Project Team Quick Reference Guide

This topic provides a reference for the Project Center Project Team activity center.

Purpose

Use the Project Team activity center to assemble and manage a unique team for each project based on who participates in the project. Assemble your project team by assigning contacts from the Project Center Contacts database to your project team. Organize and group team members to facilitate communication between internal and external team members when using functions such as transmittals, submittals, action items, and Newforma Info Exchange.

Audience

Internal project team members.

Key Features

- Create a unique team list for each project.
- Group team members to organize and facilitate communication.
- Modify contact information for project team members.
- Establish access to your Info Exchange website for the project and assign permissions.

To add people to the project team

1. Select Add Team Members > From Contacts from the Tasks panel in the Project Team activity center.

Select From Company to select from a list of contacts by company.
2. Select team members in the **Choose New Team Members from Global Contact List dialog box** and select **OK**.

![Choose New Team Members from Global Contact List dialog box](image1)

3. Select **Add New** to add a new team member that is not already in the contacts database.

![Add New](image2)

4. In the **Add New Project Team Member dialog box**, enter either a valid and unique **Email Address** or a **First Name** and/or **Last Name**. Fill in any other contact information you wish and select **OK**.

![Add New Project Team Member dialog box](image3)
To give team members access to the Info Exchange website

1. To give a team member access to the Info Exchange website, select their contact record and select **Modify** in the **Tasks** panel. Select the **Project Roles and Permissions** tab.
2. Select the **Allow Web Access to this Project on Your Info Exchange Server** checkbox.
3. Verify the correct **Permission Set** is applied. Anyone outside your company is automatically identified as an external user.
4. If this is the first project the user has been given access to, they receive an email with a link to login and a temporary password. After logging in they will change their password and can access this project’s information.

    **Note:** If you want to view project information on the website, you must also join the project team.

To modify or remove team members

1. To modify a team member’s information select the team member and select **Modify** in the **Tasks** panel.
2. Make any necessary changes to the **Contact Information**, **Contact Notes**, **Project Roles and Permissions**, or **Project Assignments** tabs in the **Modify Project Team Member** dialog box and select **OK**.
3. To remove the contact from the project team select the contact and select **Remove** in the **Tasks** panel. This removes the contact from the project team but not the Global Contacts List.

![Tasks panel](image)

**To create project team groups**

1. To organize the project team into groups select **Add Group** in the **Tasks** panel.

![Add Group](image)

2. Assign a **Group Name** and select the **Group Members** in the **Add Project Team Group** dialog box. A team member can be assigned to multiple groups.

![Add Project Team Group dialog box](image)
To communicate with the project team

1. To send an email to a project team member or group select the team member or group and select Send Email in the Tasks panel.

2. To send files via email or Info Exchange to a project team member or group select Send Files and select Via Info Exchange or Via Email.

3. Fill in the Subject, add any Remarks and Add Files or Add Folders you wish to send on the Files to Transfer tab. Select Send or Transfer depending on whether you chose via Email or via Info Exchange.