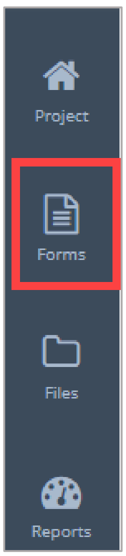
Directive

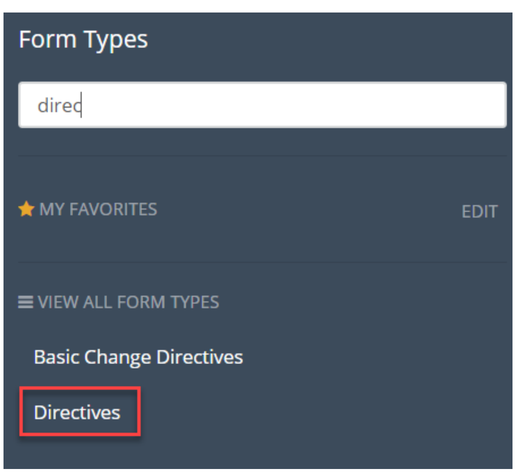
The directive serves as a management process to direct and guide the outcome of a project by initiating a requirement(s) to an individual or group(s). The directive will not be used to change the time, cost, scope or any other contractural item for the project. This document is created and submitted by the DGS Project Manager.

Creating a Directive

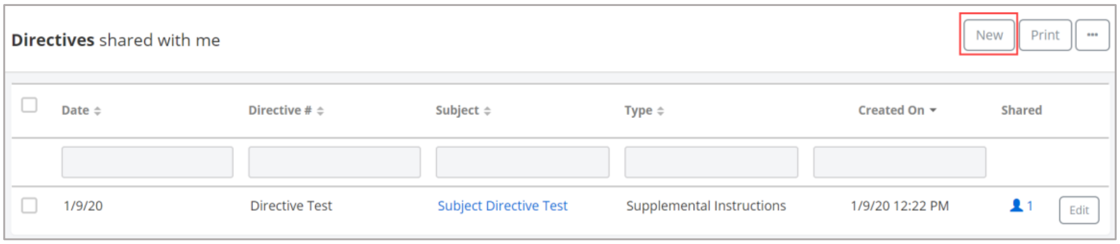
1. Within the project, click the **Forms** icon on the left navigation pane.



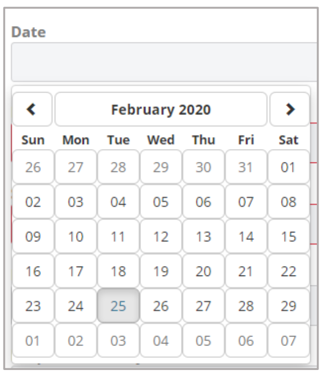
2. Type in the **Form Type** start typing Directive and the View All Form Types will show Directive. Click on **Directive**.



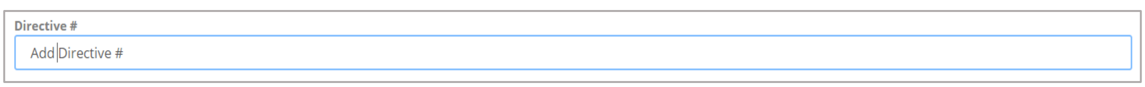
3. The "Directives shared with me" page will be displayed. To create a new Directive, click the **New** button.



4. Click inside the **Date** field and select the date the directive is created.



5. Enter the **Directive #**.

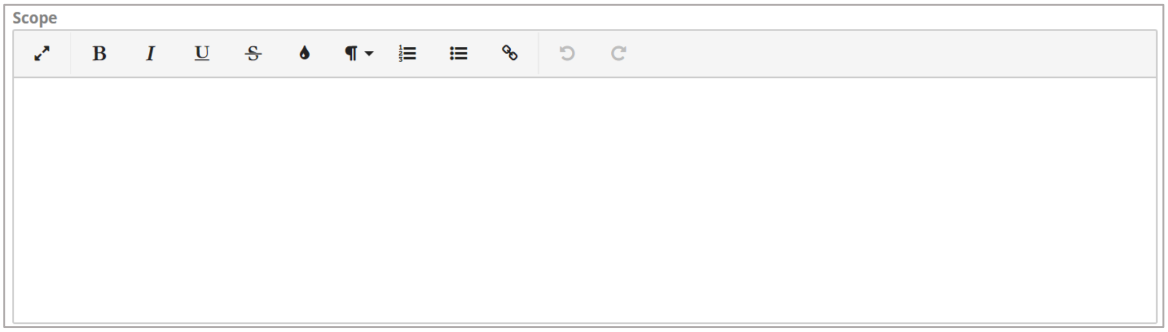


6. Enter the title of the Directive in the **Subject** field.

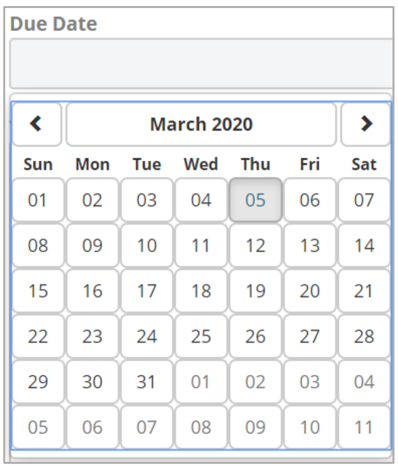
7. Click inside the **Initiated By** field and select the name of the initiating party from the list.

8. Click inside the **Responsible Party** field and select the name of the company the directive is issued to.

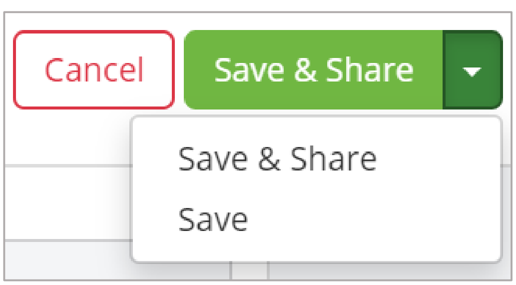
9. Enter the direction for the directive in the **Scope** field.



10. Click inside the **Due Date** field and select the date the response to the directive is due.

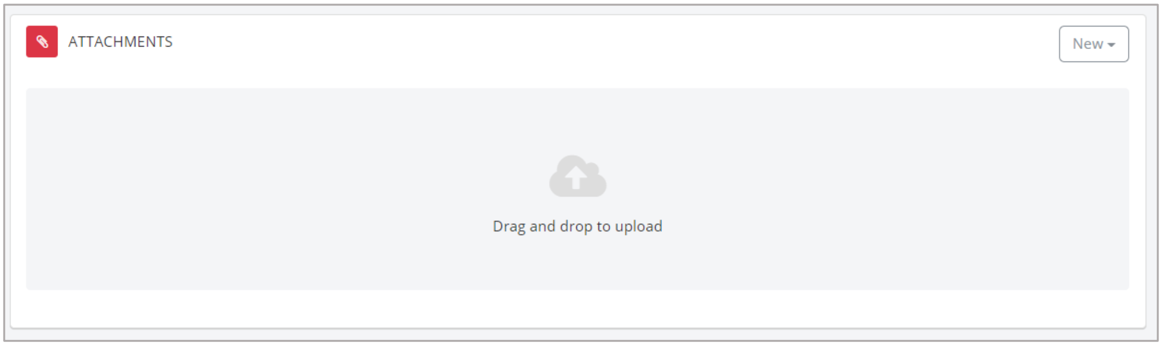


11. Once the Directive is complete, click the **Save and Share** button and share with the appropriate Vendor.



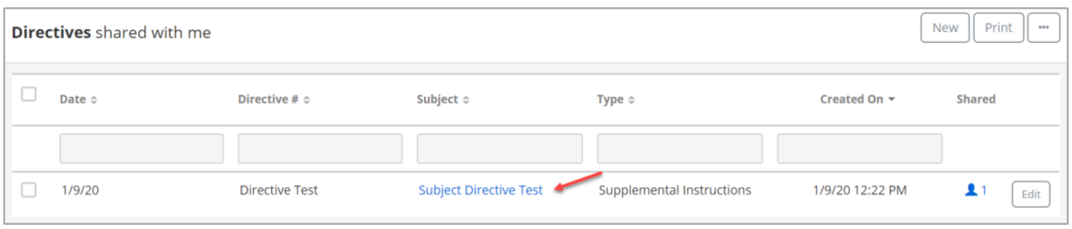
12. To add supporting documentation, scroll to the **Attachments** section of the document and drag and drop one or more files to the upload area.

support@projectteam.com
(703) 961-1007

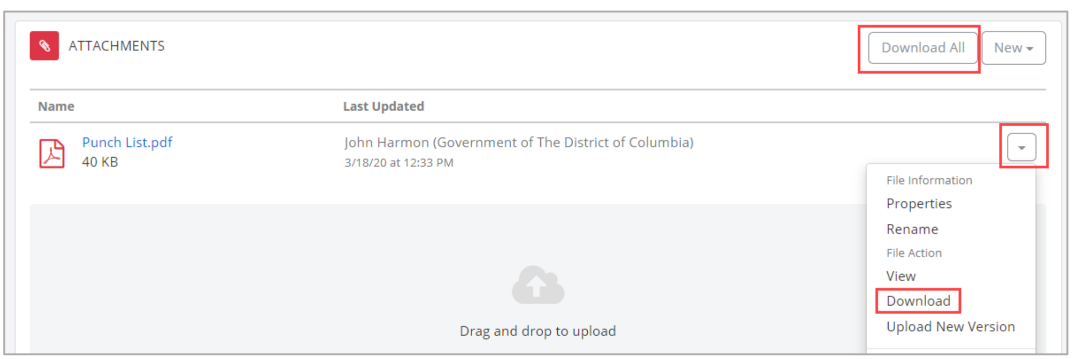


Responding to the Directive

1. Open the Directives log and click the **title of the Directive** you would like to edit.



2. Scroll to the **Attachments** section of the form. **Download** the files by clicking the dropdown arrow next to the file and clicking the **Download** option. To download all the files click the **Download All** button.



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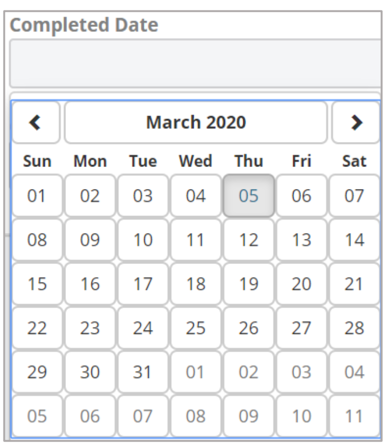
3. Once you have reviewed the directive and are ready to respond click the **Edit** button in the Details section.

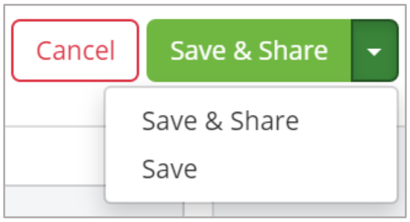
3. Enter your response in the **Vendor Response** field.

4. Click inside the **Completed Date** field and select the date the directive is completed.

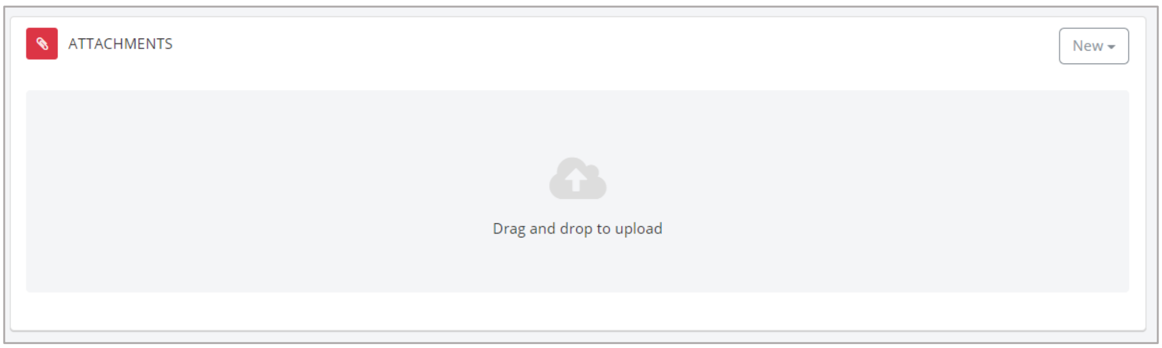


5. Click inside the **Completed By** field and select the name of the person who completed this Directive.

6. Once the response to the directive is complete, click the **Save** button to save the document.



7. To add additional supporting documentation, scroll to the **Attachments** section of the document and drag and drop one or more files to the upload area.



Adding Comments

1. If you wish to start a discussion about the request, enter this in the **Comments** section of the form and press the **Post** button. (Please make sure notifications for Comments for you and your team are turned on. The steps to set this up are in the My Page Quick Reference Guide).