

4_ePlg_CreateNEPAPProject_AccessRoles_edit

The third objective for this course is to grant your interdisciplinary team members access to your newly created project, and if you noticed, one of the tabs on the edit project window was labeled team definitions. If you recall, we accessed the edit project window by first right clicking on our project folder, and from the context menu selecting option, E-planning project, and edit. The screen will refresh and edit project window will appear. Now you will see the team definitions tab. Clicking on the tab will show you the team summary table that lists all of the IDT members, their team roles, their disciplines, their contact information, and their status. Once you have completed the task of adding additional team members, from the screen you will be able to view all of the IDT members that you have assigned to the project. However, before we add any additional team members, we must first edit our own team roles. To do so, left click on your name to ensure that it is highlighted, and then select edit option, which is to the right of the screen. Doing so will launch the edit team member wizard. In the team roles field we want to select the option of PNEC, project administrator, and team lead. These new team roles have now expanded the privileges that we have inside of our projects. In other words, these new roles have given us the capability to perform many more functions related to our projects. To make these changes permanent, click on the save button in the lower right corner of the screen. Next, to add team members, click on the add button to the right of the screen. Your screen will refresh and you will see the add team member form appears. In the user type field drop-down menu, we want to ensure that we have E-planning system user selected. Next, select the

user chooser icon, which is depicted by three individuals standing next to one another. This will help you find the E-planning user you are looking for as well as populate the add team member form. Insert all parts of the user's information in the available field and click the search button. All of the E-planning users that match the search criteria will appear in the section below after you hit the search button. Once you find the desired user, click on the select button to the right of their name to choose them as a team member. From here, you will be able to define their team roles and disciplines. It is important to note that newly added team members must have at least one team role and at least one discipline added to their name. For example, we will select author, and as a discipline we will select abandon mine land specialist. Now we see that we have a team member selected, we've given them a team role, and we've given them a discipline. To make these changes take effect, click on the save button in the lower right corner of the screen. Now that you have completed these steps, your team members will have access to your project and can now author and edit documents. It is important to note here that the E-planning application does not automatically send a notification to your IDT members letting them know that they have access to the project. You must notify them through traditional means such as E-mails or team meetings. To save all of the changes that we have made in the edit project window, click the save option in the lower right corner of the screen.