Office Admin: New Teamwork Templates

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TeamWork Office Admin

TeamWork is a project management tool designed to eliminate gaps and overlaps in scoping work for the different members of the project team, whether they are subconsultants to the lead consultant, or separate consultants appointed by the client. ***TeamWork*** lists over 500 consulting scope items across 27 building design consultant types.

TeamWork is described in detail in the User version of these UserGuides (UserGuide 4.7). The instructions here cover one key difference: Admin level access privileges are required to create new design discipline profiles. Obviously, these new profiles need to be thought through carefully, and made suitable as the beginning basis for any of the firm's projects. You should review UserGuide 4.7 before creating new TeamWork templates.

TeamWork overview

In the screenshot above, you won't be able to read the Task items, but you might be able to see that we've selected Interior Designer in the Consultants schedule (which changes its field to green) and which displays the list of default tasks for that consultant type – in this case 30 items.

The only differences between the layout above and the User layout shown in UserGuide 4.7 are (a) there is a New button for the Consultant list, and the USER GUIDE instructions on the right side (not visible on the above screenshot) are appropriately different.

Permanent re-assignment of tasks

If you want to permanently reassign some tasks to a different Consultant role, change the ID code to that role after you've moved them. Be aware however, that when you get a system upgrade from **iProjects**, you will need to make these same adjustments – so it is a good idea to keep a record of any permanent reassignments.

TeamWork Setup

The green text on the layout warns you not to reassign Core Services items. Core Services are those that are basic to the particular consultant type, and which require training in the type to be able to do responsibly. The Australian version of **iProjects** identifies Core Services as those that are so identified by the Australian Institute of Architects. See the example for the Architect list shown below:

Tasks

ID	Check	Assign to Cons	Title	NOTE: Do not re-assign Core Services items. Refer User
AR01	☒		Design DNA Service Package: Perform services as defined in Design DNA for Architect.	
AR02	☐		Core Services: Perform core services as defined in AN 10.101 excluding Contract Administration.	
AR03	☐		Core Services: Perform core services as defined in AN 10.101: Contract Administration only.	
AR04	☐		Core Services: Perform core services as defined in AN 10.101: Parts A1, A2 & A3 only (Pre-design, Site analys	
AR05	☒		Prepare time and resources schedule for all architectural work.	

Core Services are also identified in Design DNA – refer UserGuide *4.3: Design DNA (DDNA): Reference to Professional Association Guide Documents.*

Adding a new Consultant role and tasks:

Select the **TeamWork** tab in the Office Admin menu. Don't get confused by the ***Project Team Assignments*** list on the System Admin: Office Settings tab. These are for Project Team assignments using form PF13.

Click New on the Consultants column.

- ❖ Type a new title (e.g. Graphics Designer) and ID (e.g. GD). [Note: Use the initials of the title as the ID, but ensure that these initials are not used as the ID for a different consultant type.]. For example, you can't create a new type ID "ME" for Mining Engineer, because that ID is already in use. (See the graphic and discussion on the next page about consultant titles.)

- ❖ Click New on the Task column. This will jump you to the Office Settings tab, displaying the schedule shown right.

- ❖ Click on New on this list, which will assign a new ID number and line (Other) as shown right. Overtype this line with the name of the new consultant type.

- ❖ Return to the **TeamWork** tab (still in Office Admin) and click the right-hand New button again. This time, it will create a new task entry in the Tasks list (see below). Enter a new IDnn. Let's say you created a new consultant type "Marina Design" – you could use MD as the ID. Then the first task would be MD01, the second MD02 and so on. Continue to build this list until complete.

Tasks   Show List   Reassign

Reassign
ID Check Cons   Title   New

❖ To delete a consultant or task, click the rubbish bin icon.

CAUTION: *Deleting a Consultant title deletes all associated tasks, so do it advisedly!*

Other Specialists List

The OS (Other Specialists) heading can be used to identify other services required, and to assign those to other Consultants; but this structure doesn't include provision for detailing the tasks for them unless you create a new Consultant Type.

We've listed two dozen of the more common ones (at right), prefixed with ID codes that do not conflict with the other preset ID codes – as a handy reference.

Users with Admin level privileges can use this list as a guide in building new Consultant lists. Over time, if there is sufficient interest, we'll add some of these titles to the system.

Tasks   Show List   Reassign

Reassign
ID Check Cons   Title

ID	Check	Cons	Title
OS01	☒	SS	Specialist security system design.
OS02	☒	CI	Specialist computer power and interface design.
OS03	☒	CD	Specialist communications system design.
OS04	☒	QA	Specialist quality assurance programme design.
OS05	☒	HC	Specialist health care facilities design.
OS06	☒	AS	Specialist air supported/membrane structures design.
OS07	☒	MD	Specialist marina design.
OS08	☒	AT	Specialist appropriate technology design (solar, wind energy).
OS09	☒	AP	Specialist air pollution control.
OS10	☒	WP	Specialist water pollution control.
OS11	☒	SP	Specialist soil pollution control (desalination).
OS12	☒	TW	Toxic waste/hazardous products treatment.
OS13	☒	GS	Specialist geological services.
OS14	☒	BS	Specialist biological services.
OS15	☒	SD	Seismic engineering design.
OS16	☒	IE	Industrial engineering/plant layout.
OS17	☒	RF	Recreation facilities specialist.
OS18	☒	EF	Education facilities specialist.
OS19	☒	PH	Aerial photography/photogrammetry.
OS20	☒	TD	Specialist transit engineering design.
OS21	☒	HA	Historic artifacts evaluation.
OS22	☒	CA	Specialist chemical analysis of materials.
OS23	☒	TS	Specialist testing services.
OS24	☒	GD	Graphic designer.

TIP: When creating new lists, it is a good idea (and will save time and reduce errors of omission) to cut and paste reusable tasks from other applicable lists – you will find that many of the more procedural items, such as planning, are pretty consistent from one discipline to another.

CAUTION: New Consultant Types created after a project has been created are not available on existing projects in the current version of the system. If a project will require a special consultant that's not on the list, create the title before setting up the new project.

Users can later complete the task list – but then this task list won't be available on any other projects. It is much better to create a generic task list first, and then amend it as needed for a particular project.