Simplified Adding Users to Projects

NOTE: When adding new users to a Project it is important to validate the potential spellings for their name and their Business' name so that the Directory does not become cluttered with duplicates.

ProjectTeam has improved the process of adding users to projects by assigning the Share Group at the time that they are invited to the Project.

If the new project user **exists** in ProjectTeam, skip to Step 13.

Validate Existing Business

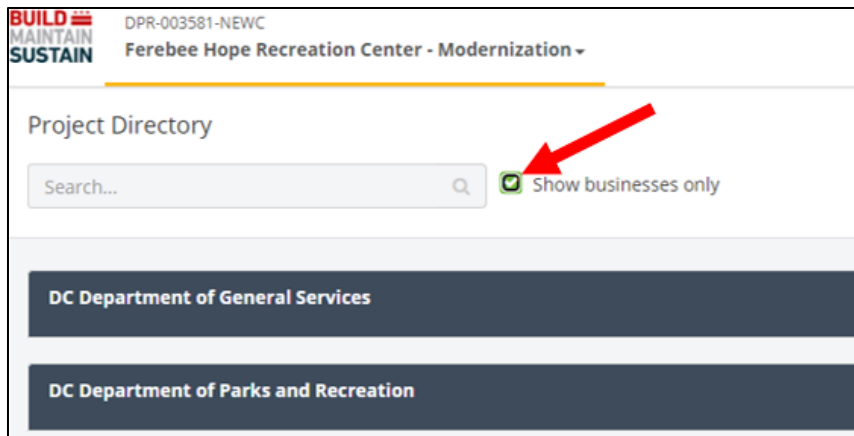1. Click the **Directory** icon on the left navigation pane.

2. Check the **"Show businesses only"** box to validate that the business exists.

   NOTE: If the business is on the project skip to Step 9.

   Using the Show businesses only will allow validation of all businesses and it will reduce the chance of missing a business that could have been entered with a full or abbreviated name.

   NOTE: If "DPR" had been entered into the search box, then "DC Department of Parks and Recreation" would not have displayed.
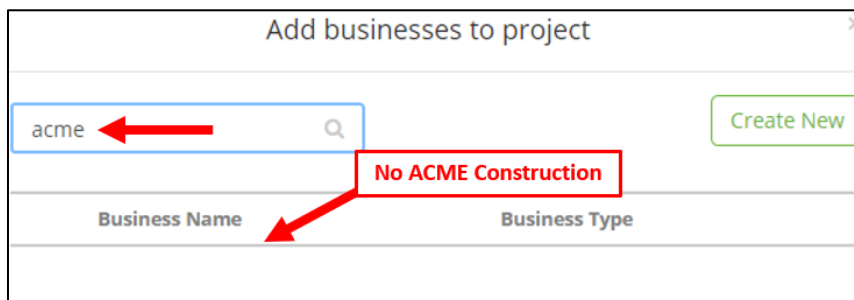
Add a New Business to DGS ProjectTeam

3. Since the business is not on the project, click on the **Add Business** in the top right corner of the screen.

4. Search for an existing business in the **DGS Directory** by entering their name. If there is a matching business, skip to Step 9.

   NOTE: Search for their **full name** and their **abbreviated name** before creating a new one.
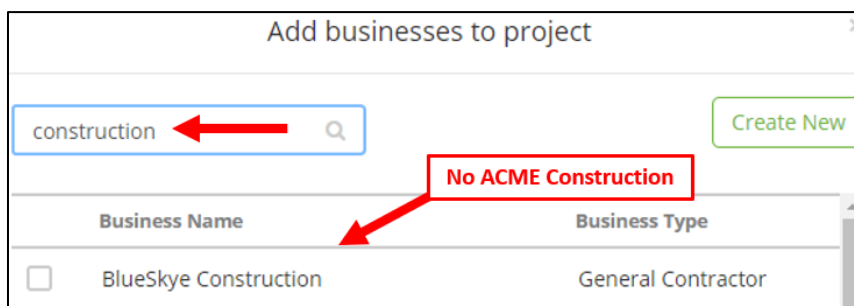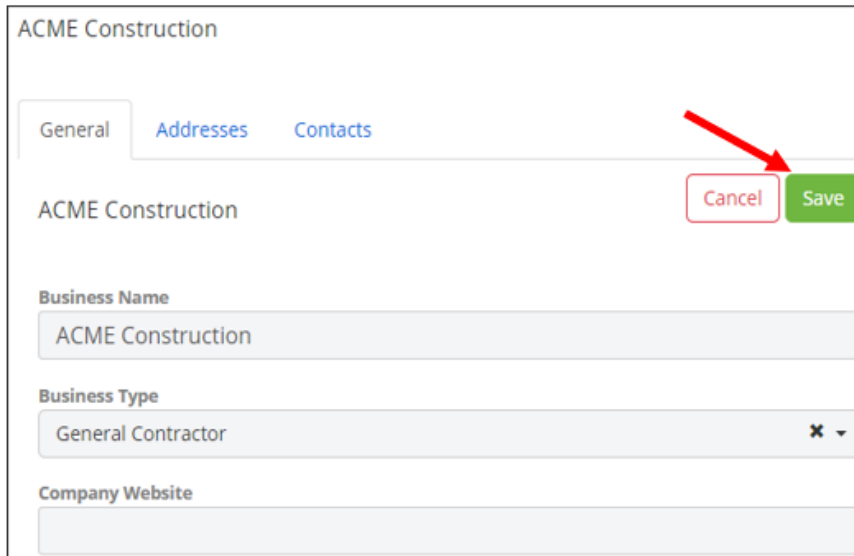
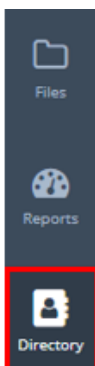5. Once it has determined that the **full or abbreviated business name does not exist**, click on the **Create New** button.

6. **Complete** the new business form **General tab** and then click the **Save** button.

7. Click on the **Directory** icon on the left navigation pane.

8. The **new business** now shows up In the Project Directory.

Add a New or Existing User to ProjectTeam

9. Click on the **Add Contact** in the upper right corner of the webpage.

10. Select the **business** and click on **Add Existing.**

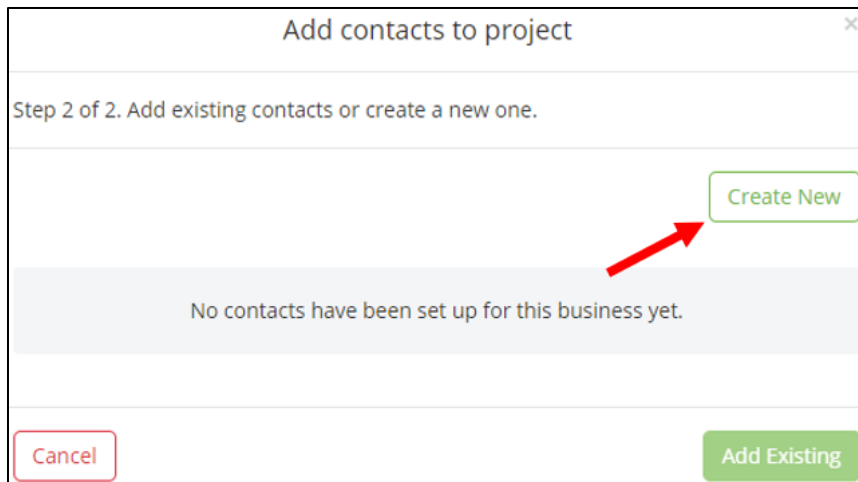11. Look for the user's name (**including last name, nickname and formal name**).
    If the user's name exists, select the user and click **Add Existing.** Then skip to Step 13.
    If the user is new, the click on **Create New**.

Add contacts to project ×

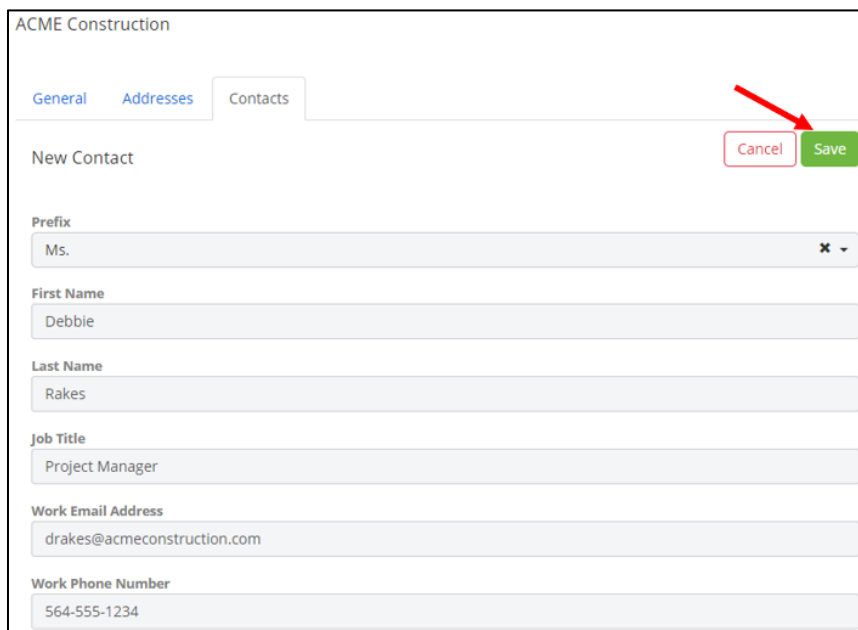Step 2 of 2. Add existing contacts or create a new one.

Create New

No contacts have been set up for this business yet.

Cancel   Add Existing

12. **Complete** the user's contact information and then click **Save**.

ACME Construction

General   Addresses   Contacts

New Contact   Cancel   Save

Prefix
Ms.   × ▾

First Name
Debbie

Last Name
Rakes

Job Title
Project Manager

Work Email Address
drakes@acmeconstruction.com

Work Phone Number
564-555-1234

Inviting the User and Adding them to a Share Group

13. In the **Project Directory**, click on the **Invite** under the new user's name.

Debbie Rakes
Invite

14. **Select the Share Group(s)** that the user belongs in and **click Send Invite**.

NOTE: The Share Group is assigned based on the access that they require for this project **according to their contract**, not based on their work title or on past projects.

For example, a **GC** Project Manager is assigned to the **General Contractor** Share Group, not the Project Manager Share Group.

External vendor users will be in the General Contractor, Commissioning, Architect/Engineer, Construction Manager, Inspector, Cost Estimator, etc.

DGS users will be assigned to Share Groups based on the project role such as Project Manager, Executive Program Manager, Assistant Project Manager, Budget, etc.
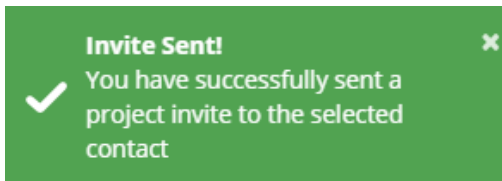

15. A **confirmation note** will appear indicating that the Invitation was Sent.

16. Once they have **accepted the Invitation,** the user will **immediately have access** to the project with their assigned Share Group access.

17. Make sure to **share** any relevant records in the system **with the share groups** that you have added users to so that they can see and use the records as/when needed. You can also "pre-share" records with a share group before they have users and the users will have access to those records as they are added to the share groups.