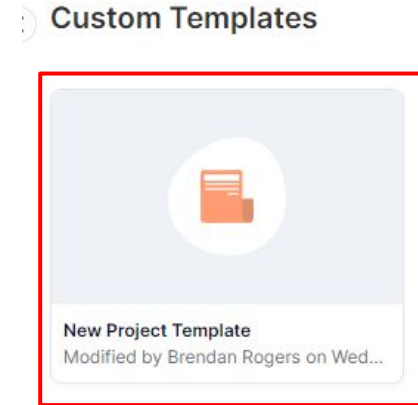
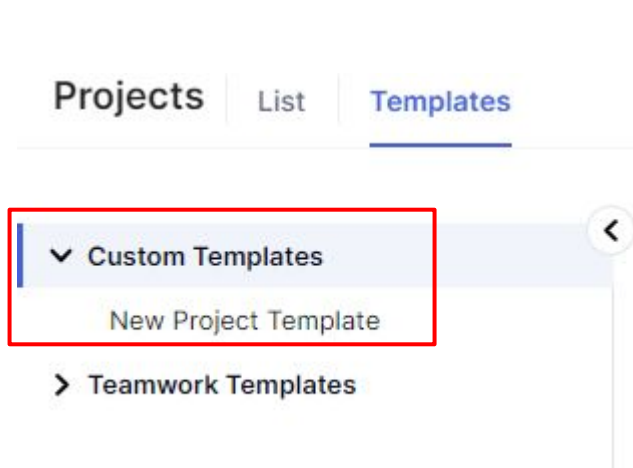
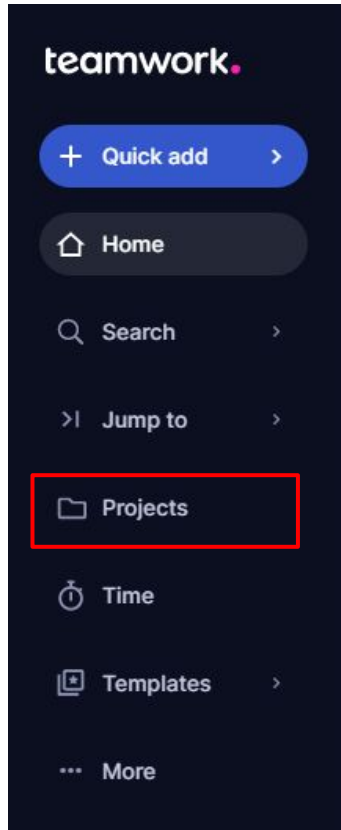


How To: Access New Item Setup Sheet



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:

Create a Project

1 Project Options 2 **Details** 3 Add People 4 Choose what to carry over 5 Advanced Options

The target date is used to calculate other dates, like task and milestone date, when using a project template

Don't include Saturdays and Sundays when calculating new ... [Preview dates](#)

Starts on 02/22/2023

Choose a name Project Name

Choose a Company Pratt Industries

Create a Project

1 Project Options 2 Details 3 **Add People** 4 Choose what to carry over 5 Advanced Options

People 51 Teams

Pratt Industries

- ☒ AB Alex Bernhardt
- ☒ AI Alex Inda
- ☒ April Kulp

Select project owner

Choose

Create a Project

1 Project Options 2 Details 3 Add People 4 Choose what to carry over 5 **Advanced Options**

Add a project category Active Product Launches

Tag this project

+ Add Tag

Time

☐ Billable

- 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.

The image shows two screenshots of a task management application. The left screenshot displays a sidebar menu with the following tasks: Structure (8 tasks), Art (7 tasks), Material Quoting (2 tasks), Internal Systems Onboarding (6 tasks), and Inventory Analysis (6 tasks). The 'Internal Systems Onboarding' task is highlighted with a red box. The right screenshot shows the detailed view of the 'Internal Systems Onboarding' task. It includes a search bar, a list of sub-tasks (Structure, Art, Material Quoting), and a section for 'Internal Systems Onboarding'. Under this section, there is a task titled 'Build AS400 Setup Sheet' with a 'Less' button. A red box highlights a text box containing the following information:

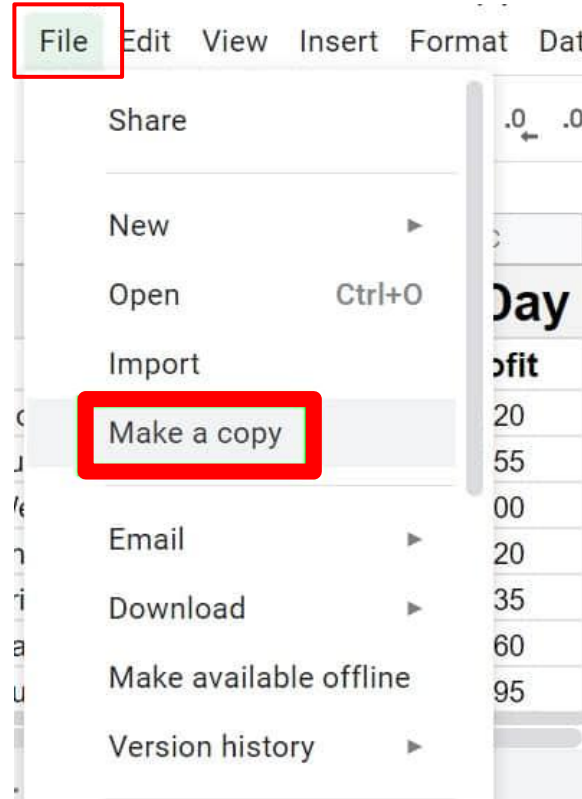
Link to AS400 Setup Sheet Template:
<https://docs.google.com/spreadsheets/d/1FGAu35QqPQjoRjuwA8Lx2038drZSaO2lYJW2xsKMXTs/edit#gid=1246406984>
Please create a duplicate copy and then upload the new sheet link here for reference.



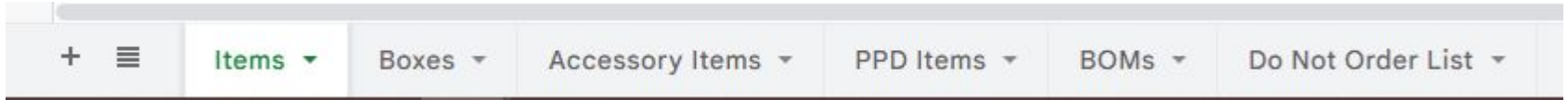
Note:

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

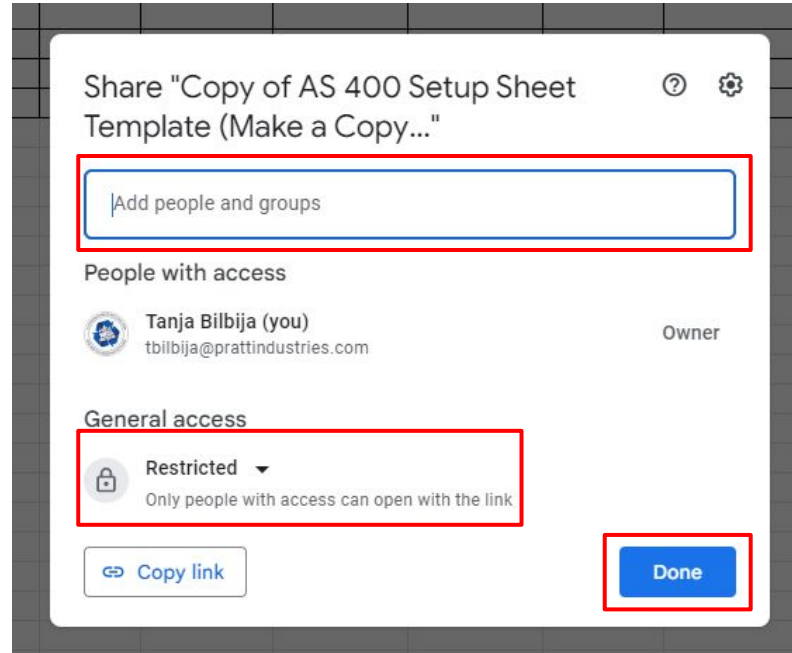
**4. Make a copy of the template before making any edits.
This is automatically added and saved to you Google Drive.**



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
