



Adding Vendor Users to Projects

To collaborate on projects in ProjectTeam and use the system properly, vendor users must be added to the project and assigned a role on the project.

The process to add users and assign their role in the system varies by user type. Please review the information below and follow the instructions to add vendor users to your projects and manage their access and project role via share group assignment.

NOTE: Only users who will be actively collaborating on the project in ProjectTeam need access to the project in the system. It is the responsibility of the DGS PM to determine who needs access to their project in ProjectTeam and to ensure that they are provided with that access and set up properly to facilitate use of the system.

Validate Existing Business

1. Open the project that you wish to add the user(s) to and click the **Directory** icon on the left navigation pane.

NOTE: If the business is already listed as part of the project in the Directory skip to Step 7.



Add a Business to The Project

2. If the business is not already listed in the Directory as part of the project, click on the **Add Business** in the top right corner of the screen.



3. Search for an existing business in the **DGS Directory** by entering their name. If there is a matching business, select it and skip to Step 7. Otherwise follow the steps below to add a new business to the ProjectTeam system.

The screenshot shows a dialog box titled "Add businesses to project". At the top, there is a search input field containing the text "acme" with a magnifying glass icon to its right. A red arrow points to the search field. To the right of the search field is a green button labeled "Create New". Below the search field is a table with two columns: "Business Name" and "Business Type". A red box with the text "No ACME Construction" is positioned above the table, with a red arrow pointing to the "Business Name" column header.

The screenshot shows the same "Add businesses to project" dialog box. The search input field now contains the text "construction" with a magnifying glass icon to its right. A red arrow points to the search field. The "Create New" button is still present. The table below has the same headers: "Business Name" and "Business Type". A red box with the text "No ACME Construction" is positioned above the table, with a red arrow pointing to the "Business Name" column header. The table contains one entry: a checkbox, "BlueSkye Construction", and "General Contractor".

NOTE: Make sure to check all possible options for the business name as necessary to determine whether the business already exists in the system or not. If "DPR" is entered into the search box, then "Department of Parks and Recreation" would not appear.

- 4. If it has determined that the **business does not exist**, click on the **Create New** button.



- 5. **Complete** the new business form **General tab** and then click the **Save** button.

The screenshot shows a form titled "ACME Construction". At the top, there are three tabs: "General", "Addresses", and "Contacts". The "General" tab is selected. Below the tabs, there are two buttons: "Cancel" and "Save". A red arrow points to the "Save" button. The form contains several input fields: "Business Name" with the value "ACME Construction", "Business Type" with a dropdown menu showing "General Contractor" and a close icon, and "Company Website" which is currently empty.

- 6. The **new business** now shows up In the Project Directory.

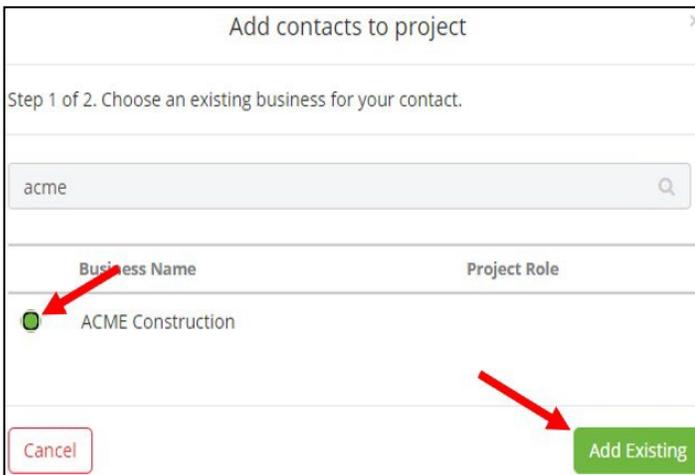


Add a New or Existing User to ProjectTeam

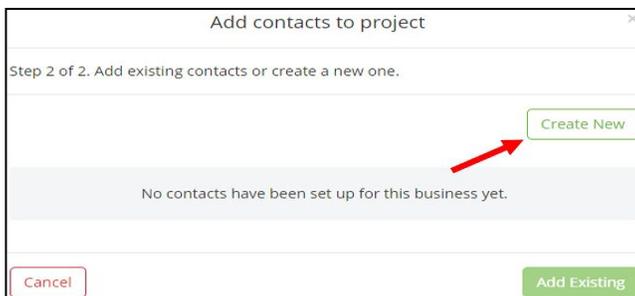
- 7. Click on the **Add Contact** in the upper right corner of the webpage.



- 8. Select the appropriate business that you wish to add a contact to, or select an existing contact from, and click on **Add Existing**.



- 9. Look for the user's name (**including last name, nickname and formal name**).
If the user's name exists, select the user and click **Add Existing**, then skip to Step 13.
If the user is new to ProjectTeam and does not appear in the list, then click on **Create New**.



10. **Complete** the user’s contact information in the pop-up window and click **Save**.

ACME Construction

General Addresses **Contacts**

New Contact Cancel Save

Prefix
Ms. ✕

First Name
Debbie

Last Name
Rakes

Job Title
Project Manager

Work Email Address
drakes@acmeconstruction.com

Work Phone Number
564-555-1234

Inviting the User and Adding them to a Share Group

11. In the **Project Directory**, click on the **Invite** button under the user’s name.



12. **Select the Share Group(s)** that the user belongs in and **click Send Invite**.

NOTE: The Share Group is assigned based on the access that they require for this project **according to their contract**, not based on their work title or on past projects.

For example, a **GC** Project Manager is assigned to the **General Contractor** Share Group, not the Project Manager Share Group.

Add user to share group

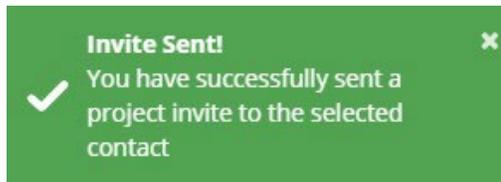
Choose share groups the user should get added to once they join the project.

gen

Group Name	Description
<input checked="" type="checkbox"/> General Contractor	

Cancel Send Invite

13. A **confirmation note** will appear indicating that the Invitation was Sent.



14. Once they have **accepted the Invitation**, the user will **immediately have access** to the project with their assigned Share Group access.
15. Make sure to **share** any relevant records in the system **with the share groups** that you have added users to so that they can see and use the records as/when needed. You can also “pre-share” records with a share group before they have users, and the users will have access to those records as they are added to the share groups.