# Stages 300-600 Tools

Version V3.10.32: 27 March 2012

## Stages 300-600 tools overview

ProForm tools first used in Stages 3 (Design Development), Stage 4 (Coordination), Stage 5 (Documentation) and Stage 6 (Procurement) are:

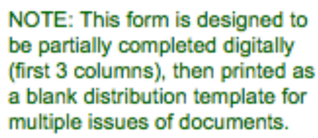
PF31 Drawing Checking Record
PF32 Design Review Checklist
PF51 Samples Register
PF61 Tender Log

**iProjects** ProForm tools are listed under the Stage where they are first needed. Typically, tools started in one Stage are used in subsequent Stages, often acquiring more information input as the project moves along. Exceptions are Common tools (see UserGuide 3.4.1) and Management tools (see UserGuide 3.4.6).

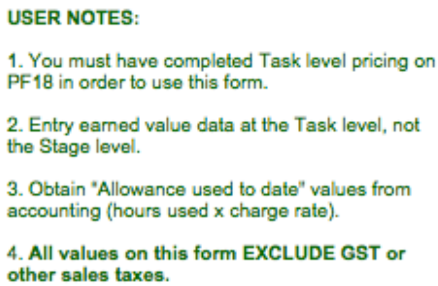
## Features common to most **iProjects** ProForm tools


Typically, ProForm tools have one or more of three types of on-screen help, as indicated below.

- **Control panel:** Upper right, just outside the form printable area, is a graphic that contains three to seven standard commands, appropriate to the ProForm function. For details on how to use this control panel, refer UserGuide ***1.1: Login & Navigation.*** "Dupe" means "duplicate this record".
- **Margin UserGuides:** On many ProForm templates, there are notes – always in green text, providing advice in using the ProForm. An example is shown right.




- **On-form User Notes:** Many templates include notes within the printable area of the template, as shown right.



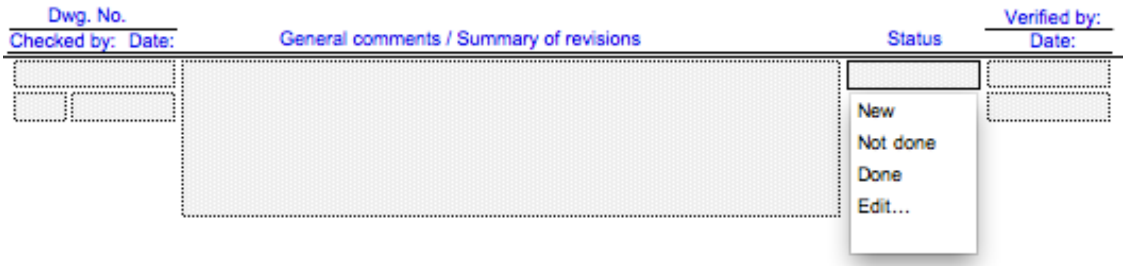

These notes mean that most templates will be self-explanatory, particularly as they are designed to "mirror" the way most practices operate. For inexperienced users, the following details will help explain the use of the Stage templates listed.

## Special features of particular ProForm templates

### PF31 Drawing Checking Record

This template is not meant to supplant the customary process of "red-marking" drawings, but to track and monitor overall progress, as indicated. Status is assigned using the drop-down panel shown below (next page).

When the design professional has indicated that changes have been made, and assigns "Done" as status, the project manager verifies and dates the verification in the right-hand fields.



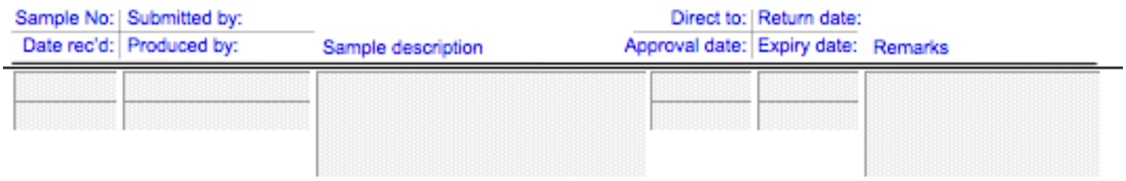

## PF32 Design Review Checklist

The Design Review Checklist is used to record the outcome of a project design review. The template structure should be obvious to anyone who has organized and conducted formal design reviews.

The green-text instructions in the header indicate use of the completed form.

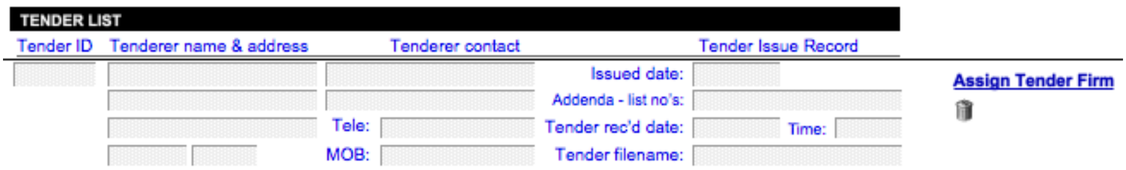
## PF51 Samples Register

PF51 tracks samples received for a project, recording all essential information, and providing a list, visible to all, of the submitted samples.




## PF61 Tender Log

This template is your record of selected tenderers ("Bidders" in US) for the project.




The Assign Tender Firm button in the right margin opens a "Picker" form that facilitates setting up the Tenderer list (see next page).

To use this tool, simply enter some part of the firm name you are searching for, and **iProjects** will instantly search the database, and display all contacts that have those words as part of their name. In the example below, we have entered "Hansen" and the database has returned seven possible matches.

To assign one of these to the Tender list, simply click on the Assign button; then repeat the process for the rest of the tender list.

This ProForm tool can also be used in open or public tender projects, but you will have to create a record of the tenderers in your Contact system to display them here.

**Picker**

**Instructions:**

There are 8 contacts with a first or last name containing the characters '**HANSEN**'.
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 Form.

Name hansen Cancel

| | | Type | Name | Address | Email |
|---|---|---|---|---|---|
| Assign | View | Firm | Hansen Yuncken Pty Ltd (SYD) | Level 6, 15 Bourke Road MASCOT NSW 2020 | sydney@hansenyuncken.com.au |
| Assign | View | Firm | Hansen Yuncken Pty Ltd (VIC) | 25 Huntingdale Road BURWOOD VIC 3125 | |
| Assign | View | Firm | Hansen Yuncken Pty Ltd (SA) | Level 1, 191 Fullarton Road DULWICH SA 5065 | adelaide@hansenyuncken.com.au |
| Assign | View | Firm | Hansen | Level 4, 136 Exhibition Street MELBOURNE VIC | info@hansen-online.com.au |
| Assign | View | Person | Jacob Hansen | | |
| Assign | View | Person | Mark Hansen | | mahansen@smartsoftware.com.au |
| Assign | View | Person | Michelle Hansen | | Michelle.Hansen@brownconsulting.com.au |
| Assign | View | Person | Richard Hansen | | rhansen@hansenyunken.com.au |