PM4 + Partners
Knowledge Articles

Workspace Overview for Consultants and the Design Team

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Welcome to the PM4+ Partners Collaboration Workspace

This booklet can help you get started in the PM4+ collaboration workspace and is recommended as the first topic you read before you start doing tasks in your workspace.
The Dashboard

The PM4+ workspaces provide a way for you to collaborate with PCL electronically for any Requests for RFIs, RFIs, Meeting Minute tasks, CRX approvals and Submittals relevant to your company.

The Dashboard is the first page you see when you log into PM4+. It is sometimes referred to as the “landing page”. This page shows a calendar, a **Work items assigned to me** space with a “to do” style list, and your Workspace tile.

At the top and along the side of the work area, is the navigation bar. It always frames your workspace regardless of which work area you are in. It features:

- The navigation menu (1)
  - Home/Dashboard
  - Favorites
  - Recent
  - Workspaces
  - Modules
- Project list selector (2)
- Page search feature (3)
- System messages (4)
- User Options settings (5)
- Workspace tiles (6)
The Navigation bar

Changing the project

The Project you are working on displays in the top right corner of the navigation bar. The drop-down lists any projects you can access.

1. Click the project number.

   ![Project Drop-down Field](image)

   The project drop-down field opens.

2. Select the drop-down arrow.

3. Scroll through the list until you find the project name.

4. Highlight and click to select the project.

   **Note:** It may take a few moments to open the project depending on how large it is.

   **Tip:** Set up bookmarks in your web browser for each of the projects you are involved in. When you select the bookmark, your workspace opens with that project active. You can have different project sessions running at the same time.

Navigation menu

Dynamics 365 offers alternative ways that you can get to programs and logs in the system. An easy way is with the Navigation menu. It is accessed by selecting the “hamburger” icon. For more information on what you can access see the topic [The Navigation pane](#).

Customizing your User Options

You can customize your workspace environment by changing values in the User Options.

1. Choose one of the following methods to view the User Options:

   a. In the top navigator bar, select the **Settings** button ( ) and select **User options** from the drop-down menu

   Or

   b. Select the hamburger menu button ( ) to open the navigation pane. Navigate from the **Modules** section, and select **Common > User options**
2. Review the list of options to modify and change as appropriate:

**Visual**
- Color theme and element size
  - Color theme - Select one of the color tile choices to change the background color on the action pane, tile and list elements in the workspace.
  - Size - Choose the size for displaying the grid elements for lists.

**Preferences**
The only item that you may want to set here is the **Company** (default project) and the **Initial page** under the **Startup** fast tab.

**Account**
These values are set by the project administrator.

**Workflow**
You only see this if workflow has been turned on and you are part of a workflow group. As a consultant you may be part of the CRX or custom list workflow. If you have a planned absence you can delegate to another user in your company to represent you. Please review with your project manager prior to activating the delegation piece.
About the Consultant Workspaces

A workspace is an activity-oriented page that allows you to view information pertinent to your company and to initiate the most frequently used tasks.

This topic describes the options available in your workspaces so you can access project information that is relevant to your company. You can learn how to navigate the workspace and about the different components of the workspace. For specific information on working with a task, please see the related documentation for that task.

Currently there are five tiles on your dashboard: CRX management, Meeting minutes administration, RFI management, Submittal management and Consultant workspace (being removed in a coming release). You can access a workspace by clicking the workspace tile from your Dashboard.

Workspace Tiles

Tiles link you to log pages for the indicated item or direct you to act on an item. Anytime you want return to the workspace you can click the X in the top corner. If you click the Home or Finance and Operation button you return to the Dashboard where you can open the workspace tile again.

Action tiles

A tile with a plus sign initiates the action described in the label. Generally, a form dialog opens where you complete fields about the item and upload any corresponding documents. After you have submitted the request you may be directed to a details page to complete more information about the item. When the tile is greyed-out there are no tasks to perform.

- **Upload package** – creates a packaged used to communicate change to contractual documents and/or drawings.

Link tiles

- **Electronic Plan Room** – this tile only appears if your project uses the electronic plan room. When clicked the start page for the plan room opens.

Count tile

A tile with a number indicates the number of records available in that group. When you click on the tile, the log page opens filtered by the value indicated on the tile.

- **Outstanding CRX approvals** only show on your workspace if you are part of the workflow approval process.
- **Assigned open meeting tasks** - meeting tasks assigned to you or your company, show in this list. You can respond to the task when you are in the list.
- **Assigned overdue meeting tasks** – overdue meeting tasks assigned to you or your company, show in this list. You can respond to the task when you are in the list.
- **Open RFIs** – all open RFIs assigned to you or your company requiring a response.
- **Overdue RFIs** – all open overdue RFIs assigned to you or your company requiring a response.
• **Submittals for review** – all submittal assigned to you or your company requiring a review.
• **Overdue submittals** – all overdue submittals assigned to you or your company requiring a review.
Tabbed lists

The tabbed lists provide the most common views, that a subcontractor is interested in seeing or which involve their company. Any list can be filtered and/or sorted by each column value or searched by using the filter box at the top.

CRX management

<table>
<thead>
<tr>
<th>My company’s outstanding RFQs</th>
<th>All quotes requiring reviewing and approval by your company show in this list.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outstanding CRX approvals*</td>
<td>When project workflows are active this list shows outstanding CRX approvals for your company.</td>
</tr>
<tr>
<td>All CRX *</td>
<td>Displays all CRX records for the project. *Only displays if workflow is active for this project.</td>
</tr>
</tbody>
</table>

RFI management

<table>
<thead>
<tr>
<th>Open RFIs</th>
<th>Lists all RFIs assigned to your company requiring a response. Select an RFI from the list to provide a review and update.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overdue RFIs</td>
<td>Lists all RFIs assigned to your company where a response is overdue.</td>
</tr>
<tr>
<td>RFIs with cost impact</td>
<td>Lists only RFIs assigned to your company where a cost impact has been identified.</td>
</tr>
<tr>
<td>RFIs with schedule impact</td>
<td>Lists only RFIs assigned to your company where a schedule impact has been identified.</td>
</tr>
<tr>
<td>All RFIs</td>
<td>Lists all RFIs for the project regardless of assigned responsibility for a response.</td>
</tr>
<tr>
<td>Closed RFIs</td>
<td>Lists all RFIs that have been closed.</td>
</tr>
</tbody>
</table>

Submittal management

<table>
<thead>
<tr>
<th>All submittals</th>
<th>All the project submittals are displayed in this view regardless of status.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overdue submittals</td>
<td>All overdue submittals with a status of 'In Consultant Review' where your company is identified as the primary consultant to review a submittal.</td>
</tr>
<tr>
<td>Closed FYI submittals</td>
<td>All the project submittals with a status of closed where no consultant/design team review was required.</td>
</tr>
<tr>
<td>Submittals for review</td>
<td>All submittals with a status of 'In Consultant Review' where your company is identified as the primary consultant to review a submittal.</td>
</tr>
</tbody>
</table>
Meeting minutes administration

**Assigned open meeting tasks**
Contains all meeting tasks assigned to your company requiring an update or response.

**Assigned overdue meeting tasks**
Contains all overdue meeting tasks assigned to your company requiring an update or response.
The Navigation pane

The Navigation pane is always available regardless of which workspace or log page you are currently viewing. It displays in a sidebar on the left side of your browser window. Clicking on one of the icons expands the selection to provide access to bookmarked Favorites, Recently opened forms, Workspaces, Modules and their pages.

The items you see are based on the security you have been granted as a consultant/owner. Frequently used modules with associated tasks have been set up in your workspace however, there are some items that can only be accessed through this menu.

### Menu Module

**Common**

These items are common to all system users. They include any inquiries that you are authorized to see and setup that allows you to customize your environment.

**External Collaboration**

This includes another way to access your workspaces and the CRX log. It is the only way to view the Package log, Document log and the Revision inquiry.

**Project Administration**

Custom lists are created by the Project Manager and are used to track information otherwise not found in the project. An example would be required safety certificates or certifications that are relevant to the area of work. You are only able to access lists where you have been included as a relevant party by the Project Manager.

The Submittals log shows all submittals for the project that are not in draft status.

The RFI log shows all Requests for Information that have been assigned to you to review. You are able to see RFIs in all statuses except draft but can only respond to those that are Open.

Custom list workflows are used when a custom list follows a routing either for approvals or to ensure participants have see relevant information tracked in a custom list.