Add Team Members
Add Contractors/Crews

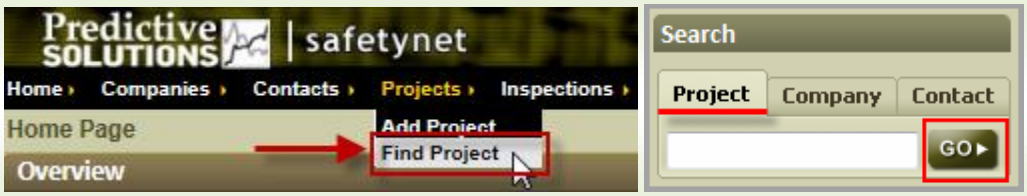
To add both team members and subcontractors, you need to start by identifying the project to which you are adding a contact. Click on 'Find Project' under the Projects menu. Alternatively, if you know the project name, type it in the 'Project' field to the right of the Home Page.

Covered Topics:

- Finding a Project
- Adding Team Members to a Project
- Adding Contractors/Crews to a Project

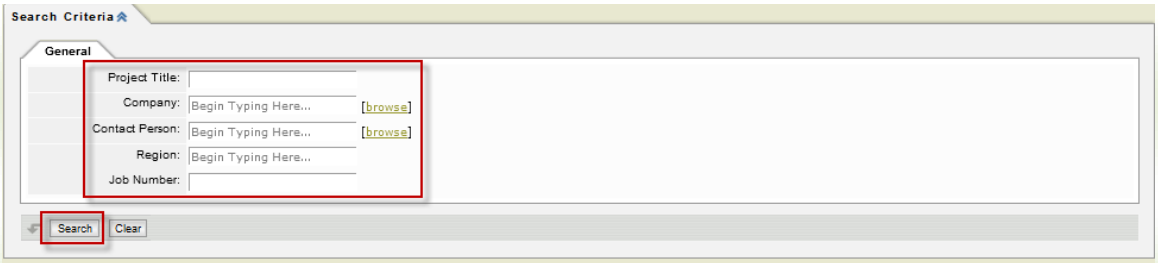
Finding a Project

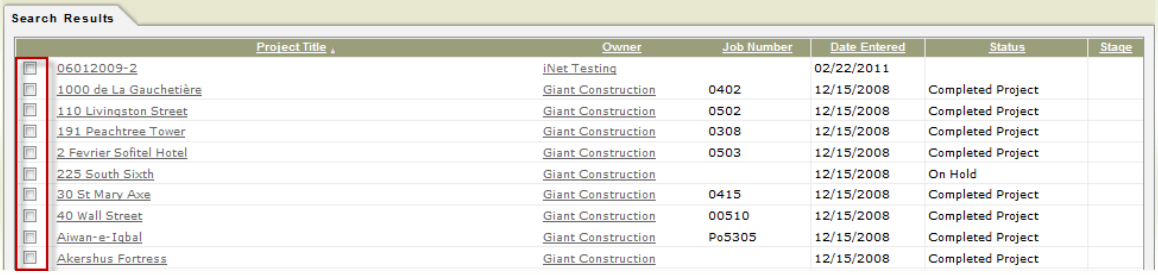
1. Click on 'Find Project' under the Projects menu. Alternatively, if you know the project name, type it in the 'Project' field to the right of the Home Page.



Clicking on "Find Project" will bring up the search screen. You can search for a project by name, company, contact person, region and/or by job number.

Enter the know information then click on "Search". A search can be done with as little as 2 to 3 letters. A list of matching projects will appear. Click on the project title of the project you would like to select. This will take you to the Project page.

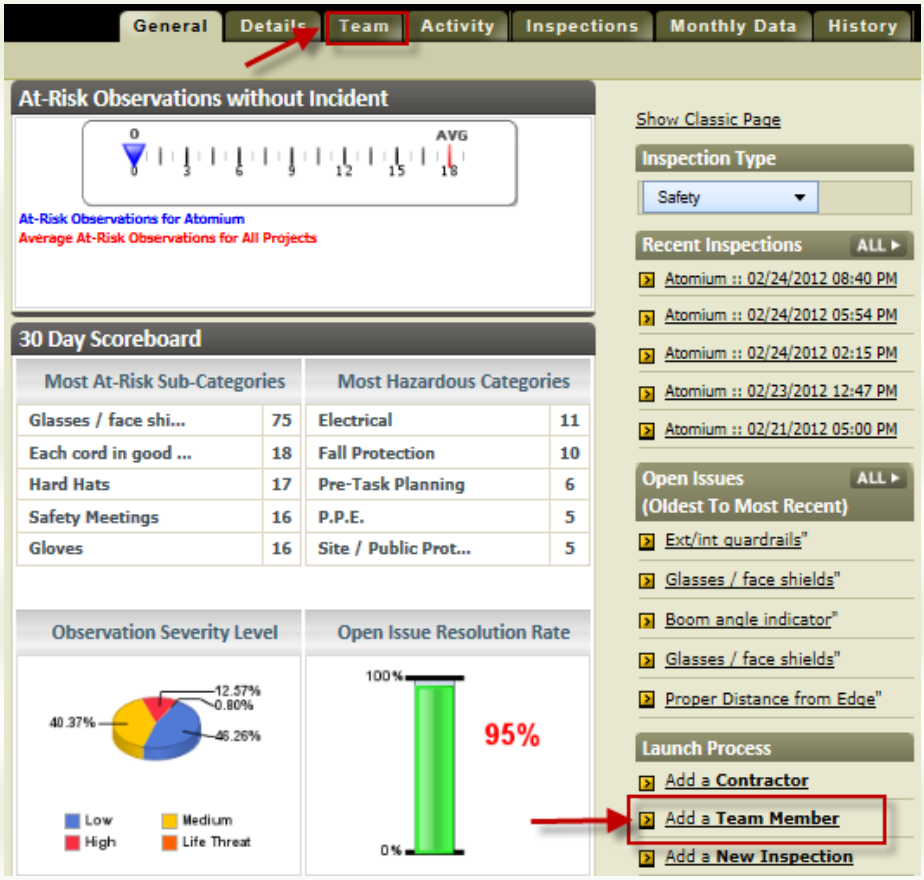




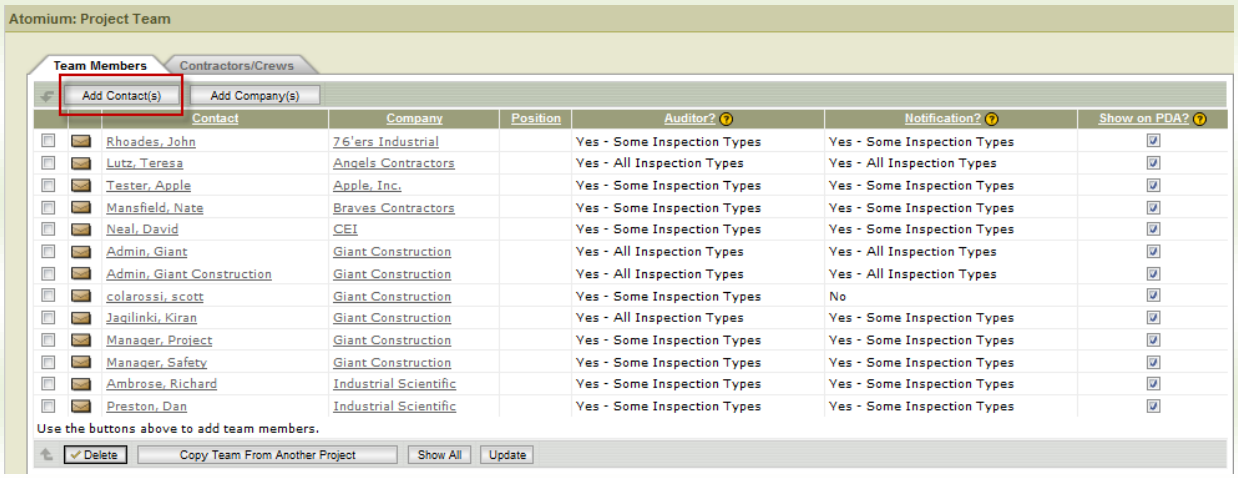
Add Team Members
Add Contractors/Crews

Adding a Team Member to a Project

1.) Click on “Add a Team Member” in the Launch Process (bottom right), or on the “Team” tab in the upper right-hand corner. Both links will take you to the same page.



2.) Click on “Add Contracts” in the upper left-hand corner. Clicking this link will open a pop-up window.

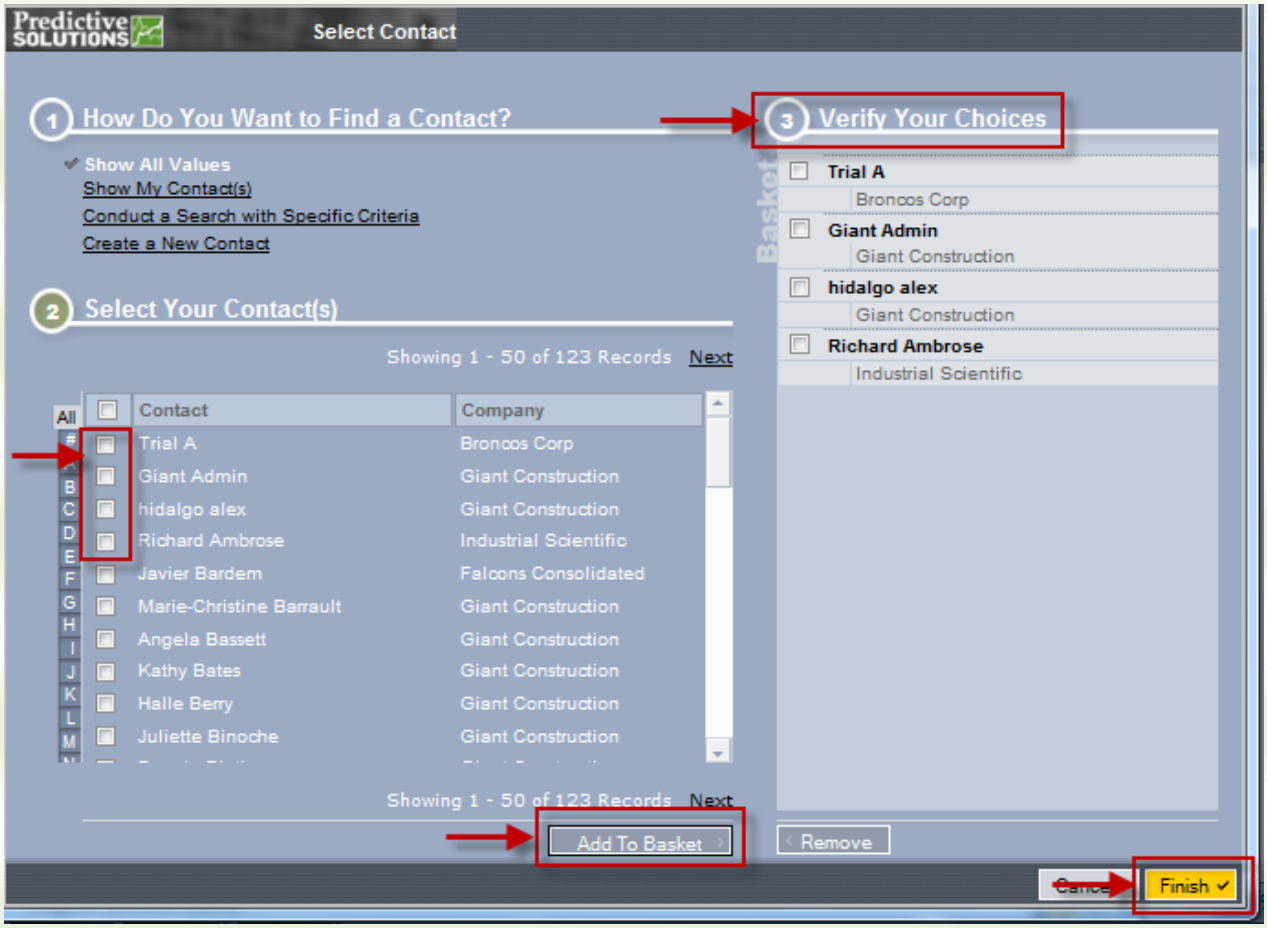


Add Team Members
Add Contractors/Crews

3.) To view all possible contacts by last name, click on the first letter of the last name on the alphabetical column on the left. You can also 'Conduct a Search with Specific Criteria' (see screen shot on the right), enter known information and click on 'Search.

Make your selection from the results by putting a check mark next to your desired name(s). Click "Add to Basket". The user(s) will appear in Section 3 "Verify Your Choices" Click "Finish".

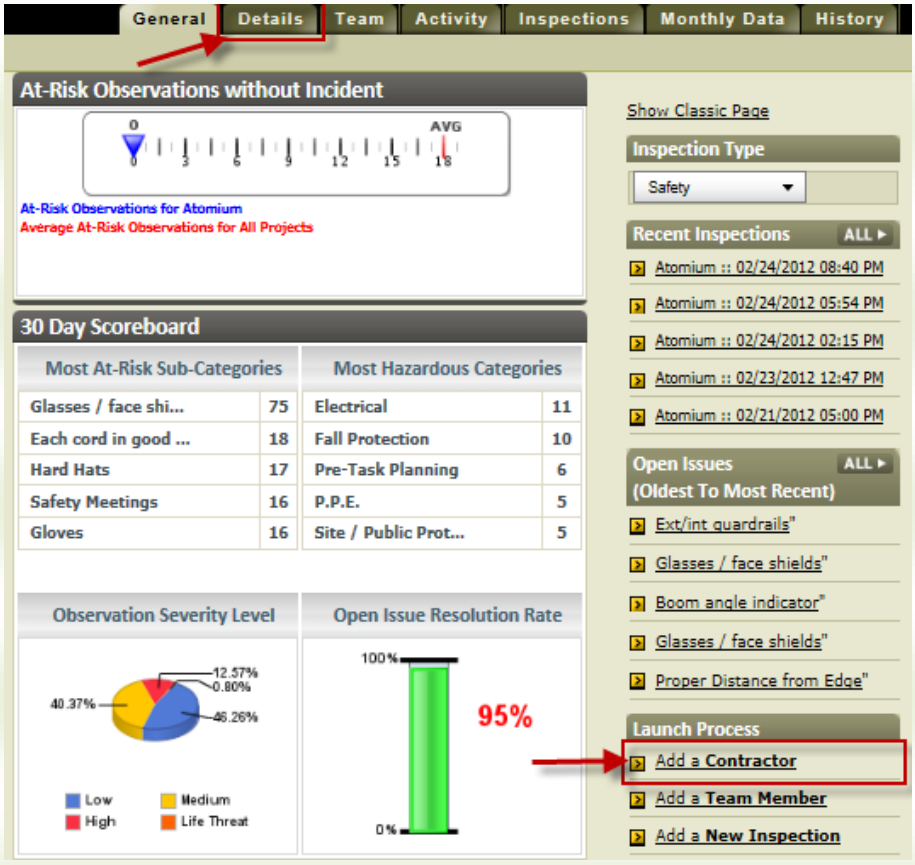
The team member(s) will now be listed on the Project Team screen. Note that the project will not appear on the newly selected team members handhelds until they are synced. The next time the user(s) log in, they will see the project listed under "My Projects" on the left –hand side of the home page.



Add Team Members
Add Contractors/Crews

Adding a Contractor/Crew to a Project

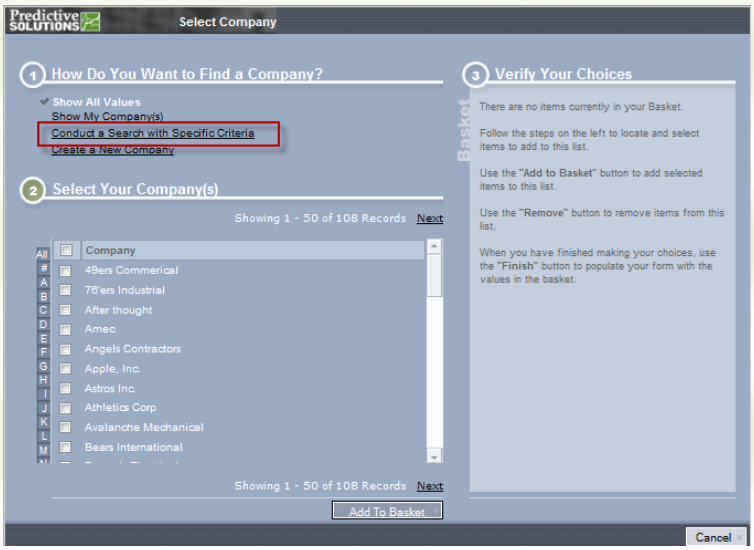
1.) Click on “Add a Contractor” on the Launch Process, bottom right, or on the “team” tab in the upper right-hand corner. If you click on the “Team” tab, you will need to click on the “Contractors/Crews” tab to add a company.



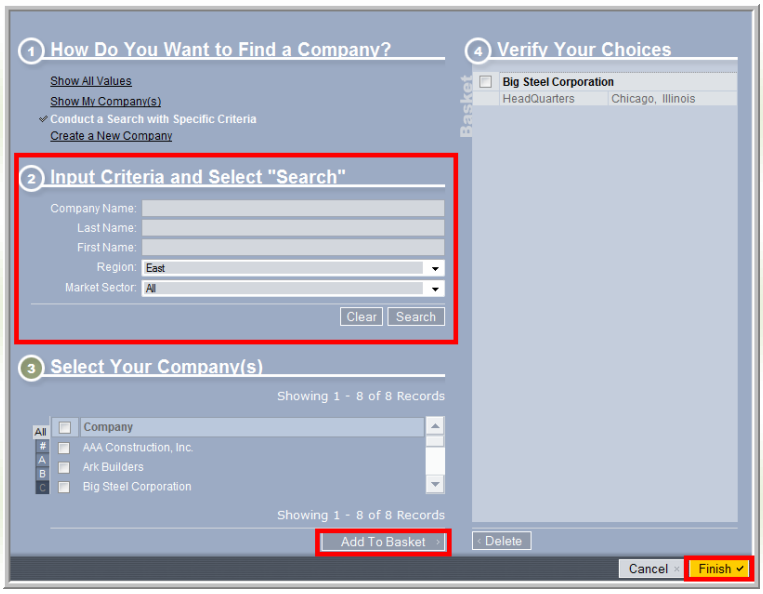
2.) Click “Add Company(s)” in the upper left-hand corner. Clicking this link with open a pop-up window.

Add Team Members
Add Contractors/Crews

To view all possible companies, click on the first letter of the last name on the alphabetical column on the left. You can also 'Conduct a Search with Specific Criteria' (see screen shot on the right), enter known information and click on 'Search.



Make your selection from the results by putting a check mark next to company name(s). Click 'Add to Basket.' The user(s) will appear in Section 4 'Verify Your Choices.' Click 'Finish.'



The company name(s) will now be listed on the Project Team screen. Note that the partner/supplier will not appear on the handheld devices until they are synced. The inspector will now be able to perform inspections of this partner/supplier.