



# PM4 + Partners Knowledge Articles

## Workspace Overview for Subcontractors

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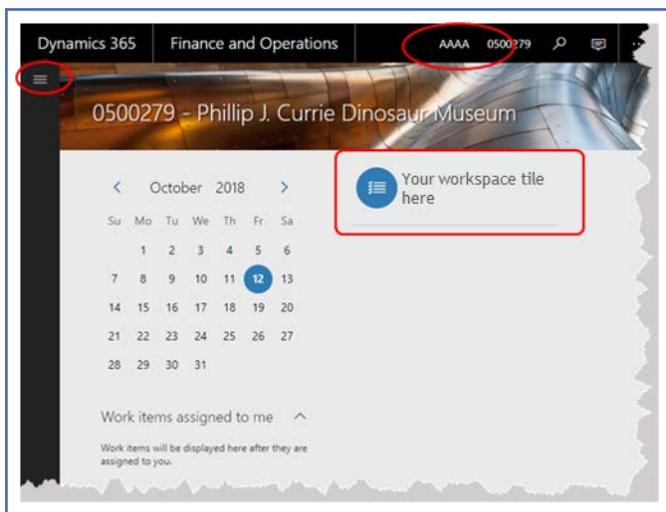
## Welcome to the PM4+ Partners Collaboration Workspace

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



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## 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.

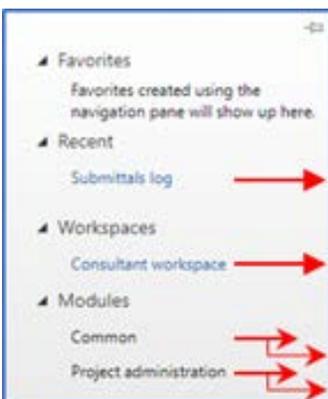
**Note:** It may take a few moments to open the project depending on how large it is.

**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**

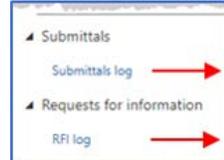
Lists the forms you have most recently visited.

#### **Workspaces**

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

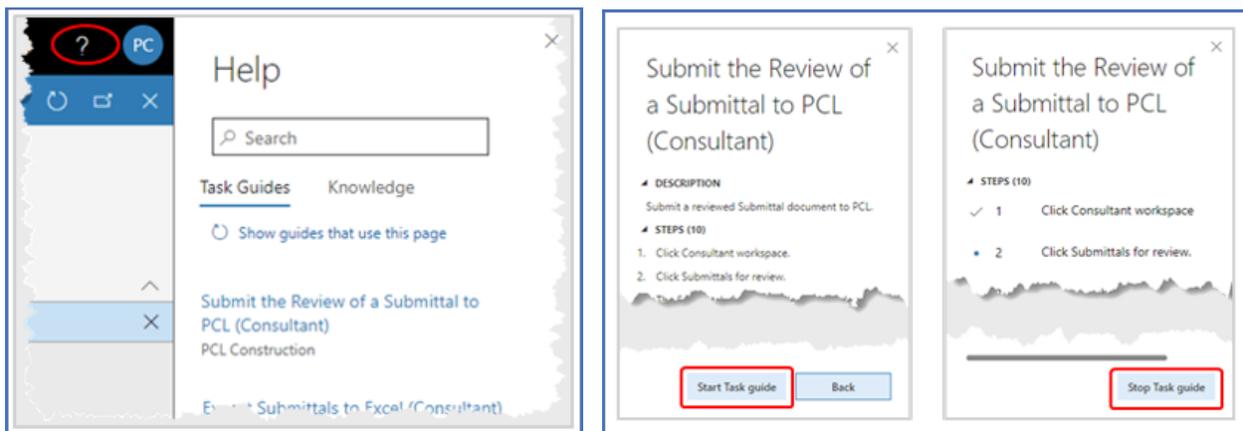
You can customize your workspace environment by changing values in the **User Options**.

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:

<b>Visual</b>	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.
<b>Preferences</b>	<b>Warning:</b> These values are set by the project administrator and should not be changed. Doing so may cause your workspace to become unstable.	
<b>Account</b>	<b>Warning:</b> These values are set by the project administrator and should not be changed. Doing so may cause your workspace to become unstable.	
<b>Workflow</b>	<b>Warning:</b> 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 Subcontract 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 Subcontractors 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:

**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"

**Note:** If the "Submit a submittal" tile appears faint (and cannot be selected) this indicates your company has no documents to submit.

Submittal no.	Submittal id	Spec section	Submittal name	Sub due date	Status	Document type	Reason for return
SUM-00006	26 05 00	Main Flr Washroom floor plugs	10/12/2018	Requested	Shop Drawing		
SUM-00007	26 05 00	Corridor S47 electrical plugs	10/10/2018	Requested	Shop Drawing		
SUM-00008	26 05 00	Corridor S49 electrical plugs	10/10/2018	Requested	Shop Drawing		
SUM-00009	26 05 00	Corridor E52 electrical plugs	10/10/2018	Requested	Shop Drawing		

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<b>Tabbed list</b>	The tabbed lists provide different views, generally the most common views, that a subcontractor is interested in seeing or which involve their company.
<b>My company's RFI requests</b>	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 <b>RFI request no</b> 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.
<b>My company's RFIs</b>	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 <b>Sub RFI no</b> . A hyperlink is available on the <b>RFI no</b> field to access more details about the RFI. You <i>cannot</i> make any edits to the RFI; however, you can add a comment that all parties involved with the RFI can see.
<b>All RFIs</b>	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 <b>RFI no</b> field to access more details about the RFI. You <i>cannot</i> make any edits to the RFI.
<b>My company's submittals to submit</b>	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.
<b>My company's submittals</b>	This view lists all of the submittals for your company regardless of their status. Records can be searched for a specific <b>Sub Submittal no</b> . You can view the current document that's been submitted or start the "Add comment" process.
<b>All closed submittals</b>	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.

