

MiTek®



SERVICES

PLATINUM GLOBAL INFORMATION PACK



Teamworks User Guide

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TEAMWORKS PROJECTS – PLATINUM GLOBAL

Date: 08/04/2020

SUMMARY

Platinum Global use Teamwork Projects as a platform to allow you as the Customer to communicate, set tasks and see the overall progress of the work that is being undertaken by your Platinum Global employee.

Below will outline the best practices for using the online portal. By following these working methods it will give more clarity leading to a more efficient working relationship with you and your Platinum Global employee.

ACCOUNT LOGIN

Platinum Global will set up your account and send you a mail once this is done. The mail will allow you to log on and create your own password therefore giving you access to the online portal.

The image shows a two-part process. On the left is an email invitation from Teamwork Projects. The email header says 'You've been added!' and 'Hi [redacted]'. The body text states: 'Linh Huynh has added you to [Platinum Global](#). Dear All, You are invited to access Platinum Global Portal. Please kindly click on the link provided and create your own password to access. Some instructions to getting start with the Teamwork Portal can be found in the link below: <https://support.teamwork.com/projects/getting-started/>. Please feel free to ask if you have any questions, Thanks and Regards, Linh Huynh Platinum Global'. A red box highlights a 'Get Started' button. On the right is the login page for the Platinum Global portal. It features the 'PLATINUM GLOBAL' logo and says 'Hi [redacted] welcome to Platinum Global!'. Below this, it says 'Please choose a password to get started.' with a 'Password' label and a 'Get started' button. A red arrow points from the 'Get Started' button in the email to the 'Get started' button on the login page.

You will automatically be directed to the Teamwork's projects welcome page after setting a password.

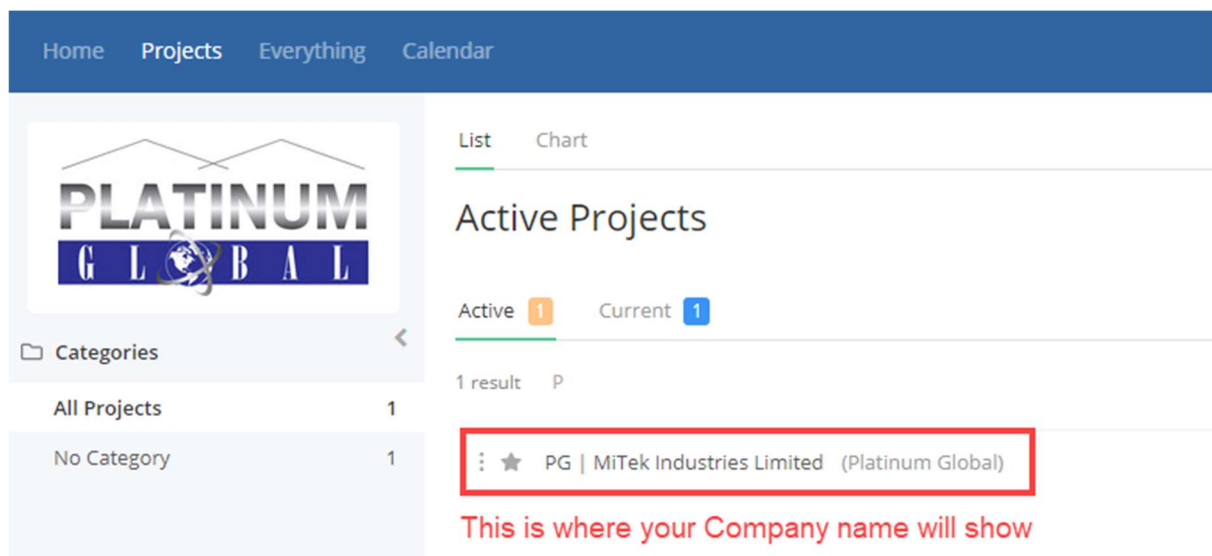
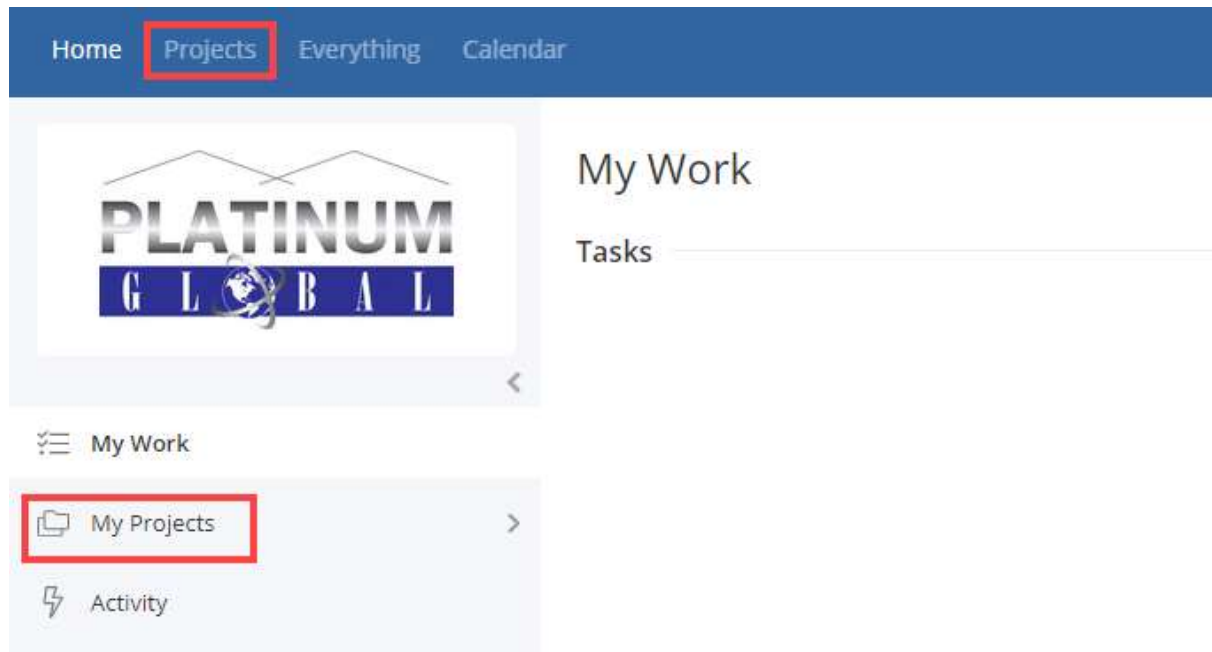
To gain access to the online portal once you have logged out use the link below;

<https://platinumglobal.teamworkpkm.net/>

PROJECTS + TASKS

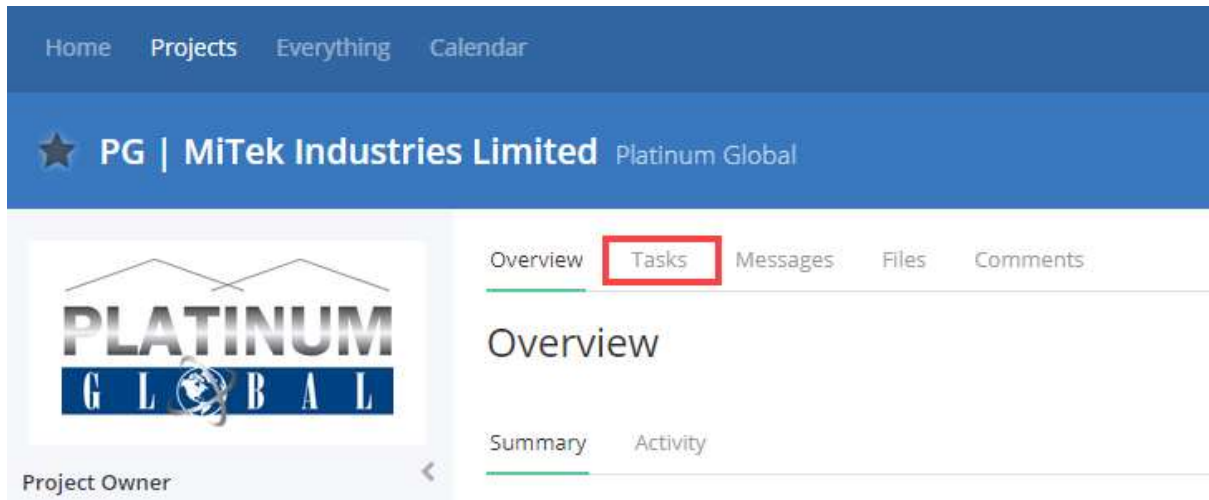
PROJECTS

To start setting tasks for your Platinum Global employee you must first navigate to the Project page. This is where you will see your company name. Inside this project is where all tasks are held. You can get to your projects by either from the navigation panel on the left hand side or by the menu bar at the top of the page.

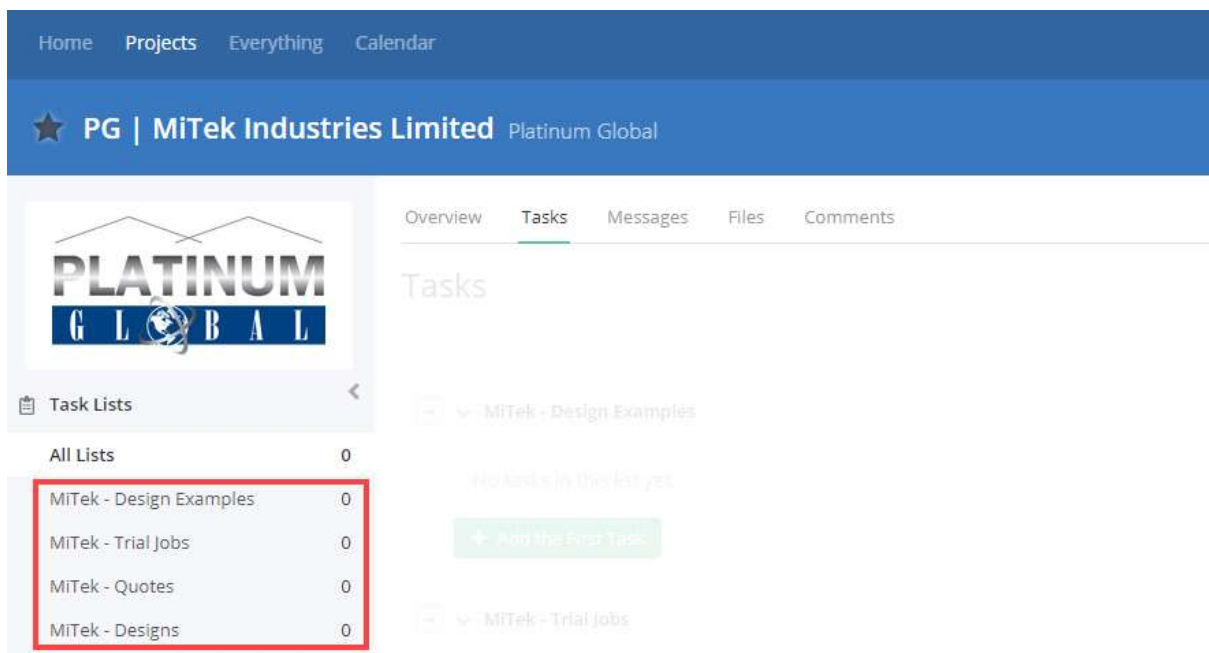


TASK LISTS

From here you can click on the project. This will launch you into your task overview page. You can then navigate to the tasks page from there.

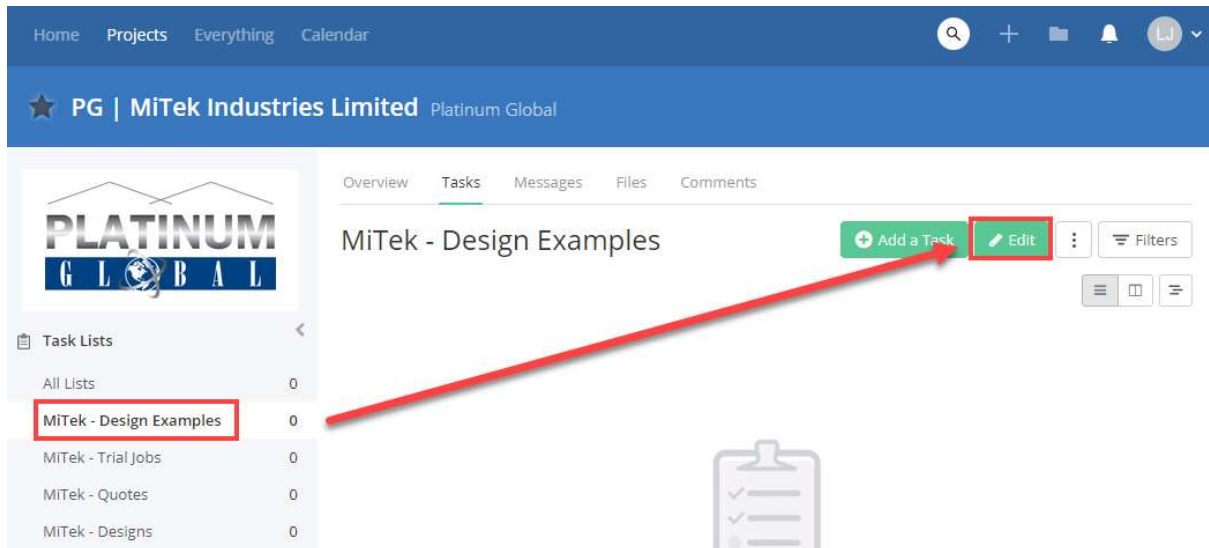


By default, you will be set up with four task lists. These are to separate out your Trial work, quotes, designs and design examples. By doing this the designer will have more clarity on what kind of work they will be undertaking, also for ease of searching and finding tasks for the Customer.

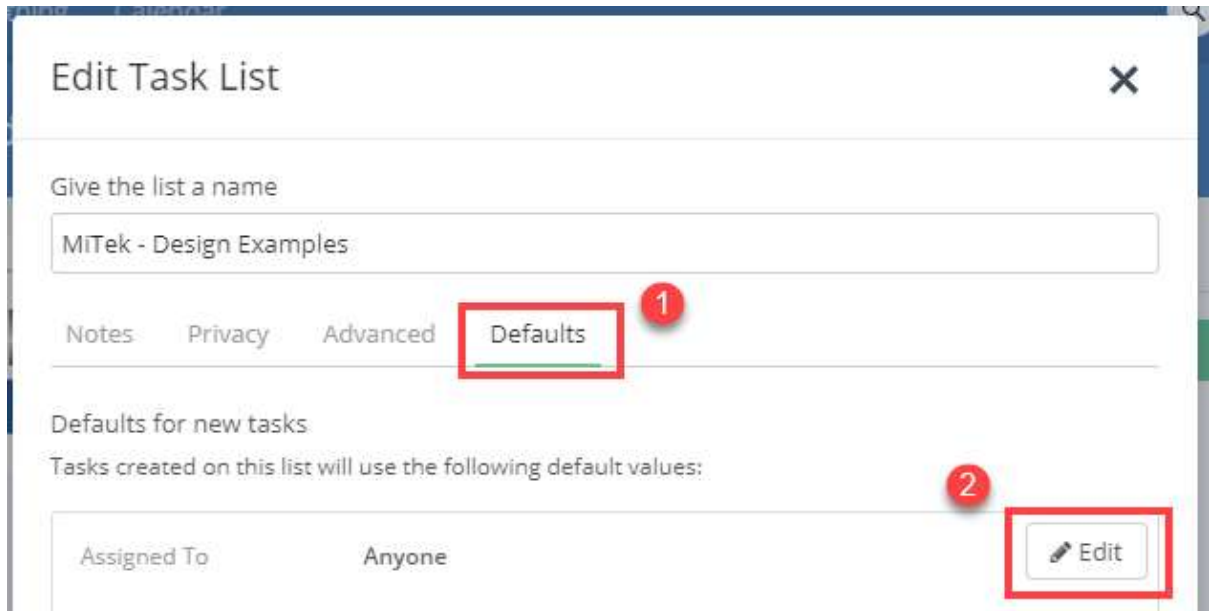


TASK LIST DEAFULTS

You should then set your defaults for each task list. If this isn't done, you will have to set the settings each time for each task that is set within the task list. The defaults include, assigning the task employee who will be undertaking the work and setting the followers are the task list. The followers will receive emails whenever a comment has been added to the task

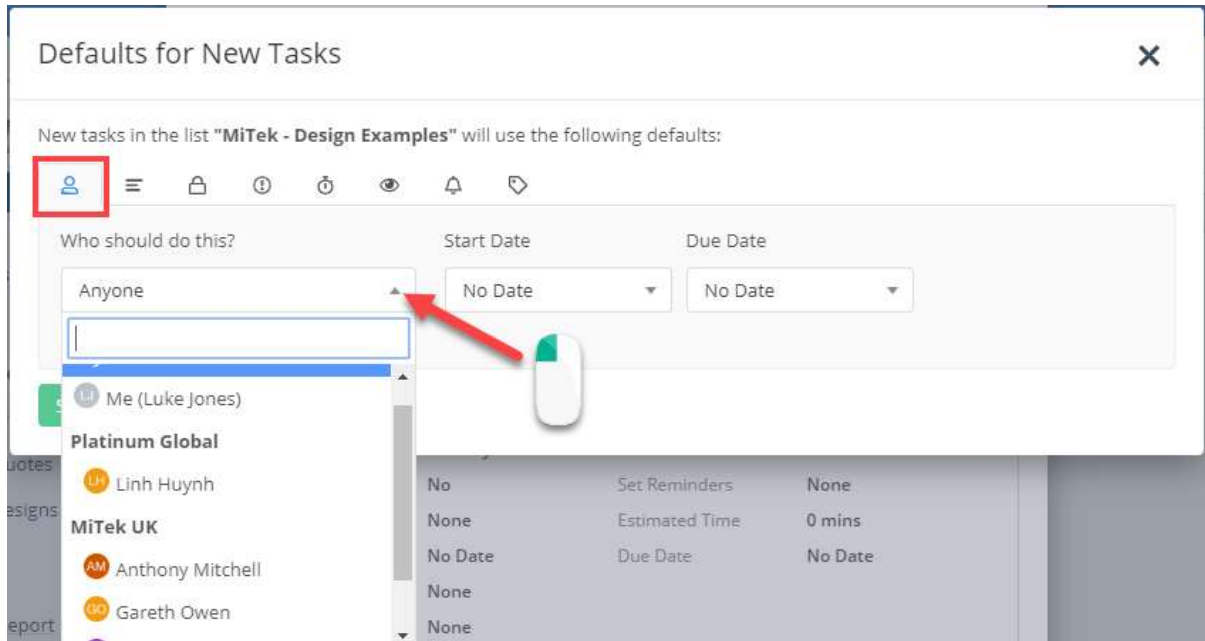


Click on the Task list you wish to set the defaults for then select 'Edit' in the top right corner of the page.



Select 'Defaults' and then select 'Edit'

From here you can now start to set your defaults for the tasks that will be set within the list.



Defaults for New Tasks

New tasks in the list "MiTek - Design Examples" will use the following defaults:

Who should do this?

Start Date

Due Date

Anyone

No Date

No Date

Me (Luke Jones)

Platinum Global

Linh Huynh

MiTek UK

Anthony Mitchell

Gareth Owen

No

Set Reminders

None

None

Estimated Time

0 mins

No Date

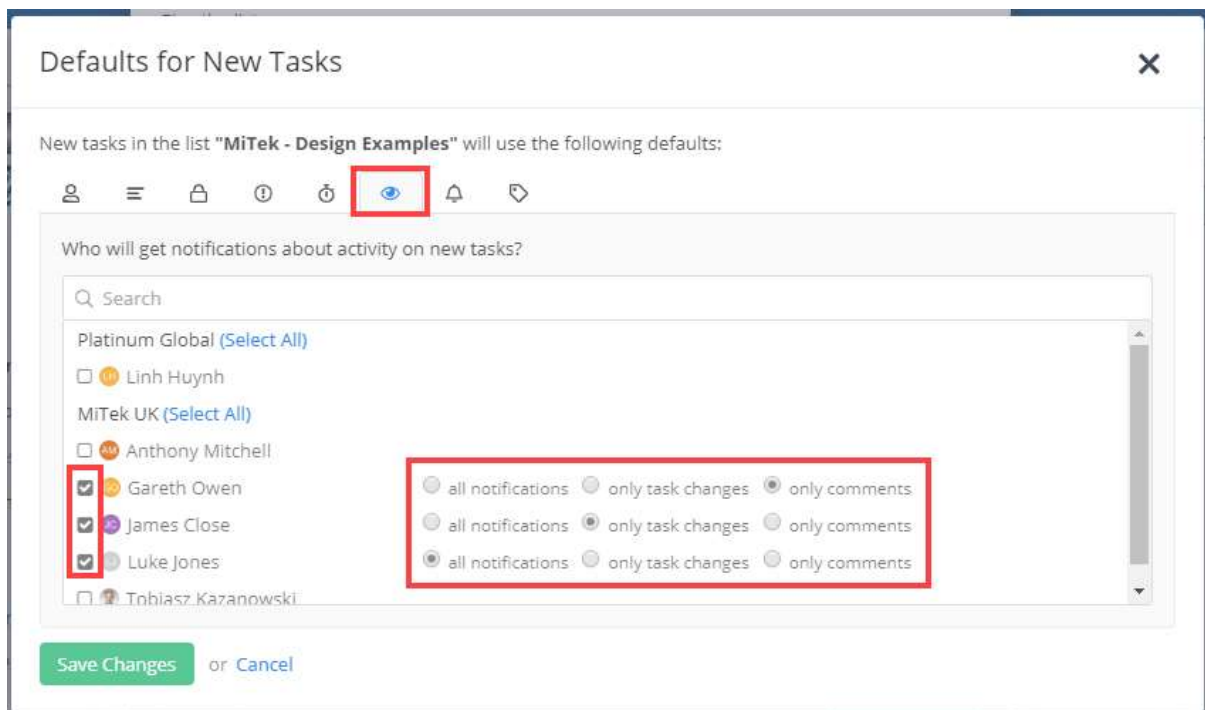
Due Date

No Date

None

None

To set the person who you want to all tasks to be assigned to can be done by navigating to the 'Who & When' tab and selecting the drop-down list from 'Who should do this?' All tasks will then be set against this person.



Defaults for New Tasks

New tasks in the list "MiTek - Design Examples" will use the following defaults:

Who will get notifications about activity on new tasks?

Search

Platinum Global (Select All)

Linh Huynh

MiTek UK (Select All)

Anthony Mitchell

Gareth Owen

James Close

Luke Jones

Tobiasz Kazanowski

all notifications

only task changes

only comments

all notifications

only task changes

only comments

all notifications

only task changes

only comments

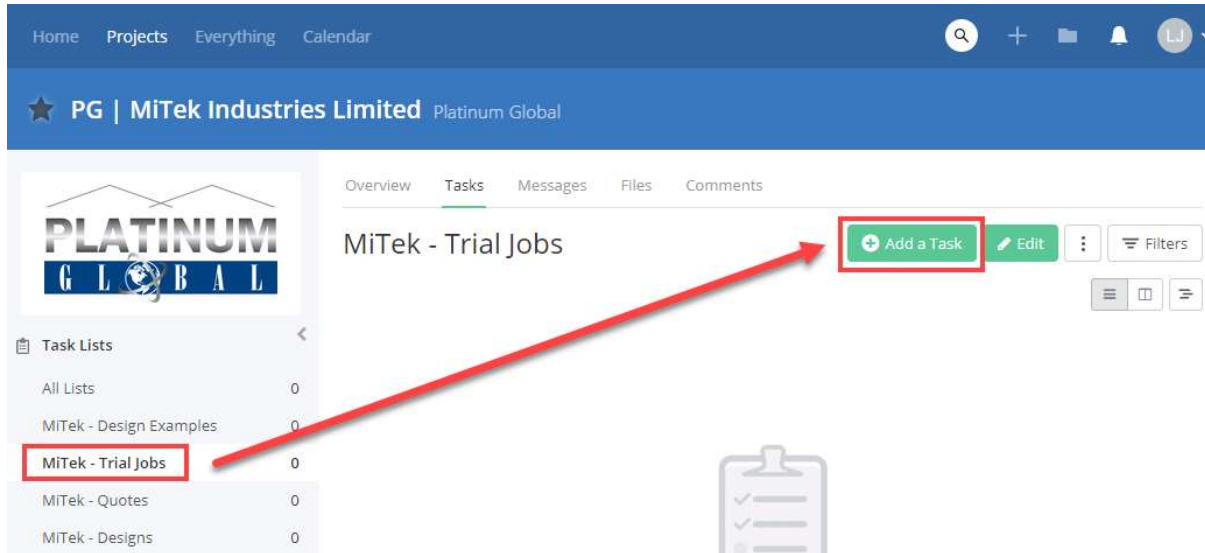
Save Changes or Cancel

To set the followers to receive notifications for the tasks can be done by navigating to the 'Followers' tab selecting the employee you want to receive a mail notification and what notifications to receive.

Once these settings have been adjusted to your specification click 'Save Changes'

SETTING A TASK

To set a task you will need to navigate to the task list you want to set the task within. Once selected on the task list, select 'Add a Task' in the Top right corner of the page



All tasks should be set out as detailed below. This is for constancy of task titles and for ease of finding a task.

- Title Name - 'MBA Project No' - 'Customer name' - 'Site Name' - 'Brief Description'
- Select 'Notify by Email?' for the person who's task it is to be notified
- Start and Due date must be set on the 'Who and When' Tab
- Description of work to undertake plus any architects notes that are not on drawings must be detailed in the 'Description' Tab
- All drawings to be uploaded to the task for designs to be completed. (if there are more than 15 drawings it would be best practice to zip them up and upload the one file.)
- Priority to be set
- ****Optional**** you can also set the followers of the task on the task too if you would like it to be different to the set defaults

✓ M20001 - A Customer - A Site Name - 10 house types

Who should do this?

Me (Luke Jones)

☒ Notify by Email? ☐ Multiple People

Start Date

09/04/2020

Due Date

30/04/2020

Today | +1 Day | +7 Days | No Date Today | +1 Day | +7 Days | No Date

Save Changes or Cancel

✓ M20001 - A Customer - A Site Name - 10 house types

Provide a detailed description for this task (optional)

10 House types to design. Floor and Roof required
House types A + B to have a Hoist load on floor designs

Save Changes
or Cancel

✎ ✓ M20001 - A Customer - A Site Name - 10 house types

Would you like to attach files to this task?

	Category
<input checked="" type="checkbox"/> 14-BR-003, Rev A First Floor Plan - 1-50 @ A3.p...	<div>No Category</div>
<input checked="" type="checkbox"/> 14-BR-005 Roof Plan - 1-50 @ A3.pdf	<div>No Category</div>
<input checked="" type="checkbox"/> 14-BR-006, Rev A Front Elevation - 1-50 @ A3.p...	<div>No Category</div>
<input checked="" type="checkbox"/> 14-BR-007 Side Elevation - 1-50 @ A3.pdf	<div>No Category</div>
<input checked="" type="checkbox"/> 14-BR-008, Rev A Rear Elevation - 1-50 @ A3.pdf	<div>No Category</div>
<input checked="" type="checkbox"/> 14-BR-009, Rev A Side Elevation - 1-50 @ A3.pdf	<div>No Category</div>
<input checked="" type="checkbox"/> 14-BR-010 Section S2 - 1-50 @ A3.pdf	<div>No Category</div>

+ Add Files
Select from Existing Files...

Save Changes
or Cancel

✓ M20001 - A Customer - A Site Name - 10 house types

Choose the priority of this task

☐ None
☒ Low
☐ Medium
☐ High

Save Changes
or Cancel

✓ M20001 - A Customer - A Site Name - 10 House types

Who will get notifications about activity on this task?

Search

Platinum Global (Select All)

☐ Linh Huynh

MiTek UK (Select All)

☐ Anthony Mitchell

☒ Gareth Owen

☐ James Close

☒ Luke Jones


☐ Tobiasz Kazanowski

☒ all notifications ☐ only task changes ☐ only comments

☒ all notifications ☐ only task changes ☐ only comments


Select 'Save Changes' once all the information for the task has been filled in.

(PG | MiTek Industries Limited) - New task: M20001 - A Customer - A Site Name - 10 House types (MiTek - Trial Jobs)

 (Platinum Global) <application@teamwork.com>
To: Luke Jones

[Report as Suspicious Email](#)

----- WRITE YOUR REPLY ABOVE THIS LINE -----



has assigned a task to you.

M20001 - A Customer - A Site Name - 10 House types -- [View](#)

(#25491519)
Task details

Start Date: 09/04/2020


Due Date: 30/04/2020

An email will then be sent to the person who the task is assigned to.

TASK COMMENTS

Task comments are used for yourself and the Platinum Global employee to communicate about the task that has been assigned to them. If a comment has been added by Platinum Global and you are set as a follower to receive notification you will get a mail to say a comment has been added


(PG | MiTek Industries Limited) Re: Task: M20001 - A Customer - A Site Name - 10 House types (MiTek - Trial Jobs)

 (Platinum Global) <application@teamwork.com>
To: Luke Jones

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

[Report as Suspicious Email](#)

----- WRITE YOUR REPLY ABOVE THIS LINE -----



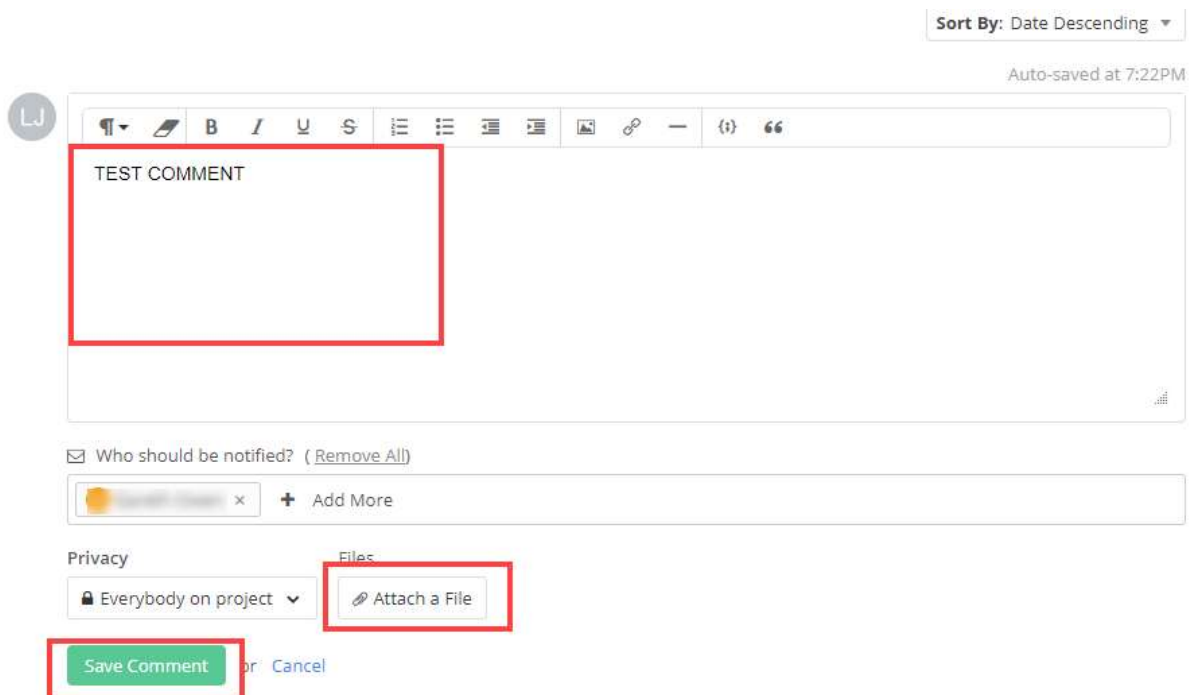
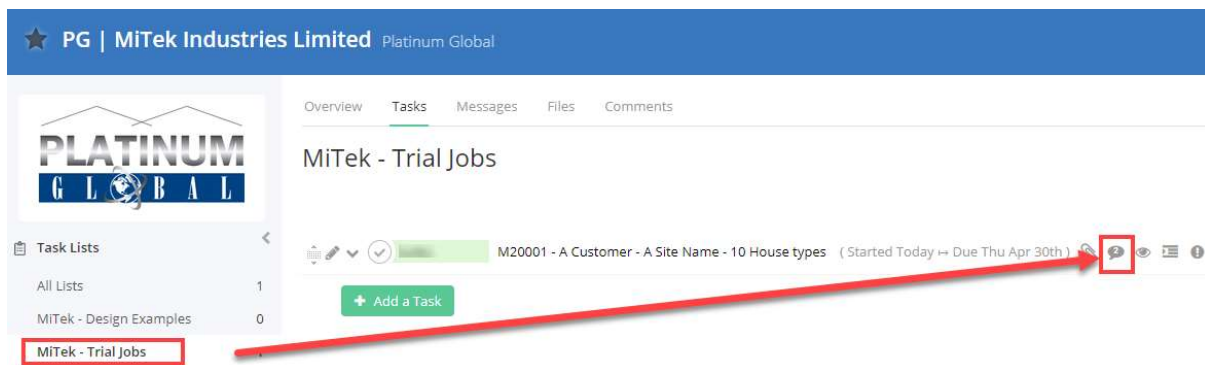
Apr 09 7:13 PM **commented on this task**
A TEST COMMENT - NEED MORE INFORMATION ON HOUSE TYPE A, NO FLOOR LAYOUT

You will see who commented on the task and what the comment is without having to login to the portal.

You can either reply to the mail and attach any required Attachments or you can login to the Teamwork's portal and reply to the comment.



Replying to email.



You can also assess comments by clicking the task. You will see a much clearer view this way.

Task Details

✓

Luke J.

M20001 - A Customer - A Site Name - 10 House types (Started Today → Due Thu May 7th)

Files

Paste (2020-04-09 18-59-51).png

by Luke Jones, 2 hours ago - 22.96 KB

Preview

Manage Task Attachments

Comments

LJ

Add your comment here

LJ

Luke Jones (MiTek UK)

TEST COMMENT - LAYOUT ATTACHED

1 attachment - Hide

55-BR-003 First Floor Plan - 1-50

120KB

LJ

Luke Jones (MiTek UK)

A TEST COMMENT - NEED MORE INFORMATION ON HOUSE TYPE A. NO FLOOR LAYOUT

Replying through Teamwork's.

All comments will be kept within the task. This is so the designer can easily refer back to it if needs be.

*** Please use the method of comments within tasks to communicate and not the 'Messages' or 'Files' Tab on the Task list, if gets very difficult to find files once these are uploaded this way***

Home Projects Everything Calendar

★ PG | MiTek Industries Limited

Platinum Global

PLATINUM GLOBAL

Task Lists

Overview Tasks Messages Files Comments

MiTek - Trial Jobs

✓

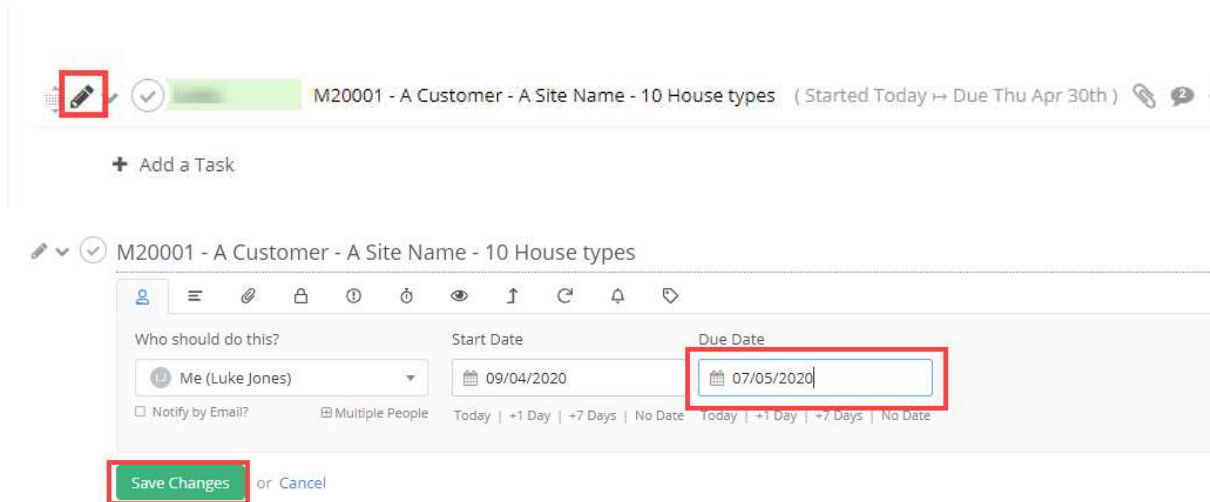
Luke J.

M20001 - A Customer - A Site Name - 1

EDITING A TASK

If a task needs to be changed you can simply edit the task and save changes. For example, the due date needs to be edited.

Navigate to the task in question. Select the edit button, make the change and select 'Save Changes'



Who should do this? Start Date Due Date

Me (Luke Jones) 09/04/2020 07/05/2020




☐ Notify by Email? ☐ Multiple People Today | +1 Day | +7 Days | No Date Today | +1 Day | +7 Days | No Date

Save Changes or Cancel

COMPLETING A TASK

Once the task has been completed it will be the customers job to set it as completed. To do this navigate to the task and simply select the 'Tick' button next to the task. This will then move the task into a completed task list.

MiTek - Trial Jobs




Luke J.
M20001 - A Customer - A Site Name - 10 House types
(Started Today → Due Thu May 7th)

+ Add a Task

Task Lists + Add New


- All Lists 0
- MiTek - Design Examples 0
- MiTek - Quotes 0
- MiTek - Designs 0
- Completed Task Lists**
- MiTek - Trial Jobs 1**

Reports

- Task Lists Report
- Gantt Chart Export

Views

- Gantt Chart
- Board View







All Tasks Completed.

You have completed all the tasks in this list.
Add more tasks by clicking the button below

+ Add a Task

1 completed tasks

COMPLETED TASKS


M20001 - A Customer - A Site Name - 10 House types
Apr 9th by






PLATINUM GLOBAL

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