Common Tools

Version V5.01.01 15 November 2016

Common tools overview

Common tools in **iProjects** are:

CF	Communication Form
PF01	Internal Project
PF02	Project Document Register & Transfer
PF03	Incoming Project Document Register

iProjects Common tools are used throughout all Stages of a Project. PF01: Internal Project form is a special-purpose template, described on p. 2.

Features common to most **iProjects** ProForm tools

Typically, ProForm tools have one or more of three types of on-screen help, as indicated below.

Email
Preview
Print
Save As PDF
Zoom
New
Dupe

- **Control panel:** Upper right, just outside the form printable area, is a graphic that contains three to seven standard commands, appropriate to the ProForm function. For details on how to use this control panel, refer UserGuide ***1.1: Login & Navigation.*** "Dupe" means "duplicate this record".
- **Margin UserGuides:** On many ProForm templates, there are notes – always in green text, providing advice in using the ProForm. An example is shown right.

NOTE: This form is designed to be partially completed digitally (first 3 columns), then printed as a blank distribution template for multiple issues of documents.

- **On-form User Notes:** Many templates include notes within the printable area of the template, as shown right.

USER NOTES:

1. You must have completed Task level pricing on PF18 in order to use this form.
2. Entry earned value data at the Task level, not the Stage level.
3. Obtain "Allowance used to date" values from accounting (hours used x charge rate).
4. **All values on this form EXCLUDE GST or other sales taxes.**

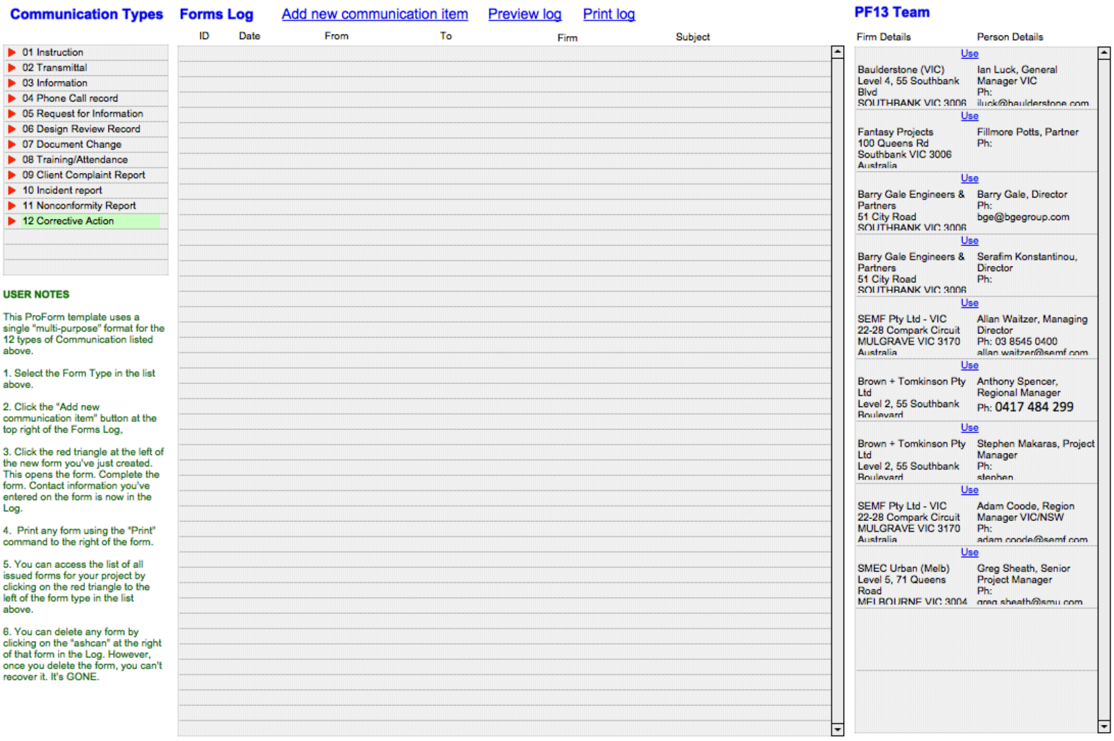
These notes mean that most templates will be self-explanatory, particularly as they are designed to "mirror" the way most practices operate. For inexperienced users, the following details will help explain the use of the Stage templates listed.

Special features of particular ProForm templates

CF Communication Form

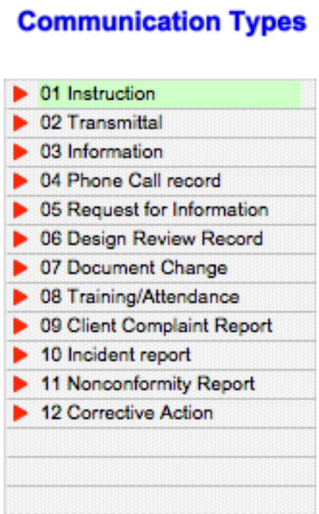
The multi-purpose **Communication Form** (CF) manages 12 different functions. Originally developed by the Australian firm of Thomson Adsett Architects (and used with their permission), we automated the concept to create a powerful and highly efficient way of tracking all of the standard communication protocols that are usually required to have a life as a print or electronic pdf document. (See *Update Note* below.)

This template contains two basic tools: a central communication management page, shown below, and a template for individual communication items generated by the system.



The basic template has a Communication Type selection list at left, with extensive User Notes. In the center is a list view to display the items belonging to any one of the 12 Types, with the Type selected by clicking on the red arrow in the Types schedule.

The 12 types of communication are shown at right, and mirror conventional paper-based forms in general use for these purposes. Types 09 -12 are for use with firms that have ISO 9001 QM systems; these uses support key requirements in that standard.

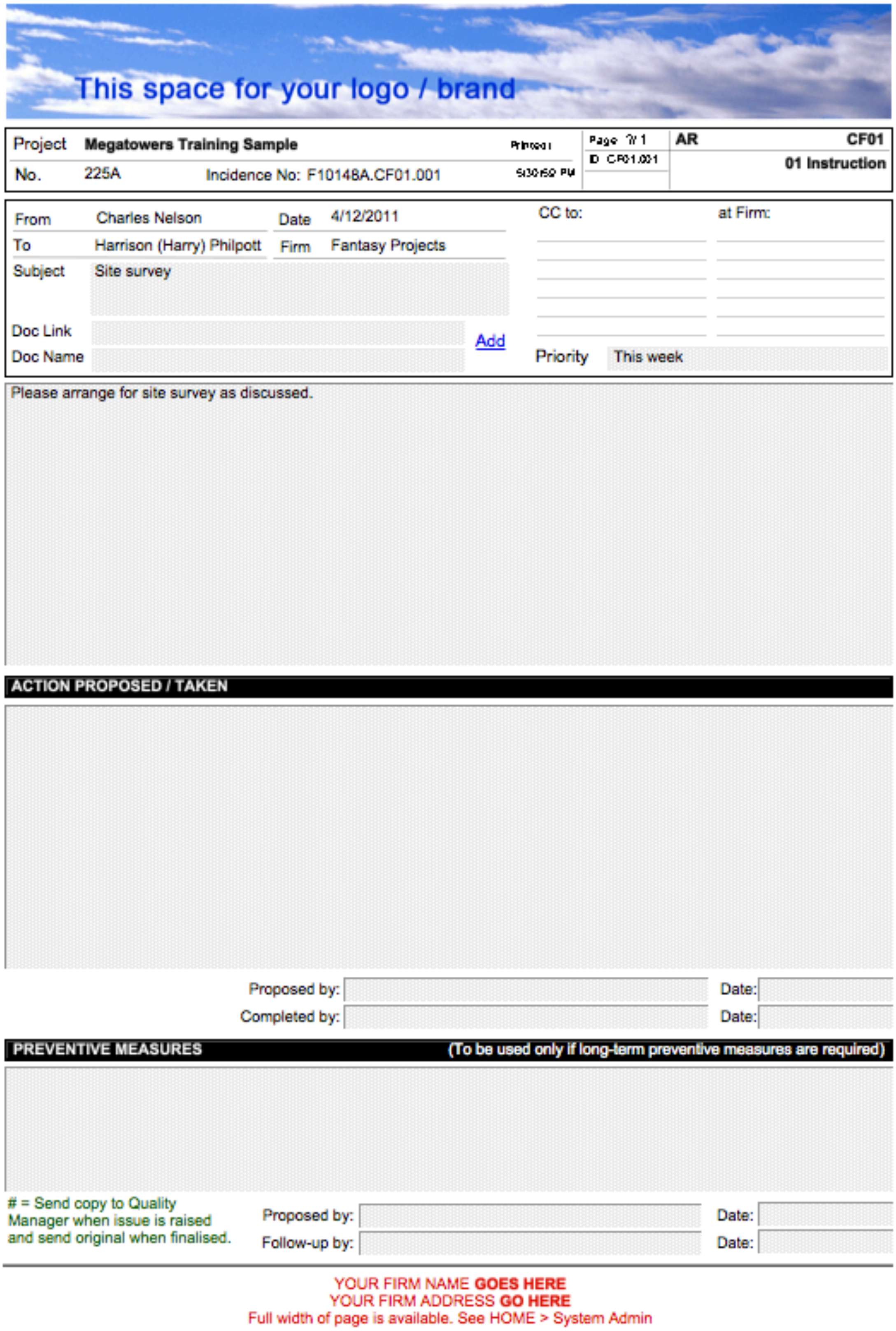


There are two ways to create a new communication item.

To send a message to someone on the Project Team: First select the Communication Type you want to send, by clicking the relevant red triangle. On the right is a list of all contacts assigned to the project, for instant selection – just click the Send to button above the relevant contact to copy the recipient's details into the To and Firm fields in the list. Doing this creates a new individual communication form.

To send a message to someone else: Again, select the type of communication you want to send, using the red triangle. Click the Add new general message item, top centre of the template, which creates a new template for your message.

Either of the above methods opens a new message template (see next page) in the category selected, and assigns it the next ID number.



This space for your logo / brand

Project	Megatowers Training Sample		Printed	Page 1/1	AR CF01
No.	225A	Incidence No: F10148A.CF01.001	5:30:52 PM	ID CF01.001	01 Instruction

From	Charles Nelson	Date	4/12/2011	CC to:	at Firm:
To	Harrison (Harry) Philpott	Firm	Fantasy Projects		
Subject	Site survey				
Doc Link			Add		
Doc Name				Priority	This week

Please arrange for site survey as discussed.

ACTION PROPOSED / TAKEN

Proposed by: Date:

Completed by: Date:

PREVENTIVE MEASURES (To be used only if long-term preventive measures are required)

= Send copy to Quality Manager when issue is raised and send original when finalised.

Proposed by: Date:

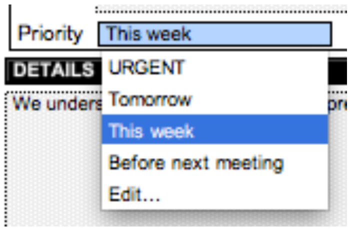
Follow-up by: Date:

YOUR FIRM NAME **GOES HERE**
YOUR FIRM ADDRESS **GO HERE**
Full width of page is available. See HOME > System Admin

Note the overall structure. As this is a multi-purpose template, it has features that cover all cases. Your first reaction might be: *"Why do we need all this? Why not just send an email?"* Unless you have invested in a special-purpose email management system, your email records are probably not sorted by project, and probably trying to get everybody to centrally store all email in a project-based, easy-retrieval is a constant headache.

Although a tad more initial work, this template solves the problem, and keeps all project-relevant communications securely linked to the project number in your system – organized, logged, and instantly accessible.

Once you have created your message, the easiest way to distribute it is to save it as a .pdf document, and send it as an attachment to an email, with copies to the additional people you've identified in the upper right CC: field.



Two more points about this template: First, Priority is set by an editable drop-down panel, as shown right.

Second, You can generate a list of any of the log of Communication Types using the Preview log and Print log buttons.

Email

The Email function is not enabled in v5.

What's Next – "Fillable" pdf documents?

We're researching the best ways to make .pdf documents "fillable" by recipients, so return communication documents can be digitally filed, retrieved and access without scanning. Adobe's Acrobat™ is one good way, but it means buying a site license for each workstation. We hope to find a solution that offers similar functionality that we can build into **iProjects.** Watch this space!

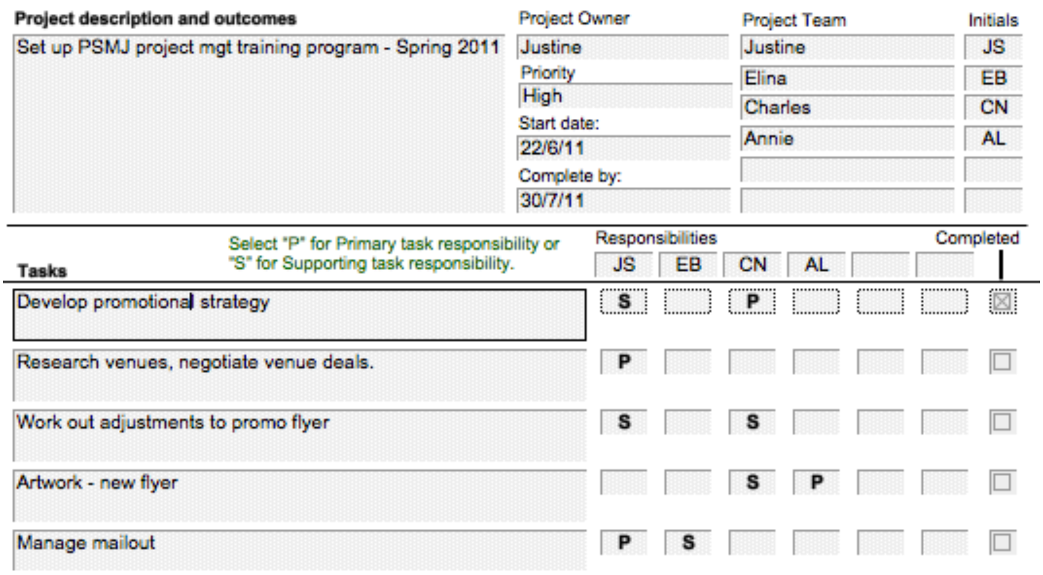
PF01 Internal Project

We built the Internal Project template to manage our own huge number of small in-office projects: What is the project, who will work on it, and so on. We thought you might like to use it, too, so we've added it to your bag of tricks - if you think it will work for you!

If it's not obvious, this template automates a couple of feature we've used for years for small project plans:

- The "project owner" – the person responsible for delivering the project.
- Priority: A drop-down list of priorities in the big scheme of things.
- Tracking of Primary and Supporting responsibilities for each task. There can only be one primary, but multiple supporting, responsibilities.

The simple example below shows how we use this template. It helps keep us on track.



PF02 Project Document Register & Transfer

PF02 is duplicates what is probably the most efficient paper-based design firm form ever created; the ultimate expression of efficiency in a world that is fast becoming history.

One of our future projects is to figure out how to re-create this efficiency in a digital environment. *Watch this space.*

PF03 Incoming Project Document Register

PF03 updates the conventional, paper-based format for tracking inward project documents: When did we get it, whom from, what is it, what date is it, who's it for. To this we've added fields for *Document type* and *Document file name*.

The first utilizes a drop-down menu to help us categorize the document type; the send provides an instant link to retrieve any document that is stored electronically in our database.

The *Description* and *Received from* fields allow for a minimum of four lines of text visible at anytime, and visible at any length when the field is clicked. However, they both include a "slide-up" feature that uses only the minimum needed to display the full text when printing or creating a pdf file of the document.

Project Megatowers Training Sample
No. 225

Use this form to record and track project information received from others.

Date received:	Received from:	Description or Dwg. numbers	Doc. type:	Doc. date/rev.	Directed to:	Document filename
24/6/11	Acme Engineers	Structural steel design queries	Corresp.	19/6/11	Fred Nerk	Megatowers Quote 07675.doc
30/6/11	Acme Engineers	Structural steel concept drawings	Drawings	28/6/11	Fred Nerk	NA