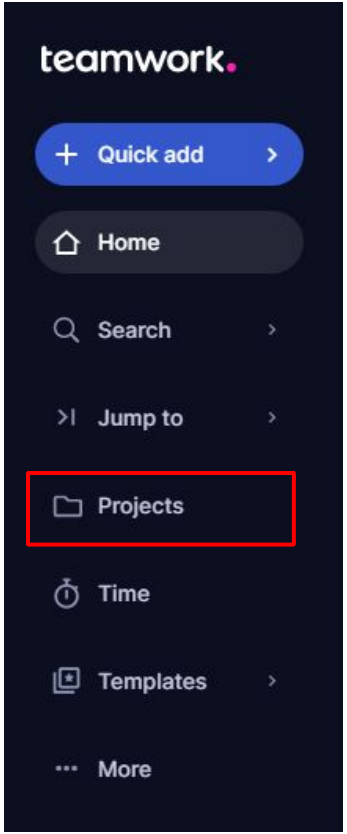
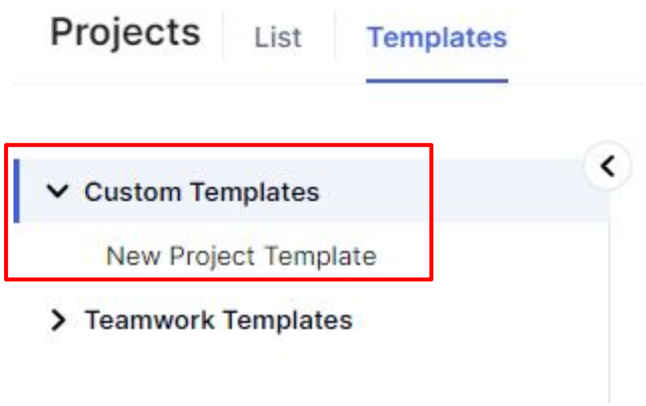
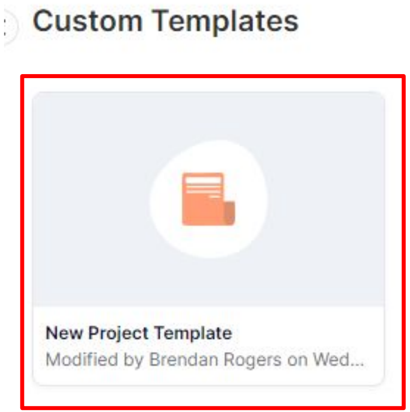
How To: Access New Item Setup Sheet

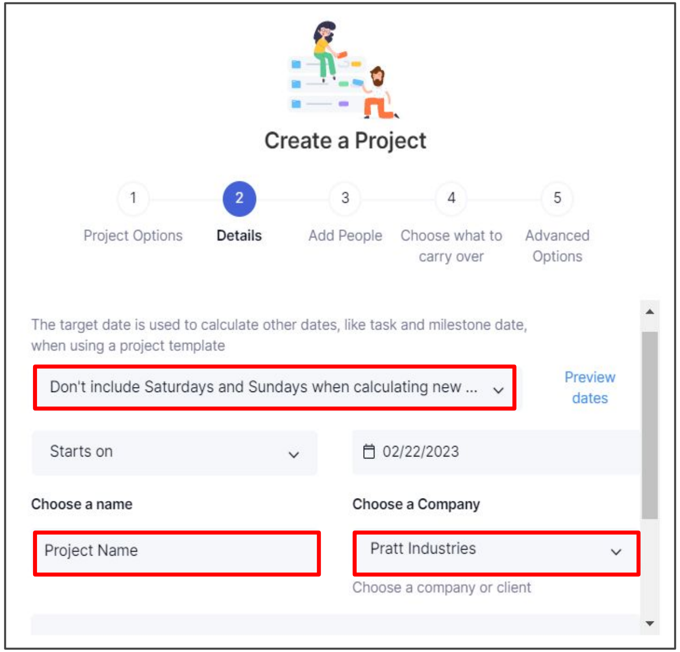
1. Begin by making a new project in Teamwork using the “New Project Template”



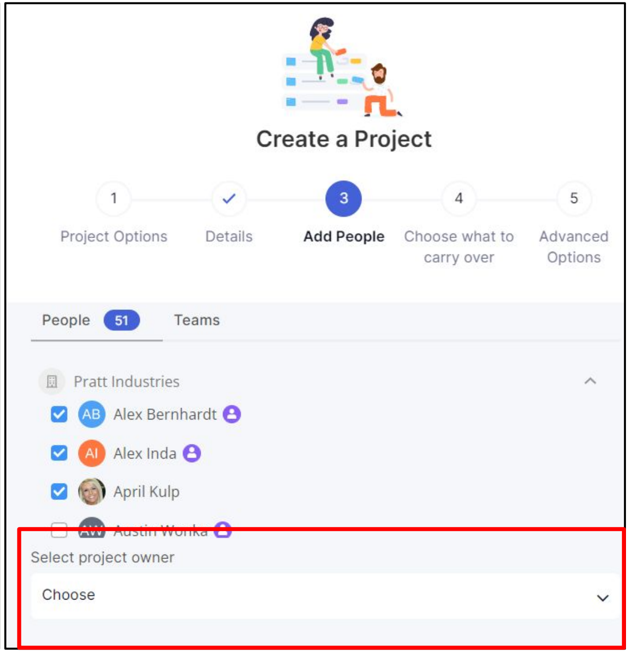




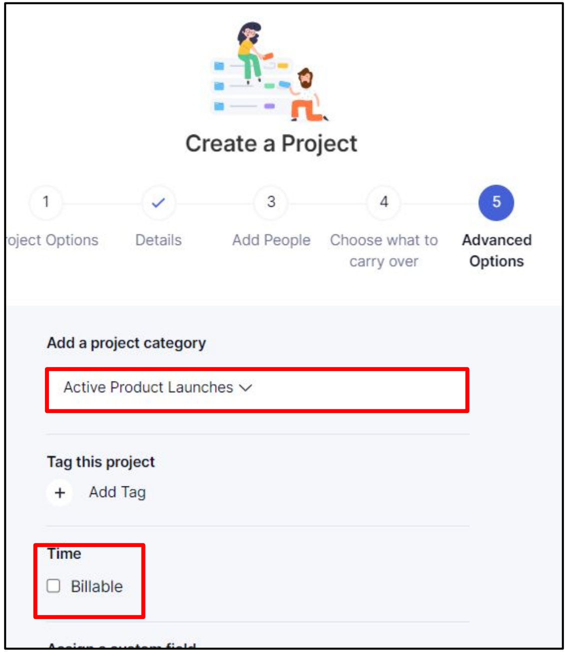
2. Set up your project making adjustments to the categories below:



- Remove weekends from deadlines
- Select a project name using your naming system
- File your project under the correct customer name

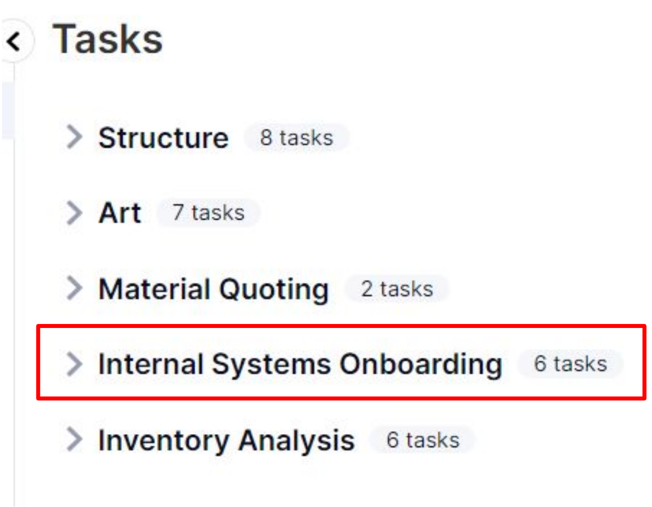


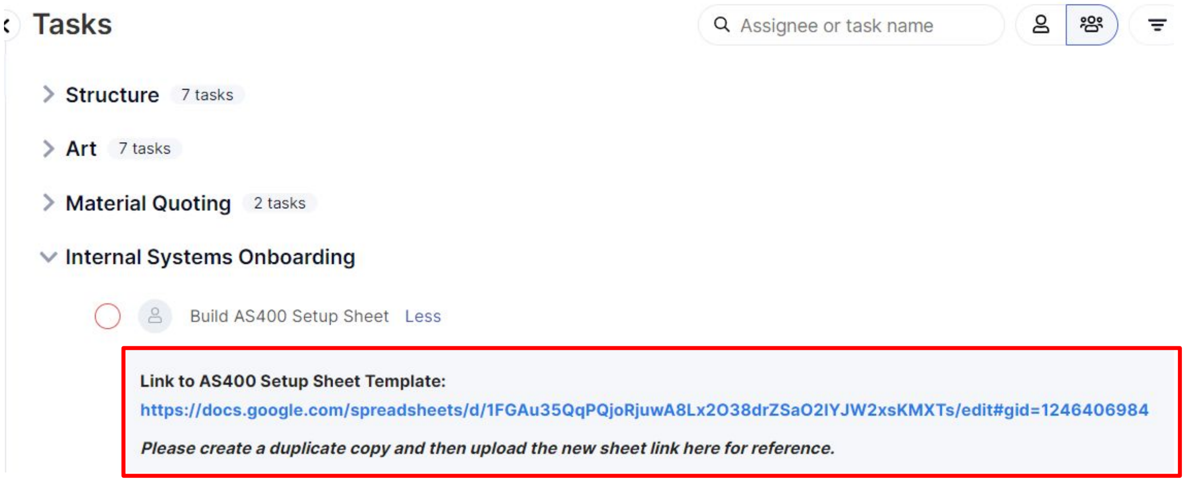
- Set yourself as the project owner



- File your project under “active” or “pitch”
- Uncheck the “billable” box

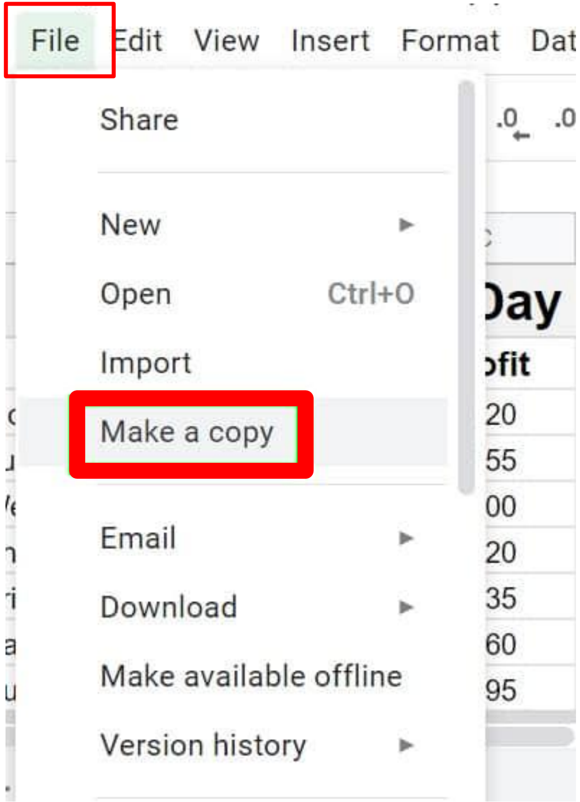
3. Under “List”, the spreadsheet will be available under “internal systems onboarding”. Assign yourself to this task.



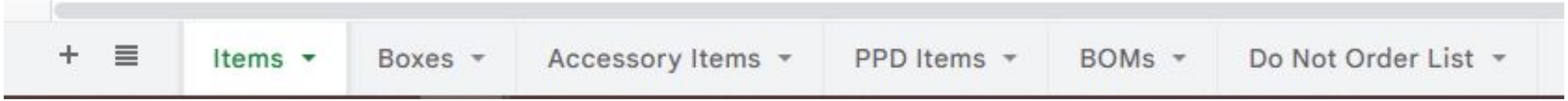


Note:
- If you do not have access to the document, select the “request access” button or contact Brendan Rogers

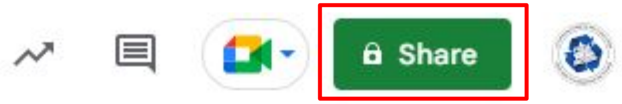
4. Make a copy of the template before making any edits. This is automatically added and saved to you Google Drive.

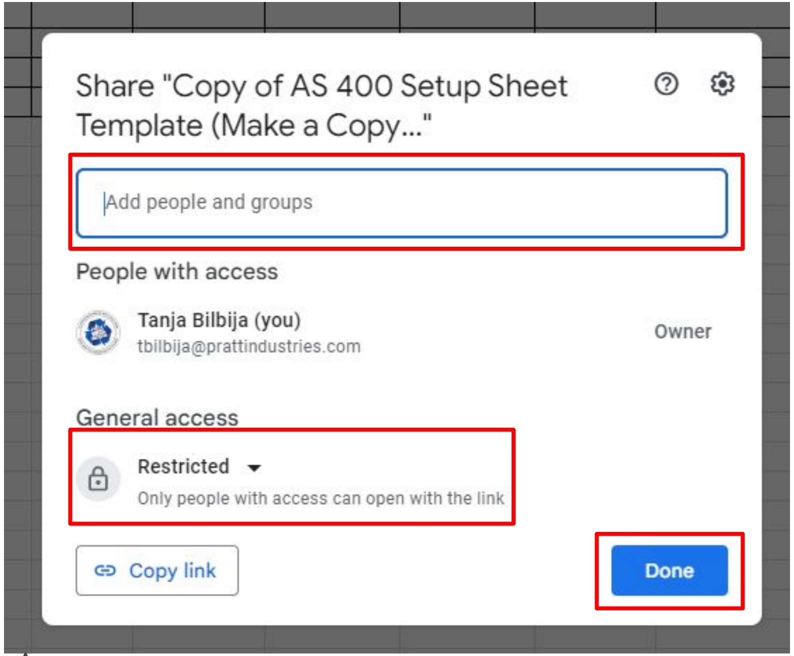


5. All pages have an example already included. Delete those examples and begin inputting your own info. Use the tabs at the bottom to navigate to the different pages.



6. Once your setup sheet is complete, share it with the appropriate people: Jim Knight & Kristen Kane (and anyone else who needs access.





- Simply type in their names and select their emails. They will be automatically notified via email once you select “done”.
- Adjust “restriction” to avoid issues with anyone not being able to access
- A follow up email to remind them is also helpful.

Helpful Tips

- Include your Teamwork project name in your title to keep files organized
- Send a follow up email to Jim and/or Kristen to ensure they got the link
- Make sure all examples are deleted to not cause confusion