PM4 + Partners
Knowledge Articles

Workspace Overview for Subcontractors

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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 Requests for Quotes, Subcontract related documents and Submittals relevant to your company. You can view your company’s executed subcontracts and any project documents.

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 several Workspace tiles.

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.
   - 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 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.
About the Subcontractor 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 six tiles on your dashboard: CRX management, Meeting minutes administration, RFI management, Subcontract management, Subcontractor workspace (being removed in a coming release) and Submittal management. You can access a workspace by clicking one of the workspace tiles from your Dashboard.

Workspace Tiles

Tiles link you to log pages for the indicated item or direct you to take an action about 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.

<table>
<thead>
<tr>
<th>CRX Management</th>
<th>Meeting Minutes Administration</th>
<th>RFI management</th>
<th>Submittal management</th>
<th>Subcontractor workspace</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outstanding RFQs</td>
<td>Assigned open meeting tasks</td>
<td>Assigned overdue meeting tasks</td>
<td>New RFI request</td>
<td>Submit submittal</td>
</tr>
</tbody>
</table>

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 a tile is greyed-out there are no tasks to perform.

- Initiate a New RFI request
- Submit a submittal

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 RFQs** – is for open requests for quotes directed to your company. When you are in the list you can submit your completed quote to PM4+.
- **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.
Tabbed lists

The tabbed lists provide the most common views, that you would be interested in seeing or which involve your 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
My company’s outstanding RFQs
This tab lists all open requests for quotes directed to your company. You can submit the quote when you are in the list. A red diamond indicates immediate attention is requested.

RFI management
My company’s RFI requests
All RFI requests submitted by your company display in this list. 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. You can only edit a request for an RFI if it is in “Draft” or “Request change” status. The RFI request no is a hyperlink you can use to view details about the request.

My company’s RFIs
This list displays any RFIs that were generated in response to RFI requests submitted by your company. The RFI no is a hyperlink you can use to access 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
All the RFIs created for the project display in this list regardless of their current status. This list can assist you in determining if questions you might want to raise exist and have been answered. The RFI no is a hyperlink you can use to access details about the RFI. You cannot make any edits to the RFI. You can however add a comment to any RFI.

Meeting minutes administration
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 list.
Assigned overdue open meeting tasks

Meeting tasks that are overdue and assigned to you or your company show in this list. You can respond to the task when you are in list.

Submittals management

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. Use this list view to submit your document(s) to PCL when you have multiple submittals to submit.

My company's submittals

This view lists all 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 ‘Closed’ submittals for the project. From this view you can download and view the PDF ‘package’ for a selected submittal. The ‘package’ contains the submittal cover page, the document and any comments added to the submittal pages.
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 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.

<table>
<thead>
<tr>
<th>Module</th>
<th>Additional available pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common</td>
<td>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.</td>
</tr>
<tr>
<td>External Collaboration</td>
<td>This includes another way to access your workspaces and the Documents log and Document Revision inquiry.</td>
</tr>
<tr>
<td>Project Administration</td>
<td>Job contacts and Custom lists are not found in your workspace and can only be accessed through these menu items.</td>
</tr>
</tbody>
</table>

The Job contact companies log provides a list of all companies assigned and working on the project. To make an off-line contact list you can use the Print grid command found under the Option tab when viewing the list. Your report can be saved as either a pdf, Word document or an Excel worksheet.

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 are only able to access lists where you are included as a relevant party by the Project Manager.