PM4 + Partners
Knowledge Articles

Workspace Overview for the Consultant/Design Team

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Contents

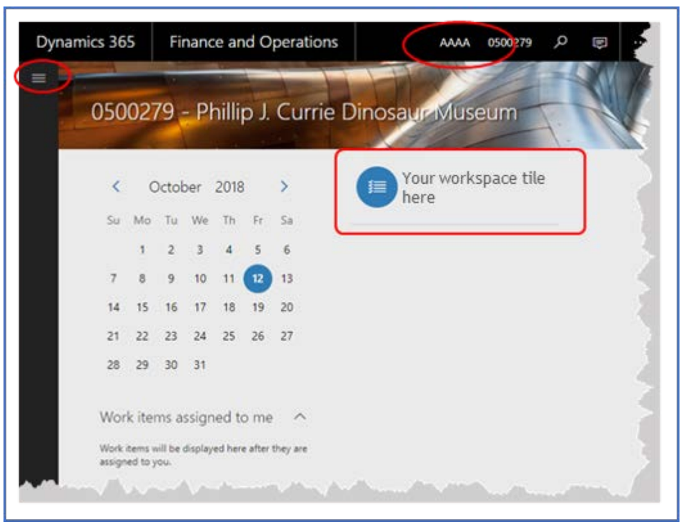
Welcome to the PM4+ Partners Collaboration Workspace

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. At the end of this topic, you will find a list of resources you can use to learn about the PM4+ environment and how it can help you simplify your project tasks.

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. Select the project name.

   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.

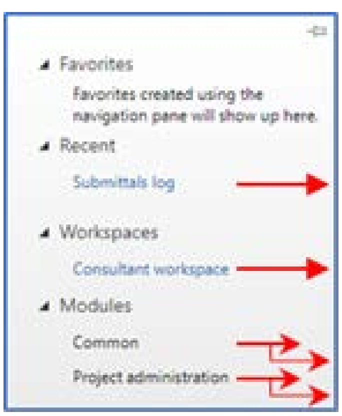
   Note: It may take a few moments to open the project depending on how large it is.

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 ☰.

The navigation pane consists of four collapsible sections:

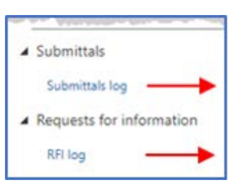


Favorites Provides quick access to the list of forms you have explicitly marked as favorites.

Recent Lists the forms you have most recently visited.

Workspace List of workspaces created for you or by you.

Modules This is the full list of modules you can access. When you select the module title, it expands to show the next menu pane.



Currently you can only access two log lists: Submittals and RFIs. You can filter and sort these lists so they display the way you want them to; not just the way they appear in the predefined workspace tabbed lists. For more information about filtering and sorting, see: Sorting and Filtering Lists.

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

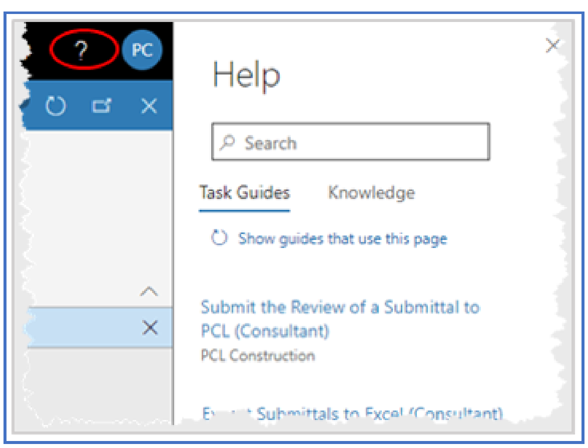
    b. Select the hamburger menu button ( ) to open the navigation pane. Navigate from the **Modules** section, and select **Common** > **User options**

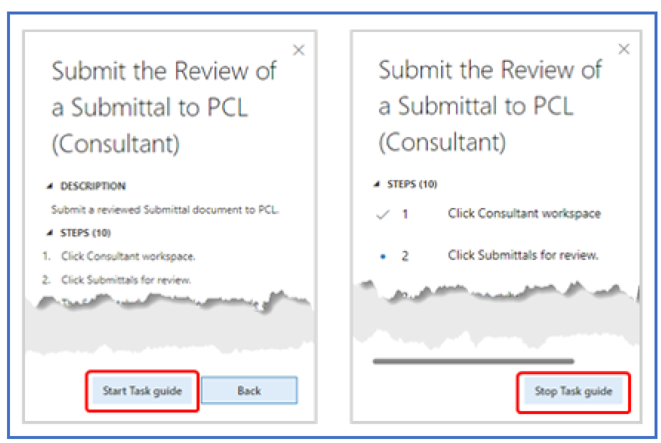
2. Review the list of options to modify and change as appropriate:

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	**Warning:** These values are set by the project administrator and should not be changed. Doing so may cause your workspace to become unstable.	
Account	**Warning:** These values are set by the project administrator and should not be changed. Doing so may cause your workspace to become unstable.	
Workflow	**Warning:** These values are set by the project administrator and should not be changed. Doing so may cause your workspace to become unstable.	

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 Consultant Workspace

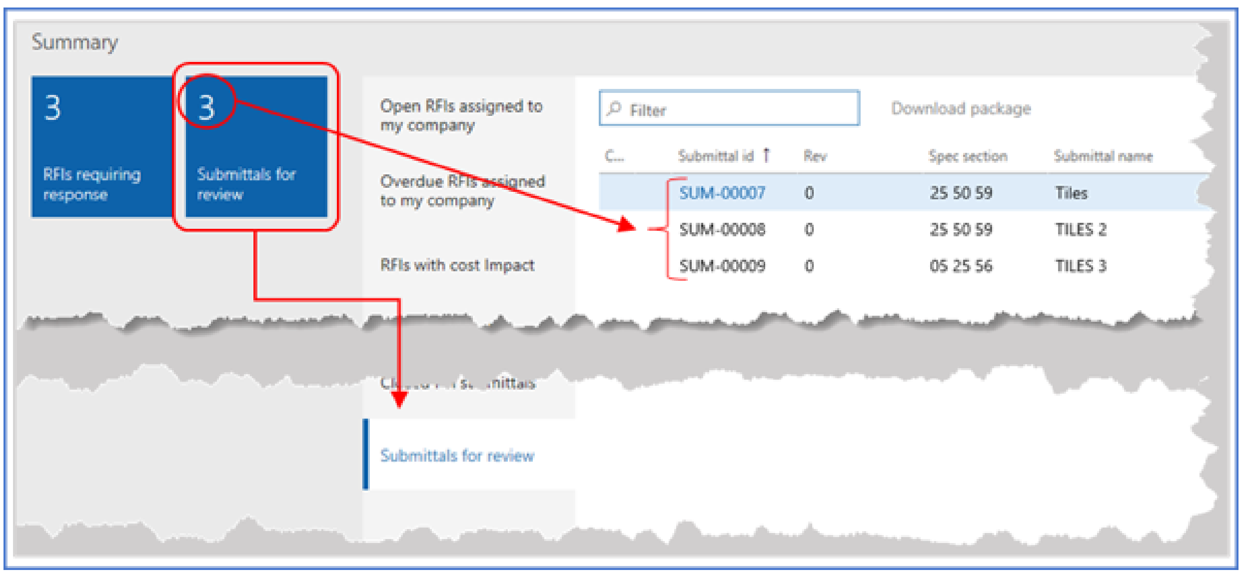
The workspace is an activity-oriented page that allows you to view information pertinent to your company and to initiate the most frequently used tasks.

This knowledge article describes the options available in the PM4+ Partners Consultants 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.

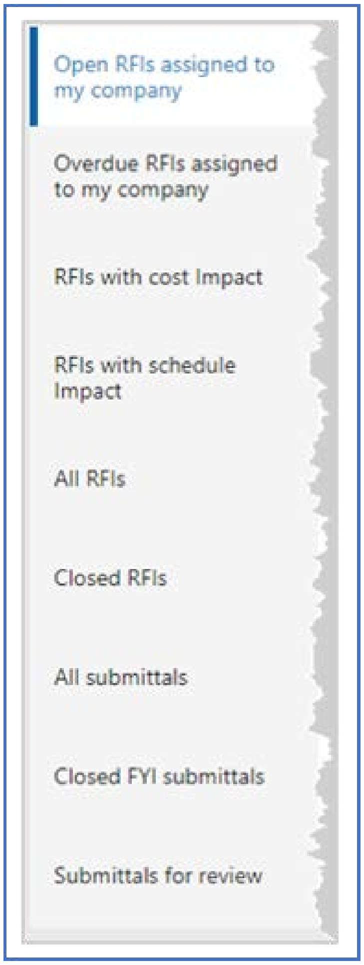
Your workspace contains two types of items:

Count tiles The number on a "count tile" shows how many records are currently in the list the tile represents. By default, the workspace has two tiles: **RFIs requiring response** and **Submittals for review**. Select a tile to view the details for the tile in the list. Doing this does not initiate the review action or the response action.



Tabbed lists

To open a tabbed list, select the title. The tab for the list is highlighted with a bold bar beside its title to show it is open.



Open RFIs assigned to my company	Lists all RFIs assigned to selected consultant requiring a response. RFIs can be selected from the list for review and consultant updates.
Overdue RFIs assigned to my company	Lists all RFIs assigned to selected consultant where a response is overdue.
RFIs with cost Impact	Lists only RFIs assigned to selected consultant where a cost impact has been identified.
RFIs with schedule Impact	Lists only RFIs assigned to selected consultant where a schedule impact has been identified.
All RFIs	Lists all RFIs that have been created for the project regardless of assigned responsibility for a response.
Closed RFIs	Lists all RFIs that have been closed.
All submittals	All the project submittals are displayed in this view regardless of status.
Closed FYI submittals	All the project submittals with a status of closed where no consultant/design team review was required.
Submittals for review	All submittals with a status of 'In Consultant Review' where your company is identified as the primary consultant to review a submittal.