

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

The screenshot shows the TeamWork interface with several tabs: Email, Contacts, Projects, Office Admin, System Admin, Value Lists, TeamWork, and Profiles. The 'TeamWork' tab is active, displaying two columns: 'Consultants' and 'Tasks'.

Consultants Table:

ID	Check	Title	New
AC	<input checked="" type="checkbox"/>	Acoustics Consultant	<input type="checkbox"/>
AR	<input checked="" type="checkbox"/>	Architect	<input type="checkbox"/>
BM	<input checked="" type="checkbox"/>	Building Maintenance Unit	<input type="checkbox"/>
CC	<input checked="" type="checkbox"/>	Communications Consultant	<input type="checkbox"/>
CE	<input checked="" type="checkbox"/>	Civil Engineer	<input type="checkbox"/>
CM	<input type="checkbox"/>	Construction Manager	<input type="checkbox"/>
EC	<input type="checkbox"/>	Environmental Consultant	<input type="checkbox"/>
EE	<input checked="" type="checkbox"/>	Electrical Engineer	<input type="checkbox"/>
FC	<input checked="" type="checkbox"/>	Food Service Consultant	<input type="checkbox"/>
FE	<input checked="" type="checkbox"/>	Facade Engineer	<input type="checkbox"/>
FS	<input checked="" type="checkbox"/>	Fire Services Consultant	<input type="checkbox"/>
HE	<input checked="" type="checkbox"/>	Hydraulics Engineer	<input type="checkbox"/>
ID	<input checked="" type="checkbox"/>	Interior Designer	<input checked="" type="checkbox"/>
LA	<input checked="" type="checkbox"/>	Landscape Architect	<input type="checkbox"/>
LS	<input checked="" type="checkbox"/>	Land Surveyor	<input type="checkbox"/>
ME	<input checked="" type="checkbox"/>	Mechanical Engineer	<input type="checkbox"/>
OS	<input checked="" type="checkbox"/>	Other Specialists	<input type="checkbox"/>
PM	<input checked="" type="checkbox"/>	Project Manager	<input type="checkbox"/>
PP	<input checked="" type="checkbox"/>	Project Programme Consultant	<input type="checkbox"/>
QS	<input type="checkbox"/>	Quantity Surveyor	<input type="checkbox"/>
RC	<input type="checkbox"/>	Restoration Consultant	<input type="checkbox"/>
RD	<input type="checkbox"/>	Rubbish Disposal Consultant	<input type="checkbox"/>
RE	<input type="checkbox"/>	Real Estate Consultant	<input type="checkbox"/>
SE	<input type="checkbox"/>	Structural Engineer	<input type="checkbox"/>
TC	<input type="checkbox"/>	Traffic Consultant	<input type="checkbox"/>
TE	<input type="checkbox"/>	Transportation Engineer	<input type="checkbox"/>
TP	<input type="checkbox"/>	Town Planner	<input type="checkbox"/>
WE	<input type="checkbox"/>	Wind Engineer	<input type="checkbox"/>

Tasks Table:

ID	Check	Cons	Title	New
ID01	<input checked="" type="checkbox"/>		Prepare time and resources schedule for all interior design work.	<input type="checkbox"/>
ID02	<input checked="" type="checkbox"/>		Prepare list of all approvals needed for interior design work, with probable review time.	<input type="checkbox"/>
ID03	<input checked="" type="checkbox"/>		Prepare list of all critical decisions, and the deadlines for making them, to be made by others in order to meet the schedule for the interior	<input type="checkbox"/>
ID04	<input checked="" type="checkbox"/>		Prepare inventory of client's existing furnishings, annotated as to condition, colours, and fitness for use.	<input type="checkbox"/>
ID05	<input checked="" type="checkbox"/>		Prepare space needs report including existing space allocations, present shortfall and future needs.	<input type="checkbox"/>
ID06	<input checked="" type="checkbox"/>		Interview client and prepare report detailing client's perceptions and requirements about interior design themes.	<input type="checkbox"/>
ID07	<input checked="" type="checkbox"/>		Prepare and present preliminary design concept plan.	<input type="checkbox"/>
ID08	<input checked="" type="checkbox"/>		Prepare and present preliminary budget cost for concept plan.	<input type="checkbox"/>
ID09	<input checked="" type="checkbox"/>		Prepare and confirm schedule of all spaces requiring interior design services.	<input type="checkbox"/>
ID10	<input checked="" type="checkbox"/>		Prepare and present preliminary materials selection boards.	<input type="checkbox"/>
ID11	<input checked="" type="checkbox"/>		Prepare options and cost study of ceiling systems including module dimensions, acoustic performance, provision for lighting and mechanical	<input type="checkbox"/>
ID12	<input checked="" type="checkbox"/>		Prepare options and cost study on raised floor systems.	<input type="checkbox"/>
ID13	<input checked="" type="checkbox"/>		Prepare options and cost study on office partition systems.	<input type="checkbox"/>
ID14	<input checked="" type="checkbox"/>		Prepare options and cost study on floor covering materials.	<input type="checkbox"/>
ID15	<input checked="" type="checkbox"/>		Prepare final finishes schedule for all spaces requiring interior design.	<input type="checkbox"/>
ID16	<input checked="" type="checkbox"/>		Prepare final cost plan for interiors work.	<input type="checkbox"/>
ID17	<input checked="" type="checkbox"/>		Prepare final colour boards.	<input type="checkbox"/>
ID18	<input checked="" type="checkbox"/>		Develop plan for and obtain client's approval of personnel office assignments.	<input type="checkbox"/>
ID19	<input checked="" type="checkbox"/>		Prepare final furniture layout plan.	<input type="checkbox"/>
ID20	<input checked="" type="checkbox"/>		Confirm fire resistance requirements of all proposed materials.	<input type="checkbox"/>
ID21	<input checked="" type="checkbox"/>		Provide specification writer with descriptions of all proposed finish materials.	<input type="checkbox"/>
ID22	<input checked="" type="checkbox"/>		Determine lead times for all custom-made and imported materials, advise architect and contractor if appointed.	<input type="checkbox"/>
ID23	<input checked="" type="checkbox"/>		Confirm deadline for completion of lift car interior design with subcontractor.	<input type="checkbox"/>
ID24	<input checked="" type="checkbox"/>		Confirm lighting type, location and level in all significant spaces, with building services engineer.	<input type="checkbox"/>
ID25	<input checked="" type="checkbox"/>		Confirm supply air flow patterns at draped walls with building services engineer.	<input type="checkbox"/>
ID26	<input checked="" type="checkbox"/>		Confirm power supply and telephone systems locations for office partitions and means of housing same.	<input type="checkbox"/>
ID27	<input checked="" type="checkbox"/>		Prepare tender conditions for interiors work, coordinate with construction manager.	<input type="checkbox"/>
ID28	<input checked="" type="checkbox"/>		Review tenders for interiors work, make recommendation to client.	<input type="checkbox"/>
ID29	<input checked="" type="checkbox"/>		Perform manufacturing plant inspections for all custom-fabricated items.	<input type="checkbox"/>
ID30	<input checked="" type="checkbox"/>		Oversee installation of interiors work items.	<input type="checkbox"/>

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		Assign to	
ID	Check	Cons	Title
AR01	<input checked="" type="checkbox"/>		Design DNA Service Package: Perform services as defined in Design DNA for Architect.
AR02	<input type="checkbox"/>		Core Services: Perform core services as defined in AN 10.101 excluding Contract Administration.
AR03	<input type="checkbox"/>		Core Services: Perform core services as defined in AN 10.101: Contract Administration only.
AR04	<input type="checkbox"/>		Core Services: Perform core services as defined in AN 10.101: Parts A1, A2 & A3 only (Pre-design, Site analysis)
AR05	<input checked="" type="checkbox"/>		Prepare time and resources schedule for all architectural work.

NOTE: Do not re-assign Core Services items. Refer User

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. Overtyping 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](#)

ID	Check	Cons	Title	
	<input checked="" type="checkbox"/>			

[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](#)

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