PM4 + Partners Knowledge Articles

Workspace Overview for Subcontractors

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Contents

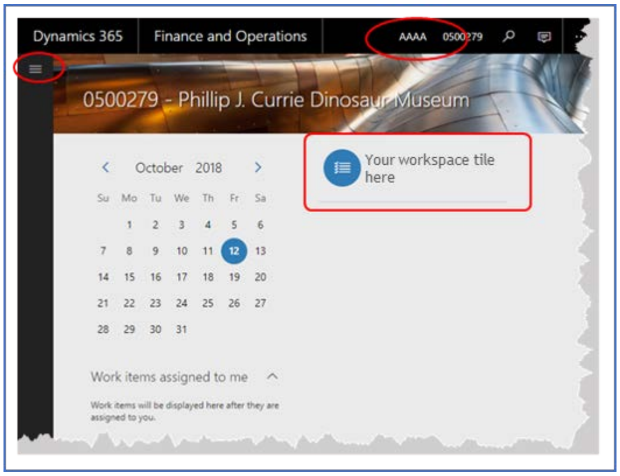
Welcome to the PM4+ Partners Collaboration Workspace

This booklet will 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+ Consultant workspace provides a way for you to collaborate with PCL electronically for any requests for RFIs, RFIs 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
- Project list drop-down
- Page search feature
- System messages
- User Options settings
- On-screen help called Task Guides

The navigation bar

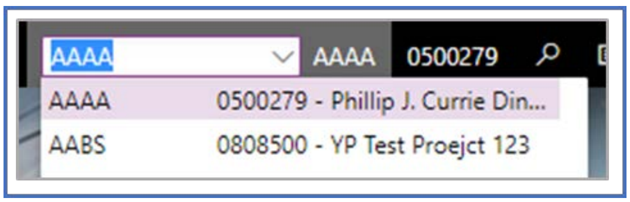
Changing the project

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.

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 will open 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

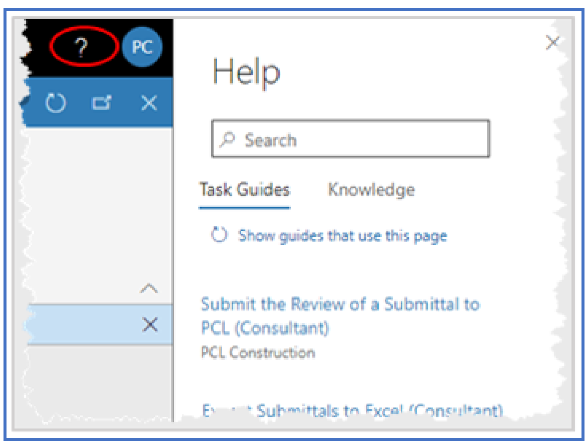
   b. Select the hamburger menu button ( ) to open the navigation pane. Navigate from the **Modules** section, and select **Common** > **User options**

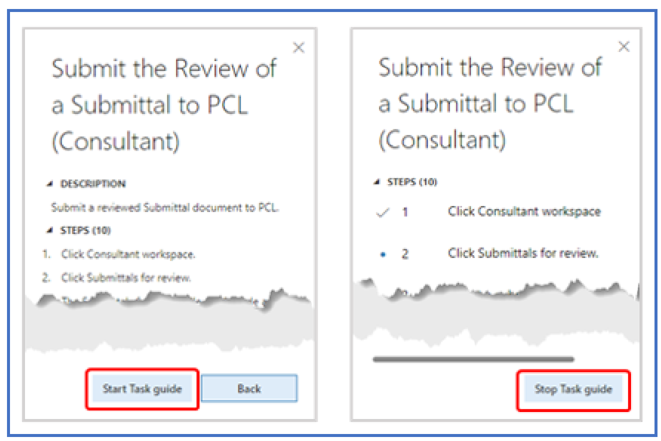
2. Review the list of options to modify and change as appropriate:

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 will only see this if workflow has been turned on and you are part of a workflow group. As a subcontract you may be part of the 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.	

Accessing on-screen help

Select the **Help & Support** button **(?)** on the top right of the navigation bar to open the Help window on the right side of your work area. The Help window displays the Task Guides you can use as a quick reference to walk through a process. Task guides show you where you need to be, which buttons you need to select and when, and tracks which step you are on in a procedure. You can leave the help window up while you are working in your environment or close it at any time.



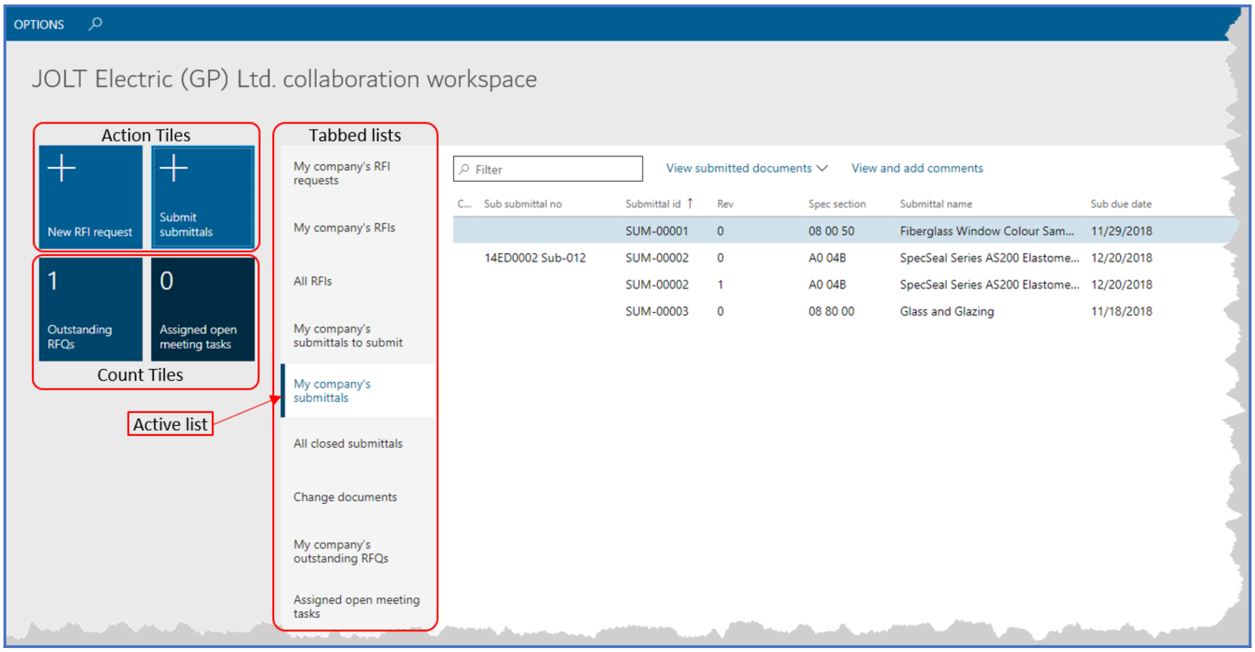


About the Subcontractor Workspace

The 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 workspace, so you can access project information that is relevant to your company. You will learn how to navigate the workspace and about the different components of the workspace.

You can access the subcontractor workspace by selecting the workspace tile from your Dashboard. If you bookmarked this page in your browser and use that link, the system redirects you to your Dashboard after you log in.



Tiles

Action tiles A tile with a plus sign indicates it will initiate the action described in the label. You can take one of two actions with these tiles:

- Initiate a "New RFI request"
- "Submit a submittal" – a greyed-out tile indicate there are no submittals in the system to submit.
- “Electronic Plan Room” – this tile will only appear if your project uses the electronic plan room. When clicked the start page for the plan room will open.

Count tile A tile with a number indicates the number of records available in that group. When you click on the tile it will take you to the log list filtered by the value indicated on the tile.

- outstanding RFQs - Open requests for quotes directed to your company. You can take action to submit the quote when you are in the list.
- Assigned open meeting tasks - meeting tasks that have been assigned to you or your company,will show in this list. You can respond to the task when you are within the list.

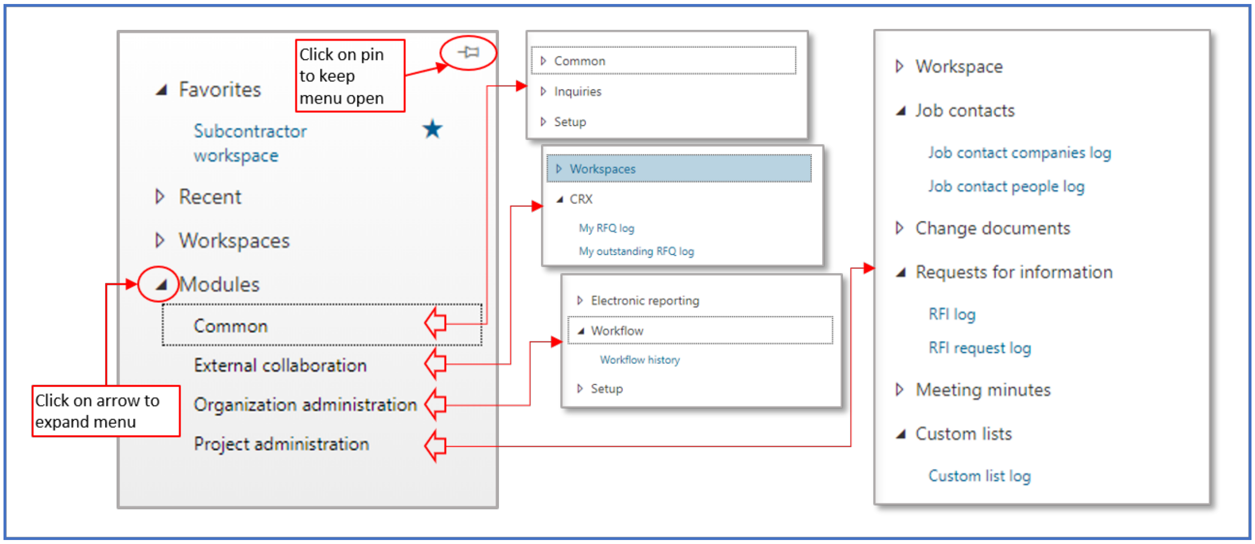
Tabbed lists

The tabbed lists provide different views, generally the most common views, that a subcontractor is interested in seeing or which involve their company.

My company's RFI requests	This list displays all the RFI requests submitted by your company. This list can be filtered and/or sorted by each column value or searched by a "Sub RFI no". The status of the RFI requests informs you about where the RFI request is in the review and approval process, and whether further information or revisions are needed. A hyperlink is available on the **RFI request no** field to access more details about the request. You can only edit a request for an RFI if it is in "Draft" or "Request change" status.
My company's RFIs	This list displays any RFIs that were generated in response to RFI requests submitted by your company. This list can be filtered and/or sorted by each column (except Urgency), or searched by a **Sub RFI no**. A hyperlink is available on the **RFI no** field to access more details about the RFI. You *cannot* make any edits to the RFI; however, you can add a comment that all parties involved with the RFI can see.
All RFIs	This list displays all the RFIs created for the project. You can filter and/or sort by each column (except Urgency) to find RFIs initiated by other companies working on the same project. This list can assist you if answers have already been provided to questions you might want to raise. A hyperlink is available on the **RFI no** field to access more details about the RFI. You *cannot* make any edits to the RFI.
My company's submittals to submit	This list displays the submittals that your company needs to submit to PCL. It contains submittals that are in the initial request phase or that have been returned for re-submission. This list can be filtered and/or sorted by each column. You can submit your document to PCL from this list.
My company's submittals	This view lists all of the submittals for your company regardless of their status. Records can be searched for a specific **Sub Submittal no**. You can view the current document that's been submitted or start the "Add comment" process.
All closed submittals	This list displays all the submittals for the project with a status of "Closed" for all subcontractors. You can download and view the PDF document containing the submittal cover page and the comments added to the submittal pages from this list.
Change documents	You will be able to monitor and view all change document affecting the project.
My company's outstanding RFQs	Open requests for quotes directed to your company. You can take action to submit the quote when you are in the list.
Assigned open meeting tasks	Meeting tasks that have been assigned to you or your company, will show in this list. You can respond to the task when you are within the list.

The Navigation pane

The Navigation pane can be accessed from both the Dashboard and the workspace by clicking the Show Navigation pane button under the navigation bar. It provides access to workspaces, menu elements, recently opened forms and user-defined favorites. The items you see are based on the security you have been granted as a subcontractor. 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	**Available pages and lists description**
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 the workspace for subcontractors and the RFQ log that is found as a tabbed list within your workspace
Organization administration	You can look at the history of your responses to RFI requests and RFQs under the Workflow history page.
Project Administration	Job contacts and Custom lists are not found in your workspace and can only be access through these menu items.
	The Job contact companies log provides a list of all companies assigned and working on the project. Through the Options > Print grid command found when viewing the list, you can download the list in a number of formats, which can then be used as a off-line contact list.
	The Job contact people log is the list of people assigned and working on the project. You can also download this list using the Option > Print grid command.
	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 will only be able to access lists where you have been included as a relevant party by the Project Manager.