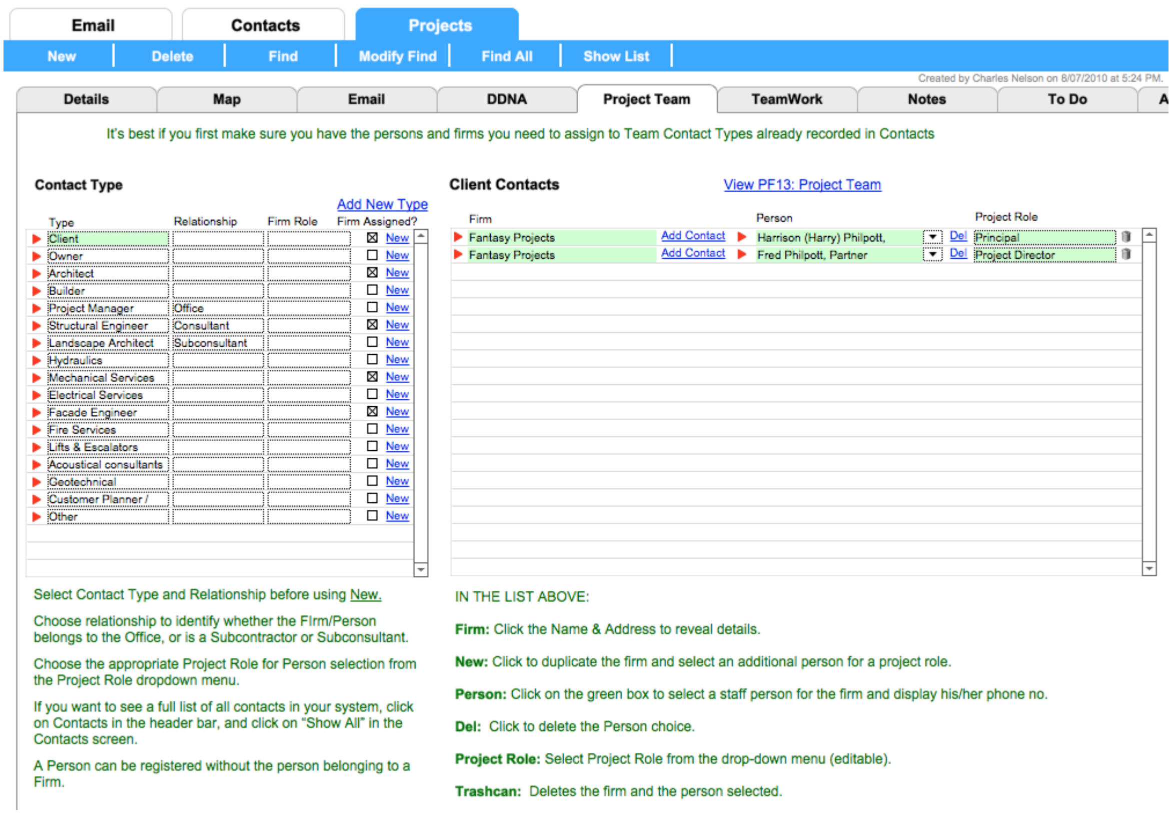
Project Team

Version V3.10.32: 24 March 2012

Using Project Team

Project Team allows you to organize the team by adding project roles to the team and assigning contacts to these roles. It looks like this:

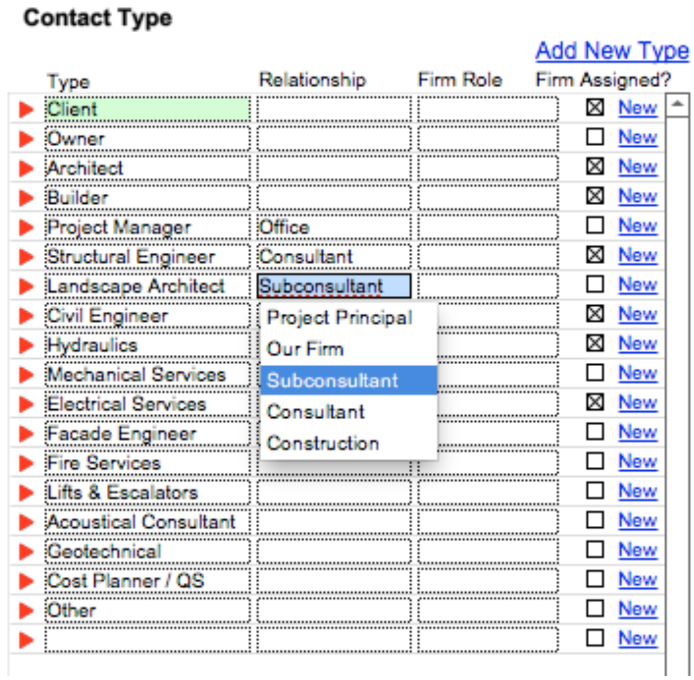


You can quickly and easily set up a contact list for a project, with multiple persons and corresponding responsibilities per firm, and know that these details will always automatically be kept up-to-date.

The template has two schedules: **Contact Type** and a corresponding list of contacts for that type, at the right. In the example above, Client Contacts are displayed, because Client is selected (by using the red arrow) in the **Contact Type** List.

Note that there are comprehensive User Notes (in green) below, to minimise the learning curve. Note also the suggestion at the top to ensure that anybody you want to assign has been previously entered in the contact list. Doing this simplifies the assignment process. Although it takes a minute or two more to set up, it's always worth doing.

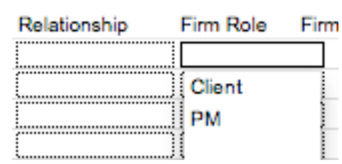
Let's look at the **Contact Type** schedule, which has several useful features:

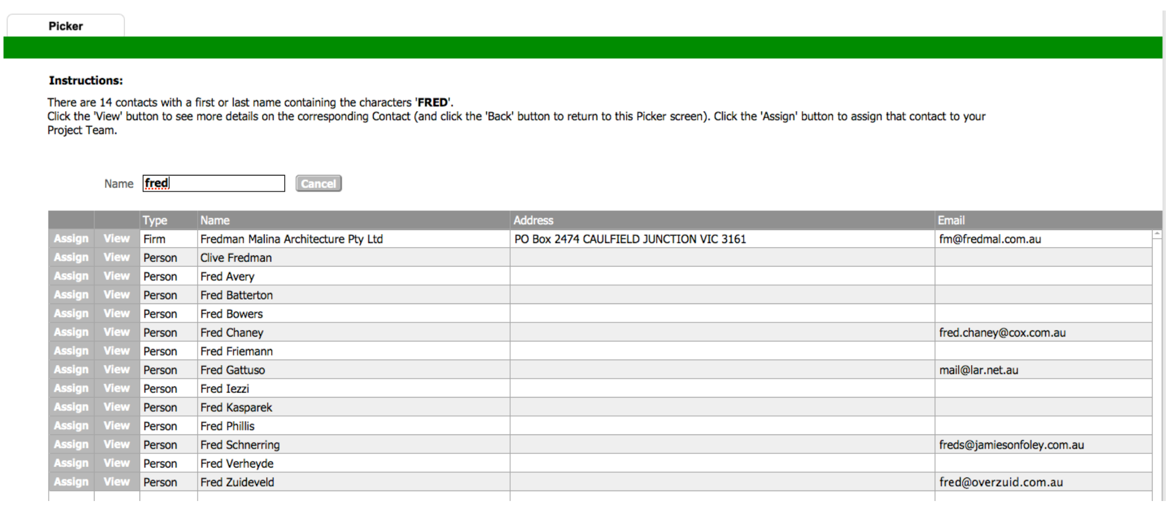

Contact Type

Add New Type

Type	Relationship	Firm Role	Firm Assigned?	
Client			☒	New
Owner			☐	New
Architect			☒	New
Builder			☒	New
Project Manager	Office		☐	New
Structural Engineer	Consultant		☒	New
Landscape Architect	Subconsultant		☐	New
Civil Engineer			☒	New
Hydraulics			☒	New
Mechanical Services			☐	New
Electrical Services			☒	New
Facade Engineer			☐	New
Fire Services			☐	New
Lifts & Escalators			☐	New
Acoustical Consultant			☐	New
Geotechnical			☐	New
Cost Planner / QS			☐	New
Other			☐	New
			☐	New

- You can add new types using the Add New Type button.
- Relationship of the Contact to your firm can be set using the drop-down Relationship panel (so everybody on the team knows).
- There is a similar drop-down pane for Firm Role, to identify whether a contact (usually used just for the PM role, but can be others) is part of the Client's team or the PM's team (below right).
- The Firm Assigned? checkbox indicates whether not a contact has been selected for that Type.
- To assign a new contact type to the list, click the New button at the right of the Type you are adding. This opens a new tool called **Picker**, shown below.




Picker

Instructions:

There are 14 contacts with a first or last name containing the characters '**FRED**'.
Click the 'View' button to see more details on the corresponding Contact (and click the 'Back' button to return to this Picker screen). Click the 'Assign' button to assign that contact to your Project Team.

Name fred Cancel

		Type	Name	Address	Email
Assign	View	Firm	Fredman Malina Architecture Pty Ltd	PO Box 2474 CAULFIELD JUNCTION VIC 3161	fm@fredmal.com.au
Assign	View	Person	Clive Fredman		
Assign	View	Person	Fred Avery		
Assign	View	Person	Fred Batterton		
Assign	View	Person	Fred Bowers		
Assign	View	Person	Fred Chaney		fred.chaney@cox.com.au
Assign	View	Person	Fred Friemann		
Assign	View	Person	Fred Gattuso		mail@lar.net.au
Assign	View	Person	Fred Iezzi		
Assign	View	Person	Fred Kasparek		
Assign	View	Person	Fred Phillis		
Assign	View	Person	Fred Schnerring		freds@jamiesonfoley.com.au
Assign	View	Person	Fred Verheyde		
Assign	View	Person	Fred Zuideveld		fred@overzuid.com.au

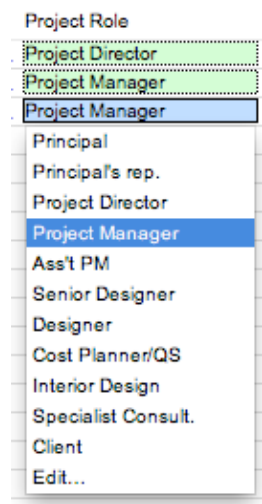
In this sample, we have entered "fred" in the search field, and we can see that the database has returned all Firms and Persons that have "fred" as part of their name. If there is an address and/or email in the database for the person/firm, it will be displayed.

If you know who you want to assign, click the **Assign** button; otherwise you can click the **View** button to look at the database record for the person/firm.

Making an assignment enters the data in the appropriate **Contact** field and checks the corresponding box under the **Contact Type** schedule.

Now let's look at the assigned project contacts list – in the example below, the list for Structural Engineer.

Two people have been assigned, Barry and Serafim, and assigned projects roles. We want to add another person to their part of the team, so we click Add Contact, which adds another line to the firm list. Clicking in the Person field displays a list of all of the firm's people listed in our database, in this case three.



We can either select one of those, or click on the red arrow to the left of the Firm column – which takes us to the Firm contact record, and add the name and details of the person we want to assign. Then we return to this screen and select and assign that person.

We can delete a Person entry by clicking the Del button left of his/her name.

We can assign each person a project role by clicking in that field, displaying the editable drop-down pane shown, and selecting the appropriate role from the list. Finally, we can delete the whole line using the "trashcan" button.

PF13 Project Team

You can, by clicking the View PF123: Project Team button, create an "export" list of the project team, which you can print or save as a pdf file, to send to others on the project team – see example next page.

Use this feature to keep external team members updated with current contacts.

Thanks to named persons and firms

We have populated this imaginary sample project (hence the Client name "Fantasy Projects" and its well-known kite-flying Director Fillmore Potts) with the names of real people and firms selected from our database. No such project exists, and we hope the firms shown won't mind being included as sample data.

It won't be the first Fantasy project any of them have ever been involved with!

If one of you are looking at this, and feel it is not appropriate, we'll happily remove you from the example. Let us know!

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Project	**Megatowers Training Sample**		**AR** **PF13**
No.	**225A**		**Project Team**

PROJECT DATA

Project Address	100 St Kilda Rd St Kilda VIC,	Location address (if different):	St Kilda	Approved by Date	

CONTACT DATA

Type Relationship Firm Role	**Client**	Fantasy Projects 1 Queens Road Melbourne VIC 3004 Australia Ph:	Project Role **Principal**	Harrison (Harry) Philpott, Partner Ph:
Type Relationship Firm Role	**Client**	Fantasy Projects 1 Queens Road Melbourne VIC 3004 Australia Ph:	Project Role **Project Director**	Fred Philpott, Partner Ph:
Type Relationship Firm Role	**Architect**	Sanders Turner Ellick Architects Pty Ltd PO Box 758 MACKAY QLD 4740 Australia Ph: 07 4957 7341	Project Role **Project Manager**	Geoff Daniels, Architect Ph:
Type Relationship Firm Role	**Architect**	Sanders Turner Ellick Architects Pty Ltd PO Box 758 MACKAY QLD 4740 Australia Ph: 07 4957 7341	Project Role **Project Director**	Steven Turner, Director Ph: steve.turner@stea.com.au
Type Relationship Firm Role	**Structural Consultant**	Barry Gale Engineers & Partners 51 City Road SOUTHBANK VIC 3006 Australia Ph: 03 9686 9100	Project Role **Project Director**	Barry Gale, Director Ph: bge@bgegroup.com
Type Relationship Firm Role	**Structural Consultant**	Barry Gale Engineers & Partners 51 City Road SOUTHBANK VIC 3006 Australia Ph: 03 9686 9100	Project Role **Project Manager**	Serafim Konstantinou, Director Ph:
Type Relationship Firm Role	**Mechanical**	Meinhardt Victoria Pty Ltd Level 12, 501 Swanston Street MELBOURNE VIC 3000 Australia Ph: 03 8676 1200	Project Role **Project Director**	Ron Hose, Deputy Chairman Ph:

YOUR FIRM NAME **GOES HERE**
YOUR FIRM ADDRESS **GO HERE**
Full width of page is available. See HOME > System Admin