
User Reference

xProjects v10x

By CMiC

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Contents

XPROJECTS SUITE.....	1
OVERVIEW – xPROJECTS SUITE.....	1
SECURITY.....	1
STANDARD ICONS.....	2
XPROJECTS MANAGER.....	3
OVERVIEW – xPROJECTS MANAGER.....	3
SETTING YOUR PROJECT.....	4
USER PROFILE SETUP.....	5
USING LOGS.....	8
<i>Query Mode for Logs</i>	9
<i>Additional Records Link</i>	9
<i>Sorting Log Information</i>	9
<i>Adding Log Records to the Treeview</i>	10
<i>Using Query Filters on Logs</i>	10
<i>Attachments Column for PM Objects Log</i>	11
PRINTING REPORTS.....	11
USING NOTES AND ATTACHMENTS.....	11
<i>Notes</i>	11
<i>Attachments</i>	12
<i>Shared Document URL in Attachments Tab</i>	15
SELECTING/USING CONTACTS.....	16
<i>Selecting Multiple Contacts</i>	16
<i>Adding Contacts on the Fly</i>	17
LINKING/CREATING A PCI TO OBJECTS.....	20
COMMUNICATION MANAGEMENT.....	21
OVERVIEW OF COMMUNICATION MANAGEMENT.....	21
PROJECT CALENDAR.....	21
<i>Adding an Action Item to the Calendar</i>	21
<i>Specifying non-working days in the Project Calendar</i>	23
<i>[Edit Preferences] – Button</i>	24
MY ACTIONS PAGE.....	24
PROJECT PARTNER DIRECTORY.....	25
<i>Adding/Editing Project Partner Alternate Addresses</i>	26
PROJECT CONTACT DIRECTORY.....	27
<i>User Profile – Tab</i>	28
<i>Email Notifications – Tab</i>	29
<i>Win/Lose Bid and Updating Project Contact Id for I/O Email</i>	30
DISTRIBUTION LISTS.....	30
<i>Creating a New List</i>	31
<i>Editing an Existing List</i>	31
<i>Using a Distribution List</i>	31
MANAGING MEETING MINUTES.....	32
<i>Meeting ID/Item Id Masks default and Field Security</i>	32

<i>Creating a New Meeting</i>	33
<i>Add Attendees</i>	36
<i>Entering Meeting Minutes</i>	36
<i>Enter Meeting Notes</i>	37
<i>Updating Existing Items</i>	37
<i>Meeting Minutes – Printing Form Letters</i>	42
WORKING WITH TRANSMITTALS.....	43
<i>Entering a Transmittal</i>	43
<i>Editing a Saved Transmittal</i>	46
<i>Deleting a Transmittal</i>	46
<i>Copying a Saved Transmittal</i>	46
<i>Uploading Attachments in Transmittals</i>	46
<i>Printing a Transmittal Record</i>	46
<i>Transmittals Queue</i>	46
<i>Log for Transmittals Created from Submittals</i>	47
COMMUNICATION LOGS.....	48
<i>Creating a Communication Record</i>	48
<i>Editing a Saved Communication Record</i>	49
<i>Deleting a Communication Record</i>	49
<i>Responding to a Communication</i>	49
<i>Linking/Creating a PCI from a Communication Record</i>	49
WORKING WITH RFIS	50
<i>RFI PM Role Privilege</i>	50
<i>Creating an RFI</i>	51
<i>Editing a Saved RFI</i>	52
<i>Copying an RFI</i>	52
<i>Deleting an RFI</i>	52
<i>Answering an RFI</i>	52
<i>Days to Resolution in RFI Log</i>	57
ENTERING ISSUES	58
<i>Assigning Related Objects to Issues</i>	59
<i>Days to Resolution in Issues Log</i>	59
<i>Re-Opening Closed Issues via CMiC I/O</i>	59
<i>[Link to Issue] – Button</i>	59
MANAGING DOCUMENTS	60
OVERVIEW – DOCUMENT MANAGEMENT.....	60
SUBMITTALS	60
<i>Creating a Submittal</i>	61
<i>History tab in the Submittal Screen</i>	63
<i>Submittal Responsibility</i>	63
<i>Reminder Notifications for Preparation Start</i>	64
<i>Automatic Submittal Update via Collaboration</i>	65
<i>Related Objects for Submittals</i>	65
<i>Importing Submittals</i>	65
PROCUREMENT (SUBMITTAL) LOG	67
SUBMITTAL RESPONSIBILITY LOG	68
SUBCONTRACTOR SUBMITTAL LOG	68
ALTERNATE OPTION FOR SUBMITTAL SCHEDULE.....	69
<i>Automatically Creating Review Cycle on Submittal Return</i>	74
SUBMITTAL PACKAGES	74
<i>Create Submittal Items Directly in the Package</i>	74
<i>Updating the Submittal Package</i>	75
DOCUMENTS	75
<i>Adding a New Document</i>	75
<i>Adding a Revision</i>	76

<i>Adding a Note to a Revision</i>	77
<i>Importing Document Headers</i>	77
<i>Auto-numbering Documents</i>	78
<i>Creating Documents without Document Packages</i>	78
<i>Multiple Upload for Documents Log</i>	79
<i>Document Log Displaying Related PM Objects</i>	79
<i>Mobile Drawing Management</i>	80
DOCUMENT PACKAGES	82
<i>Auto-numbering of Document Packages</i>	83
<i>Creating a Document Package</i>	83
<i>Transmitting a Document Package</i>	83
BID MANAGEMENT	85
OVERVIEW – BID MANAGEMENT	85
INVITATION TO BID.....	85
<i>Creating the Invitation</i>	85
<i>Adding Bidders to the Invitation</i>	86
<i>Filtering With CSI Codes</i>	88
<i>Broadcasting to Pre-qualification Applicants</i>	92
<i>Updating Bidders</i>	93
<i>Printing the Invitation to Bid</i>	93
<i>Broadcasting Invitation to Bid via Email</i>	93
<i>ITB Broadcast History</i>	95
<i>Bidder Response Log</i>	96
BID ITEM SIGMA GRID	96
BID ITEM ENTRY AND IMPORT.....	97
<i>Configuring the Bid Items View</i>	99
<i>Querying Bid Items</i>	100
<i>Adding and Editing Bid Items</i>	101
<i>Importing Bid Items</i>	101
<i>Updating the Budget with Bid Items</i>	102
<i>Bid Item and Budget Update for Lump-sum and Expense Authorization Projects</i>	103
<i>Variance ‘on the fly’ between Selected Pricing Sets</i>	104
<i>Creating Submittals from Bid Items</i>	104
<i>Bid Item Markups</i>	104
<i>Bid Item Markups for Alternate Lines</i>	105
<i>Bid Item Group Maintenance</i>	106
BID PACKAGE ENTRY	106
<i>Buy Out Items</i>	107
<i>Bidders</i>	109
<i>Purchasing Buy Out Items</i>	109
<i>Bid Analysis (Buy Out)</i>	110
ADDENDUM ENTRY	113
<i>Broadcasting Invitation to Bid from Addendum</i>	114
ENTERING YOUR BID	116
<i>Including Attachments with the Bid</i>	118
<i>Submitting the Bid</i>	119
ANALYZING BIDS	119
BUYOUT ITEMS AND BUYOUT ITEMS LOG	120
BUDGET & COST MANAGEMENT.....	123
OWNER CHANGE ORDERS	123
<i>Notes & Attachments Tabs for Owner Change Orders</i>	125
POTENTIAL CHANGE ITEMS.....	125
<i>Adding a Potential Change Item</i>	126
<i>Selecting Bid Items as PCI Detail Lines</i>	132

‘On the Fly’ Phase/Category in PCIs.....	132
‘On the Fly’ Billcodes	134
Allowing Null Job/Phase/Category in PCI Details	134
PCI Detail Posting by Owner Change Number	135
Separate Post Privilege for Internal and External PCI.....	136
Allowing Posted PCIs to be Linked to Unposted OCOs	137
Modify PCI	138
Editing a Posted PCI.....	139
Copying a Posted PCI.....	139
Deleting a PCI.....	139
PCI Markup Rules Maintenance.....	139
Recalculation of Markups for ‘Split Out’ PCI.....	141
Tracking Remaining Amount – Subcontract versus PCI.....	142
Printing PCI Reports.....	142
COST STATUS QUERY	143
Projected Final Flag – JC Control File Setting.....	143
Image Link to Cost Status Query.....	146
BUDGET STATUS QUERY (REVENUE).....	147
OWNER CHANGE TRANSMITTALS	148
Creating an Owner Change Transmittal	149
Editing an Owner Change Transmittal.....	149
Deleting an Owner Change Transmittal.....	149
CREATING A SUBCONTRACT.....	150
Creating the Contract Header	150
Subcontract Control Amount	153
SUBCONTRACT SCHEDULE OF VALUES	154
[Select PCIs] – Button.....	154
[Select Bid Items] – Button.....	155
Manually Entering the Subcontract Detail Lines.....	155
Subcontractor Schedule of Values.....	156
Importing Subcontract Schedule of Values.....	157
Updating Other Contract Info.....	159
Line Re-numbering for Inclusions, Exclusions and Special Pricing.....	160
Free Form – Tab.....	161
Deleting Compliance Codes from a Subcontract.....	161
Copying From another Subcontract.....	161
CREATING A SUBCONTRACT CHANGE ORDER	162
The PCI Column in the Change Order Details	164
Subcontract Change Orders & PCI Details with TBD.....	164
SORTING USER DEFINED FIELDS.....	165
JSP SUBCONTRACT INTEGRATION WITH WORKFLOW	166
ADDING SOV LINES TO POSTED SUBCONTRACT AND POSTED SC CHANGE.....	167
VOIDING OF SUBCONTRACTS AND SUBCONTRACT CHANGE ORDERS.....	168
Privileges to Disable Printing for Subcontract/Subcontract Change Order.....	169
THE SUBCONTRACT LOG.....	169
PCI-SUBCONTRACT TRACKING LOG.....	170
ENTERING PAYMENT REQUISITIONS	170
Entering a New Requisition.....	170
Copying an RFP to Imaging	171
Viewing an RFP	181
Editing an RFP	181
Deleting an RFP	181
Posting and Voiding an RFP	181
VIEWING COMPLIANCE INFORMATION.....	182
CONTRACT FORECASTING AND PCI PROJECTION.....	182
[Forecast Comments] – Button.....	185

<i>PCI Projection as Sigma Grid</i>	186
<i>Contract Forecasting with PCI Projections – MIP Template</i>	186
<i>Modified Override Calculations</i>	186
EXPENDITURE AUTHORIZATION	187
<i>Completing an Expense Authorization Request</i>	187
SITE MANAGEMENT	191
DAILY JOURNAL (DAILY REPORT)	191
<i>Creating a new Journal Report</i>	192
<i>[Send I/O Email] for Daily Journals – Button</i>	192
<i>Copy Previous Journal – Button</i>	193
<i>Adding Information to the Journal</i>	194
<i>Field Security in the Daily Journal</i>	202
<i>Privilege to Edit Own Record</i>	202
<i>Deleting a Daily Journal</i>	203
<i>Printing the Journal</i>	203
<i>Daily Journal Audit and Email Notification for Changes</i>	203
<i>Daily Journal Log View for Equipment and Labor Costs</i>	204
PUNCH LIST LOG	205
<i>Auto-numbering for Punch List Headers and Items</i>	207
<i>Paging in the Details Section</i>	207
<i>Creating a Punch List</i>	208
<i>Updating a Punch List</i>	209
<i>Copying a Punch List Detail Item</i>	209
<i>‘Copy From’ Functionality</i>	210
<i>Printing a Punch List</i>	211
<i>CMiC I/O for Punch Lists</i>	211
<i>Punch List Details Export</i>	212
<i>Punch List Import</i>	212
<i>Punch List Notes and Attachments</i>	214
FIELD WORK DIRECTIVES	214
<i>Creating a FWD</i>	215
<i>‘Treat as To’ – Checkbox</i>	215
<i>Updating a FWD</i>	216
<i>External Collaborator Update of Follow-up Notes</i>	216
<i>Printing a FWD</i>	216
NOTICES	216
<i>Creating a Notice</i>	216
<i>Updating a Notice</i>	217
<i>Printing a Notice</i>	217
<i>Days to Resolution in Notices Log</i>	217
UNITS COMPLETE	217
CHECKLISTS	220
<i>Project-Specific Checklists</i>	221
<i>Related Objects – Tab</i>	224
<i>Locking Checklists</i>	225
<i>Rules Governing Checklists</i>	225
REPORTS	227
PRINTING REPORTS	227
<i>Printable Pages</i>	227
<i>Printing a Report</i>	228
BALL IN COURT REPORT	229
<i>Print For All Projects Option</i>	231
FILE MAINTENANCE	233

OVERVIEW – FILE MAINTENANCE	233
MENU MAINTENANCE.....	233
<i>Security Settings for Menu Maintenance</i>	237
<i>Defining Custom Menu Items for Documents and Document Packages</i>	238
<i>Attaching Business Partner Form to JSP Treeview</i>	239
<i>Document Folders</i>	240
PROJECT SYSTEM OPTIONS	242
<i>General – Tab</i>	243
<i>Locking – Tab</i>	250
<i>Document Types – Tab</i>	250
<i>Field Options – Tab</i>	251
<i>Contract Forecast – Tab</i>	252
COMPANY CONTROL.....	253
<i>Code Masks – Tab</i>	253
<i>Defaults – Tab</i>	254
<i>Change Management – Tab</i>	257
<i>Project Calendar – Tab</i>	262
<i>Bid Management – Tab</i>	263
PROJECT MAINTENANCE	264
<i>Project Information</i>	264
<i>General – Tab</i>	265
<i>Key Players (Assignment) – Tab</i>	267
<i>Job Info – Tab</i>	270
<i>Defaults (Project Specific) – Tab</i>	271
<i>Security (Project Security) – Tab</i>	274
<i>Notes – Tab</i>	275
<i>Attachments – Tab</i>	275
<i>Review/Approval – Tab</i>	275
<i>User Defined Fields (UDF) – Tab</i>	276
<i>Project Maintenance – Auto-numbering Masks</i>	276
<i>Project Funding Sources</i>	277
<i>Closing/Reopening Projects</i>	278
<i>Viewing the Current Project</i>	279
<i>Access Project Using Associated Bid Job Code</i>	280
LOCAL TABLES.....	282
<i>Meeting Minutes Agenda Item Status Maintenance</i>	282
<i>Global Meeting Track Maintenance</i>	282
<i>Meeting Topics</i>	283
<i>Submittal Status & Submittal Package Status</i>	283
<i>Submittal Type</i>	284
<i>Punch List Status</i>	284
<i>Punch List Item Description</i>	284
<i>Field Work Directives Status Maintenance</i>	286
<i>Notices Maintenance</i>	287
<i>Funding Source Maintenance</i>	287
<i>Alternate Types</i>	287
<i>CSI Code Maintenance</i>	288
<i>Bid Package Types</i>	288
<i>Bid Package Status</i>	289
<i>ITB Broadcast Templates Maintenance</i>	289
<i>WBS Codes/Values Maintenance</i>	296
<i>Checklist Maintenance</i>	296
ACTIVITY MAINTENANCE & IMPORT	304
<i>Adding an Activity</i>	304
<i>Importing Schedule Activities</i>	304
REPORTS & FORM LETTER ASSIGNMENT	305

<i>[Report Defaults] – Button</i>	307
<i>Excel MIP Documents for Report Assignment</i>	308
<i>Form Letters & Key Players</i>	309
MOBILE DRAWING MANAGEMENT – SETUP	310
OVERVIEW – MOBILE DRAWING MANAGEMENT	310
REQUIREMENTS	311
ECM DRAWING SET EXTRACTION.....	312
<i>Overview – ECM Drawing Set Extraction</i>	312
<i>Part 1: Select Project & Original PDF</i>	313
<i>Part 2: Extracting Sheet Labels & Sheet Titles</i>	317
<i>Part 3: Converting Sheet Label Call-Outs to Hyperlinks</i>	321
xPROJECTS & MOBILE DRAWING MANAGEMENT	323
<i>ECM Drawings – Screen</i>	323
<i>CMiC/PSPDF Web Viewer – xProjects</i>	324
MOBILE FIELD & MOBILE DRAWING MANAGEMENT	329
SET UP.....	331
<i>ECM Explorer</i>	331
<i>xProjects – PM Role Setup</i>	334
CUSTOMIZING YOUR WORKSPACE	339
OVERVIEW – CUSTOMIZATIONS.....	339
CUSTOMIZING THE LOGS.....	339
<i>User Control for Items Added to Treeview Log</i>	340
<i>Adding/Removing Fields</i>	341
<i>Changing the Order</i>	341
<i>Modifying the Header & Alignment of Data</i>	341
<i>Adding/Modifying Links & Link Descriptions (Hints)</i>	341
<i>Sort Order</i>	341
USER-DEFINED FIELDS	342
USER-DEFINED CLASSIFIERS.....	343
DEFINING DEFAULT QUERY FILTERS	344
XPROJECTS SECURITY	347
CREATING xPROJECTS USER	347
<i>Create New User</i>	347
<i>Completing Setup Process</i>	348
DELETING xPROJECTS USER	349
ADDING CONTACTS TO PROJECT	350
xPROJECTS ROLES	352
<i>Overview</i>	352
<i>Creating a New Role</i>	353
<i>Assigning Menu Items</i>	354
<i>Assigning Program Access</i>	355
<i>Assigning Privileges</i>	356
<i>Assigning Users</i>	358
<i>Assigning Field Security</i>	358
<i>Customizing a Specific User</i>	359
PROJECT ROLE DEFINITION	360
<i>Admin Req. – Checkbox</i>	360
<i>Key Player – Checkbox</i>	361
<i>Order Seq.</i>	361
<i>Project Roles & Privileges</i>	362
CONVERT PARTNERS AND CONTACTS: CONVERT/MERGE FROM PROJECT TO SYSTEM LEVEL	365
ADDENDUM	367

COPY FUNCTION	367
VENDOR COMPLIANCE WARNING.....	367
TABULAR DISPLAY FORM TOTALS & COUNTERS	368
SPELL CHECKING.....	368
USER EXTENSIONS.....	368
<i>Limiting User Extensions (UE) on PM Documents in JSP</i>	369
PHASE SEGMENTATION	370
<i>Segment Security Required – Checkbox</i>	370
<i>Enterable Segment Position (Options) – Radio Buttons</i>	371
PROGRAM SECURITY - ASSIGN PHASE/CATEGORY ‘ON THE FLY’	374
CLASSIFIERS IN JSP LOGS	375
PRIVILEGE TO SEE PENDING (UN-SUBMITTED) PM OBJECTS	375
FIELD SECURITY FOR [PRINTABLE] BUTTON	376
MULTIPLE DOCUMENT UPLOAD	376
MULTIPLE REPORTS PRINTING	380
<i>Merging Attachments after Generating the Report</i>	381
SCREEN EDITOR	383
INDEX	385

xProjects Suite

Overview – xProjects Suite

The CMiC xProjects Suite (previously known as PM JSP and Collaboration) is a web-based collaborative application that enables all parties to actively participate on-line, helping to ensure that a quality product is delivered on time and on budget.

The system is designed to do more than just manage project documents. It covers the project from bid to close, allowing all members of the project team to be current and informed at all times.

The system is built around a standard treeview that everyone is familiar with using. It is intuitive to use with all information being shown in a log format first. From the log the user can then drill down to see or enter details.














From the Enterprise point of view, the system simplifies and standardizes communication between parties with on-line forms and the fact that there is no more double entry required. The project parties enter their own data, this can be anything from communications to payment requests.

Security

All data entered in the xProjects application is secure. The basic rules of the application are:

- Data entered but not submitted can only be seen by the contact/company that entered the data.
- Submitted data is no-longer available for update by any party.
- Submitted data can only be viewed by the From/To and CC'd parties.
- Only the 'To Contact' on submitted data is allowed to reply/answer the data.
- Parties that are CC'd on data can only view the data.
- All parties can add notes or attachments to any data they have view/edit rights on.

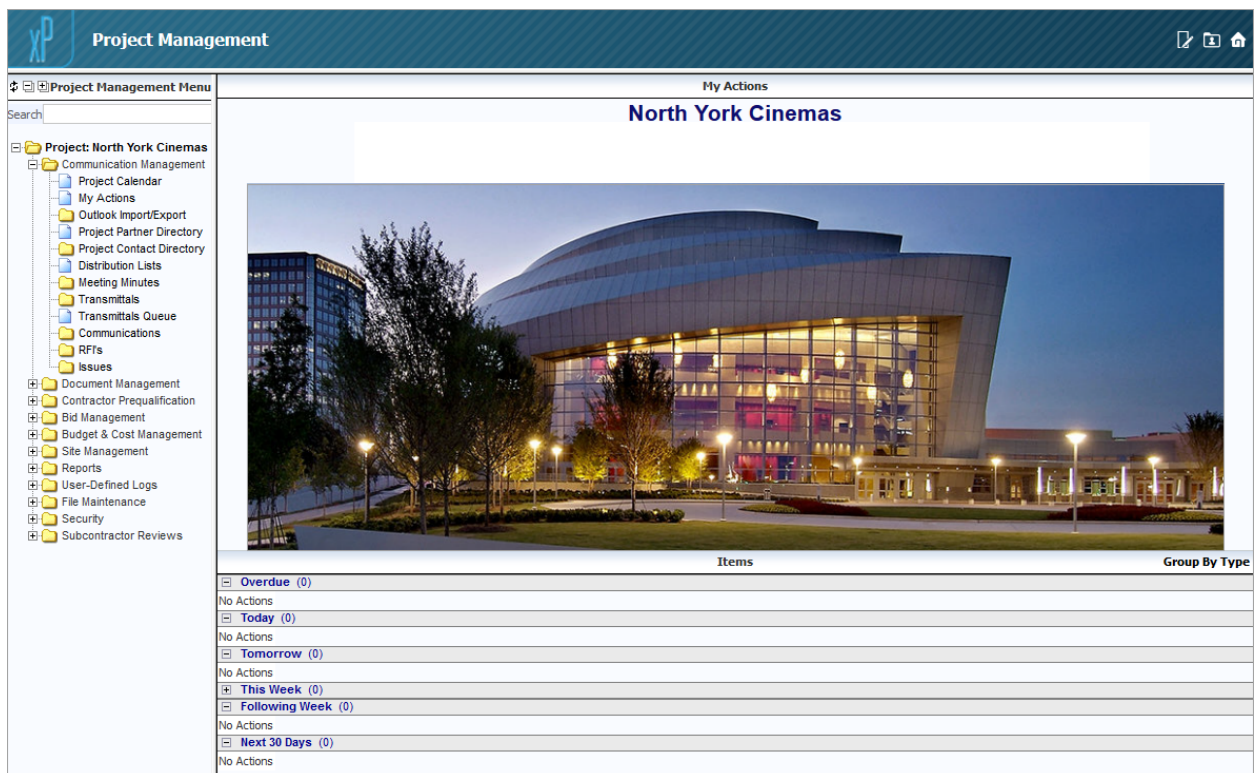
Standard Icons


	Edit
	Required field marker
	Add a new record (Blue Plus)
	Delete/Remove Record
	Close
	Save
	Calendar Popup Available
	Select
	Move Up
	Move Down
	View
	Tree Node is complete
	Tree Node has more data

xProjects Manager

Overview – xProjects Manager

The xProjects Manager is the navigation tool that lets you view all project data. The navigation is done via a Treeview. The tree has seven main nodes that represent the different functional areas within a project. Below each of these nodes are multiple programs relating to the function. For example, under the Communication node, there are programs for the Contact Directory, Meeting Minutes, Transmittals, Communication logs, RFIs and Issues.



Each Treeview node will have an  icon next to the entry if it can be opened further. To select an option from the tree, just highlight the option and click.

When the Treeview is first opened it will indicate next to each item how many new or modified items exist. The number of new items is displayed in black while the number of modified items is shown in blue. When the

log is then entered, these items will be displayed at the top of the log. Once you have opened the item from the log, the new/updated count is revised.

Logs show data that has either been created by you or sent to you by another member of the project team either directly or as a CC on the record. To view more information about a particular record in the log, just click on the linked field. Once you have opened an updated or new item from the log, the new/updated count is revised.

Most of the Logs also have an **[Add]** button at the top of the log. This allows you to create a new record directly from the Log screen.

Setting Your Project

As a Project Collaborator, you may be involved in more than one project at a time, therefore you must tell the system with which project you want to work. You may change the current project at any point in time and you do not have to exit and re-login each time you want to change projects.

The first node of the xProjects Manager is the project. If you want to change your project:

- Click on the Project Name
- Use the List of Values to select the required project
- Press the **[Submit]** button

The system will refresh the screen showing you the Treeview in context to the newly selected project.

Whenever a user sets a default project in xProjects, it updates the Default Project field on the PM Company Default screen of the Forms version.

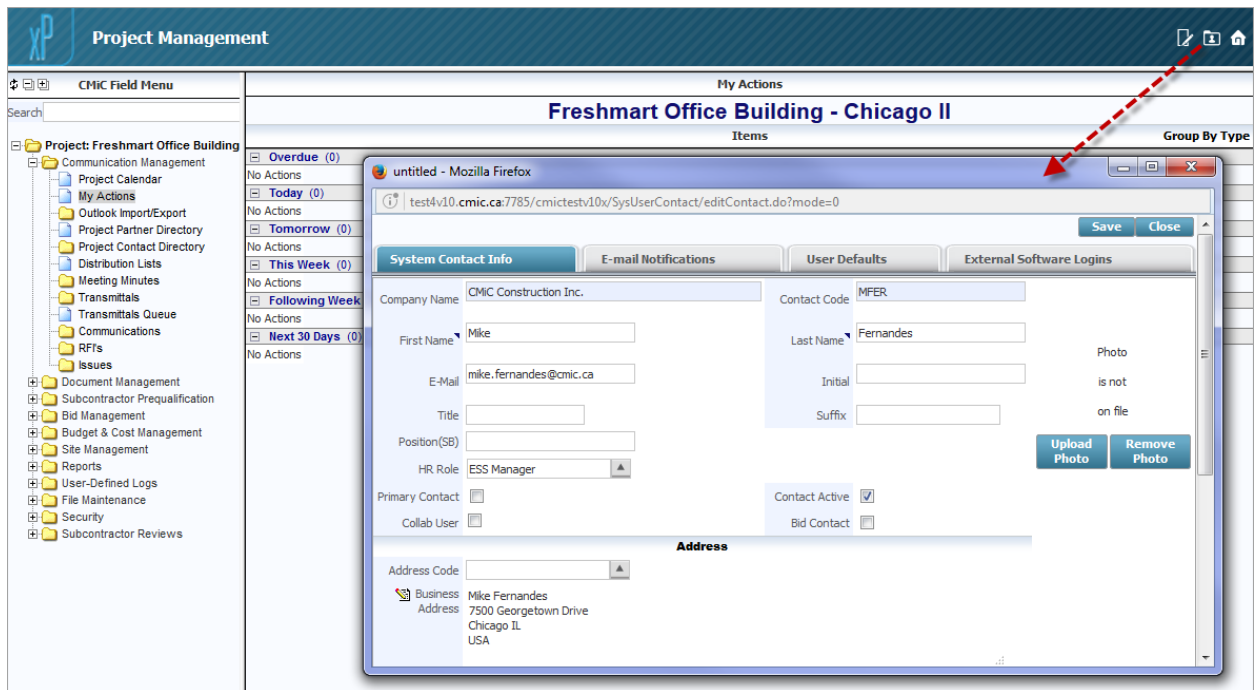
Field security can be applied to the Customer and Address fields in the Project Selection LOV:

The screenshot displays the 'Project Management' interface. On the left is a 'CMIC Field Menu' treeview with categories like Communication Management, Document Management, and Security. The 'Security' category is expanded, showing sub-items like Partners, Contacts, and Role Maintenance. The main panel on the right is titled 'MIKE PMJSP Role' and contains a 'Column/Field Security' table. This table lists fields such as 'Customer Info', 'Bid Job Code', and 'Add Action Item Button', each with a dropdown menu for selecting a security level. The 'Unrestricted' option is currently selected for all listed fields. A note at the top of the main panel states: '*Note: Not all programs have fields available with field privileges'. Below this note is a 'Programs' dropdown menu set to 'PM Menu - Project Selection'.

Item Name	Security Level
Customer Info	Unrestricted
Bid Job Code	Unrestricted
Add Action Item Button	Unrestricted

xProjects > Security > Role Maintenance > Assign Field Security

User Profile Setup




Example of User Profile pop-up window launched from the Profile link at the top of each screen.

System Contact Info – Tab

The screenshot shows the 'System Contact Info' tab of a user profile form. At the top right are 'Save' and 'Close' buttons. Below the tab headers, the form is organized into several sections:

- Company Information:** Fields for Company Name (CMIC Construction Inc.), Contact Code (MFER), First Name (Mike), Last Name (Fernandes), E-Mail (mike.fernandes@cmic.ca), Title, Position (SB), and HR Role (ESS Manager).
- Contact Details:** Fields for Initial and Suffix. A 'Photo' section indicates the photo is 'not on file' with 'Upload Photo' and 'Remove Photo' buttons.
- Primary Contact:** Checkboxes for 'Primary Contact' and 'Collab User'.
- Contact Status:** Checkboxes for 'Contact Active' (checked) and 'Bid Contact'.
- Address Section:** A header 'Address' followed by an 'Address Code' dropdown and a 'Business Address' field containing: Mike Fernandes, 7500 Georgetown Drive, Chicago IL, USA.
- Contact Information:** Fields for Work Phone (1 312 298-3000), Home Phone, Mobile, Main Fax, 2nd Fax, and Fax Prefix. A 'Preferred Contact Method' dropdown is set to 'Mail'. Other fields include 2nd E-mail (SB), Pager, Web Page, Other Info, and Fax Suffix.
- User Information:** A checked 'User ID' field with the value 'MIKEFER1' and a 'Password' field with a masked password and a password change icon.

This popup allows you to modify your profile, and change your own password. The function is available from any of the logs available on the Treeview. At the top of each screen there is a link called 'Profile'. When this is activated, the system opens a window where it is possible to update your own profile.

To change your password, you will need to use the  icon next to the password field. The system requires that you type in your new password twice, to ensure validity. Once done press the [**Save**] button - this will process your change.

This screen is also used to set system wide defaults for receiving e-mail notifications regarding new and updated items.

Email Notifications – Tab

System Contact Info	E-mail Notifications	User Defaults	External Software Logins
Object Description	To	Cc	All
Communication	None ▼	None ▼	None ▼
Daily Report	None ▼	None ▼	None ▼
Field Work Directives	None ▼	None ▼	None ▼
Issue	None ▼	None ▼	None ▼
Meeting	None ▼	None ▼	None ▼
Notice	None ▼	None ▼	None ▼
Punch List	None ▼	None ▼	None ▼
Request For Information	None ▼	None ▼	None ▼
Submittal	None ▼	None ▼	None ▼
Transmittal	None ▼	None ▼	None ▼
			Save Close

User Profile pop-up window – E-mail Notifications tab

The **E-mail Notifications** tab is used to set system wide defaults for receiving e-mail notifications regarding new and updated items. The choices made here are the defaults for every project that you are associated with. These options may be changed on a project-by-project basis if required via the Project Contacts screen.

For each of the xProjects object types listed you can specify if you want to receive e-mail when you are the “To” person and when you are copied (CC’d) on the item. The options for each column are “**New**” and “**None**”.

The **All** column allows users who are neither “**To**” nor “**CC**” on project correspondence, but who have the View privilege (also applies to Restricted View All for RFIs) for a PM object to receive alerts.

As shown below, this tab’s drop-down boxes are changed to checkboxes when the PM Systems Options screen’s, “**Use Note/Attachment flags in Email Notification Setup**”, checkbox is checked. In this case, there are additional checkboxes to allow for email notifications when Notes or Attachments are added to a PM object. There is also a checkbox for when an RFI is answered.

System Contact Info	E-mail Notifications	User Defaults	External Software Logins									
Object Description	To				Cc				All			
	New	Mod	Note	Att	New	Mod	Note	Att	New	Mod	Note	Att
Communication	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Daily Report		<input type="checkbox"/>										
Field Work Directives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Punch List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request For Information	<input type="checkbox"/> <input type="checkbox"/> Ans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Ans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Ans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Submittal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transmittal	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			
Save Close												

Example of drop-down boxes changed to checkboxes when the PM Systems Options flag **Use Note/Attachment flags in Email Notification Setup** is in effect.

User Defaults – Tab

System Contact Info		E-mail Notifications		User Defaults		External Software Logins	
Name				Value			
Initial number of rows in the log				<input type="text"/>			
Session Expiration Time (Minutes)				<input type="text"/>			
Timeout Warning Appears (x) Minutes Before Timeout				<input type="text"/>			
<input type="button" value="Update"/>							

User Profile pop-up window – User Defaults tab

The **User Defaults** tab allows you to set the expiration time for each session, timeout warning in minutes and the default number of records that are to be shown in the logs.

External Software Logins – Tab

				<input type="button" value="Save"/>		<input type="button" value="Cancel"/>		<input type="button" value="Close"/>	
System Contact Info		E-mail Notifications		User Defaults		External Software Logins			
Software	BIM360	Username	MIKEFER1	Password	●●●●●●●●●●●●●●●●	Confirm Password	<input type="text"/>		
External Software				Username		Action			
No Records Found									

User Profile pop-up window – External Software Logins tab

The **External Software Logins** tab is used to store usernames and passwords for third-party software (e.g., Bluebeam, BIM360, DocuSign) integrated with xProjects.

Using Logs

Logs are lists of records related to a specific xProjects object. Logs only show data for records that you are allowed to see, so this would be all the objects that have been sent to you as the ‘To’ person or have been copied to you as one or more of the cc’s, or records that you created.

Query Mode for Logs

PCI No.	PCI Name	Date	Post Date	Status	Type	Total Budg. Amount	Total Bill. Amount	Classifier 1	Classifier 3	Attachments	Reason	Source
COI000007	Internal - Allowance	12/Jan/2018		Pending	Internal Change Orders	10,000.00	0.00					
COE0000006	External CO - Owner Allowance	12/Jan/2018		Approved	External Change Orders	0.00	0.00					
COE0000005	External OA	12/Jan/2018		Pending	External Change Orders	0.00	0.00					
COE0000004	Exterior Stone Wall - Extra Labor	11/Jan/2018		Pending	External Change Orders	1,000.00	5,750.00					
COB0000003	26 0500 - Cost Increase \$20K Rev. Inc & Rev. Increase \$30K	13/Nov/2017	13/Nov/2017	Approved	Original Budget Change Orders	20,000.00	30,000.00					
COT000001	Trans. 26 0500 1000 to 26 0500 2000	10/Nov/2017	10/Nov/2017	Approved	Transfer Change Orders	0.00	0.00					
COE0000003	03 31 13 2000 10K Increase for extra concrete	09/Nov/2017	09/Nov/2017	Approved	External Change Orders	10,000.00	15,000.00					

Log records can be filtered out using the query feature. The query criteria are remembered for the current log while the user drills into a detail record and returns to the same log. The sort order also is remembered while the user works with the same log.

To query the log, simply click the **[Enter Query]** button while in any log, and a blue line of empty fields will be displayed above the log records. Enter the value or query criteria for record selection.

For date fields, the format for query entry is dd-mm-yy, dd/mm/yy or dd-mmm-yyyy. You can include operators such as '=', '<', '>', '>=' etc. where appropriate.

Additional Records Link

Job	Contract No.	My Boolean Field	Description	Vendor	Vendor Code	Original Amount	Controlling Job	Date	Post Date	Posted SC Changes	Status	Pending SC Changes	Pending OK Changes	Total Pending Changes	Attachments
MCATEST	MCAT000001		CONCRETE	Broadstreet Concrete	00000005	6,250.00	ALL	08-03-2016	05-04-2016	27,200.00	Closed	300.00	0.00	300.00	
MCATEST	MCAT000011		SOV Upload	Broadstreet Concrete	00000005	0.00	ALL	05-08-2016		0.00	Pending		0.00	0.00	
MCATEST	MCAT000009		spacing test	Broadstreet Concrete	00000005	1,450.00	ALL	28-05-2016	28-05-2016	0.00	In Process	-299.00	0.00	-299.00	
MCATEST	MCATAM004		Using Unlinked PCI	AMIGAS	AMIGAS	25.00	ALL	26-05-2016	26-05-2016	0.00	In Process	19,200.00	0.00	19,200.00	
MCATEST	MCATEST100001		SCO Posting Not Allow Total Less Than Billed	York University	1000	500.00	ALL	21-12-2017	21-12-2017	-400.00	In Process	0.00	0.00	0.00	
MCATEST	YAY		yay	cmic	00000	500.00	ALL	07-12-2016	07-12-2016	0.00	In Process	500.00	0.00	500.00	
MCATEST	AZTEST001		aztest001	Broadstreet Concrete	00000005	0.00	ALL	13-06-2016	13-06-2016	0.00	In Process	636.25	0.00	636.25	3
MCATEST	AZTEST002		AZTEST002	Broadstreet Concrete	00000005	0.00	ALL	13-06-2016	13-06-2016	0.00	In Process	0.00	0.00	0.00	
MCATEST	YORKSK311		YORKSK311	Leaside Contractors	LEASIDE	2,000.00	ALL	31-08-2017	31-08-2017	-1,800.00	In Process	0.00	0.00	0.00	

Example of additional records link at the top of logs in JSP

If there are too many records to list by a screen in Log Mode, an additional records link appears at the top of the logs, framed above, to indicate there are more records to display.

Sorting Log Information

Logs can be easily sorted by clicking on the column title. When this is done the system will quickly re-sort the list in ascending order according to the data in the column. To sort in descending order, click the same column title again. Each time a sort is applied to a column the column title displays an arrow indicating the sort order as either ascending or descending.

Adding Log Records to the Treeview

Log records can be added to the Treeview to create an ‘items to work on list’ for this session directly in the Treeview. This allows you to move around this system opening and closing programs but keeping these marked items easily available.

Each record in the log has an arrow at the very start of the record. To add a record to the Treeview, click the arrow. If you want to add all the items in the current log, use the double arrow on the title bar of the log.

Using Query Filters on Logs

Column		Operator	Filter	Value	Example Value
Track Code	LIKE		%		%xyz%
Record Status	=		CLOSED		xyz

Save As Default | Reset To System Defaults

Show All Filters | Clear | Reset | Submit | Cancel

The following substitution variables are available for filtering: &today, &username, &userid, &partner, &partnername, &contact. Use the DD-MON-YY format for Date values.

Meeting Minutes									(Filtered)
Track Code	Track name	Meeting No.	Subject	Meeting Date	Location	End Date	Next Meeting Date	Attachments	
PLANNING	Planning	PLN-081101	Site Cleanup - planning	08/10/2011		08/10/2011	08/17/2011		
Total (1 row)									

Filters are used to limit the data shown on the system logs. You may define your own Default Filter for each log or use the system default. A basic restriction would be to not show items with a CLOSED status. Filters can be changed easily using the **[Show Filter]** button.

If there currently is a filter associated with the data shown on the log – on the title line of the log there will be the word ‘Filtered’ to the far right of the title. This filtered indicator will only display if there is a restriction applied to the data shown. To view the query filter, use the **[Show Filter]** button. This will open a section above the log with the current filter condition shown. You may change this condition or see what other fields are available by using the **[Show All Filters]** button.

Column		Operator	Filter	Value	Example Value
Track Code	LIKE		%		%xyz%
Track name					
Meeting No.					
Subject					
Meeting Date					
Location					
End Date					
Next Meeting Date					
Attachments					
Record Status	=		CLOSED		xyz

Save As Default | Reset To System Defaults

Show All Filters | Clear | Reset | Submit | Cancel

The following substitution variables are available for filtering: &today, &username, &userid, &partner, &partnername, &contact. Use the DD-MON-YY format for Date values.

Meeting Minutes									(Filtered)
Track Code	Track name	Meeting No.	Subject	Meeting Date	Location	End Date	Next Meeting Date	Attachments	
PLANNING	Planning	PLN-081101	Site Cleanup - planning	08/10/2011		08/10/2011	08/17/2011		
Total (1 row)									

To change or add a query condition, select the required operator from the list then enter the matching required value. To remove a specific column condition set the operator to blank.

The **[Clear]** button will remove all filters shown. The **[Reset]** button will set the filter back to your default values. Once all changes required have been completed use the **[Submit]** button to redisplay the data according to the new filter values.

Attachments Column for PM Objects Log

ent

Add CommunicationShow FilterSend To SpreadsheetEnter Query

Communications										
Communication No.	Type	From Partner	From Contact	To Partner	To Contact	Date	Subject	Status	Record Status	Attachments
00000001	COLAB	SM US International (V10)	Amanda Matthews	Eagle Investments Company	Marion Davies	08/Jun/2011	09.42728 - Document upload - change of selection drop-down	0	SUBMITTED	1
00000002	EMAIL	SM US International (V10)	Amanda Matthews	SB (DO NOT USE) - US	Stephen Bennet	26/Nov/2010	FORMS - 09.35710	0	SUBMITTED	2
00000003	EMAIL	SM US International (V10)	Amanda Matthews	Lincoln Developers	Gregory Abbott		JSP - 09.35710 Type shown based on sort number	0	PENDING	
00000004	FACED	SM US International (V10)	Amanda Matthews	Eagle Investments Company	Marion Davies	26/Nov/2010	JSP - 09.35710 Type shown based on sort number	0	SUBMITTED	
00000005	FACED	SM US International (V10)	Amanda Matthews	Eagle Investments Company	Marion Davies	06/Dec/2010	09.41609 - History	0	SUBMITTED	1
00000006	FACED	SM US International (V10)	Amanda Matthews	SB (DO NOT USE) - US	Stephen Bennet	22/Dec/2010	test	0	SUBMITTED	
00000007	EMAIL	SM US International (V10)	Amanda Matthews	Eagle Investments Company	Marion Davies	14/Jan/2011	JSP - 09.35710 Type shown based on sort number	0	SUBMITTED	
00000008	FACED	Washington Consulting Services	Boris Fullerton	SM US International (V10)	Amanda Matthews	19/Jan/2011	test completion items	0	SUBMITTED	
00000009	FACED	Washington Consulting Services	Boris Fullerton	SM US International (V10)	Amanda Matthews	19/Jan/2011	test completion items	0	SUBMITTED	
00000010	FACED	SM US International (V10)	Amanda Matthews	SM US International (V10)	Amanda Matthews	19/Jan/2011	test for displaying closed items	0	SUBMITTED	
00000012	FACED	Parrish Construction Partners	Simon Parrish	SM US International (V10)	Amanda Matthews	19/Jan/2011	test for attachments	0	PENDING	
00000013	FACED	SM US International (V10)	Amanda Matthews	SB (DO NOT USE) - US	Stephen Bennet	08/Jun/2011	test	0	SUBMITTED	
00000014	FACED	SM US International (V10)	Amanda Matthews	Eagle Investments Company	Marion Davies		Document attachment - 11.57586	0	PENDING	1
00000015	FACED	SM US International (V10)	Amanda Matthews	Lincoln Developers	Gregory Abbott	09/Jun/2011	notification test	0	SUBMITTED	
00000016	FACED	SM US International (V10)	Amanda Matthews	Lincoln Developers	Gregory Abbott	09/Jun/2011	notification test	0	SUBMITTED	
00000017	FACED	SM US International (V10)	Amanda Matthews	SB (DO NOT USE) - US	Stephen Bennet	20/Jul/2011	Creation of communication record	0	SUBMITTED	
00000018	FACED	SM US International (V10)	Amanda Matthews	Washington Consulting Services	Will Smith	20/Jul/2011	test for displaying closed items	0	SUBMITTED	
00000019	FACED	SM US International (V10)	Amanda Matthews	British Airways	Carey Dexter	20/Jul/2011	very large monster	0	SUBMITTED	
00000021	FACED	SM US International (V10)	Amanda Matthews	Kovax Enterprises	hey dude	29/Jul/2011	review v10 functionality	0	SUBMITTED	
Total (19 rows)										

The Attachments column in the log of PM objects shows the number of attachments there are on a given record of that object log. The user can drill down on this number to see the underlying attachments:

In addition, there are buttons on this drill-down screen that allow the user to add attachments without having to actually bring up the record details.

Printing Reports

For details about printing reports, please refer to the following section in this guide: [Printing Reports](#).

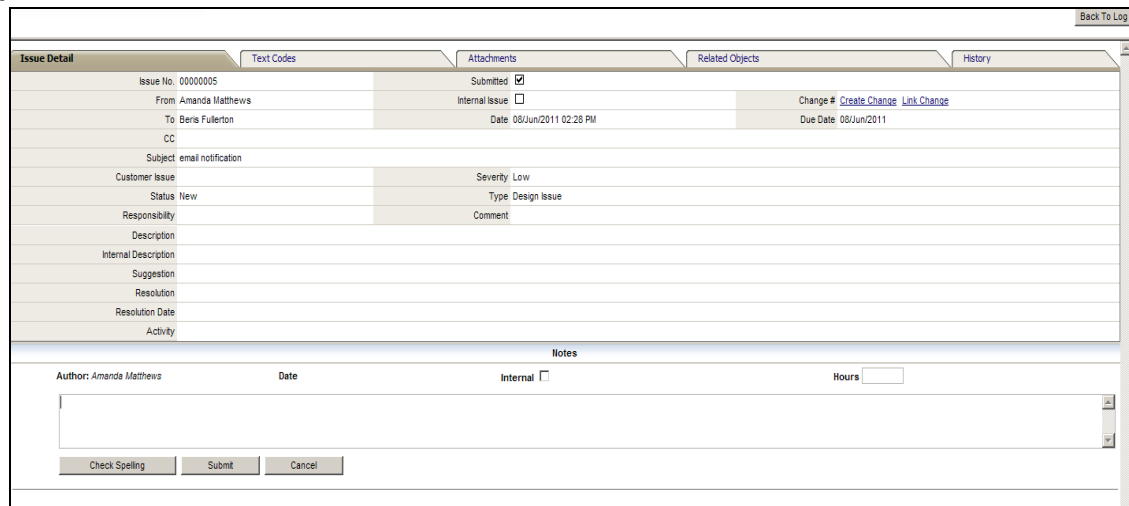
Using Notes and Attachments

Notes and Attachments can be added to almost any XProjects object by anyone who has access to the object, this includes the creator, the To and the CC'd parties. To add a note or attachment open the item and move to the Note or Attachment tab as required.

Notes

There are two methods of entering notes. The first is a simple method of adding the note at the bottom of the screen, the second is to add the note via a 'Notes' tab.

Simple Method

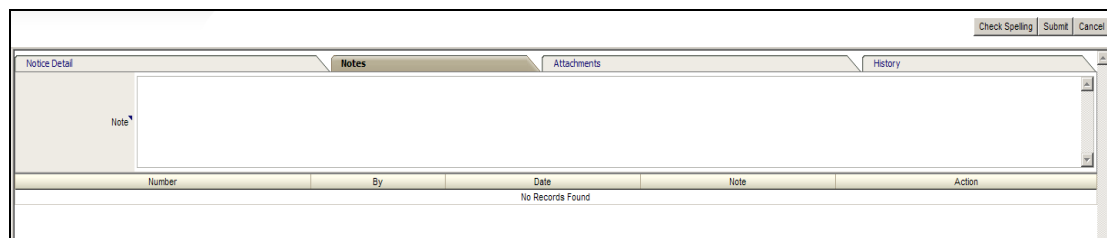


Notes can be added when in view mode by using the **[Add Note]** button. When pressed the Notes button will open up an area of the screen below the current record, similar to the picture below.

- Type in the text of the note
- Press the **[Save]** button.

The date, time and your user name are automatically saved with each note.

Notes Tab



To add a note where the screen has a Notes tab, open the notes tab then use the **[Add Note]** button to open up a text area where the note text can be entered. Any screen that has notes already entered will display a check box next to the title of the Notes Tab.

- Enter the text of the note, then press **[Submit]** to save the note.

Notes entered via the notes tab, can be deleted by the user who created the note by using the **✗** when viewing data on the notes tab.

Attachments

To add an attachment, open the Attachment tab. There are buttons for uploading multiple documents (**[Upload Multiple]**), uploading a single document (**[Upload New]**) or adding existing documents that reside in the Document Management repository (**[Add Attachment]**).

To add a new attachment, use the **[Upload new]** button. This opens a window similar to that below.

- Select the Document Type
- Enter the Document ID and Title

- All other fields except the Attachment field may differ with each attachment type, fill in as required.
- Enter the attachment name. Use the **[Browse]** button to open the standard file selection window. Find/Select the required file then use the **[Save]** button to upload the document.

To add an existing document to the object, use the ‘+’ to open a new line.

- Select the Document Type
- Select the Document Number
- The Revision Number will automatically default to the latest revision, but you may select which ever revision required.

Press **[Save]** when done.

Any object where attachments have been added will show a check mark on the Attachments tab when the object is opened. To view the attachments, open the attachment tab and the system will show a list of all the related attachments. To open a specific attachment, just click on the attachment link.

Document Security – Attachments

Field Security

Field security can be assigned to the **[Add Attachment]** button when in the Document Entry program (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Documents*). The possible setting is ‘Unrestricted’ or ‘Read-only’. When set at ‘Read-only’, the **[Add Attachment]** button is shown, but it is disabled.

Linking Privilege by Document Type

PM Roles

Project Management Menu

Search: [Go]

Project: Freshmart - Orangeville Grocery

- Communication Management
- Document Management
- Subcontractor Prequalification
- Bid Management
- Budget & Cost Management
- Site Management
- Reports
- User-Defined Logs
- File Maintenance
- Security
 - Partners
 - Contacts
 - Convert/Merge Partners and Contacts
 - User Maintenance
 - Change User LDAP Server
 - Role Maintenance
 - User Access
 - Project Roles
 - License Pools
 - Subcontractor Reviews

Project Roles

Role	Description	Admin Req.	Key Player	Order Seq.	Ev. We.
PM	Assistant PM	<input type="checkbox"/>	<input type="checkbox"/>		
PM-ADMIN	PM Administrator	<input type="checkbox"/>	<input type="checkbox"/>		
PMD	Project Manager Director	<input type="checkbox"/>	<input type="checkbox"/>		
PMRAJ	Rajkrole	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
PRIMECONT	Prime Contact	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4	
PRUDIRECT	Project Director	<input type="checkbox"/>	<input type="checkbox"/>	10	
PROJACCT	Project Accountant	<input type="checkbox"/>	<input type="checkbox"/>	5	
PROJCOORD	Project Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	4	

Update Role PM

☒ View/Create/Update/Delete All Objects

☒ Restricted View All for RFIs

Send/Receive

- ☒ Receive Owner Change Order
- ☒ Send Partner RFI
- ☒ Redirect RFI
- ☒ Send Partner Transmittal
- ☒ Send Partner Issue
- ☒ Send Partner Punch List

☒ View/Create/Update/Delete All Document Types

☐ Mobile Springboard Objects

Receive Partner RFI

- ☒ Receive Partner RFI
- ☒ Forward RFI
- ☒ Send I/O Email
- ☒ Send Partner Communication
- ☒ Send Partner Notice

Annotations:

- Select Project Role. Project Role selected appears in the Update Role field.
- If checkbox is checked, allows linking privileges to 'all' document types, for users with the Project Role
- Click link to open pop-up window to assign linking privileges for each document type, for users with the Project Role

Project Roles; standard Treeview path: xProjects > Security > Project Roles

Use the Project Roles screen to assign linking privileges by document type, for users with the Project Role. Check the checkbox for **'View/Create/Update/Delete All Document Types'** to allow linking privileges for all document types.

Update Role PM

Save Close

Description	Show In Menu	View	Create	Edit	Delete	Link	Unlink
Attachment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Audio/Video	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents uploaded in ADF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drawing Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drawings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Financial Documents from Prequal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Photos	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Planning Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SCRFP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schematics and Blueprints	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Annotations:

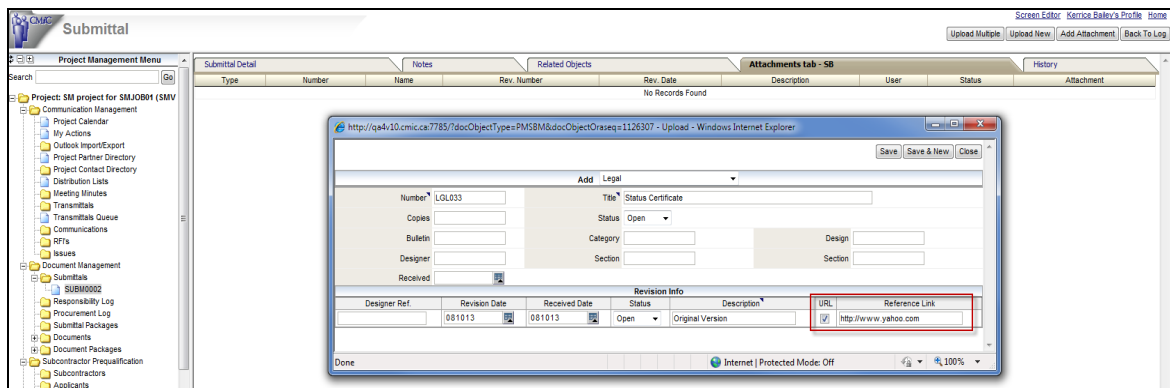
- Checking this checkbox will check all of the boxes in the column

Example of the pop-up window launched from the **'View/Create/Update/Delete All Document Types'** link in the Project Roles screen

Click the **'View/Create/Update/Delete All Document Types'** link to open the pop-up window to assign privileges for each document type.

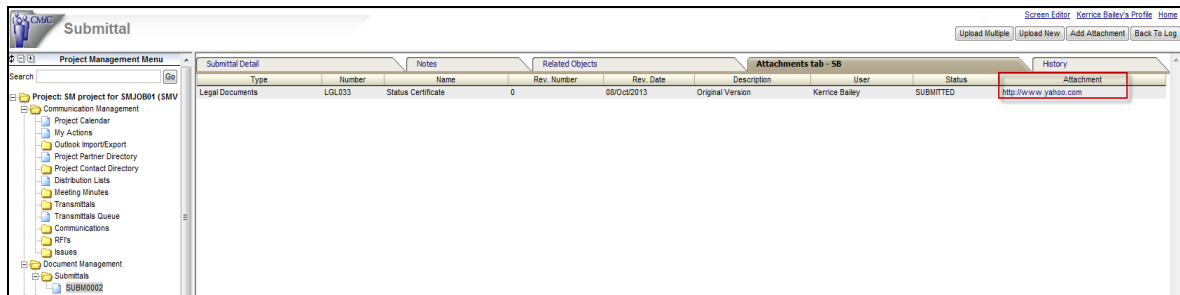
If the **'Link'** checkbox is unchecked against a particular document type for a role, the user with that role will not be able to add existing document attachments of that document type to any PM objects, even though they might still be able to do so for other types, as per the settings for the other document types.

Shared Document URL in Attachments Tab



The Upload New feature in the Attachments tab allows specification of a **URL** for shared documents such as those hosted in BlueBeam or the equivalent, as well as uploading new attachments.

The URL checkbox is used for this purpose. By default, the checkbox is un-checked. When checked, it allows the user to specify a URL (in the Reference Link field) for the document instead of the actual physical file.



For a URL, the "Attachment" field will display the URL in the following way:

- If length of the URL is less than or equal to 60 characters, display the full URL.
- If length of the URL is greater than 60 characters, display the first 57 characters of the URL concatenated with "...".

Example:

`https://login.yahoo.com/config/login_verify2?&.src=ym&.in..."<https://login.yahoo.com/config/login_verify2?&.src=ym&.in...`

DISCLAIMER: The user needs to provide fully specified URL (including protocol e.g. http://) in order for the link to work correctly. Specifying incomplete URL paths, such as "www.yahoo.com" may result in malformed reference links.

NOTE: We have globally changed the label of the "Upload New" button in "Attachments" tab to "Add/Upload New" since we now allow for addition of URL-type attachments.

Selecting/Using Contacts

Selecting Multiple Contacts

xProjects programs allow the selection of multiple contacts at one time and the selection of a distribution list when selecting CC's. The CC Contact LOV available on all CC contact fields' defaults to project contacts, but it can be switched to a Distribution List by changing the radio button at the top of the list.

Find:

<< Prev Set 1 - 13 of 13 Next Set >>

☒ Project Contacts ☐ Distribution Lists ☐ All Contacts

Name ▼	Code	Partner Name	Partner Code	<input type="checkbox"/>
hey dude	DUDE	Kovax Enterprises	KOVAX	<input type="checkbox"/>
William Smart	WSM	Washington Consulting Services	WASHINGT	<input type="checkbox"/>
Will Smith	WS	Washington Consulting Services	WASHINGT	<input type="checkbox"/>
Stephen Bennet	SB	SB (DO NOT USE) - US	SUS	<input type="checkbox"/>
Simon Parrish	SMSUB1	Parrish Construction Partners	PARRISH	<input type="checkbox"/>
PROJ ONLY	PO	SM US International (V10)	SMV10	<input type="checkbox"/>
Marion Davies	MD	Eagle Investments Company	EAGLE	<input type="checkbox"/>
Karen Williams	KW	Parkdale Holdings	PARKDALE	<input type="checkbox"/>
Gregory Abbott	GA	Lincoln Developers	LINCOLN	<input type="checkbox"/>
Carmen Wong	CARMEN	Gladstone Design/Build	GLADSTON	<input type="checkbox"/>
Carey Dexter	CD	British Airways	BRITISH	<input type="checkbox"/>
Beris Fullerton	BF	Washington Consulting Services	WASHINGT	<input type="checkbox"/>

If 'Distribution Lists' is selected, then the data will change to display similar to below:

Find: <input type="text" value=""/>				Go	Close	Accept
<< Prev Set		1 - 8 of 8	Next Set >>		Add New	
<input type="radio"/> Project Contacts <input checked="" type="radio"/> Distribution Lists <input type="radio"/> All Contacts						
Name	Code	Partner	<input type="checkbox"/>			
Internal Folks			<input type="checkbox"/>			
Amanda Matthews	SB	SMV10	<input type="checkbox"/>			
Other Company			<input type="checkbox"/>			
Amanda Matthews	SB	SMV10	<input type="checkbox"/>			
Others			<input type="checkbox"/>			
Marion Davies	MD	EAGLE	<input type="checkbox"/>			
Will Smith	WS	WASHINGT	<input type="checkbox"/>			
Beris Fullerton	BF	WASHINGT	<input type="checkbox"/>			
Karen Williams	KW	PARKDALE	<input type="checkbox"/>			
Gregory Abbott	GA	LINCOLN	<input type="checkbox"/>			
William Smart	WSM	WASHINGT	<input type="checkbox"/>			

When using this mode, if the user checks the select box against the Distribution List group name then all contacts within the distribution group will be added. The user may also select individual contacts by checking the selection box directly against the name.

Adding Contacts on the Fly

The 'To' LOV on all programs allows 'Internal Users' with the appropriate privileges to Add a Project Contact on the Fly. Field security can be applied to the PM Role field in the 'Add contacts on the fly' pop-up screen (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Project Contact Popup*).

On any 'To contact' field the LOV will display as below:

Code	Name	Partner	Name
SB	Amanda Matthews	SMV10	SM US International (V10)
BF	Beris Fullerton	WASHINGT	Washington Consulting Services
CD	Carey Dexter	BRITISH	British Airways
CARMEN	Carmen Wong	GLADSTON	Gladstone Design/Build
GA	Gregory Abbott	LINCOLN	Lincoln Developers
KW	Karen Williams	PARKDALE	Parkdale Holdings
MD	Marion Davies	EAGLE	Eagle Investments Company
PO	PROJ ONLY	SMV10	SM US International (V10)
SMSUB1	Simon Parrish	PARRISH	Parrish Construction Partners
SB	Stephen Bennet	SUS	SB (DO NOT USE) - US
WS	Will Smith	WASHINGT	Washington Consulting Services
WSM	William Smart	WASHINGT	Washington Consulting Services
DUDE	hey dude	KOVAX	Kovax Enterprises

To add a new contact – use the **[Add New]** button. This will open a screen similar to below:

Partner	
<input checked="" type="radio"/> Use Existing Partner <input type="radio"/> Add New Partner	
Code	<input type="text"/>
Contact	
<input checked="" type="radio"/> Use Existing Contact <input type="radio"/> Add New Contact	
Code	<input type="text"/>
Primary Contact	<input type="checkbox"/>
Bid Contact	<input type="checkbox"/>

The contact being added can be one of three types: A new contact for an existing project partner, or an existing contact for the partner but not yet assigned to the project or a new partner and therefore new contact for the project.

To add a new contact for an existing project partner:

- Select the 'Use Existing' under the partner
- Select the correct partner code from the Partner Code LOV
- Move to the Contact area and select the 'Add New'

- The screen will open up and display an area to enter standard contact information, the contact code and first and last names are the only required data.
- Press **[Save]** when done.

To add existing contact for the partner not yet assigned to the project

- Select the 'Use Existing' under the partner
- Select the correct partner code from the Partner Code LOV
- Move to the Contact area and select the 'Use Existing'
- Select the required contact from the Contact Code LOV
- Update Primary and Bid flags as required
- Press **[Save]** when done.

To add a new project contact

- Select the 'Add New' under the partner – this will redisplay the screen in a format similar to below:

The screenshot displays a web form titled 'Partner' and 'Contact' with 'Cancel' and 'Save' buttons at the top right. The 'Partner' section has two radio buttons: 'Use Existing Partner' (unselected) and 'Add New Partner' (selected). Below this are input fields for Abbreviation, Name, Street, Suite, City, State/Province (with a dropdown arrow), Country, and ZIP Code. The 'Contact' section also has two radio buttons: 'Use Existing Contact' (unselected) and 'Add New Contact' (selected). Below these are fields for Code, Title, Position, Primary Contact (checkbox), First Name, Last Name, Initial, Bid Contact (checkbox), and Role (with a dropdown arrow). At the bottom, there are two side-by-side sections: 'Address' with fields for Street, Suite, City, ZIP Code, State/Province (dropdown), and Country; and 'Contact Information' with fields for Phone, Fax, Mobile, Pager, and E-Mail.

- Enter the Partner Information. The Partner Abbreviation and Name are the only required fields.

- Move to the Contact area
- Enter the Contact Information. The Contact Code, First and Last Name fields are the only required fields.
- Press [Save] when done.

Linking/Creating a PCI to Objects

Change #	Status	Submitted	Co-Author RFI No.	Received	Change #	Date Required	Acknowledgement Date	Cost Amount	Days
19/Jan/2011 12:08 PM	Open	<input checked="" type="checkbox"/>		<input type="checkbox"/>		19/Jan/2011			

The linking to or creating of a PCI from different xProjects objects is available to 'Internal' users only.

Linking is available on most, if not all PM objects. Once the main record has been entered (Submitted) there are two hyperlinks that will display on the page next to the Change# field: '[Create Change](#)' and '[Link Change](#)'.

The 'Create Change' link will open up the PCI screen where you can enter a new PCI. The default PCI type (Internal, External or Transfer) is determined from the PM Enterprise setting on the company control file.

In the case of Documents and Document Packages, the 'Create Change' link will open up the PCI Entry screen showing show all the business partners from all the transmittals ever created with the document or package.

Enter the PCI as per normal, then when you return to the originating screen the PCI number will display as a hyperlink instead of '[Create Change](#)' and the 'Link Change' hyperlink will have changed to 'Remove Link'.

The 'Link Change' hyperlink displays a list of all PCIs. Select the required PCI to link to the communication record.

To remove the link between a communication record and a PCI use the 'Remove Link' hyperlink.

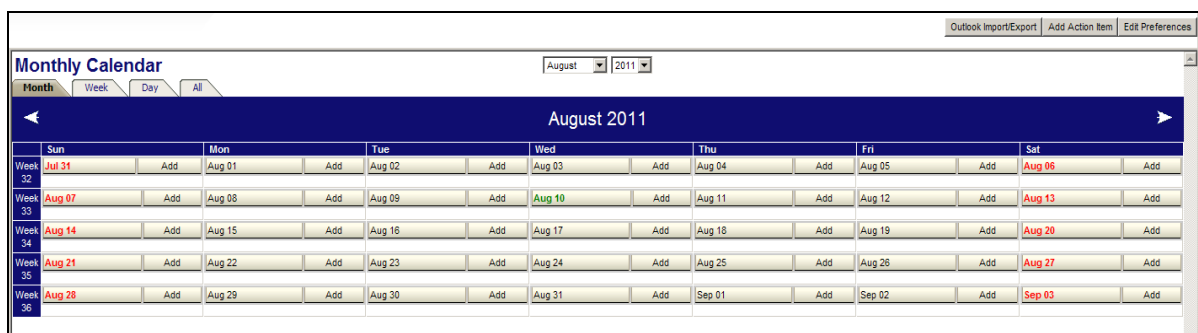
Communication Management

Overview of Communication Management

Communication Management is the area within xProjects Manager where as a member of the project team it is possible to review, enter and update project information that has to do with communications such as Meeting Minutes, Issues, RFIs, Transmittals, and of course a log of generic communications. This is also where the project calendar is available and where the list of project contacts is maintained.

NOTE: When creating correspondence objects in PM, the 'From' contact field (default is current user) can be changed while creating the correspondence but cannot be changed once the record is submitted. This is managed using field security. The 'From' contact can be assigned field security so that it is 'Read-only'. When it is set as 'Read-only', it is still editable when the record is un-submitted, but when it becomes submitted, the user cannot edit the 'From' contact (unless the field security is changed back to 'Unrestricted'). This applies to the following objects: Issues, Communications, Field Work Directives, Notices, Owner Change Transmittals, Punch Lists, Requests for Information, and Transmittals.

Project Calendar



The Project Calendar is a quick way to view meetings and other scheduled items as they relate to the current project. Items can be easily added and shared with other project contacts.

Adding an Action Item to the Calendar

Adding an item to the project calendar is very simple. The calendar allows for the addition of a single item or a recurring item. Plus, you can create an item that includes multiple project contacts if required.

To add a new item to the calendar, move to the date required and click the add link, or use the **[Add Action Item]** button. Depending on your security rights you will be able to add a shared, private and/or public item.

Private Items are items that only you can see, Public items are items anyone collaborating on the project can see, while shared items are restricted to certain persons only.

Items can also be created for multiple persons at one time. For example, if you are adding a meeting to the calendar, you may include all the persons attending the meeting on the action item. This means that it will show up on everyone's calendar automatically.

If the action item is for more than yourself, then you can add other people by clicking on the **[For]** button. This will open an area where you can select other people individually or select a pre-defined group of contacts.

- Enter the persons included in this item
- Select the action code
- Enter the date, time and title
- If the item is to be recurring such as a weekly or monthly meeting, then you may elect to define the occurrences.
- Select the frequency
- Select the day of the week
- Enter when to end

When done press the **[Save]** button.

Specifying non-working days in the Project Calendar

By default, weekends are non-working days. Days can be marked as non-working or working.

To designate a day as non-working or working, right-click the mouse-pointer on the day and select the setting. When a day is changed from working to non-working, the color will be changed to red, except in cases where it is the current day - in this case it will remain green.

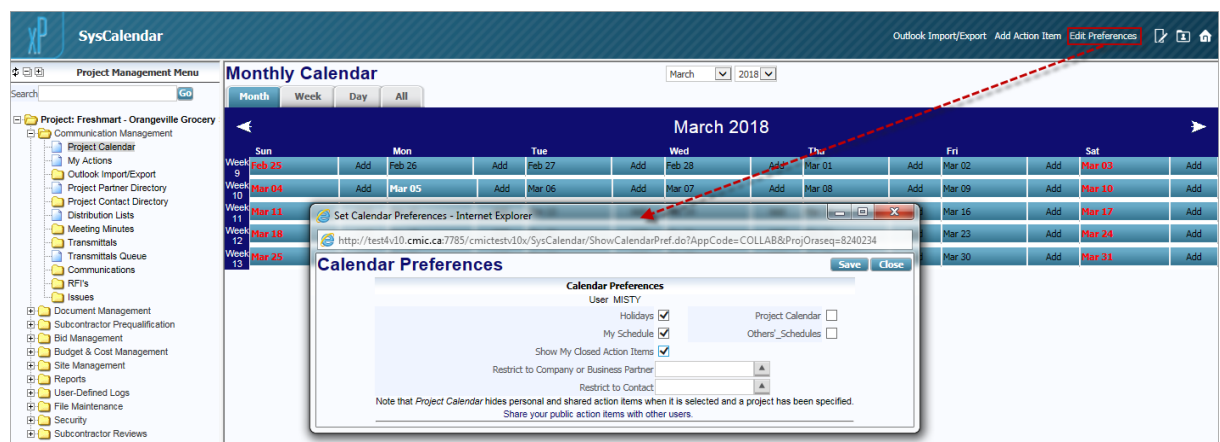
NOTE: Only users with the privilege to '**Maintain non-working days**' will be able to make these changes and it is only available in Project Management JSP.

Non-working days can be defined by making use of the Payroll 'Holidays' feature in the Local Tables section of the Payroll Module. Once defined, they are seen on the Project Calendar.

Holiday Date	Description	Web URL
01/JAN/2013	New Years Day	
21/FEB/2013	President's Day	
30/MAY/2013	Memorial Day	
04/JUL/2013	Fourth of July	http://www.american.edu/heintze/fourth.htm
02/SEP/2013	Thanksgiving	

The PM working/non-working days functionality is tied in with the determination of submittal due dates (once the lead times are entered), RFI due dates, and owner change order completion dates.

[Edit Preferences] – Button



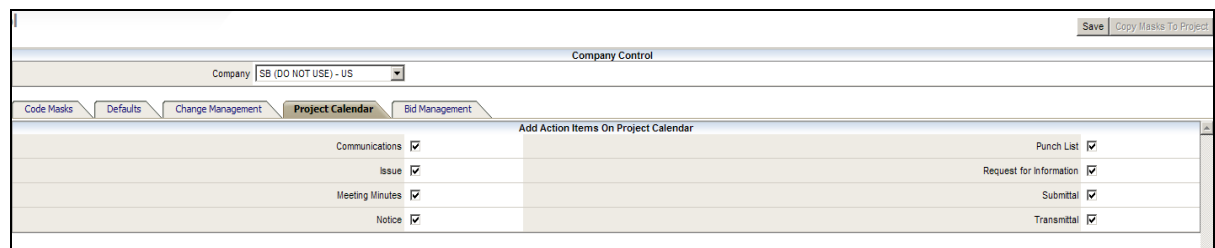
Example of Calendar Preferences pop-up window launched from the System (Project) Calendar

Show My Closed Action Items – Checkbox

When checked, it will show any Closed action items belonging to the current user, and is applicable to the tabs: Month, Week and Day.

My Actions Page

Action Items can be created from PM correspondence objects by setting the flags in the Project Control 'Project Calendar' tab (see first screenshot below). When that happens, action items created under the right conditions (due date) and with the current user as the Responsible party, will be displayed in this page.



Standard Treeview path: xProjects > File Maintenance > Local Tables > Company Control

The program lists all of the current user's action items for the current project that can be grouped by Date or Action. The user is able to open the object (RFIs, Communications, Notices, Issues, Meeting Minutes, Punch List, Submittals, and Transmittals) in the popup window displayed when the user clicks on the object link.

My Actions			
Project 1 - SUS			
Items			
			Group By Type
Overdue (9)			
17/Dec/2010	Submittal	null	Submittal-DEMO-STATUS
11/Jan/2011	Other Actions	To Be Determined	Action item demo - completed items
24/Jan/2011	Other Actions	Meeting	test
08/Feb/2011	Other Actions	To Be Determined	testnnnn
14/Apr/2011	Other Actions	To Be Determined	retest
18/Apr/2011	Other Actions	To Be Determined	test
02/Jun/2011	Request For Information	00000009	test - for Answer - Jun 2
16/Jun/2011	Submittal	RESP-2	test2
30/Jun/2011	Other Actions	To Be Determined	Shared item -
Today (0)			
No Actions			
Tomorrow (0)			
No Actions			
This Week (0)			
No Actions			
Following Week (0)			
No Actions			
Next 30 Days (0)			
No Actions			

The link in the top right-hand corner allows the display to toggle between grouping the items by object type (**Group By Type**) and grouping them by date (**Group By Date**).

When grouping by date, these are the groups:

Today


















































































Tomorrow

This week = starting from the day after tomorrow until a week from today


Next week = between 8 and 14 days from today

Next 30 days = day 15 to 30

Project Partner Directory

Project Partners						
Code	Abbrev	Name	Hotel Quality	Sort Order	Group	Action
ACTION	ACTION	Action Design				Addr   
AETNA	AETNA	Aetna Insurance				Addr   
ALFATECH	ALFATECH	Alfa Tech				Addr   
ALTFENCE	ALTFENCE	ALT Fencing				Addr   
AMGAS	AMGAS	American Gas Supply Co.				Addr   
ATCO	ATCO	ATCO Properties and Management Inc				Addr   
AXIS	AXIS	AXIS Technologies				Addr   
BOWER	BOWER	Bower Design				Addr   
BRITISH	BRITISH	British Airways	ENTER MORE			Addr   
DELMAR	DELMAR	Delmar Development Corporation				Addr   
EAGLE	EAGLE	Eagle Investments Company				Addr   
GLADSTON	GLADSTON	Gladstone Design/Build				Addr   
HATHAWAY	HATHAWAY	Hathaway Build/Design				Addr   
KOVAX	KOVAX	Kovax Enterprises				  
LINCOLN	LINCOLN	Lincoln Developers				Addr   
MAYNARDS	MAYNARDS	Maynards				Addr   
MY-SURE	MY-SURE	My Surety Vendor				Addr   
PARKDALE	PARKDALE	Parkdale Holdings				Addr   
PARRISH	PARRISH	Parrish Construction Partners				Addr   
RIGOR	RIGOR	Rigor Consulting and Design/Build				Addr   
ROOFMAN	ROOFMAN	The Roof Man LLC				Addr   
SMV10	SMV10	SM US International (V10)				Addr   
STANDARD	STANDARD	Standard Industrial Developers				Addr   
SUS	SUS	SB (DO NOT USE) - US				Addr   
TWAIN	TWAIN	Twain Alliance - Massachusetts				Addr   
WASHINGT	WASHINGT	Washington Consulting Services				Addr   
ZZ	ZZ	CMIC ZZ Construction Company				Addr   

The PM JSP version of the 'Assign Project Contacts' form is called Project Partner Directory.

The screen shows a log of the Project Partners, and users can click on the 'Contacts' icon  to view and Add contacts if they have the appropriate privileges.

Business Partners can also be added (**Add** button) and removed from the log (red '**X**'). When a business partner is removed, the underlying contacts are removed as well.

Use the 'Edit' icon beside each record to make changes to the business partner record. Changes are only allowed on some fields (sort order, abbreviation and directory group), in JSP. All other fields can be edited in the Forms version.

Creating a new Directory Group

The Directory Group is one way of categorizing business partners by specialty so that when the Directory Listing is printed then business partners of a certain specialty will appear together on the report.

When editing or creating a business partner the LOV of the 'Group' field can be used to add or remove directory groups.

Assigning Business Partners to a Project

The [**Assign**] button is used to allow assignment of business partners to the project if they are not already on the project. The user can then add contacts to these business partners as well.

Copying Business Partners from another Project

The [**Copy From Project**] feature allows copying of business partners and if required, their contacts, from another project within the same company or from across all other companies. There are also options to copy the Collaboration Flag, Roles and/or E-mail notification preferences for contacts. The latter 3 flags are only visible after checking the 'Also Copy Project Contacts' flag.

Adding/Editing Project Partner Alternate Addresses

Alternate addresses can be added for project partners and excludes those partners that are project-only.

In the Action column of the Project Partner Directory log, the '**Addr**' link is shown beside project partners who are also corporate business partners.

Add Address

Close

Address List

Address Code	Name	Street	Suite	City	State/Province	Country	Zip/Postal Code	Phone Number	Fax Number	E-mail	Action
PKDL1	Parkdale Horizons Group	1400 Park Avenue		New York	NY	USA	345690		(605) 893-2390		
PKDL2	Parkdale Holdings Inc.	90 Main Street			CA	USA					
PKDL3	Added in the Proj partner Mai										

Clicking on the 'Addr' link will allow the user to modify the existing alternate address information of the project partner by using the 'Edit' icon beside the record, or add an alternate address by clicking the [Add Address] button that is shown.

Field security can be set on the Addr (address) link.

Project Contact Directory

ent

Add ContactExport to OutlookShow FilterSend To SpreadsheetEnter Query

Project Contact Directory										(Filtered)
❏	Contact Code	Contact Name	Email	Phone	Fax	Pager	Mobile	LastModificationTime		
❏	BF	Boris Fullerton	stephanie@cmic.ca					2011-08-09 03:55pm		
❏	CARMEN	Carmen Wong						2011-08-09 03:55pm		
❏	CD	Carey Dexter	steph@cmic.ca					2011-08-09 03:55pm		
❏	DUDE	hey dude						2011-07-29 03:27pm		
❏	GA	Gregory Abbott						2011-08-09 03:55pm		
❏	KW	Karen Williams	steph@cmic.ca					2011-08-09 04:02pm		
❏	MD	Marion Davies	stephanie@cmic.ca					2011-08-09 03:55pm		
❏	PO	PROJ ONLY	pronly@cmic.ca					2011-07-29 03:36pm		
❏	SB	Amanda Matthews	stephanie@cmic.ca					2011-08-09 09:46am		
❏	SB	Stephen Bennet	stephanie.bromfield@cmic.ca					2011-07-29 03:39pm		
❏	SMSUB1	Simon Parrish	stephanie@cmic.ca					2011-08-09 03:55pm		
❏	IWS	Will Smith	Stephanie@cmic.ca					2011-08-09 03:55pm		
❏	WSM	William Smart	Steph@cmic.ca					2011-08-09 03:55pm		
Total (13 rows)										

The Project Contact Directory contains all the information regarding project contacts. The screen starts as a simple list of all contacts for the project ordered by contact name.

To view more information about a contact and/or to view a picture of the contact, find the contact required and then click on the contact name. This will open a new screen where you see all the details pertaining to the contact such as address, phone, fax, and e-mail....plus e-mail notifications specific to the current project.

When a new project contact is being created, the 'Project Only' flag is available to select regardless of the partner type. The exception is if the screen is called from within the Project Partner JSP for a project-only partner, then it has to be checked and disabled. The flag is never updateable while editing project contacts, only in add mode.

When a corporate contact is selected from the LOV, the flag is automatically unchecked then disabled.

Field Security can also be placed on this flag.

The contact information may be exported to Microsoft Outlook by clicking on the button 'Export To Outlook'. Only those users with the privilege "Logs (Contacts) - Show Outlook Export/Import Buttons" set to 'Y' would have access to this button.

This screen is very similar to the User Profile screen discussed earlier in the manual. Depending on your security, you may be able to add and edit project contacts via this screen. In Edit Mode the user may update the standard contact information as well as the Contact PM Role, Password and Security Roles. Field security can be added to the Contact Name (First and Last Name fields) in the Project Contact Directory. These fields should still be updateable when accessed via the Project Partner Directory.

User Profile – Tab

Additional Fields for Project Contact with Associated Employee Number

The screenshot shows the 'User Profile' tab in the 'Contact Maintenance' window. The form is for a user named Winston Douglas at CMIC Test Company. The fields 'Estimated Start Date' (050308), 'Estimated End Date' (291112), 'Actual Start Date' (230309), and 'Actual End Date' (190809) are highlighted with a pink box. The 'Employee Assigned' checkbox is checked. The 'Address' section shows an address code and a full address.

The following five fields only apply to a Project Contact that has an associated employee number (to which field security can be applied):

- Estimated Start Date
- Estimated End Date
- Actual Start Date
- Actual End Date
- Employee Assigned (Currently Assigned/Working Flag – Y/N)

Automatic Project Contact ID

The screenshot shows the 'User Profile' tab in the 'Contact Maintenance' window. The form is for a user named Gregory Abbott at Lincoln Developers. The 'Project Contact ID' field is highlighted with a pink box and contains the value 'SU/SPROJ01GA'. The 'Address' section shows a business address in Chicago.

When adding a Project Contact, the Project Contact ID will be automatically populated with the Project Code and Contact Code value.

Email Notifications – Tab

Email Preferences for RFI Answer

Object Description	To				Cc				All			
	New	Mod	Note	Att	New	Mod	Note	Att	New	Mod	Note	Att
Communication	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Daily Report		<input type="checkbox"/>										
Field Work Directives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issue	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Punch List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request For Information	<input type="checkbox"/>	<input type="checkbox"/> Ans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Ans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Ans	<input type="checkbox"/>	<input type="checkbox"/>
Submittal		<input type="checkbox"/>										
Transmittal	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>			

Example of additional checkbox against RFI in Project Contact Directory – E-mail Notifications tab

There is an additional checkbox against RFI in the Email Preferences of the Project Contact to indicate whether the contact should receive an email notification when an **RFI is answered** and the contact is the 'To' or 'CC' or 'All' contact on the RFI.

This checkbox, like the others, is only available when the PM Systems Options flag '**Use Note/Attachment flags in Email Notification Setup**' is checked (standard Treeview path: *xProjects > File Maintenance > Project System Options*).

Win/Lose Bid and Updating Project Contact Id for I/O Email

Company Code: Company SUS SB Urban Systems

User Extensions: +

Estimate Management: Hcssxml1, Invrgcodej, LAST_PATCH, Job_Ue, User Extension6, User Extension7, More Extensions ...

Related Screens: +

Related Screen 1, Related Screen 2, Related Screen 3, Related Screen 4, Related Screen 5, Related Screen 6, Related Screen 7, More Related ...

Bid	Lost/Won	Date	Post Date	Recalculate Revenue	Update Buyout Item Bid Job	Update Project Contact ID's
AUG12-01	Open Bid					
AUG14-01	Open Bid					
AUG16-01	Open Bid					
AUG19-05	Open Bid					
AUTOBID1	Open Bid					
AUTOBID2	Open Bid					
AUTOBID3	Open Bid					
BASE-001	Open Bid					
BIDDATE1	Open Bid					

☐ View Invalid Post Date Records By Job

Reason:

Competitor:

Accounts Process Notes

Checked: Project Contact ID will be updated to reflect the new Project Code for ALL existing contacts assigned to current Project

Record: 50/207 <OSC>

When the Job Costing Win/Lose Bid flag "Update Project Contact ID's" is checked, all Project Contact ID's on the associated project will be updated with the new job code (also project code) that is entered in the Actual Job field of the win/lose bid screen. This is done to ensure any I/O emails sent will reflect the new project code. The default setting of the flag is 'un-checked' to maintain previous functionality.

NOTE: If there are any unprocessed I/O emails sitting in the I/O inbox which are for the contacts where Project Contact ID has changed, they will result in an error. It is not feasible to make the programming modification address these outstanding I/O's with the old project contact ID.

Distribution Lists

Distribution List					
Code	OTHER	Description	Others		New Save Cancel
Code	Description	Action			
COMPANY	Other Company				X
INTERNAL	Internal Folks				X
OTHER	Others				X
SUBS	Subcontractors				X
Partner Code	Partner Name	Contact Code	Contact Name	Action	
LINCOLN	Lincoln Developers	GA	Gregory Abbott		X
PARKDALE	Parkdale Holdings	KW	Karen Williams		X
EAGLE	Eagle Investments Company	MD	Marion Davies		X
WASHINGTONT	Washington Consulting Services	BF	Berie Fullerton		X
WASHINGTONT	Washington Consulting Services	WSM	William Smart		X
WASHINGTONT	Washington Consulting Services	WS	Will Smith		X

The system allows for 'CC's to be added individually or by selecting a pre-defined distribution list. Distribution lists are unique to each project. The same contact can be in more than one distribution list.


Creating a New List

- Press the [**New**] button
- Enter a Distribution List Code and Name
- Press [**Save**]. The screen will return to a list of existing distribution lists. Select the one just created.
- The screen will return to the opening screen with the newly created distribution list highlighted. Press the Add hyperlink on the Change Contacts bar. This will open a window displaying all project partners – select the required partners for this distribution list.

Editing an Existing List

After the screen displays – click on the distribution list required. The system will highlight the distribution list.

- Add new contacts by using the Add hyperlink on the Change Contacts bar. This opens a window displaying all project partners – select the required partners for this distribution list.

Remove a contact from the list by clicking the  icon in the Action column next to the contact name to be deleted. When done press [**Save**].

Using a Distribution List

Anywhere in the system where a ‘CC’ can be entered, selecting a distribution list instead of individual contacts is allowed.

When entering CC’s, the LOV that is provided to select contacts, also allows for the selection of distribution lists.

Find:

☐ Project Contacts
☒ Distribution Lists
☐ All Contacts

Name	Code	Partner	<input type="checkbox"/>
Internal Folks			<input type="checkbox"/>
Amanda Matthews	SB	SMV10	<input type="checkbox"/>
Other Company			<input type="checkbox"/>
Amanda Matthews	SB	SMV10	<input type="checkbox"/>
Others			<input type="checkbox"/>
Marion Davies	MD	EAGLE	<input type="checkbox"/>
Will Smith	WS	WASHINGT	<input type="checkbox"/>
Beris Fullerton	BF	WASHINGT	<input type="checkbox"/>
Karen Williams	KW	PARKDALE	<input type="checkbox"/>
Gregory Abbott	GA	LINCOLN	<input type="checkbox"/>
William Smart	WSM	WASHINGT	<input type="checkbox"/>

To display distribution lists, change the default from 'Contacts' to 'Distribution Lists'. The system will redisplay the LOV showing all distribution lists and their associated contacts. You can now either select one or more specific contacts or select one or more complete distribution list buy just checking the select box next to the distribution list name.

Managing Meeting Minutes

Every project has many different types of meetings, such as Weekly Subcontractor Meetings, Safety Meetings, and Owner Meetings. CMiC xProjects makes the tracking of meeting information simple, by only showing meeting minutes that the current user attended. Each meeting can track attendees, courtesy copies, agenda items and their status and responsible parties.

A meeting can either have a status code of 'Pending' or 'Submitted'. Pending means that only the creator of the meeting will be able to view and edit the meeting. 'Submitted' locks the meeting - it can no longer be updated and all attendees can view the meeting minutes. Only the creator of the meeting can 'Submit' the meeting minutes.

To view a list of the meetings that you are party to, use the click on the 'Meeting Minutes' node in the Treeview. This will open a log of all meetings.

To view the details of any meeting just click on the meeting ID field.

Meeting ID/Item Id Masks default and Field Security

Users can define both the Meeting ID and Item ID masks via the Project Control Defaults tab as well as Project Maintenance Defaults tab. The values from the Project Control will be used as defaults for the Project level, which in turn will be used as defaults at the Meeting Track level.

Field security can also be defined on any of the fields: the Group Item, Sequence No., Restart Meeting, Meeting ID Mask, Item ID Mask and the Re-Open Meeting button which is enabled if the last meeting in a track is closed and the field security is set to “Unrestricted”.


Creating a New Meeting

When a new meeting is started, the first thing that has to be defined is the meeting track. Meeting tracks are used to differentiate types of meetings such as Safety, Progress and Owner meetings. All meetings within a track are sequentially numbered and each track has a frequency assigned to it. The frequency will be used to determine the Next Meeting Date.

Prior to recording specific details, a Meeting must be created.

Create a Meeting Track

Meeting tracks are used to differentiate types of meetings such as Safety, Progress and Owner meetings. All meetings within a track are sequentially numbered and each track has a frequency assigned to it.

- From the Treeview select Meeting Minutes
- Press the [**Add Meeting**] button in top right hand corner
- If this is a new meeting type, then use the  icon next to the Track field to open the Create Track
- Enter a Name and Description for the Track
- Select the meeting frequency from the drop down list
- Enter a Mask for the Meeting Number and the Meeting Items Numbers. For example SF*** would create Meeting Numbers of SF001, SF002 ...
- Indicate if you want to restart meeting items from the number 1 for each new meeting
- If required, you can add a Footnote that will be printed on all Meeting Documents for this particular track
- When done use the [**Save**] button to return to the Add Meeting screen. The [**Cancel**] button will close this window without saving the information entered, and the [**Save & New**] button allows the user to create multiple tracks at the same time. This feature is usually only used at the beginning of a project when you are just starting to set up the system.

Enter General Meeting Information

- Enter the Subject
- Enter the Date, Time and expected duration of the meeting
- Enter a reminder date for the meeting
- Enter the Meeting Location and Purpose

Entering Agenda Items

When starting a new meeting track, it is not necessary to enter agenda items, as they can be entered after the meeting, when the minutes are entered.

Agenda Items are used to track topics within a meeting. Each agenda item can have a responsible party assigned and a note saved against it.

Example of agenda item with Notes, as indicated by the checkmark

A checkmark indicates if Meeting Minutes Agenda Item has notes, as shown in the screenshot above.

Agenda items when created for the first time will always have the status 'New'. Once an agenda item is moved forward to a second meeting, the status becomes open.



To add an agenda item, use the **+** icon that is available in the Action Column of the Agenda Tab.

This will open up an agenda item record. Only the Name field is a mandatory field, as indicated by the blue triangle. You may fill in the Agenda ID if you want, or if the Agenda ID is left blank, the system will automatically generate the number according to the mask applied on the track.

On all new agenda items entered, the status will default to 'New'. As this item is moved to the next meeting, the status will change to 'Open'. The user can then edit the status to be On Hold, Closed or Deferred. Closed items are not carried forward to the next meeting agenda.

NOTE: Please see the Meeting Minutes Agenda Item Statuses section in File Maintenance for further information on agenda item statuses.

Any agenda item can be a Group Item. A group will display in bold type and acts as a Title on the Agenda. A group item has all the same properties as a normal item, but it displays its name and number in bold to facilitate reading the agenda.

When done adding one agenda item you have a choice of using the  icon again to add another agenda item or to use the [Save] button. It is always possible to add more agenda items. While in edit and adding a new row, the user can also **copy previous record** using the  icon.


When [Save Draft] is used, the record is saved but remains in edit mode, compared with [Save] in which the record is saved but then the screen changes to view mode.

In view mode, the user is able to link an agenda item to an Issue by using the [Link to Issue](#) link which is located to the right of the agenda item (next to the change item links).

Add Attendees

The first time you create a meeting, you should add all parties you expect to be attending and any courtesy copied parties as well. Then each time you prepare the next meeting all this information will roll forward automatically.

Open the Attendees tab, if the screen is not open for entering data; use the [Edit] button at the top of the screen.

- Using the  icon
- Enter the Contact Code/Name/Company
- Mark as Courtesy Copy only if required
- Enter any unique Notes regarding the attendee if required

NOTE: Only attendees entered against the meeting will be able to view the meeting minutes.

Guests

Guests may be added by utilizing the 'Guest' checkbox. If the user checks this box, the contact LOV will be replaced by a simple text field where the name of the guest can be typed (if the previous value in the Name field was not saved, the user can un-check the Guest flag and the original entry will resurface). The 'cc only' and 'Absent' boxes are disabled when the Guest checkbox is checked.

Entering Meeting Minutes

The only person who can add meeting minutes is the person who created the meeting. When the meeting has a status of 'Pending', the user will be able to add/edit or remove details from the meeting minutes.

From the Treeview Log for Meeting Minutes, click on the appropriate Meeting Number. This will open the meeting in view mode. At the top of the screen there will be an **[Edit]** button. This button changes the screen from View to Edit mode. You must be in Edit mode to be able to enter the meeting minutes.

Enter Meeting Notes

Open the Notes Tab. If there are existing notes, a check mark will appear on the tab.

Notes that have been entered previously will be available for update, submittal or deletion.

Press the **[Add Note]** button at the top of the screen to enter a new note.

Once the minutes are complete you should **[Submit]** the minutes. This will allow all the attendees to view the meeting minutes. At any point you can create the next meeting minutes by using the **[Create Next Meeting]** button.

Updating Existing Items

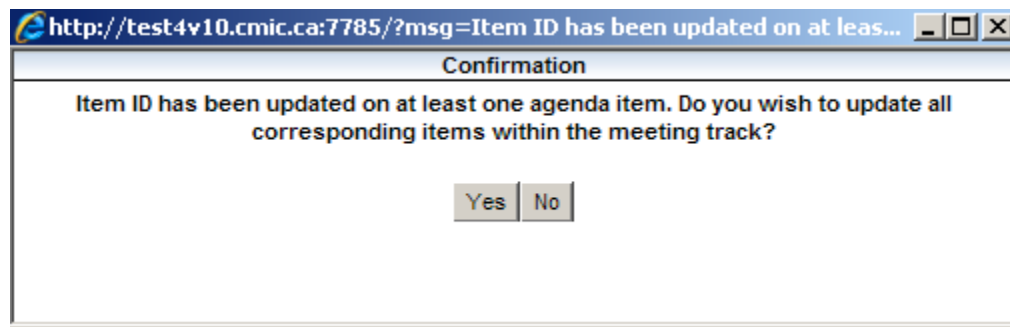
As meetings go forward, agenda items become complete and need to be removed from future meetings. To do this, change the status to 'Closed'. When the next meeting is created, this agenda item will not be carried forwards.

If there are also items that need to be put off until another meeting, this can be done by setting the status to 'Deferred'. These items will be brought forward to the next meeting but will have a status of Deferred.

Some of the items on the agenda may have due dates and persons responsible. These fields can also be updated at this time.

Each agenda item has a note field. This field can be updated/added as required. If adding more information to a note, you may want to start the note with the Date, so that it is easy to track chronologically what has happened to the agenda item.

When one or more Agenda Item IDs are changed, a confirmation message is displayed:




When 'Yes' is chosen, the previous agenda item IDs are not displayed in the Agenda Item Report, but if 'No' is selected, the previous agenda item IDs are displayed in the report (after Create Next Meeting, and then modifying the agenda ID), thus maintaining the previous functionality as well.


This confirmation message is only applicable to the JSP version.

Adding New Agenda Items

As with most meetings the agenda is usually followed however there are always new topics introduced for discussion that were not already on the agenda. Again, these items should be recorded.

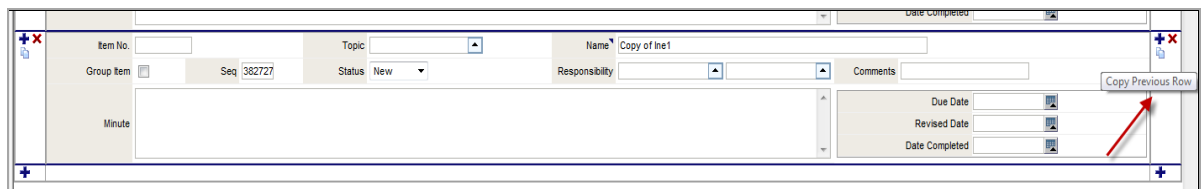
The system allows you to insert a record above any existing record, or to add the new agenda item at the end of the list.

To insert a record above use the  icon in the action column of the agenda item you want to create a record above.


To add a record to the end of the agenda list move to the very bottom of the list and use the  icon that is not associated with a record.

When an agenda Item note is added (using the sundial icon), then Agenda Item and Name are shown as the source in the popup of the Agenda Item note.

Copying Agenda Items

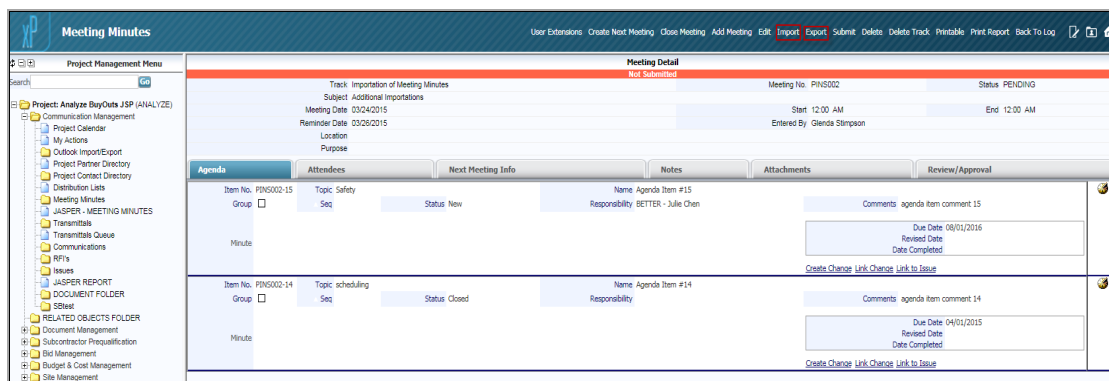


The screenshot shows a form for creating or editing an agenda item. At the bottom right, there is a button labeled 'Copy Previous Row' with a red arrow pointing to it. The form includes fields for Item No., Group Item, Seq, Status, Topic, Name, Responsibility, Comments, Due Date, Revised Date, and Date Completed.

Agenda Items are copied by first clicking the blue '+' to insert a record. The icon  is now displayed. If you hover the cursor on this icon you will see its hint line: Copy Previous Row.

The contents of the **previous** Agenda Item are copied into the current record when you click on the icon.

Importing and Exporting Agenda Items



The screenshot shows the 'Meeting Minutes' screen. At the top, there are buttons for 'Import' and 'Export'. The screen displays a table of agenda items with columns for Item No., Group, Seq, Status, Topic, Name, Responsibility, Comments, Due Date, Revised Date, and Date Completed. The table shows two items: 'Safety' and 'Scheduling'.

The **[Import]** and **[Export]** buttons on the Meeting Minutes screen allow the importing and exporting of agenda items into the meeting currently being viewed.

Field security can be added to the **[Import]** button (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Meeting Minutes*). The setting is 'Unrestricted' or 'Hidden'.

Update Back *ALL*

*Note: Not all programs have fields available with field privileges

Programs Meeting Minutes

Column/Field Security

Item Name	Security Level
Meeting Date	Read-Only
Group Item	Unrestricted
Seq	Unrestricted
Restart Meeting Items Numbering Within New Meeting	Unrestricted
Meeting ID Mask	Unrestricted
Item ID Mask	Unrestricted
Reopen Meeting Button	Unrestricted
Item No.	Unrestricted
Close Meeting Button	Unrestricted
Printable Button	Unrestricted
Delete Track Button	Unrestricted
Import Agenda Items Button	Unrestricted
	Hidden

Importing Agenda Items

Pre-requisite for Importing: Meeting ID and Agenda Item IDs must already be defined.

The import control file layout is:

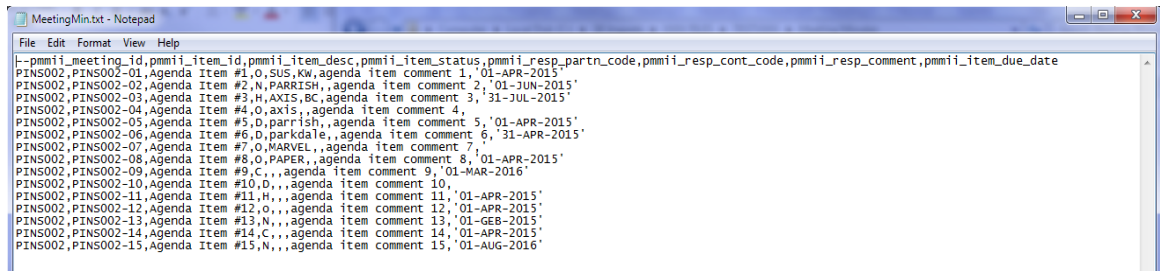
File name = pmmeetingitem.ctl

```
pmmeetingitem.ctl - Notepad
File Edit Format View Help
LOAD DATA
APPEND
INTO TABLE DA.PMMEETINGITEMIMPORT
FIELDS TERMINATED BY "," OPTIONALLY ENCLOSED BY "'"
(
  pmmii_meeting_id      ,
  pmmii_item_id         ,
  pmmii_item_desc       ,
  pmmii_item_status     ,
  pmmii_resp_partn_code ,
  pmmii_resp_cont_code  ,
  pmmii_resp_comment    ,
  pmmii_item_due_date   DATE 'DD-MON-RRRR'
)
```

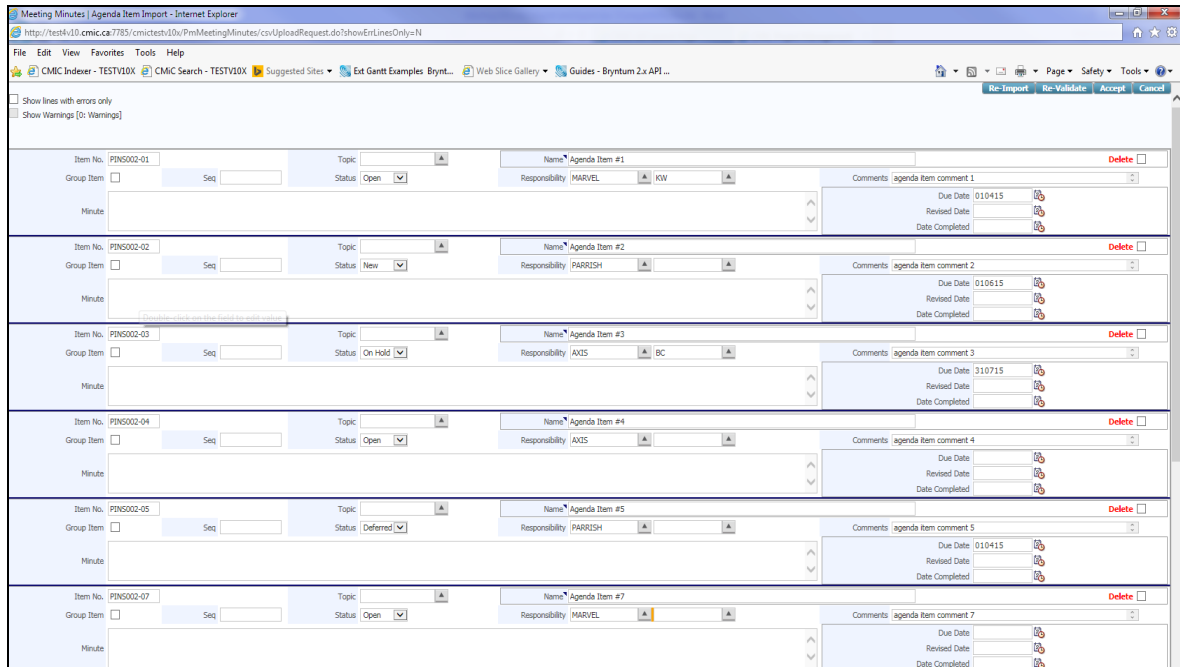
Field Name	Field Type	
PMMII_MEETING_ID	VARCHAR2(10)	(Meeting ID)
PMMII_ITEM_ID	VARCHAR2(10)	(Agenda Item ID)
PMMII_ITEM_DESC	VARCHAR2(4000)	(Agenda Item Description)
PMMII_ITEM_STATUS	VARCHAR2(1)	(Agenda Item Status)
PMMII_RESP_PARTN_CODE	VARCHAR2(8)	(Responsible Partner/Company Code)
PMMII_RESP_CONT_CODE	VARCHAR2(8)	(Responsible Contact)
PMMII_RESP_COMMENT	VARCHAR2(1000)	(Comment)
PMMII_ITEM_DUE_DATE	DATE	(Agenda Item Due Date)

NOTE: Topic and Minutes (notes) have been added to the Meeting Minutes Import control file (pmmeetingitem.ctl): PMMII_TOPIC and PMMII_ITEM_NOTE.

Sample file for import:

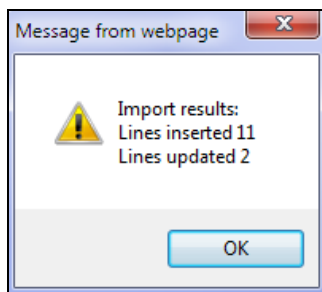


After clicking the **[Import]** button and selecting the file to be imported, the user clicks the **[Upload]** button to pull the data into the Import Validation screen:



Any records marked for deletion will be collapsed and later removed after revalidation. Records selected for deletion can be unchecked if the user decides not to remove them.

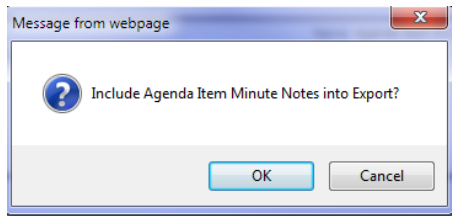
Additional changes can be made here and then revalidated before finally 'Accepting' the import into the Meeting Minutes screen. A notification is sent giving the number of records inserted and updated:



Exporting the Agenda Items

The **[Export]** button is used to export the agenda items to a spreadsheet.

When the user clicks the **[Export]** button, a confirmation message is displayed asking if the Notes are to be included:



If 'Cancel' is selected, the export file will be created without the agenda item notes.

If 'OK' is selected, the export file will include the agenda item notes (under the 'Minute' column) each separated by

:

For example, exporting:

And selecting 'OK' will give:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Item_No	Topic	Name	Group	Seq	Status	Responsibility_Partr	Partner_Type_Code	Responsibility_Cont	Comments	Minute	Due_Date	Revised_Date
2	PIN5002-14	scheduling	Agenda Item #14	N		C				agenda item comment 14	24-MAR-15 (KW) more agenda item notes added 24-MAR-15 (KW) note added to demonstrate the use in the	4/1/2015	
3	PIN5002-15	Safety	Agenda Item #15	N		N	BETTER	P	JC	agenda item comment 15	export	8/1/2016	

Selecting 'Cancel' will give:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Item_No	Topic	Name	Group	Seq	Status	Responsibility_Partr	Partner_Type_Code	Responsibility_Cont	Comments	Due_Date	Revised_Date	Date_Completed	
2	PIN5002-14	scheduling	Agenda Item #14	N		C				agenda item comment 14	4/1/2015			
3	PIN5002-15	Safety	Agenda Item #15	N		N	BETTER	P	JC	agenda item comment 15	8/1/2016			

'Minute' column is missing

Agenda Item Topics

Agenda Item topics can be maintained at both the global level as well as at a project-specific level.

The Meeting Topic Maintenance screen, located in the File Maintenance section of the JSP Treeview, allows users to add, edit and delete meeting (agenda item) topics that can be used by any project.

To maintain project-specific meeting topics, there is a PM Role privilege 'Edit Meeting Topic' that will need to be assigned to the user in order to be able to edit and remove project-specific meeting topics.

The Topic LOV will display both global and project-specific topics. Any topic typed in by the user will automatically be stored, but only the user with the 'Edit' privilege will be able to edit or delete them.

Deleting an Agenda item

Sometimes, you may want to remove an agenda item instead of closing it. This can be done by using the 'Delete' icon in the action column of the record to be deleted. The system will confirm the delete with the user before continuing.

Sorting Agenda Items

You can sort Agenda Items by clicking on any of the agenda item fields that has blue text. The system will remember your preference and will keep the sort until you change it by clicking on another field.

Updating Next Meeting Info

As with all meetings, although they are scheduled to be every Friday at 10: am sometimes they need to be re-scheduled. This can be done by updating the data in the Next Meeting info tab. Here you can change the meeting date, time, and location as well as change the subject and add a comment if required.

The data entered here will be used to 'build' the next meeting minutes, and to remind the attendees about the next meeting.

Updating Attendees

Each meeting can track attendance plus you can mark persons absent and enter a comment if required. It is also possible to add new attendees by using the icon.

Meeting Minutes – Printing Form Letters

In Meeting Minutes, changes have been made to the Print popup to allow printing of Form Letters that are defined on Meeting Minutes. The dropdown list of reports will now contain the following items:

- 1) Standard Reports (Agenda Items, Meeting Minutes): the functionality behind these is preserved

2) Additional item "Other Reports and Form Letters", which will navigate to the standard report popup, used by all other programs where "Print" button is available

When this option is selected, the next popup shows the different report types: standard, custom reports, form letter based.

Working with Transmittals

Whenever you send a project related item such as drawings, material samples or submittals you want to be able to record that the item(s) have been sent, when they were sent and to whom the item was sent. Transmittals provide the mechanism to accomplish both of these tasks.

Within the xProjects environment a transmittal record is automatically made available to the 'To Party' plus everyone that is CC'd on the transmittal can view the details. When the 'To Party' opens the transmittal it is marked as received. From a Project Management point of view, transmittals provide a formal source of proof that items were sent and the reason for their transmittal.

As with most xProjects screens the creator must submit the transmittal before anyone else can see it and once submitted the transmittal cannot be changed. Only the parties involved in the To or CC contacts will be able to see the transmittal once submitted, and only when the To Party opens the transmittal will it be marked as 'Received'.

Entering a Transmittal

Transmittals can be entered by any Project Party, and viewed by the To and Cc parties. Transmittals are a record of the sending of documents or samples.

To create a transmittal, open the Communications Node of the xProjects Manager and click on the Transmittals node. This will automatically open a list of transmittals that you are somehow involved with as either the Creator, Receiver or a CC'd participant.

When the log screen is displayed there is a button at the top of the screen [**Create Transmittal**]. This function will open the Enter Transmittal screen. This is where new transmittals are created.

Transmittal Details – Tab

The 'From' field will automatically default to yourself and the 'Date' field to today's date, but you can change the date if required. Fields with blue triangles next to them are mandatory fields.

- Select the person to whom the transmittal will be sent or check the free Form field and enter a free form name.
- Enter the Reason for the transmittal. This would be the subject field in an e-mail.
- The 'Contents' section will only be displayed when the PM Control Flag (Defaults tab) 'Show Transmittal Contents' is checked.
- The Via field can be any value, for example FedEx and Tracking Number. If there is no third party shipping company involved, we suggest the Via field be set to 'COLL' for CMiC xProjects. The LOV lists the previously entered values and users may select any one from the list. Also, users can maintain the values with edit/delete functions.
- Check the fields appropriate for the transmittal and if there are other reasons, check the 'Other' field and enter text to describe the reason.
- The Remarks field is used for a general purpose comment about the transmittal.

NOTE: The check-box fields can have their boiler plate values changed (i.e. the labels for the check-boxes are customizable). The changes are done in Prompt Maintenance of PM JSP.

Transmittal Items – Section

Once the general information is complete, you need to list the items included on this transmittal. Use the **+** in the Transmittal Item section of the screen to open a new row.

- Enter the quantity
- To transmit a single document, document package or submittal package, use the List of Values (LOV) in the item field to select the correct type. Then select the actual object from the Reference field LOV. This will then attach a link to the object and the transmittal.
- To transmit something like a sample – just type in the object on the Item field. Then leave the Reference field blank and enter a description.
- The Date and Status fields can be set as required. Field security exists for Submittal Status (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Transmittal*).

The Status field in the transmittal header can be used to set the default Status for PM objects being added to Detail lines of the transmittal if the status of the PM objects being added is Null. If the PM object being added already has a status set, then this status will be populated in the detail line.

The Status field is only available in Edit mode and serves no purpose in View mode.

The Status field defaults to 'By Detail Lines' when the user enters edit mode. This allows new PM objects to be entered with their own, unaltered status by default.

The screenshot shows the 'Transmittal Details' form in xProjects v10x. The form is divided into three main sections: 'Transmittal Details', 'Address', and 'History'. The 'Transmittal Details' section includes fields for 'Transmittal No.' (TRN-0013), 'From' (Misty Retchford), 'To' (Mike Fernandes), 'Re' (Orangeville Grocery Store - RFI), 'Via', 'Content', 'Actions', 'Status' (set to 'By Detail Lines'), 'Remarks', 'Acknowledgement Date' (031518), 'Cost Centre - Row', and 'Number Of Rooms'. The 'Address' section includes 'Submitted', 'Date - Details' (031518), 'Received', 'Due Date', and various checkboxes for content types (Shop Drawing, Change Order, Specifications, Letter, Plans, Other) and actions (For Approval, For Your Use, As Requested, For Review and Comment, Other). The 'History' section includes 'Submitted', 'Date - Details' (031518), 'Received', 'Due Date', and checkboxes for status (Approved As Submitted, Approved As Noted, Returned After Loan, Returned for Corrections, Resubmit, Submit, Returned). The 'Transmittal Items' table at the bottom has columns for Action, #, Qty, FF, Item, Date, Reference, Rev., Description, Comment, Status, and Action. The Status field in the table is highlighted with a red box and set to 'Open'.

NOTE: The default value in the Status drop-down at the header level 'By Detail Lines' is not an actual value, just an indication that the Transmittal Items' details Status can be set with a default value (e.g. Under Review, Approved, Open, Closed or Rejected) if the PM object being added has a status of Null.

When complete use the [Save] button. This will redisplay the complete transmittal and allow you to review it before submitting it.

Address – Tab

The screenshot shows the 'Transmittal Entry Screen' with the 'Address' tab selected. The 'Transmittal Details' section contains the following information:

- Transmittal No.:** A1MARBLE-0000006
- From:** M'ar,ble Mer'cha,nt
- To:** Meghan O'brien
- CC:** Renter Man, Rob Roj
- Re:** Address Tab Addition
- Via:** Via Fedex, ☒ Attached, ☒ Separate Cover
- Content:** ☒ Shop Drawing, ☒ Change Order, ☒ Specifications, ☒ Letter, ☒ Plans, ☒ Other, ☒ Prints, ☒ Samples
- Actions:** ☒ Send, ☐ Forward, ☐ Return, ☒ For Approval, ☐ For Your Use, ☐ As Requested, ☐ For Review and Comment, ☐ Other, ☐ Approved As Submitted, ☐ Approved As Noted, ☐ Returned After Loan, ☐ Returned for Corrections, ☐ Resubmit, ☐ Submit, ☐ Returned
- Remarks:** Address Tab Test

The 'Transmittal Items' table shows the following data:

#	Qty	Item	Date	Reference	Rev.	Description	Comment	Status
1	1	FREE FORM	042811				Comments	Open

The 'Address' tab has been added to the Transmittal Entry Screen. This addition provides the same functionality as the Enterprise Transmittal Entry Form.

The screenshot shows the 'Address' tab with two sections: 'To' and 'From' addresses.

To Address:

- Company:** Rental Company
- Attn:** Meghan O'brien
- Street:** 100, renter Street
- Suite:** 500
- City:** Chicago
- Zip Code:** 45645
- State/Prov.:** Illinois
- Country:** US

From Address:

- Company:** A1ARBL1
- Signed:** M'ar,ble Mer'cha,nt
- Street:** 859, Stoney Creek
- Suite:** 300
- City:** Chicago
- Zip Code:** 85964
- State/Prov.:** Illinois
- Country:** USA

The address tab has two sections: one each for 'To' and 'From' addresses. The default addresses of the project partners are populated and displayed. If required, users may override the address details by selecting an 'Address Code' from the LOV which may be invoked by clicking on the LOV icon on the 'Street' field.

The screenshot shows the 'PM Master' screen with the 'Column/Field Security' table. The table lists the following fields and their security levels:

Item Name	Security Level
Free Form To Flag	Unrestricted
Forward	Unrestricted
Return	Unrestricted
Address Tab	Unrestricted

Field Security may be applied to the 'Address' tab. The default value is 'Unrestricted'. Users may prefer to assign 'Hidden' value to specific or 'ALL' roles to hide the tab.

Editing a Saved Transmittal

To edit a transmittal that has not yet been submitted, just use the xProjects Manager Treeview to find the transmittal in question, once the details are shown on the page, use the [**Edit**] button to open up the fields for data entry. The only field that cannot be updated during editing is the Transmittal number.

Deleting a Transmittal

An un-submitted (pending) transmittal can be deleted by the creator but only a user with the delete privilege and access to the project can delete a submitted transmittal. Use the xProjects Manager Treeview to find the record in question, then, once the details are shown on the page use the [**Remove**] button to remove the record from the system.

Copying a Saved Transmittal

A transmittal can be copied to one or more contacts denoted as 'TO' contacts, instead of allowing only copying to one contact at a time. A multi-select LOV is presented and once selection is finished a transmittal is created for each contact that is selected.

Uploading Attachments in Transmittals

In view mode, [**UPLOAD**] and [**UPLOAD MULTIPLE**] buttons are available so that attachments can be uploaded as Transmittal detail items. These attachments are created for any of the defined Document Types selected.

Printing a Transmittal Record

Any transmittal can be printed. Use the transmittal log to open the required transmittal, and then at the top of the screen use the [**Print Report**] button.

There are two options to choose from when printing the Transmittal report (PM1100.REP): 'Use Corporate Address' or 'Use Project Address'.

- a. When '**Use Corporation Address**' is selected, the report pulls the Address at the Corporate Level (Business Unit/Company).
- b. When '**Use Project Address**' is selected, the report pulls the Address at the Project Level – the Project Address located on the General tab of the Project Maintenance record.

In both cases the Logo is the logo of the company to which the project belongs.

The 'blank' option represents the standard print was that obtained prior to these changes.

Select the required parameters, and then press the [**Print**] button.

For more information on printing refer to the 'Printing Reports' section of this guide.

Transmittals Queue

Queued transmittals created from submittals or document history can be viewed in the Transmittals Queue. The transmittals are actually created by first selecting the record(s) and then clicking the [**Create Transmittal**]

button. You can **Combine Transmittals to the Same Contact** and or **Ignore Multiple Senders When Grouping**.

	From Partner	Contact	To Partner	Contact	Type	Item
<input type="checkbox"/>	A1 Block and Paving Company	Blocker Man	CMic America Test Company	Ravichandran Venkatachalam	Submittal	RVSUB00
<input type="checkbox"/>	A1DOORS NAME	Door Man	RV EXTERNAL COLLABORATOR	EXTERNAL Contact	Submittal	RVSUB00
<input type="checkbox"/>	AECON	DUNCAN AECON	CMic America Test Company	Ravichandran Venkatachalam	Submittal	RVSUB00

Combine Transmittal to Same Contact? ☒ Ignore Multiple Senders when Grouping? ☐

The [Delete] button provides users with the ability, from within the transmittal queue, to delete any unnecessary transmittals that may have been inadvertently created.

Log for Transmittals Created from Submittals

Project Management

Project Management Menu

Search [] Go

- Project: SM project for SMJOB01 (SMV)
 - Communication Management
 - Document Management
 - Subcontractor Prequalification
 - Bid Management
 - Budget & Cost Management
 - Site Management
 - Reports
 - User-Defined Logs
 - File Maintenance
 - Local Tables
 - Menu Maintenance
 - Enterprise PM
 - Project System Options
 - Project Control
 - Project Maintenance
 - Activities
 - User-Defined Log Types
 - User-Defined Logs
 - Log Builder**
 - Default Filters
 - User-Defined Fields
 - Report Assignment
 - Prompt Maintenance
 - User Defaults Maintenance
 - Document Merge
 - Real-Time Integration
 - Security

System Log

Description

- Owner Change Orders
- Owner Change Transmittals
- Partners
- Positions
- Potential Change Items
- Procurement Log
- Project Contact Directory
- Project Maintenance
- Projects
- Punch List
- Request For Payment
- Request for Information
- Requisitions
- Retrain Date Log
- Review Addendum
- Review Self-Service Enrollment
- SSRAD Screens
- Salary Planning
- Salary Survey
- Subcontract Change Orders
- Subcontractor Schedule of Values
- Subcontracts
- Submittal Packages
- Submittal Responsibility Log
- Submittals
- System Calendar
- System Log
- System Log Filters
- Training Classes
- Training Courses
- Transmittals
- Transmittals From Submittal**

Standard Treeview path: xProjects > File Maintenance > Log Builder – Transmittals From Submittal

Log Builder provides a log definition for Transmittals created from Submittals. User-defined logs can be created based on this log definition.

Communication Logs

The Communication log can be used in two ways, it can be used as a communication tool, or it can be used to record the details of other types of communication such as telephone calls, e-mails, faxes... Or it can be a mixture of both.

The Communication Log is designed to be used by all parties involved in the project. The general rules of the screen are:

- The From contact is always the person who enters the data
- The TO contact can be any other project party.
- Until the Communication is submitted the creator can change any information regarding the communication and the To and CC'd contacts will not be able to see the record
- Once a Communication Record is submitted the creator cannot change it unless he has the privilege to do so.

Creating a Communication Record

From the xProjects Manager Treeview, select the Communication Log node. This will open your Log of communication records. Press the [**Create Communication**] button to open the Entry Screen.

OR

While viewing the details of an existing Communication Record use the [**Add Communication**] button to open up the Entry screen.

The Communication Record Entry screen is made of two tabs, the Communication Record and Attachments. The only required data are the To, Subject and Message fields and they are marked as mandatory.

- The From field will always default to yourself

- Select the person to whom the communication is directed. The List of Values will display all contacts for the project.
- CCs are not required, but if needed press the **[CC]** button to open up the CC entry field. You can enter as many CCs as required, the only stipulation is that they must all be contacts for the project. For each new CC to be added use the **[+]** icon to open a new field.
- Select the Communication Type. The display order is determined by the sort order number in the Communication Type definition screen (Forms version). The Communication screen uses the type with the lowest sort order as the default value in the Type drop-down box.
- Enter the Subject of the Communication – There is a maximum of 200 characters.
- The Message is required. This field is an open text field.

Once the entry is complete you have two options: to save the communication, or to save and submit the communication. By saving only, you are telling the system that you have entered the record but are not yet finished editing it and do not want the To or CC'd parties to see the communication record yet. By Submitting it, you as the creator can no longer change it, plus the To and CC'd parties will be able to view and respond to it. By Submitting the communication record you are not restricting the ability to add notes or attachments.

Editing a Saved Communication Record

To edit a communication record that has not yet been submitted, just use the xProjects Manager Treeview to find the communication in question, and then once the details are shown on the page, use the **[Edit Communication]** button to open up the fields for data entry.

Deleting a Communication Record

The only Communication Record that can be deleted is one that has not yet been submitted. Use the xProjects Manager Treeview to find the record in question, then once the details are shown, use the **[Delete Communication]** button to remove the record from the system.

Responding to a Communication

Anyone who was associated with the Communication can respond to the communication, this means the creator, the To and the CC'd parties. There can be multiple responses to a communication, so in effect the program acts as a history of the communication. Any Communication record that requires acknowledgement or a response will display in the 'Received' node of the Communication Log section of the xProjects Manager Tree. Using the log or the xProjects Manager Tree, open the record in question. The system will automatically mark the communication as 'Received' once the 'To' party opens the record. Responses are not necessarily required.

The communication will display in read mode. To enter a response, use the **[Response]** button to open up the response fields.

Linking/Creating a PCI from a Communication Record

The linking to or creating of a PCI from a communication record is limited to 'Internal' users only. Once a communication record has been entered **[Submitted]** there are three hyperlinks that will display on the page next to the Change# field: 'Create Change', 'Link Change' and 'Add to Change'.

The 'Create Change' link will open up the PCI screen where you can enter a new PCI. The default PCI type (Internal, External or Transfer) is determined from the PM Enterprise setting on the company control file.

Enter the PCI as per normal, then when you return to the communication screen the PCI number will display as a hyperlink instead of 'Create Change' and the 'Link Change' hyperlink will have changed to 'Remove Link'.

The 'Link Change' hyperlink displays a list of all PCIs. Select the required PCI to link to the communication record.

To remove the link between a communication record and a PCI use the 'Remove Link' hyperlink.

The 'Add to Change' link displays an LOV with all PCIs for the current project and allows the user to associate the Communication record with the selected PCI. Multiple PCIs can be associated to the single Communication record, but this has to be done one at a time.

Working with RFIs

The Request for Information (RFI) screen is designed to be used by all parties involved in the project. The general rules of the screen are:

- The From contact is always the person who entered the RFI.
- The TO contact can be any other project party.
- Until the RFI is submitted, the creator can change the RFI, the To and CC'd contacts will not be able to see the record.
- The To Contact on a submitted RFI is the only person who can reply, but all parties included on the RFI can add notes and attachments.

RFI PM Role Privilege

Restricted View All for RFIs

The privilege: **"Restricted View All for RFIs"** will allow collaborators to view RFIs that are sent to their company or from their company, related to the current project, without the need for setting the ViewAll privilege for RFIs, or to include them as CCs.

In other words, if a role has this flag, then the RFI log will only show RFIs where the From Company equals the Project Company plus any RFIs where the From Company is the User's Company.

If the flag is not active, then the standard RFI rules that already exist will apply. The privilege also ensures that the user can access any 'Forwarded as' RFIs for his/her company or the project company.

Send Partner RFI & Receive Partner RFI

The TO List of Values is driven by security settings for both the current user creating/updating the RFI and the intended TO (and CCs) recipient(s).

The Current user must have the PM Role privilege “**Send Partner RFI**” turned on to see a full list of partners in the TO LOV. In addition, the TO recipient must have the privilege “**Receive Partner RFI**” turned on, otherwise they will not be shown in the LOV.

This security setting applies to the RFI actions Create, Redirect and Forward.

Creating an RFI

From the xProjects Treeview, select the RFI node. This opens the log screen of RFIs. Press the **[Add RFI]** button to open the RFI Entry Screen (shown above).

OR

While viewing the details of an existing RFI, use the **[Add RFI]** button to open up the RFI Entry screen.

The RFI Entry screen is made of four tabs: **RFI Detail**, **Attachments**, **Related Objects** and **History**. The **History** tab becomes visible after the RFI is created and saved. The only required data is on the **RFI Detail** tab. All fields with a blue triangle before the field are mandatory.

- The **From** field will always default to yourself.
- Select the person to whom this RFI is directed. The List of Values will display all contacts for the project.
- CCs are not required, but if needed press the **[CC]** button to open up the CC entry field. You can enter as many CCs as required, the only stipulation is that they must all be contacts for the project. For each new CC to be added, use the **[+]** icon to open a new field.

NOTE: The ‘Add CC’ (+) button is available to external collaborators with PM Roles that do not have the ‘Update All’ privilege.

- Enter the Subject of the RFI – There is a maximum of 200 characters.
- The **Date Created** field defaults to the system date, but may be changed if required.
- **Source** is a user-defined field. It is usually used to group related RFIs together under one easy to query field. There is a list of values which will display any sources already used for this project from which you can select a value or you can type in a new source if applicable. Going forward the List of Values will then contain the new source code.
- For the **Date Required** field, enter the date by when an answer is required.
- Enter the **Question, Suggestion, Cost Impact** and **Schedule Impact** fields as required.
- Hyperlinks can be included in Notes and Answer fields. The link is accessible in view mode.
- Classifiers can be added to RFIs. If classifiers are used, field security can be placed on them. The possible security settings are 'Unrestricted', 'Read-Only' or 'Hidden'.

Once the entry is complete, you can click the [**Check Spelling**] button to check your spelling before Saving or Submitting the RFI. By saving only, you are telling the system that you have entered the RFI but are not yet finished editing it and do not want the To or CC'd parties to see the RFI yet. By Submitting the RFI, the To and CC'd parties will be able to view the RFI and the To party can answer it as required, in addition, you are not restricting the ability to add notes or attachments.

Editing a Saved RFI

To edit an RFI that has not yet been submitted, just use the xProjects Manager Treeview to find the RFI in question, and then once the details are shown on the page, use the [**Edit RFI**] button to open up the fields for data entry. The only field that cannot be updated during an edit is the RFI ID.

Copying an RFI

Use the [**Copy**] button to copy the current RFI. The Copy function will not copy any of the Answer fields.

Field security can be applied to the [**COPY**] button in RFI Entry. The default value is set to 'Hidden' on the 'ALL' role. This will need to be reset on any roles that previously had the ability to see the [**Copy**] button.

Deleting an RFI

The only RFI that can be deleted is an RFI that has not yet been submitted. Use the xProjects Manager Treeview to find the RFI in question, then once the details are shown, use the [**Delete RFI**] button to remove the RFI from the system.

Answering an RFI

Any RFIs that require answering will display in the 'Received' node of the RFI Section of the xProjects Manager Tree. Using the RFI log, or the xProjects Manager Tree, open the RFI to be answered.

The RFI will display in read mode. To enter the answer, use the [**Answer**] button to open up the Answer fields.

The only fields available to update when answering an RFI are the fields that show in Entry Mode.

- The Answered By and Date Answered fields will default to yourself and the system date

Enter the Answer text and any related cost/schedule impacts. The [**Accept Suggestion**] is an easy way to accept a suggestion which was made when the RFI was created without re-typing the text. The button will copy the suggestion into the answer.

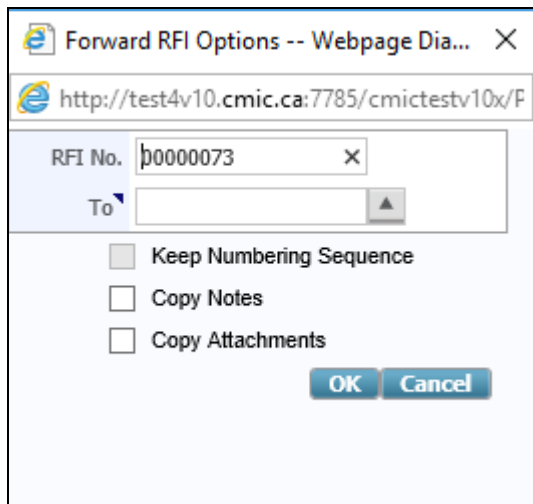
NOTE: It is possible to have a confirmation message displayed prior to accepting a suggestion, so that greater care is taken with the answer that is selected. The confirmation is set up in the PM Control Defaults tab as a field labeled: "**Accept RFI Suggestion Confirmation Message**". If the field is not empty, then the message will pop up when the [**Accept Suggestion**] button in any RFI for that company is pressed. In this case, the user has the option of proceeding with the suggestion as the answer.

- Update the Status of the RFI as required – i.e. Accepted, Rejected, Returned...

Once complete use the [**Submit**] button to save the changes.

Forwarding an RFI

The [**Forward**] button becomes available to any user who has the Project Role privilege to “Forward RFIs”.

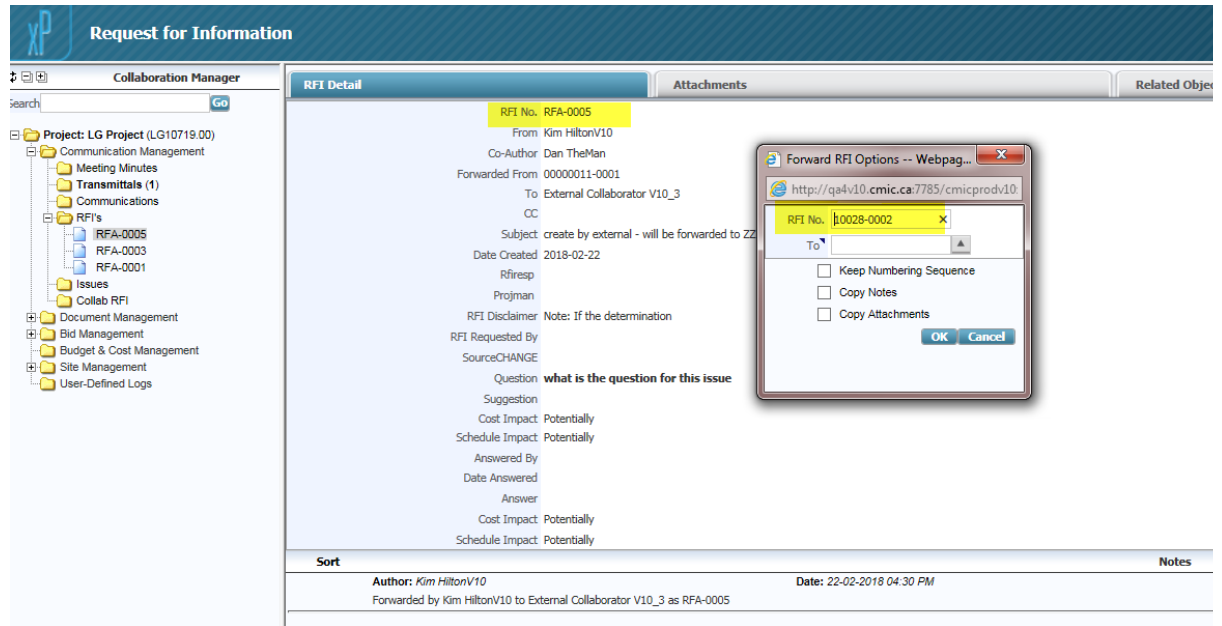


In the resulting popup screen, the **RFI No.** field will populate with the RFI number and it may be read-only or editable, depending on the Project Control Mask setup.

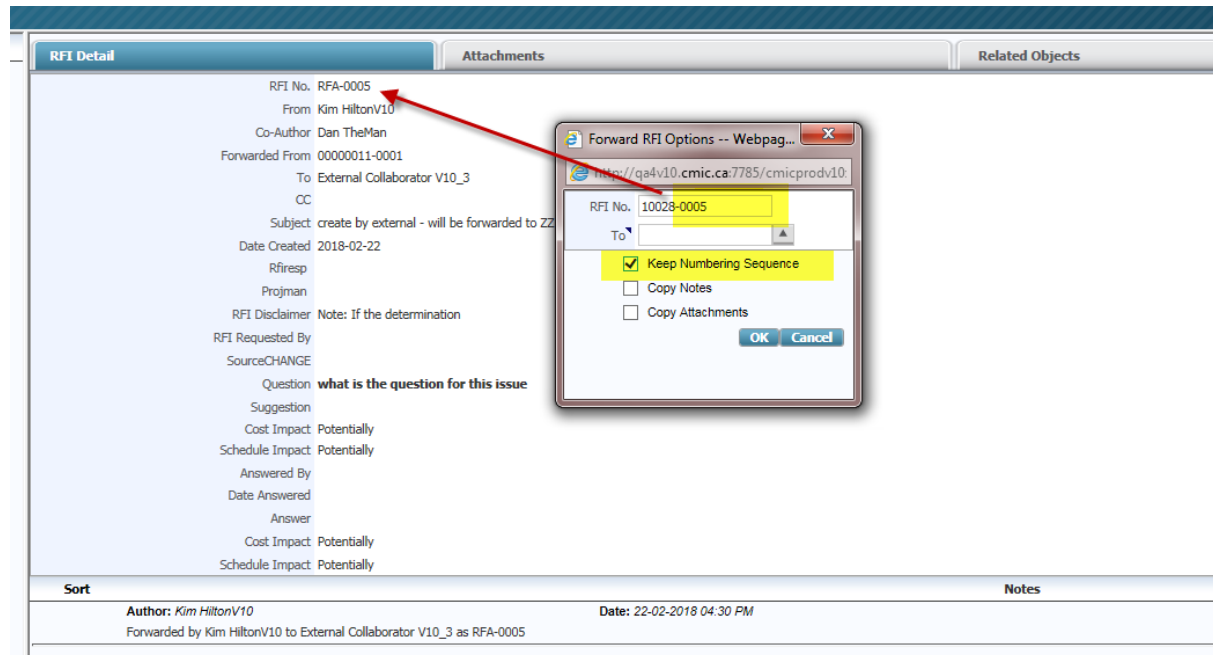
The **Keep Numbering Sequence** checkbox is only applicable to Collaborators, and it is enabled for them when they are forwarding an RFI. Note, for a Collaborator to forward an RFI, the Forward RFIs Project Role privilege is required.

When a Collaborator checks the **Keep Numbering Sequence** checkbox in the Forward RFI popup, the current Sequence Number from the RFI will be populated into the sequence portion of the new Forwarded RFI Number. See sample below:

Example: Below is an RFI received by a Collaborator. Note, the sequence portions of the RFI number and forwarded RFI number are not the same (“0005” vs “0002”):



Once the **Keep Numbering Sequence** box is checked, the sequence portion of the forwarded RFI number changes to the sequence portion of the received RFI, as shown below:



Receiving Forwarded RFI & Updating Reference RFI

The [Update Ref. RFI] button is used when an RFI has been forwarded to you and you wish to switch the **RFI No.** field with the **Forwarded From** field, as per the following:

Sample of received RFI that was forwarded to you:

Request for Information LiveCycle RFI Send JD Email Reject Answer Add Copy Edit Redirect Delete Close RFI Add Note Forward Update Ref. RFI Print Report Link to Issue Back To Log

Project Management Menu Go

Search:

Project: LG Project (LG10719.00)

- Communication Management
 - Project Calendar
 - Export Calendar to Outlook
 - Project Partner Directory
 - Distribution Lists
 - Meeting Minutes
 - Transmittals Queue
 - Communications
 - RFIs
 - 0000011-0001
 - 10028-0001
 - Issues
 - Colab RFI
- Document Management
- Subcontractor Prequalification
- Bid Management
- Budget & Cost Management
- Site Management
- Reports
- User-Defined Logs
- File Maintenance
- Security
- Subcontractor Reviews
- Review Moderation
- Subcontractors
- New Node

RFI Detail Attachments Related Objects History

RFI No: 10028-0001
From: External Collaborator V10_3
Co-Author: Lori Gibson
Forwarded From: RFA-0001
To: External Architect V10x
CC:
Subject: review the UDP fields
Date Created: 03/09/2018
Rfresp:
Program:
RFI Disclaimer Note:
RFI Requested By:
SourceCHANGE:
Question: **Enter new question on 10028-0001**
Suggestion:
Cost Impact: Potentially
Schedule Impact: Potentially
Answered By: External Architect V10x
Date Answered: 03/09/2018
Answer: **this is the answer for the question on this request for information**
Activity:

Status: **Returned**
Submitted: 03/09/2018 03:58 PM
Co-Author RFI No: RFA-0001
Received: ☐
Change #: [Create Change](#) [Link Change](#)
Date Required: 01/25/2018
RFI Type: Architectural
Address1:
Cost Amount:
Days:
Cost Amount: 25,000.00
Days: 5

Update Referenced RFI Options

☒ Copy Note
☒ Copy Attachments
☒ Update Question
OK Cancel

Notes

Author: Lori Gibson Date: 03/09/2018 03:58 PM
Forwarded by Lori Gibson to External Architect V10x as 10028-0001

Sample of received RFI after clicking [Update Ref. RFI]:

Request for Information Check Spelling Submit Cancel

Project Management Menu Go

Search:

Project: LG Project (LG10719.00)

- Communication Management
 - Project Calendar
 - Export Calendar to Outlook
 - Project Partner Directory
 - Distribution Lists
 - Meeting Minutes
 - Transmittals Queue
 - Communications
 - RFIs
 - 0000011-0001
 - 10028-0001
 - Issues
 - Colab RFI
- Document Management
- Subcontractor Prequalification
- Bid Management
- Budget & Cost Management
- Site Management
- Reports
- User-Defined Logs
- File Maintenance
- Security
- Subcontractor Reviews
- Review Moderation
- Subcontractors
- New Node

RFI Detail Attachments Related Objects History

RFI No: **RFA-0001**
From: Lori Gibson
Co-Author: **Lori Gibson**
Forwarded As: 10028-0001
To: External Collaborator V10_3
CC:
Subject: review the UDP fields
Date Created: 2018-01-25
Rfresp:
Program:
RFI Disclaimer Note:
RFI Requested By:
SourceCHANGE:
Question: **Modified question: Enter new question on 10028-0001**
Suggestion:
Cost Impact: Potentially
Schedule Impact: Potentially
Answered By: Lori Gibson
Date Answered: 03/09/18
this is the answer for the question on this request for information
Answer:
Cost Impact: ☐ Potentially ☒ Yes ☐ No
Schedule Impact: ☐ Potentially ☒ Yes ☐ No
Activity:

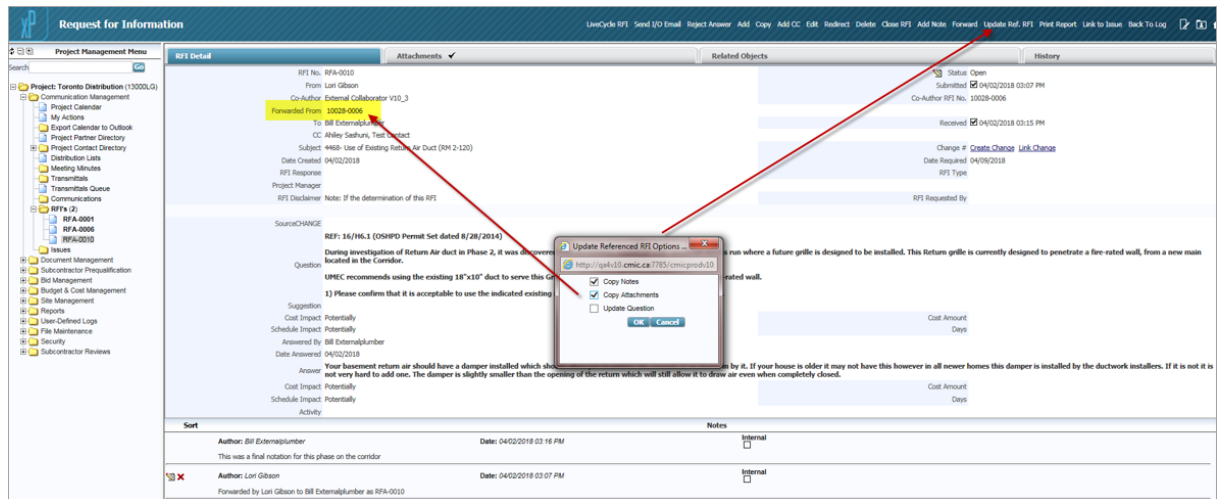
Status: **Returned**
Submitted: 01/25/2018 10:15 AM
Co-Author RFI No:
Received: 01/25/2018 10:16 AM
Change #: [Create Change](#) [Link Change](#)
Date Required: 2018-01-25
RFI Type:
Address1:
Cost Amount:
Days:
Cost Amount: 25,000.00
Days: 5

Accept Suggestion

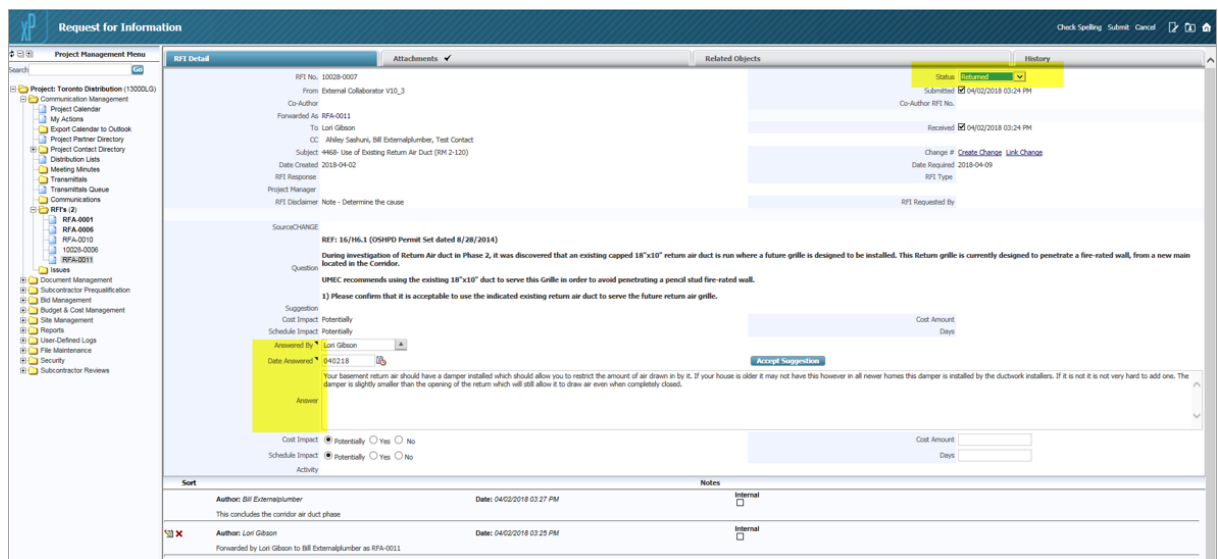
Notes

Author: Lori Gibson Date: 03/09/2018 03:58 PM
Forwarded by Lori Gibson to External Architect V10x as 10028-0001

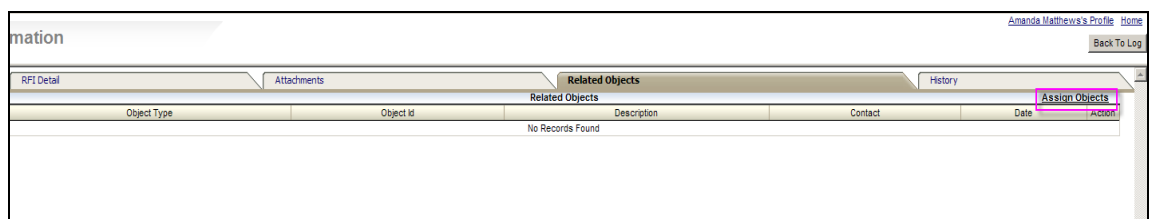
The **[Update Ref. RFI]** button is also used when an RFI has been forwarded to you and you wish to copy the completed Answer, Notes, Attachments and updates to the Question from the forwarded RFI to backfill the source (originating) RFI.



Upon completing the update, the screen will toggle the user back to the original source RFI in Edit mode for the Answer section only. This allows the user to make any additional adjustments to the Answer prior to saving the updates to the original RFI. The Status on the RFI is changed to 'Returned', as shown in the screenshot below.



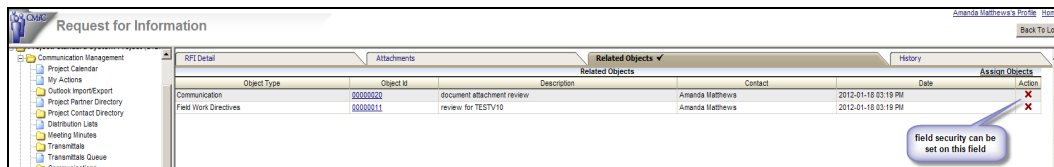
Related Objects Tab




Related Objects can be assigned to various PM objects such as RFIs, Communications, any defined Document Types, etc., using the 'Assign Objects' link.

You can also add PM objects 'on the fly' using the **[Add New]** button in the Assign Objects popup screen. The new records for Communications and Documents will be included in your selection list.

Field security can be applied to the for RFI Related Objects tab. The default setting is 'Unrestricted'.



Field security can also be applied to the 'Un-assign' / 'Disconnect' icon  under the Action field (Disconnect Related Objects).

RFI History Tab

The History tab tracks most changes that happen to an RFI (except for a few things mentioned further):

- All of the fields (except for classifiers) that can be changed in the JSP screen when in the Edit mode
- Insert / Update /Delete of Notes (External Notes Only) and related document attachments
- CMiC IO E-mail sending, receiving
- Re-opening, closing of an RFI
- Forwarding, Answering, etc.

Request for Information							Back To Log
RFI Detail		Attachments		Related Objects		History	
Date	Author	Recipient	Action	Description	Status		
10/Jun/2011 10:00 AM	Amanda Matthews		Record updated	Status changed from OPEN (Open) to REJECTED (Rejected)			
10/Jun/2011 09:57 AM	Amanda Matthews		Added Note No. 1	Forwarded by Amanda Matthews to Gregory Abbott as 00000015			

While the RFI is "pending" (red bar in JSP), changes are not tracked. History starts recording for SUBMITTED records only.

Changes are tracked regardless of whether they are done in JSP or Forms.

Linking / Unlinking of PCIs is not tracked in this version yet.

Days to Resolution in RFI Log

Request for Information													Add RFI	Show Filter	Send To Spreadsheet	Enter Query
RFI No.	Forwarded as	Subject	Question	Date Created	From	To	Date Required	Date Answered	Status	Delivery Status	Attachments	Days to Resolution				
00000022		Answer By and Answer Date - read-only	what is the question?	29/Jul/2011	Amanda Matthews	Gregory Abbott	29/Jul/2011		PENDING	My RFIs		12				
00000021		Answer By and Answer Date - read-only	what is the question?	29/Jul/2011	Amanda Matthews	Gregory Abbott	29/Jul/2011		PENDING	My RFIs		12				
00000023		review	what?	29/Jul/2011	Amanda Matthews	Will Smith	29/Jul/2011	29/Jul/2011	OPEN	My RFIs		0				
00000020		Check navigation of Attachments tab	what was the question?	29/Jul/2011	Amanda Matthews	Boris Fullerton	29/Jul/2011		OPEN	My RFIs	1	12				
00000018	00000019	make hay while the sun shines	a bird in the hand is worth 2 in the bush	20/Jul/2011	Amanda Matthews	Karen Williams	20/Jul/2011	20/Jul/2011	OPEN	My RFIs		0				
00000019		make hay while the sun shines	a bird in the hand is worth 2 in the bush	20/Jul/2011	Amanda Matthews	Will Smith	20/Jul/2011		OPEN	My RFIs		21				
00000016	00000017	Field Security set as Hidden		10/Jun/2011	Amanda Matthews	Stephen Bennet	10/Jun/2011	10/Jun/2011	OPEN	My RFIs		0				
00000017		Field Security set as Hidden		10/Jun/2011	Amanda Matthews	Simon Parrish	10/Jun/2011		OPEN	My RFIs		61				
00000015		Field security when set at Read-only	is that so?	10/Jun/2011	Amanda Matthews	Gregory Abbott	10/Jun/2011		REJECTED	My RFIs		61				
00000014	00000015	Field security when set at Read-only	is that so?	10/Jun/2011	Amanda Matthews	Stephen Bennet	10/Jun/2011	10/Jun/2011	OPEN	My RFIs		0				
00000011		test RFI email notification	what is it?	08/Jun/2011	Amanda Matthews	Stephen Bennet	08/Jun/2011		OPEN	My RFIs	1	63				
00000013		RFI - User Defined Fields (from OI Classifiers table) test	test	08/Jun/2011	Amanda Matthews	Stephen Bennet	08/Jun/2011		OPEN	My RFIs		63				
00000012		Field Security for Status field	test	08/Jun/2011	Amanda Matthews	Stephen Bennet	08/Jun/2011		PENDING	My RFIs		63				
00000008		test	test	02/Jun/2011	Amanda Matthews	Stephen Bennet	02/Jun/2011		OPEN	My RFIs		69				
00000009		test - for Answer - Jun 2	ask a question	02/Jun/2011	Stephen Bennet	Amanda Matthews	02/Jun/2011		OPEN	RFIs to Me		69				
LINCOLN-000001		test Answer		01/Jun/2011	Gregory Abbott	Stephen Bennet	01/Jun/2011		OPEN			70				
00000007		test for answered by and answer date		26/May/2011	Amanda Matthews	Stephen Bennet	26/May/2011		OPEN	My RFIs		76				
00000006		10.47043 - field security set to read-only		15/Feb/2011	Amanda Matthews	Marion Davies	15/Feb/2011		OPEN	My RFIs		176				
00000005	00000006	10.47043 - field security set to read-only		15/Feb/2011	Amanda Matthews	Stephen Bennet	15/Feb/2011		OPEN	My RFIs		176				
00000004		10.47043 - retest	the big question	15/Feb/2011	Amanda Matthews	Stephen Bennet	15/Feb/2011		OPEN	My RFIs		176				
00000003		check RFI	is it working now	19/Jan/2011	Amanda Matthews	Stephen Bennet	19/Jan/2011		OPEN	My RFIs		203				
00000002		test this again	what is it?	14/Jan/2011	Amanda Matthews	Stephen Bennet	14/Jan/2011		OPEN	My RFIs		208				
00000001		test for IO		09/Dec/2010	Amanda Matthews	Stephen Bennet	09/Dec/2010		OPEN	My RFIs		244				
Total (23 rows)																

The value of the **Days to Resolution** column in the RFI Log is determined in the following way:

- a. If the Date Required is empty, then the value is empty
- b. If the Date Required is not empty then:
 - If the Date Answered is empty, then the result is System Date – Date Required
 - If the Date Answered is NOT empty, then the result is Date Answered – Date Required

Entering Issues

Issues are a way of communicating information on what may be problems with the project. Issues may be used internally to manage the project or by suppliers and/or the owner to document items. Issues can be answered directly, or may be the originating source for different types of objects such as RFIs or Change Orders.

- Enter the 'To' person and any CC's required
- The Customer issue is your own tracking number
- The Severity, Status and Type are required fields
- Enter a Subject (a brief summary) for the issue - this will display on the log.
- Add any backup documentation via the Attachments or Related Objects tab as required

The 'Date Resolved' field will auto-populate with the current date as soon as the resolution information is entered (it also allows manual override to a null value).

Use the [**Submit**] button to save and send this issue, or the [**Save**] button to save the issue so you can review it before submitting.

Each time the responsibility of the issue is changed, the system automatically adds a note indicating who changed the responsibility.

Text Codes for Issues

The default Text Types for Issues have to be set in the PM Control before the associated Text Codes can be available in the Text Codes LOV.

Assigning Related Objects to Issues

The screenshot shows the 'Assign Objects' button highlighted in a pink box. The interface includes tabs for 'Issue Detail', 'Text Codes', 'Attachments', 'Related Objects', and 'History'. The 'Related Objects' tab is active, displaying a table with columns: Object Type, ID, Description, Date, and Action. The table contains four rows of data, each with a red 'X' in the Action column.

Object Type	ID	Description	Date	Action
Addendum	1157538	Check for Add Attachment field security	09/Jun/2011 12:00 AM	X
Bid Package	SUS-FORMS8PK1	Bid Package for Forms Analyze Bids		X
Communication	00000015	notification test	09/Jun/2011 02:36 PM	X
Communication	00000017	Creation of communication record	20/Jul/2011 08:53 AM	X

The Related Objects tab provides a way of linking PM objects with Issues. In this tab, the **[Assign Objects]** button allows querying the database for related information including attachments of various types, using key word searches. From the resulting objects found, the user can select objects to be assigned to the issue.

The search can be made for attachments to the PM objects that contain the search word as well. A maximum of three search strings can be accommodated, separated by commas.

When the search results are displayed, user selection of objects is made by checking the checkbox beside the desired record(s) and then clicking on the **'Assign'** link.

Days to Resolution in Issues Log

The value of the **Days to Resolution** column in the PM Issues Log is determined:

- If the Date Required is empty, then the value is empty
- If the Date Required is not empty then:
 - If the Resolution Date is empty, then the result is System Date – Date Required
 - If the Resolution Date is NOT empty, then the result is Resolution Date – Date Required

Re-Opening Closed Issues via CMiC I/O

The checkbox **"Reopen Closed Issues"** in the Miscellaneous tab of the CMiC I/O Parameter screen (Forms version) can be utilized to re-open closed issues via CMiC I/O. When checked, a Closed Issue will be re-opened upon receiving a new note or attachment via CMiC I/O, provided the sender has the PM JSP Project Role privilege to "Add Notes/Attachments to Closed Issues".

[Link to Issue] – Button

The screenshot shows the 'Link to Issue' button highlighted in a pink box. The interface is titled 'SM Project Manager' and includes 'Update' and 'Back' buttons. A note states: 'Note: Not all programs have fields available with field privileges'. Below this, there are 'Programs' and 'Communications' dropdown menus. A table titled 'Column/Field Security' lists various fields and their security levels. The 'Link to Issue' button is highlighted in the table.

Item Name	Security Level
From Contact	Unrestricted
Add To Change	Unrestricted
Printable Button	Unrestricted
Link to Issue	Unrestricted
	Hidden

Field security can be applied to the **[Link to Issue]** button on the following screens: Communications, RFIs, Transmittals, PCIs, Field Work Directives, Notices, Daily Journal, and Owner Change Transmittals.

Managing Documents

Overview – Document Management

The Document Log is where all types of documents such as Drawings, Specifications, Bulletins... are maintained and revised. Each type of document has its own node on the Treeview. Included under the Document Management node are also Submittals and Submittal Packages.

Documents that have already been defined can be added to items such as communications, RFIs, Transmittals, or any other screen that has an 'Attachments' tab.

New documents can also be added to the document log, via the 'Attachments' tab on most screens by using the **[Upload New]** button. This will bring in revision 0 of any new document.

Revisions to documents can only be done via the Document Log. Whenever a document is attached to an object, the user has the ability to select the required revision.

Submittals

As a Vendor/Subcontractor to the project, the Submittal log will display all submittals that are applicable to your company. As the General Contractor, this log displays all submittals.

As with any other log, any of the columns can be sorted, just by double clicking on the column title and of course the log can be customized to your own layout in the Query Builder.

Creating a Submittal

Standard Treeview path: *xProjects > Document Management > Submittals*

To create a new submittal, use the **[Add Submittal]** button at the top of the log screen.

The Submittal ID will be editable while in 'Edit' mode, if the '**Allow Override**' flag is ON in the Masks popup for the Submittal ID Mask in Project Maintenance.

The Package ID field is used to link the submittal to a submittal package.

Enter the Status of the package. Field security can be applied to this field (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Submittal*).

CCs are not required, but if needed press the **[CC]** button or the **[Add CC]** button on the Main Toolbar to open up the CC entry field. For each new CC to be added, use the **[+]** icon to open a new field. You can select CCs from the current Project Contacts, Distribution List or All Contacts. Any contacts added as 'CC' are available when the **[Send I/O Email]** button is clicked, as long as they have an email address.

Enter the Submittal Contact information.

NOTE: The JSP Project Maintenance - Defaults tab contains a Submittal Approver (Partner and Contact Code) that, if entered, will be used in the Submittal to default in the Approved By and Returned By fields. The Submittal Package JSP will also populate the specified default Approver in the Approved By and Returned By fields.

The **Comment** field can take up to 4000 characters, and has the double-click feature that allows editing in a popup box. Field security can be applied to this Comment field.

The **[Send E-Mail]** button will display a popup with a To, CC, Subject and Message fields. The 'To' field will be pre-populated with the contacts from the submittal header, the rest will be entered by the user.

The **[Send I/O Email]** displays the standard I/O popup window and allows the user to send an I/O to a collaborator. The History tab is updated with all changes (I/O sent, notes and attachments) made to the record through I/O. Field security can be applied to the **[Send I/O Email]** button. The default value is set at Unrestricted on the *ALL* role (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Submittal*).

Submittal Schedule Dates

To calculate the Required Start and Required End dates, enter the Activity Start date and related schedule lead times in the Schedule section. When done, click on the **[Save]** button to save the submittal.

The dates will be automatically calculated based on the lead times (default lead times can be set in the Project Control Defaults tab or Project Maintenance - Defaults tab).

Field security exists for Required Start Date and Required End Date for Submittals (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Submittal*).

The Required Start date will be updated with the Preparation Start date, and the Required Finish date will be updated with the Approval Finish date.

If any date is manually adjusted after being determined by the system, it will not cause the other dates to be updated, but will be highlighted with a yellow background.

If no Activity Start Date is entered, but you have at least one schedule date and the lead times for all the others, then the system will calculate all the other dates including the Activity Start Date.

An Activity Start Date can be tied to an Activity Code, or can be entered on its own.

Determination of Overdue Days

Overdue = Latest history cycle, last line Action date - Required Finish Date

If last line action date is empty,

Overdue = Closed Date - Required Finish Date

If closed date is empty,

Overdue = System Date - Required Finish Date

Submittal History

To view or update the history of the submittal use the **[Edit History]** button which is available in Edit mode. This will open a page similar to below.

Add Reviewer Create Transmittal Queue Transmittal Create Review Cycle Save Close											
Show Current Cycle Only History											
Action	Trnsm	Cycle	Action	Due Date	Action Date	Days Diff	From	Contact	To	Contact	
X	<input type="checkbox"/>	2	Received						SM US International (V10)	Amanda Matthews	
X	<input type="checkbox"/>	2	Sent		160611		SM US International (V10)	Amanda Matthews	SM US International (V10)	Amanda Matthews	
X	<input type="checkbox"/>	2	Returned						SM US International (V10)	Amanda Matthews	
X	<input type="checkbox"/>	2	Forwarded				SM US International (V10)	Amanda Matthews			

From this page you can

- Add additional contacts to send or forward to
- Mark an item for transmittal
- Record the date an action occurred
- Create a Transmittal
- Queue the Transmittal
- Create a new review cycle

Field security to the Status field in the History popup is also available.

Adding Reviewers

When the **[Add Reviewer]** button is clicked, a new record row is created at the bottom of the grid. The current Cycle number is defaulted in. The desired Action Code can be selected from the LOV.

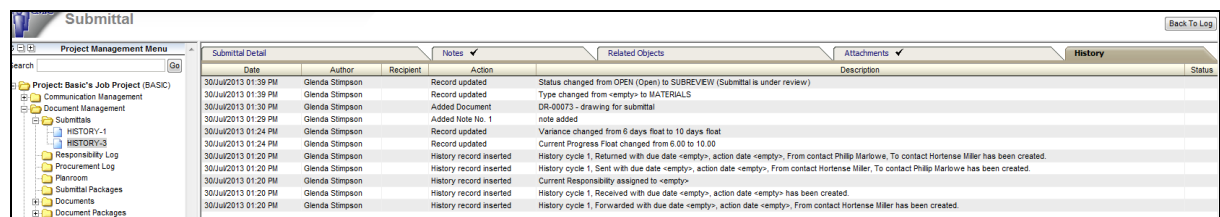
- On the Received and Return lines, the contacts (with their partners) will be returned to the From fields, the To fields will be populated with the current user.
- On the Sent and Forwarded lines, the contacts (with their partners) will be returned to the To fields, the From fields will be populated with the current user.
- The additional lines have a different background color to distinguish them from the 'regular' lines.

Each additional reviewer has to be added and the record saved before transmittals can be sent to him/her. It is also on saving that the review screen is updated with the transmittal number for the transmittal that is created.

Deleting Review Lines or Review Cycle

Use the red 'X' beside each line to delete the line if needed, and the single red 'X' at the left-most side of the grid to delete the cycle.

History tab in the Submittal Screen



Date	Author	Recipient	Action	Description	Status
30Jul2013 01:39 PM	Glenda Simpson		Record updated	Status changed from OPEN (Open) to SUBREVIEW (Submittal is under review)	
30Jul2013 01:39 PM	Glenda Simpson		Record updated	Type changed from <empty> to MATERIALS	
30Jul2013 01:30 PM	Glenda Simpson		Added Document	DR-00073 - drawing for submittal	
30Jul2013 01:29 PM	Glenda Simpson		Added Note No. 1	note added	
30Jul2013 01:24 PM	Glenda Simpson		Record updated	Variance changed from 6 days float to 10 days float	
30Jul2013 01:24 PM	Glenda Simpson		Record updated	Current Progress float changed from 6.00 to 10.00	
30Jul2013 01:20 PM	Glenda Simpson		History record inserted	History cycle 1, Returned with due date <empty>, action date <empty>, From contact Philip Marlowe, To contact Hortense Miller has been created.	
30Jul2013 01:20 PM	Glenda Simpson		History record inserted	History cycle 1, Sent with due date <empty>, action date <empty>, From contact Hortense Miller, To contact Philip Marlowe has been created.	
30Jul2013 01:20 PM	Glenda Simpson		History record inserted	Current Responsibility assigned to <empty>	
30Jul2013 01:20 PM	Glenda Simpson		History record inserted	History cycle 1, Received with due date <empty>, action date <empty> has been created.	
30Jul2013 01:20 PM	Glenda Simpson		History record inserted	History cycle 1, Forwarded with due date <empty>, action date <empty>, From contact Hortense Miller has been created.	

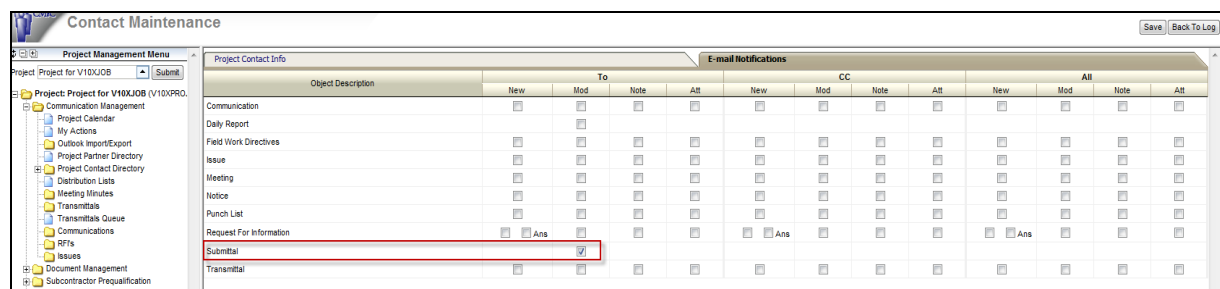
Every time an email alert is sent (for Sent action) or the submittal is updated, a record is added to the History tab indicating the date, user and nature of the update.

Submittal Responsibility

Current Responsibility and Contact fields pull from the Submittal history and if all action dates are populated for the latest Review Cycle then the submittal is complete. In the latter case, the Current Responsibility is blank.

Submittals directed to the current user will appear BOLD for that user until they are directed to a different contact (that is when the Current Responsibility is changed from the current user).

The system will generate an automatic email notification for Submittal on change of responsibility to an external contact. To facilitate this, the Submittal object has been added to the list of PM objects for which Email Preferences can be set on the Contact record:



Object Description	To				CC				Alt			
	New	Mod	Note	Alt	New	Mod	Note	Alt	New	Mod	Note	Alt
Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Daily Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field Work Directives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Punch List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Request For Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Submittal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transmittal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The 'To' contact for the submittal actions where applicable (Sent), with the email preference setup, will receive an email alert:

From:	CMiC PTFV10_X Alert [cmicptfv10_x@cmic.ca]
To:	Stephanie Bromfield
Cc:	
Subject:	Submittal SUBM0004 has been modified

Submittal

Date Sent: Wednesday April 17 2013 at 10:27 AM
 Project: Project for V10XJOB
 Submittal No.: SUBM0004
 To: Stephanie Cowan [stephanie@cmic.ca]

Responsibility of Submittal SUBM0004 has been assigned to you.

[Click here to log into CMiC Collaboration](#)

Reminder Notifications for Preparation Start

The screenshot shows the 'PM Control - Defaults' and 'Project Maintenance - Defaults' tabs. The 'Send Reminder Email' checkbox is checked, and the 'Days Prior to Preparation Start' field is set to 4. Other fields like 'Delivery', 'Approval', 'Fabrication', 'Review', and 'Preparation' are also visible.

The two fields: checkbox **'Send Reminder Email'** and the numeric field **'Days Prior to Preparation Start'**, on the PM Control –Defaults and Project Maintenance –Defaults tab and Submittal Entry screen, allow reminder email notifications to be **sent to the external collaborator during the Submittal Preparation stage**.

When the box is checked, it indicates that a reminder email must be sent. A value in **'Days Prior to Preparation Start'** indicates the number of days prior to the Preparation Start Date that the email notification must be sent.

When these fields are set in the PM Control their value will be inherited by any new projects.

The values in the Project Maintenance screen default from the PM Control into new projects but can be overridden.

The values default from the project level to the Submittal but can be overridden in the individual submittals.

Therefore, once the external collaborator contact is filled in the 'Preparation By' fields and the submittal saved, the email is scheduled to be sent based on the 'Days Prior to Preparation Start', if it makes sense when compared to the current date.

Field security can be applied to the 'Send Reminder Email' and 'Days Prior to Preparation Start' fields in the submittal header. The default setting is 'Unrestricted' for both.

EXAMPLE OF NOTIFICATION EMAIL:



Automatic Submittal Update via Collaboration

Automatic update of the Submittal Status, Action Date and Responsibility back to the General Contractor occurs when the Architect/Subcontractor responds to an I/O email or updates the submittal record via the Subcontractor Submittal screen.


These changes fully automate the Submittal review cycle, for all stages: Received, Sent, Returned and Forwarded.

Whether an inbound I/O is received from Subcontractor or Architect (as exists in Submittal history) or an outbound I/O is sent to an Architect or Subcontractor (also according to Submittal history), the system recognizes the action and updates the corresponding history record (Action Date and Status) as well as the Submittal header record (Status, Responsibility). The system also expects that the submittal documents will be sent as attachments to the I/O's, otherwise the updates might not occur.

Related Objects for Submittals

The Related Objects tab is used for assigning existing Project Management objects, namely Communications, Submittals and Documents to the current submittal.

Clicking on the [Assign Objects](#) link will display a popup box from which the user can select the object type and then the particular object or use the **[Add New]** button to create the PM object 'on the fly'.


Field security can also be applied to the 'Un-assign' / 'Disconnect' icon  under the Action field (Disconnect Related Objects).

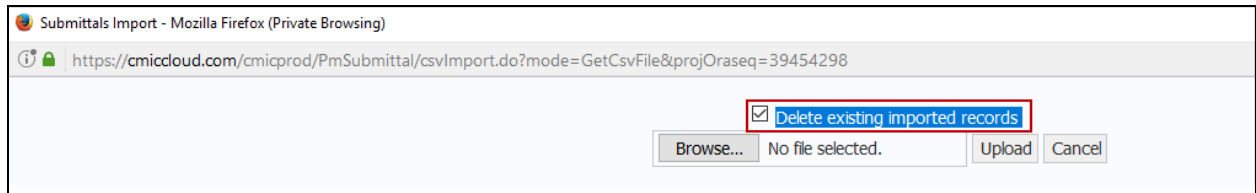
Importing Submittals

Importation of Submittals is subject to the same "Create" privilege as the **[Add Submittals]**. That is, unless the user has the **CreateAll** privilege on submittals, he/she will not be able to import submittals.

To import submittals, from the Submittal log of the appropriate company and project, clicking the **[Import]** button will open the file selection form.

Once the file is selected, click **[Upload]** to bring the data in prior to validation. The **Delete exiting imported records** checkbox (shown below), if checked, removes any records that may reside in the "temporary" import table, so that it only contains the current records to import. The import table will also be cleared out when you click on the **[Accept]** button on the import interface.

Note, the “temporary” table will not be cleared out and can grow to huge proportions if: 1) the **Delete existing imported records** checkbox is left unchecked 2) if a user closes the browser using the close button  as opposed to clicking on the **[Cancel]** button on the import interface.



Edit the data. Clicking on the ‘Edit’ icon at the left of the display will show additional fields being imported. All fields shown with a non-white background include an error and must be corrected to be imported. Placing the mouse-pointer over the colored area will give details of the error. Individual records may be deleted from the Import by checking the Delete flag on the left side of the display.

Use the **[Re-Validate]** button to update changes and review any further errors. Once all records are corrected, click the **[Accept]** option. Existing submittal records will be updated and new ones will be created by the import, if they do not already exist.

If a non-existent submittal package code is specified in the import file, a submittal package record will be created for it. The user is advised of this in the error log.

Validation rules for Activity Code

- 1) If an activity code in the import is specified and already exists, the 'Activity Start Date' will be ignored.
- 2) If the activity code is null in the import, the import will not update the submittal activity if the submittal already has an activity code.
- 3) If the activity code in the import is different than the activity code on the submittal, the system will re-link and recalculate the schedule as per the new activity code.

The import file (can be .txt, or .csv) for Submittals includes the following fields (in this order):

Field Name	Description	Attribute
PMFSMI_COMP_CODE	(required and must pre-exist)	VARCHAR2(2)
PMFSMI_PROJ_CODE	(required and must pre-exist)	VARCHAR2(10)
PMFSMI_SBMT_ID		VARCHAR2(16)
PMFSMI_SBMT_NAME		VARCHAR2(200)
PMFSMI_PKG_CODE		VARCHAR2(10)
PMFSMI_REC_FROM_PARTN_ABBREV		VARCHAR2(8)
PMFSMI_REC_FROM_CONTACT_COD		VARCHAR2(10)
PMFSMI_RET_BY_PARTN_ABBREV		VARCHAR2(8)
PMFSMI_RET_BY_CONTACT_COD		VARCHAR2(10)
PMFSMI_SENT_TO_PARTN_ABBREV		VARCHAR2(8)
PMFSMI_SENT_TO_CONTACT_COD		VARCHAR2(10)
PMFSMI_FWD_TO_PARTN_ABBREV		VARCHAR2(8)
PMFSMI_FWD_TO_CONTACT_COD		VARCHAR2(8)
PMFSMI_REQUIRED_START_DATE		Formatted as: 'DD-MON-RRRR'

PMFSMI_REQUIRED_END_DATE		<i>Formatted as: 'DD-MON-RRRR'</i>
PMFSMI_CLV_VALUE_CODE1		VARCHAR2(16)
PMFSMI_CLV_VALUE_CODE2		VARCHAR2(16)
PMFSMI_CLV_VALUE_CODE3		VARCHAR2(16)
PMFSMI_CLV_VALUE_CODE4		VARCHAR2(16)
PMFSMI_CLV_VALUE_CODE5		VARCHAR2(16)
PMFSMI_CLV_VALUE_CODE6		VARCHAR2(16)
PMFSMI_SBMT_STATUS_CODE		VARCHAR2(10)
PMFSMI_ACTIVITY_START_DATE		<i>Formatted as: 'DD-MON-RRRR'</i>
PMFSMI_DATE_CHANGE_CODE		VARCHAR2(12)
PMFSMI_COPIES_NUM		NUMBER(11)
PMFSMI_CM_CODE		VARCHAR2(11)
PMFSMI_LEAD_TIME_STAGE6		NUMBER
PMFSMI_LEAD_TIME_STAGE5		NUMBER
PMFSMI_LEAD_TIME_STAGE4		NUMBER
PMFSMI_LEAD_TIME_STAGE3		NUMBER
PMFSMI_LEAD_TIME_STAGE2		NUMBER
PMFSMI_LEAD_TIME_STAGE1		NUMBER
PMFSMI_SPEC_SEC_CODE	this is the spec. code of the submittal entry	VARCHAR2(30)
PMFSMI_SORT_ORDER_NUMBER		NUMBER
PMFSMI_CLOSED_DATE		<i>Formatted as 'DD-MON-RRRR'</i>
PMFSMI_TYPE_CODE	Indicates type of submittal	VARCHAR2(10)
PMFSMI_SPEC_SUBSEC_CODE	Indicates Spec Sub-Section for submittal	VARCHAR2(30)
PMFSMI_PROCUREMENT_FLAG	Default is 'N'	VARCHAR2(1)
PMFSMI_ACTIVITY_CODE		VARCHAR2(10)
PMFSMI_QC_REQUIREMENT_FLAG	Default is 'N'	VARCHAR2(1)

Procurement (Submittal) Log

Any Submittals created as a 'Procurement Item' or later flagged as a procurement item after being created, are displayed in the Procurement Log. The **Procurement Item** checkbox is located at the top right-hand corner of the Submittal screen.

Days Out

The field '**Days Out**' has been added to list of available fields for the Submittal Log in PM JSP.

Days Out = System Date - Sent Date

(Sent Date is the Action Date value for the 'Sent' line in the submittal history)

For example if the sent date is March 1, 2010 and the system date is March 31, 2010 then the days out would be 30 days.

When the submittal is **Returned** (Action Date on history line is 'Returned'), the calculation is adjusted to:

Days Out = Return Date - Sent Date.

Submittal Responsibility Log

Project Management

Add Submittal

Show Filter

Sent To Spreadsheet

Enter Query

Project Management Menu

Search

Go

Project: Project #1 (SDPROJ001)

Communication Management

Document Management

Submittals

Responsibility Log

Procurement Log

Planroom

Submittal Packages

Documents

Document Packages

Subcontractor Prequalification

Bid Management

Budget & Cost Management

Submittal Responsibility Log

Submittal No.	Name	From Partner	From Contact	Returned By Partner	Returned By Contact	Sent To Partner	Sent To Contact	Forwarded To Partner	Forwarded To Contact	Status	Current Cycle	Attachments
SD-SB-0003	Submittal record creation # 1	SM US International (V10)	Amanda Matthews	Paradise Construction Developers	Martin Bell	Paradise Construction Developers	Martin Bell	SM US International (V10)	Amanda Matthews	Open	1	
Total (1 row)												

The Submittal Responsibility Log has the same columns available as the existing Submittal Log except that it only shows the submittals in the current user's responsibility.

Subcontractor Submittal Log

Submittal No.	Name	Status	Status Code	Spec. Section	Spec Sub Section	Status Class Code	Status Class	Submittal Type Code	Submittal Type
BIP-100218	Temporary Requirements / Site Logistics								
BIP-1002	Temporary Stormwater Management (Allowance)								
BIP-10051	Project Sign @ Entrance	Re-Submit Submittal	RESUBMIT			M	M		
BIP-10061	Temporary Fencing								
Total (4 rows)									

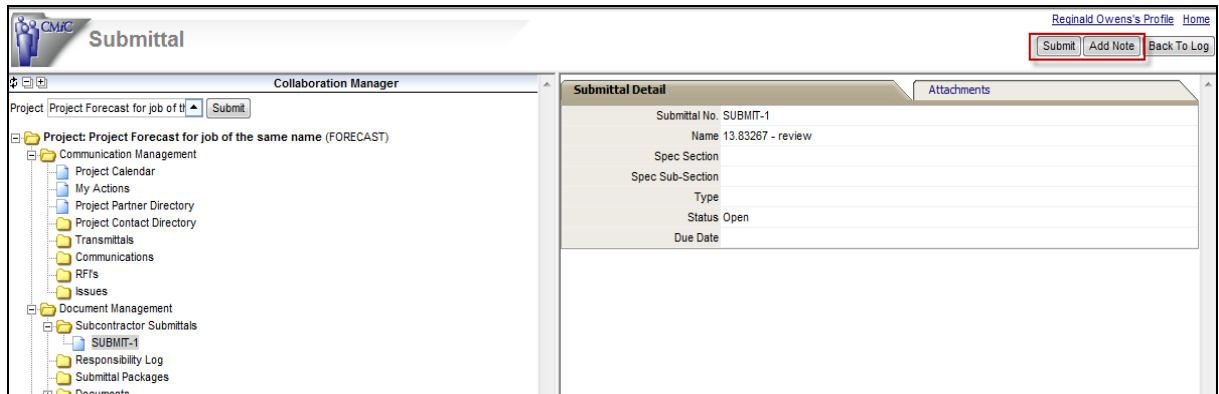
The **Subcontractor Submittals** log displays the submittals currently in the subcontractor's responsibility, and is meant to be used from that perspective.

The subcontractor xProjects role must have security rights to the Submittal Program as well as the Submittal Menu Item in order to use this screen.

The Subcontractor Submittal screen has fields suited specifically to the subcontractor: Submittal No., Name, Spec Section, Spec Sub Section, Type, Status and Due Date.

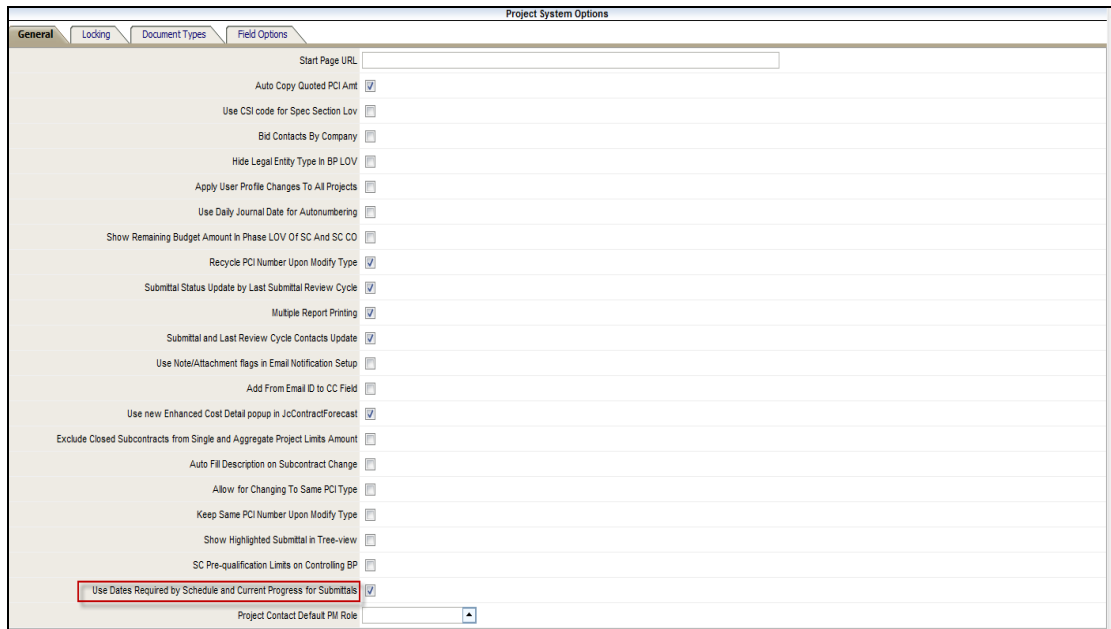
NOTE: Users with PM Role Privilege 'Maintain Submittals Spec Section LOV' will be able to edit and delete Spec Section LOV entries (standard Treeview path: *xProjects > Security > Project Roles - Maintenance*). This Submittal Spec Section LOV maintenance capability is **not available** when the LOV is used to list CSI Codes in relation to the associated PM Systems Option flag.

It also has a **[Submit]** button to allow for the submission of the finalized submittal with the corresponding change in Status and Responsibility, and a **[Add Note]** to add additional comments/notes.



The submittal status is changed to **‘Submittal Received’** and the submittal history is updated accordingly when the subcontractor submits the record.

Alternate Option for Submittal Schedule



In the PM Systems Option - General tab, the flag **‘Use Dates Required by Schedule and Current Progress for Submittals’** is used to allow users to switch between the new submittal schedule look and the older look. By default, the flag is un-checked.

When the flag is checked, the Submittal Entry screen – Schedule section has an additional row of schedule dates which represent Current Progress. There is a new Onsite column representing the date that the materials are due to be at the job site.

Also, in view mode of the Submittal, there are two new fields:

Days Until Due

The days until the next step is *due* from a process standpoint (i.e. the difference between dates from the current date (system date) and due date of the current Action step)

Days Until Required

The days the next step is *required* to be done to not impact the schedule (i.e. the difference between dates from the current date (system date) and required date of the current Action step i.e. its schedule date.)

Process standpoint stands for the **Due Date** of the **Action** which is to be completed next in the current history cycle.

Example 1:

Current Date = Dec. 06, 2013

Schedule set to 'Use **Working days**':

Days Until Due = Dec. 06, 2013 – Nov. 15, 2013 = 15 days

Days Until Required = Dec. 06, 2013 – Nov. 13, 2013 = 17 days

See screen shot below:

[Send I/O Email](#) [Send E-Mail](#) [Edit History](#) [Add](#) [Edit](#) [Delete](#) [Import](#) [Copy](#) [Print Report](#) [Back To Log](#)

Submittal Detail
[Notes](#)
[Related Objects](#)
[Attachments](#)
[History](#)

Submittal No. 00007
Name Check for WORKING DAYS
Spec Section
Sort Order
Type
Preparation By
Approval By
Returned By
Forwarded To
Required Start 25/Oct/2013
Current Responsibility SB Urban Systems
Days Until Due 15
Closed Date
Held 29
Elapsed 29
Comment
Send Reminder Email ☐
Tester Name

Package No.
Procurement Item ☐
QC Inspect & Test Reqmnt ☐
Spec Sub-Section
Copies
Status
Contact - received from
Contact - sent to
Contact - returned by
Contact - forwarded to
Required Finish 20/Nov/2013
Contact Glenda Stimpson
Days Until Required 17
Change # [Create Change](#) [Link Change](#)
Overdue 16
Last Review Cycle 1
Days Prior to Preparation Start 4

Schedule

Activity	Lead Time	Review	Lead Time	Approval	Lead Time	Forward	Float	Fabrication	Lead Time	Delivery	Lead Time	Onsite
Dates Required By Schedule												
25/Oct/2013	7	05/Nov/2013	6	13/Nov/2013	5	20/Nov/2013	4	26/Nov/2013	3	29/Nov/2013	2	03/Dec/2013
Current Progress												
25/Oct/2013	7	07/Nov/2013	6	15/Nov/2013	5	22/Nov/2013	2	26/Nov/2013	3	29/Nov/2013	2	03/Dec/2013
■ = Dates are later than Schedule dates ■ = Due dates are later than Schedule dates ■ = Dates are on/before Schedule dates												

History Summary
[Hide](#)

Cycle	Action	Due Date	Action Date	Days Diff	From	Contact	To	Contact	Status
1	Received	05/Nov/2013	07/Nov/2013	2			SB Urban Systems	Glenda Stimpson	
1	Sent	15/Nov/2013			SB Urban Systems	Glenda Stimpson			
1	Returned	22/Nov/2013					SB Urban Systems	Glenda Stimpson	
1	Forwarded	22/Nov/2013			SB Urban Systems	Glenda Stimpson			

Example 2:

Current Date = Dec. 06, 2013

Schedule set to **Calendar Days**:

Days Until Due = Dec. 06, 2013 – Dec. 25, 2013 = -19 days

Days Until Required = Dec. 06, 2013 – Nov. 19, 2013 = 17 days

[Send I/O Email](#) [Send E-Mail](#) [Edit History](#) [Add](#) [Edit](#) [Delete](#) [Import](#) [Copy](#) [Print Report](#) [Back To Log](#)

Submittal Detail
[Notes](#)
[Related Objects](#)
[Attachments](#)
[History](#)

Submittal No. 00008
Name Check for CALENDAR DAYS
Spec Section
Sort Order
Type
Preparation By
Approval By
Returned By
Forwarded To
Required Start 06/Nov/2013
Current Responsibility SB Urban Systems
Days Until Due -19
Closed Date
Held -11
Elapsed -11
Comment
Send Reminder Email ☐
Tester Name

Package No.
Procurement Item ☐
QC Inspect & Test Reqmnt ☐
Spec Sub-Section
Copies
Status
Contact - received from
Contact - sent to
Contact - returned by
Contact - forwarded to
Required Finish 24/Nov/2013
Contact Glenda Stimpson
Days Until Required 17
Change # [Create Change](#) [Link Change](#)
Overdue 12
Last Review Cycle 1
Days Prior to Preparation Start 4

Schedule

Activity	Lead Time	Review	Lead Time	Approval	Lead Time	Forward	Float	Fabrication	Lead Time	Delivery	Lead Time	Onsite
Dates Required By Schedule												
06/Nov/2013	7	13/Nov/2013	6	19/Nov/2013	5	24/Nov/2013	4	28/Nov/2013	3	01/Dec/2013	2	03/Dec/2013
Current Progress												
06/Nov/2013	7	17/Dec/2013	6	25/Dec/2013	5	01/Jan/2014	0	01/Jan/2014	3	04/Jan/2014	2	06/Jan/2014
■ = Dates are later than Schedule dates ■ = Due dates are later than Schedule dates ■ = Dates are on/before Schedule dates												

History Summary
[Hide](#)

Cycle	Action	Due Date	Action Date	Days Diff	From	Contact	To	Contact	Status
1	Received	13/Nov/2013	17/Dec/2013	34			SB Urban Systems	Glenda Stimpson	
1	Sent	25/Dec/2013			SB Urban Systems	Glenda Stimpson			
1	Returned	01/Jan/2014					SB Urban Systems	Glenda Stimpson	
1	Forwarded	01/Jan/2014			SB Urban Systems	Glenda Stimpson			

Detailed Description of the new Submittal Process

Submittal

Project Management Menu

Submittal Detail

Submittal No. WORKSHOP3

Name Samples to be sent for review, approval and then for fabrication and delivery

Spec Section

Sort Order

Type Materials

Preparation By

Approval By

Returned By

Forwarded To

Required Start 12/Nov/2013

Current Responsibility SB Urban Systems

Days Until Due -13

Closed Date

Hold

Comment

Send Reminder Email ☐

Tester Name

Package No.

Procurement Item ☐

OC Inspect & Test Request ☐

Spec Sub-Section

Copies

Status Open

Contact - received from

Contact - sent to

Contact - returned by

Contact - forwarded to

Required Finish 26/Nov/2013

Contact Glenda Simpson

Days Until Required 14

Change # Create Change Link Change

Overdue 7

Last Review Cycle 2

Days Prior to Preparation Start

Schedule

Activity	Lead Time	Review	Approval	Forward	Fabrication	Lead Time	Delivery	Lead Time	Onsite			
Preparation	5	19/Nov/2013	3	22/Nov/2013	2	26/Nov/2013	1	27/Nov/2013	2	29/Nov/2013	1	02/Dec/2013
Dates Required By Schedule	5	19/Nov/2013	3	22/Nov/2013	2	26/Nov/2013	1	27/Nov/2013	2	29/Nov/2013	1	02/Dec/2013
Current Progress	2	17/Dec/2013	0	17/Dec/2013	0	17/Dec/2013	0	17/Dec/2013	0	17/Dec/2013	0	17/Dec/2013
<div> <div> Dates are later than Schedule dates </div> <div> Dates are later than Schedule dates </div> <div> Dates are on/before Schedule dates </div> </div>												

History Summary

Cycle	Action	Due Date	Action Date	Days Diff	From	Contact	To	Contact	Status
2	Received	17/Dec/2013			SB Urban Systems	Glenda Simpson	SB Urban Systems	Glenda Simpson	
2	Sent	17/Dec/2013			SB Urban Systems	Glenda Simpson	SB Urban Systems	Glenda Simpson	
2	Returned	17/Dec/2013			SB Urban Systems	Glenda Simpson	SB Urban Systems	Glenda Simpson	
2	Forwarded	17/Dec/2013			SB Urban Systems	Glenda Simpson	SB Urban Systems	Glenda Simpson	
1	Received	16/Dec/2013	17/Dec/2013	1	SB Urban Systems	Glenda Simpson	SB Urban Systems	Glenda Simpson	
1	Sent	17/Dec/2013			SB Urban Systems	Glenda Simpson	SB Urban Systems	Glenda Simpson	
1	Returned	17/Dec/2013			SB Urban Systems	Glenda Simpson	SB Urban Systems	Glenda Simpson	
1	Forwarded	17/Dec/2013			SB Urban Systems	Glenda Simpson	SB Urban Systems	Glenda Simpson	

The user needs to know when the submittal process needs to be done to meet the project schedule. These can be referred to as the "**Dates Required by Schedule**".

Once a submittal is in process the user also needs to know what the expected **due dates** are if all the time commitments are kept. This is displayed by the **Current Progress** dates.

The "Dates Required by Schedule" are determined by back-calculating each Required Date by starting at the Delivery Finish Date i.e. Onsite date and moving backwards through each Lead Time.

The "Current Progress" due dates are defaulted with the same values initially, but will be recalculated once the user enters a new Preparation Start Date, by starting at the "Preparation Start Date" and moving forward through each Lead Time. In effect, this allows for "Late Start Dates" to be tracked using the "Dates Required by Schedule" and "Early Start Dates" to be tracked using the "Current Progress".

If any of the **Current Progress** dates is later than the **Dates Required by Schedule** dates it is highlighted in either **red** or **yellow** color.

Red color is for the **action dates (via Edit History) or manually entered dates (directly in Current Progress)** which are *later* than the corresponding schedule dates.

Yellow color is for the **due dates or projected dates (re-determined by the system after any manual changes)** which are *later* than the corresponding schedule dates.

White color is for the dates, **manual or projected**, which are *earlier than or equal* to the corresponding schedule dates.

* **Manual dates** are dates entered by the user.

* **Projected dates** are dates as a result of calculation from change of previous dates and lead times.

Initially, dates entered (projected) for **Review / Approval / Forward** in the **submittal** screen are kept as **Due Date** of **Received / Sent / Forwarded History Cycle** actions respectively. When a date is entered by the user on any of these processes in the submittal, the new date becomes the **Action Date** of the corresponding action in the history cycle, and the rest of the dates that follow are calculated as per the lead times in between.

As the dates are being calculated, the **Float period is adjusted**. This means, if the current progress Preparation/Review/Approval/Forward dates are adjusted, the float varies from a positive number to zero. If it is greater than 0, current progress Fabrication/Delivery/Onsite dates are adjusted.

Hence, **No. of float days (early or late)** is the **Variance** when float is 0; Variance is the **difference between the schedule and current progress Onsite Dates**.

In the submittal history window, when an action date is entered, the user is prompted if they would like to change the due dates going forward, and if they reply 'Yes', the system recalculates all of the upcoming due dates based on the action date just entered and the durations in the schedule.

The screenshot shows the 'Submittal History' window with a table of actions. A modal dialog box is open in the foreground, asking: 'Would you like to change the due dates going forward after Action Received?'. The dialog has 'OK' and 'Cancel' buttons.

Action	Transm	Cycle	Action	Due Date	Action Date	Days Diff	From	Contact	To	Contact
Received		1	230713	051213	135	Parrish Construction Partn	Reginald Owens	SB Urban Systems	Glenda Stimpson	
Sent		1	130813			SB Urban Systems	Glenda Stimpson			
Returned		1	110913					SB Urban Systems	Glenda Stimpson	
Forwarded		1	110913			SB Urban Systems	Glenda Stimpson			

Locking 'Dates Required by Schedule'

The screenshot shows the 'Submittal Detail' window. The 'Schedule' section is expanded, showing a table of activities. A red arrow points to the 'Dates Required by Schedule' line. The 'Current Progress' section shows the same activities with updated dates. The 'History Summary' table at the bottom shows the sequence of actions.

Activity	Activity Start Date	Variance	days late
Preparation	120713	20	
Review	090813	2	
Approval	130813	20	
Forward	110913	0	
Fabrication	110913	40	
Delivery	061113	20	
Onsite	041213		

Cycle	Action	Due Date	Action Date	Days Diff	From	Contact	To	Contact	Status
1	Received	09/Aug/2013	06/Dec/2013	119	Parrish Construction Partners	Reginald Owens	SB Urban Systems	Glenda Stimpson	
1	Sent	13/Aug/2013			SB Urban Systems	Glenda Stimpson			
1	Returned	11/Sep/2013					SB Urban Systems	Glenda Stimpson	
1	Forwarded	11/Sep/2013			SB Urban Systems	Glenda Stimpson			

The system will change schedule dates if lead times are changed for the 'Dates Required By Schedule' line provided that the submittal does not have any action date yet. That means the user can change lead times on that line and it will impact the 'Current Progress' line as well, but once some Action has been taken on that submittal record (in the Edit History) the 'Dates Required By Schedule' line is no longer updateable, that is, it is locked.

Initially only the lead times are unlocked, but once an Action is effected, the entire 'Dates Required by Schedule' line is locked. Changes can still be made to the 'Current Progress' dates and lead times.

Automatically Creating Review Cycle on Submittal Return

Under the new Submittal System Option for additional schedule dates, the status at the 'Returned' stage is associated with a Status Class of either 'Reviewed' or 'Resubmit'.

If the status class is set to a '**Resubmit**' class, the next review cycle will be created automatically and the Submittal will be placed back in the Subcontractor's responsibility.

Submittal Packages

Action	Submittal No.	Current Cycle	Name	Spec Section	Spec Sub-Section	Status	Type	Sort Order	Copies	Preparation By	Contact	Approval By	Contact	Returned By	Contact	Forwarded To	Contact	Required Start	Required Finish	Closed Date	Action
+																					+

Packages of submittals allow you to control and update multiple submittal items at one time. They are like a file folder of like/related information.

All of your submittal items can be created directly in the submittal package screen or selected from your log of existing submittals by a List of Values (LOV) which is accessed by clicking on the **[Add Submittal]** in the lower block of the Submittal Package screen.

The Lead Time functionality is available by accessing the submittal detail.

A package of submittals can be sent or forwarded to multiple recipients if required.

- Enter a unique submittal package code and a name for the package.
- Enter the review cycle parties.
- Enter the Status of the package. Field security can be applied to this field (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Submittal Package*).
- Apply the already setup submittal items by moving to the detail section and using the List of Values in the Submittal ID field to select the required submittal items.

The responsibility will automatically be set to the user who creates the package.

Create Submittal Items Directly in the Package

If you did not create the submittal items beforehand, you can create them directly in the Detail section of this screen.

NOTE: The JSP Project Maintenance - Defaults tab contains a Submittal Approver (Partner and Contact Code) that, if entered, will be used in the Submittal to default in the Approved By and Returned By fields. The Submittal Package JSP will also populate the specified default Approver in the Approved By and Returned By fields.

- Enter the submittal number if you are not using automatic numbering.
- Enter the submittal name.
- Enter the Specification Section, Specification Sub-Section and Sort Order number – remember these are only used for ordering on the submittal report log. There is an LOV available which lists all previously used values in the Spec Section field, and users can simply type in a new value if it had not been previously been used. The Spec Sub-Section does not store previous values, has no interaction or dependency on the Spec Section
- The stages of received, sent, returned and forwarded will be defaulted from the data entered on the package header but may be changed if necessary.

If you choose to select pre-existing submittals, click on **[Add Submittal]** and make your selection from the List of Values that is displayed. All the data from the submittal will default into the screen fields upon selection.

Updating the Submittal Package

When you update a submittal package, by default all the related submittals are updated at the same time. This makes the update process much quicker. To update the package, press the **[Update Package]** button.

- Enter the appropriate Action by selecting from the drop down list.
- Enter the date of the action.
- Modify the partner and contact if required.
- Set the new document status if it has changed.
- Opt to set a new review cycle if required.

All submittal items in this package will be updated with this information unless you manually override a specific item.

To view or update the history of the submittal package use the **[View History]** button after selecting the submittal package.

Documents

Adding a New Document

Add Drawings						
Number	DR-00014	Title				
Copies		Status	Open			
Bulletin		Category		Design		
Designer		Section		Section		
Received						
Revision Info						
Designer Ref.	Revision Date	Received Date	Status	Description	Attachment	
	120811	120811	Open	Original Version	Browse...	

Select the type of document that you are working with by opening the correct node on the tree. This will display all the documents within that type. Use the **[Add Document]** button to add a new document to the log. All new documents are considered to be Revision Zero.

The screen will open an entry area. Enter the new document information. Blue Triangles next to a field indicate that the field is mandatory.

- Document ID and Title are required fields. The Designer Ref. field is only mandatory if the flag 'Document Revision Designer Ref. Mandatory' (located in the PM Control – Defaults tab) is set. All other fields on the screen may be different depending on the document type. The ID field cannot contain special characters such as %'s or #'s.
- Use the **[Browse]** button to select the document. This button opens the standard file selection window.
- Once done press the **[Save]** button.

Text Codes for Documents

The default Text Types for Documents have to be set in the PM Control before the associated Text Codes can be available in the Text Codes LOV.

NOTE: Field security to the Status field in the **[View History]** popup is also available.

Adding a Revision

The screenshot shows the 'Photographs Detail' form with a 'Text Codes' tab. Below the form fields is a 'Revisions' table with columns: Number, Designer Ref., Revision Date, Received Date, Status, User, Description, Notes, Attachment, Change #, and Action. The table contains one row with the following data: Number 0, Designer Ref. upi-001, Revision Date 23/Nov/2010, Received Date 23/Nov/2010, Status Open, User Amanda Matthews, Description Original Version, Notes, Attachment SpecialPr.txt, Change #, and Action with links 'Create Change', 'Link Change', and 'Update Packages'. Below the table is a '+ Add Revision' button. An 'Add Revision' dialog box is open, showing fields for Number Rev. #, Designer Ref., Date (12/08/11), Received Date (12/08/11), Status (Open), User (Amanda Matthews), Description, Attachment, and a 'Browse...' button. The dialog has 'Save' and 'Cancel' buttons at the bottom.

Once a document has been added to the system it is often necessary to update it due to an addendum, RFI clarifications or change orders. Adding a revision to a document is a simple case of calling up the original document then using the **[Edit]** button to create the next revision.


To add new revisions use the **+** icon to open a new line

- Verify the Date,
- Enter a description of the revision
- Use the **[Browse]** button to insert the file.

[Save] the record when done.

Adding a Note to a Revision

Number	By	Date	Note	Closed	Action
No Records Found					

To add a note to a specific revision, open the document and use the  icon beside the required revision to open the standard notes window.

There can be multiple notes on a single revision, and all the notes will show on the document revision screen, as shown below.

Number	Designer Ref	Revision Date	Received Date	Status	User	Description	Notes	Attachment	Change #	Action
0	upl-001	23/Nov/2010	23/Nov/2010	Open	Amanda Matthews	Original Version		SpeciaPr.txt	Create Change Link Change	Update Packages
1	Note 1	12/Aug/2011	12/Aug/2011	Open	Amanda Matthews	Revision to be reviewed			Create Change Link Change	Update Packages
2	Note 1	12/Aug/2011	12/Aug/2011	Open	Amanda Matthews	Revision to be reviewed			Create Change Link Change	Update Packages

Importing Document Headers

To import document headers of a particular document type, users need only to be logged into the Documents Log of that type in the appropriate company and project. Clicking the Import button will open the file selection form shown above.

Once the file is selected, click the Upload option to bring the data in prior to validation. The Validation screen is presented to the user.

Edit the data. All fields shown with a non-white background include an error and must be corrected to be imported. Placing the mouse-pointer over the colored area will give details of the error. Individual records may be deleted from the Import by checking the Delete flag on the left side of the display.

Use the [**Re-Validate**] button to update changes and review any further errors. Once all records are corrected, click the [**Accept**] option. Existing document headers will be updated and new ones will be created by the import, if they do not already exist. The Document Package will also be created if it does not already exist. Otherwise, the package will be updated if necessary.

The import file for Document Headers includes the following fields (in this order):

Field Name	Description	Attribute
PMFDI_COMP_CODE	Comp. Code(required and must pre-exist)	VARCHAR2(2)
PMFDI_PROJ_CODE	Proj. Code (required and must pre-exist)	VARCHAR2(10)
PMFDI_GROUP_ID	Document Package ID (if available)	VARCHAR2(20)

PMFDI_ID	Document ID (required)	VARCHAR2(20)
PMFDI_TITLE	Document Title (required)	VARCHAR2(200)
PMFDI_TYPE_CODE	Doc. Type Code (req'd and must pre-exist)	VARCHAR2(10)
PMFDI_REV_NUM	Revision Number	NUMBER
PMFDI_REF_CODE	Designer Reference Code	VARCHAR2(60)
PMFDI_REV_DATE	Revision Date	formatted as: 'DD-MON-RRRR'
PMFDI_RECVD_DATE	Received Date	formatted as: 'DD-MON-RRRR'
PMFDI_REV_COMMENT		VARCHAR2(4000)
PMFDI_DESC1		VARCHAR2(100)
PMFDI_DESC2		VARCHAR2(100)
PMFDI_DESC3		VARCHAR2(100)
PMFDI_DESC4		VARCHAR2(100)
PMFDI_DESC5		VARCHAR2(100)
PMFDI_DESC6		VARCHAR2(100)
PMFDI_DATE1		formatted as: 'DD-MON-RRRR'
PMFDI_COPIES_NUM		NUMBER(11)
PMFDI_STATUS_CODE	Document Status	VARCHAR2(10)

Auto-numbering Documents

Users can auto-number their documents using a defined mask for each individual Document Type. Masks are defined in the PM Document Options form.

The Allow Override flag allows access to the Number Field to either enter in cases where no mask is defined, or to allow Override where a Mask is being used. Documents added will show a User name, allowing 'at a glance' display of the user that uploaded the document.

NOTE: If not assigning a Mask, ensure the Allow Override flag is CHECKED. Otherwise users will not be able to use that document type. (Default value is checked for this flag).

The definition of masks for auto-numbering of Documents is currently only available in the Forms version of Project Management, even though the assignment of Document IDs via auto-numbering is available in the JSP version as well as the Forms version.

Creating Documents without Document Packages

Documents can be created without necessarily having an associated Document Package. Both the XProjects Document Packages menu and the Forms counterpart will not show the menu option for document packages if the 'Menu Label' field is left empty when defining the document type in Document Options (Forms version).

Document Type definition is done in **PM>Setup>Local Tables>System Configuration>Document Options**.

If the menu label (in the top block of the PM document options screen) is not specified, then the packages for that document type will not be available in the menus and in the Transmittal detail line item type LOV, if a transmittal is created from the document.

The hint line of the Document Package Menu label has been modified to specify that if the field is left blank, then the package option will not be available in the menu.

Therefore, although the definitions are done in Forms version, the results are manifested both in Forms and xProjects.

Multiple Upload for Documents Log

The [**Multiple Upload**] button in the Document Log allows uploading of more than one document of the same or different document types. The characteristics of this feature are:

1. The document type in the multi-upload pop-up should default to the same as the Document log, i.e. if the user presses the multi-upload button while the Drawings log is on-screen, the document type should default to Drawings.
2. The Document log refreshes after the uploads are done.
3. If the user uploads documents to a Document Type(s) other than the onscreen Document Log, the system displays the Document Log for the first Document type specified in the multi-upload pop-up after the uploads are complete.
4. The user is able to upload to any document type when the multi-upload is invoked from a Document log.
5. The user is only able to upload to a single document type when the multi-upload button is invoked from a Document record.

Document Log Displaying Related PM Objects

A '**Related Object**' column is available on the Documents Log. This gives a count of the number of related PM objects that have the particular document as an attachment (in the Attachments tab of the PM object). The user can click on the number to get a popup of the list of objects and a link to drill to the object detail.

Mobile Drawing Management

Document: Drawing Management - ECM										
Sheet Number	Sheet Name	Rev Date	Revision	Status	Last Ref. Code	Uploaded By	Related Object	Trade	Original Page Number	Received
A-111	A-111 - FLOOR PLANS	16/May/2018	1	Approved	A-111 R1	Mike Fernandes	1	Architectural	A-110	10/May/2018
A-113	A-113 - ROOF CAP PLAN	16/May/2018	0			Mike Fernandes		Architectural		
A-114	A-114 - REFLECTED CEILING	16/May/2018	0			Mike Fernandes		Architectural		
A-115	A-115 - PHOTOVOLTAIC ROOF PLAN	16/May/2018	0			Mike Fernandes		Architectural		
A-116	A-116 - CONDITIONED SPACE AREA	16/May/2018	0			Mike Fernandes		Architectural		
A-117	A-117 - SOLAR FOOTPRINT AREA	16/May/2018	0			Mike Fernandes		Architectural		
A-201	A-201 - NORTH & SOUTH SITE ELEVATIONS	16/May/2018	0			Mike Fernandes		Architectural		
A-202	A-202 - EAST & WEST SITE ELEVATIONS	16/May/2018	0			Mike Fernandes		Architectural		
A-211	A-211 - NORTH & SOUTH ELEVATIONS	16/May/2018	0			Mike Fernandes		Architectural		
A-212	A-212 - EAST & WEST ELEVATIONS	16/May/2018	0			Mike Fernandes		Architectural		
A-311	A-311 - BUILDING SECTION	16/May/2018	0			Mike Fernandes		Architectural		
A-312	A-312 - BUILDING SECTION	16/May/2018	0			Mike Fernandes		Architectural		
A-313	A-313 - BUILDING SECTION	16/May/2018	0			Mike Fernandes		Architectural		
A-314	A-314 - BUILDING SECTION	16/May/2018	0			Mike Fernandes		Architectural		
A-315	A-315 - BUILDING SECTION	16/May/2018	0			Mike Fernandes		Architectural		
A-401	A-401 - ENLARGED BATHROOM PLAN	16/May/2018	0			Mike Fernandes		Architectural		

Sample of ECM Drawings screen in Log Mode, listing all sheets in drawing set.

After the extracted drawing set is uploaded into xProjects for a Project, using ECM Explorer, it can be accessed using the ECM Drawings screen: *xProjects > Document Management > Documents > Drawings - ECM*.

For details about the Mobile Drawing Management functionality, please refer to the following section: [Mobile Drawing Management – Setup](#).

The following are details about the fields on this screen:

Field	Description
Sheet Number	Sheet Number identifying the PDF, as extracted in ECM Explorer.
Sheet Name	Sheet Name for PDF, as extracted in ECM Explorer.

Revision Date, as entered for **Revision Date** field on Document Data Extraction popup in ECM Explorer when PDF was uploaded to xProjects:

Rev Date

Document Data Extraction

Projects

fres

(1494210) 1494210 - Productivity popup refresh issue

(YR0031) Freshmart - Dundas Grocery Store (Spring 2016)

(YR0033) Freshmart - Fairview Grocery Store (Spring 2016)

(YR0035) Freshmart - Misty River Grocery Store (Fall 2015)

Details

Version Name

Revision Date 5/17/2018 Revision no. 0

Received Date 5/17/2018

Select Document(s) Sheet Label OCR

Document Data Extraction popup in ECM Explorer.

Revision

Revision Number, as entered for **Revision no.** field on Document Data Extraction popup (shown above) in ECM Explorer when PDF was uploaded into xProjects.

Approval Status at Sheet Level (as opposed to at Revision Level), as set using **Status** field in header for Sheet in Edit Mode: **Open, Approved, Under Review, Closed, Rejected.**

Status

Drawing Management

Check Spelling Cancel Save

Drawing Management Detail

Sheet Number A-111 Sheet Name A-111 - FLOOR PLANS

Status Approved

Trade Architectural

Original Page Number Received

Revisions

Action	Number	SB - Designer Ref.	Revision Date	Received Date	Status	User	Description	Current Attachment	URL	New Attachment	Action
+	Rev #	A-111	051518			Mike Fernandes	Original Version	NoneA-111 - FLOOR PLANS.pdf		Browse... No file selected.	+
+	Rev #	A-111	051618	051618		Mike Fernandes	IFC Volume 1	NoneA-111 - FLOOR PLANS.pdf		Browse... No file selected.	+

Approval Status at Revision Level is set using **Status** field for Revision under **Revisions** section shown above.

Latest entry made for **SB – Designer Ref.** field for Sheet in Edit Mode:

Last Ref. Code

Drawing Management

Check Spelling Cancel Save

Drawing Management Detail

Sheet Number A-111 Sheet Name A-111 - FLOOR PLANS

Status Approved

Trade Architectural

Original Page Number Received

Revisions

Action	Number	SB - Designer Ref.	Revision Date	Received Date	Status	User	Description	Current Attachment	URL	New Attachment	Action
+	Rev #	A-111	051518			Mike Fernandes	Original Version	NoneA-111 - FLOOR PLANS.pdf		Browse... No file selected.	+
+	Rev #	A-111 R1	051618	051618		Mike Fernandes	IFC Volume 1	NoneA-111 - FLOOR PLANS.pdf		Browse... No file selected.	+

Uploaded By

User that uploaded Sheet to xProjects via ECM Explorer.

Related Object

Number of PM Objects (e.g., PCIs, RFIs, Issues...) to which Sheet was attached. Clicking the number opens a popup listing the PM Objects to which Sheet was attached, with links to the PM Objects.

Trade

Trade for which Sheet is relevant (e.g., Architectural, Electrical, Mechanical...), as was extracted in ECM Explorer.

Original Page Number

Original Page Number, as entered for Sheet in Edit Mode:

The screenshot shows the 'Drawing Management' window with the 'Drawing Management Detail' tab selected. The 'Sheet Number' is 'A-111' and the 'Sheet Name' is 'A-111 - FLOOR PLANS'. The 'Status' is 'Approved' and the 'Trade' is 'Architectural'. The 'Original Page Number' field is highlighted with a red box and contains the value 'A-110'. Below this is a 'Revisions' table with two rows of revision data.

Action	Number	SB - Designer Ref.	Revision Date	Received Date	Status	User	Description	Current Attachment	URL	New Attachment
+	Rev. #	A-111	051518			Mike Fernandes	Original Version	None	http://collab.cmc360.com/cmclaunch/launch.html	Browse... No file selected.
+	Rev. #	A-111R1	051618	051618		Mike Fernandes	IFC Volume 1	NoneA-111 - FLOOR PLANS.pdf		Browse... No file selected.

Received

Received Date, as set using **Received** field in header for Sheet in Edit Mode:

The screenshot shows the 'Drawing Management' window with the 'Drawing Management Detail' tab selected. The 'Sheet Number' is 'A-111' and the 'Sheet Name' is 'A-111 - FLOOR PLANS'. The 'Status' is 'Approved' and the 'Trade' is 'Architectural'. The 'Original Page Number' is 'A-110'. The 'Received' field is highlighted with a red box and contains the value '051018'. Below this is a 'Revisions' table with two rows of revision data.

Action	Number	SB - Designer Ref.	Revision Date	Received Date	Status	User	Description	Current Attachment	URL	New Attachment
+	Rev. #	A-111	051518	051418		Mike Fernandes	Original Version	None	http://collab.cmc360.com/cmclaunch/launch.html	Browse... No file selected.
+	Rev. #	A-111R1	051618	051618		Mike Fernandes	IFC Volume 1	NoneA-111 - FLOOR PLANS.pdf		Browse... No file selected.

Document Packages

The screenshot shows the 'Document Packages' window. The 'Number' field contains 'DRW-0003' and the 'Status' is 'Open'. There are fields for 'Description', 'Author Package Number', 'Importance', 'Current Date', and 'Percent Complete'. There are also text areas for 'Author Notes' and 'General Notes'. At the bottom, there is a 'Drawings' table with columns for Action, Number, Title, Revision, Designer Ref., Rev Date, Copies, Status, Bulletin, Category, Design, Designer, Section, and Action.

Action	Number	Title	Revision	Designer Ref.	Rev Date	Copies	Status	Bulletin	Category	Design	Designer	Section	Section	Action
+														

Document packages are sets of related individual documents grouped together to create a complete picture. For example, you may split your drawings into packages called Civil, Electrical, Mechanical and Structural. Then as the drawings are compiled link them to their relative packages.

Document packages have a status, i.e. Concept, Approved, Bid, Addendum Added and Issued for Construction as well as percent complete tracking and Author Package number, notes and comments.

If a document package has more than 30 documents (this is the default), the paging feature is enabled. The user can use the [Next] and [Prev] buttons to scroll forwards and backwards through the pages.

The number of records per page can be adjusted by clicking on the arrow which is adjacent to the [Next] button and changing the value in the 'Rows to display' field, then click on [Go].

Auto-numbering of Document Packages

The specification of the Document Package Mask for auto-numbering is done in Forms version by accessing the **Document Options** menu item in forms Project Management.

On the Document Options screen, the fields related to Document Package Auto-numbering are:

Pkg. Autonum. – flag indicating whether document package auto-numbering is to be used for the particular document type

Package ID Mask – indicate what the auto-numbering mask that should be used for the document package auto-numbering of the document type. The hint line for the mask shows the special characters that can be used.

Allow Override – flag indicating whether the user can override the auto-number ID proposed for the document package when it is being created.

NOTE: When these field values are set, they are applicable to ONLY the JSP version of Document Management.

Creating a Document Package

From the Document Package Log, click the [**Add Document Package**] button. The screen above is then displayed.

Enter the Document Package Number (if not using Document auto-numbering), Description and Status.


Enter the General Information about the package such as Author Package Number, Percent Complete and Importance.

Enter any Author Notes or General Notes that describe or enhance the understanding of the contents of the package.

To Add documents to the package, click the [**Add Attachment**] button. A pop-up screen showing the documents to choose from is displayed.

The user can sort, filter or find by any of the columns. The LOV displays all revisions of all documents of that document type. If more than one revision of the same document is selected for the package, the most recent one (by revision number) will be assigned to the package.

Select all the documents you wish to add to the package and use the arrows to move them from the 'Available' to the 'Selected' area. Use [**Accept**] to complete your selection.

You also have the option of creating document headers in the Detail section of this screen, by clicking the  icon while in Edit mode and entering all the information for your document.

Transmitting a Document Package

In many cases you will need to transmit a complete set of documents to one or more parties involved with the project, rather than just a single document. This is done via the Document Package screen.

- From the Document Package Log select the required package to open it up.
- Click the [**Transmit Package**] button. Field security exists for this button (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/PM Document Package*).
- By default, all documents are marked as selected to transmit, but you may manually adjust to send only specific documents from the package.
- Select the revision number you want to transmit either the current revision or create a new revision.

- Enter the party/parties you will be transmitting the document package to. If you have multiple parties, you can select them in the Distribution area of the screen.
- Create or Queue the transmittal as desired.

Bid Management

Overview – Bid Management

Collaborating means more than just entering RFIs... It is now possible for you to enter your bid information directly online. The information is secure and no one other than members of your own organization can see the bid information until it is submitted. Once it is submitted only the General Contractor can see the bid - your competition cannot see the information.

NOTE: Time Phased Budgeting has been deprecated.

Invitation to Bid

One of the first things you will want to do when working with a new project is issue Invitations to Bid. This function is intended to be a way of determining which of your suppliers or subcontractors are interested in pursuing a chance to work on the project. The invitation is generic, simply informing selected parties that you will be engaging in a project and giving them the opportunity to express their interest. This stage of the project can be done without the Job having to be completely setup, all you need is a project code and your project contacts.

Creating the Invitation

Depending on how much information you entered when creating the project, much of the information required for the Invitation to Bid will be automatically created.

Invitation To Bid											
Customer: Guelph University						Bid Date: 27/Oct/2010 12:00 AM					
Description: Lots of work - endless											
Scope											
Comments											
Street						Suite					
City						State/Province					
Postal / Zip Code						Country					
Planroom URL						Planroom Spec					
Broadcast Date: 05/Aug/2011 03:00 PM											
Bidders											Group By: None
Partner	Contact	Comment	Accept	Decline	Send	Internal Rating Company	Internal Rating Corporate	High Contract Company	High Contract Corporate	Number Of Contracts Company	Number Of Contracts Corporate
AXIS Technologies			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					175,000.00	1
Atlas Material Suppliers Inc.			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Parrish Construction Partners	Simon Parrish		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>			240,000.00	240,000.00	16	16

All the fields on this screen will default from the Project Setup screen, but you can change any of them at this point.

For example, the description you entered on the project screen may have been your own corporate information on the project, but for issuing a bid, you want the actual project synopsis.

Adding Bidders to the Invitation

Once the project information is correct, you can add your bidders to the invitation. To do this, click on the '+' in the right bottom corner of the screen. An entry line appears.

In the Partner field, click the arrow to gain access to the list of values. This will bring up a window where you can select multiple bidders at a time. Additional selection options by market sector or other partner classifications are available through the 'Filter' button (highlighted in the screenshot below).

Standard Treeview path: *xProjects > Bid Management > Invitation To Bid*

You can review partners' previous subcontract information, such as internal Rating entered at the time of subcontract entry, High Contract Amounts and Number of Contracts.

The **[Filter]** button allows additional bidder selection options.

The **"Group By"** dropdown box is only available in view mode, and allows the bidders information to toggle between being grouped by market sector, CSI Codes or having no grouping. This function is also available in the Bidders Log.

Some additional features of the Invitation to Bid are listed below:

- Attachments tab – users can add document attachments to the ITB
- ITB Broadcasts can be sent with attachments such as instructions to bidders, bid forms, scope sheets etc.
- When the 'Allow Multiple Bid Contacts per Partner' checkbox is checked in PM Systems Options, for a selected business partner in the ITB Bidders List, multiple bid contacts can be entered for a business

partner and ITB broadcasts issued for them. Additionally, each bid contact for that partner is automatically added to the bidder list when the business partner record is selected as a bidder.

Also, bear in mind that when it comes to the ITB, the potential bidders at this stage are usually not yet partners on the PROJECT, so the program was designed to look at the SYSTEM level for the bid flag on the contact.

- When the LOV for partners is invoked, the list does not initially show any partner records. **The default view is in filter mode.** The partner records are only shown after the filter selections are made and the user clicks the [GO] button.

NOTE: As Applicants for Vendor Pre-qualification can also be selected as bidders in Invitation to Bid and Bid Packages, the ‘Applicant List’ radio button has been added as a filter parameter when selecting Bidders in the Invitation to Bid and the Bid Package (Bidders) screen.

- Bidders can change their intent to bid, or not to bid, as many times as possible **but** ITB Responses are not accepted AFTER the project Bid Date...the following message will be sent:

Invitation To Bid Response

Project ITBCHANGE - ITB Enhancements - 14.89044

Submit Bid By 10/14/2014 12:00 AM

Please indicate your interest in bidding below:

Bid Package/CSI Code

- Preliminary Invitation To Bid

Bidding

Yes No

☐ ☐

Project Contact

Marion Palmer

Email Address

stephanie@cmic.ca

This ITB has a Bid Date of 10/14/2014 12:00 AM, which has passed. Bids are no longer accepted.

Notes

If you have any questions please contact Glenda Stimpson at (702) 234-1799 or email stephanie@cmic.ca.

Close

- Additional columns have been added to view mode of the Bidders display of Invitation to Bid:

Bidders														
Attachments														
Invitation To Bid														
Customer: Guelph University														
Description: Enhancements to Invitation to Bid - 14.89044														
Scope: All bid-related screens including Addendum, Bidders, Bid Package, Broadcast														
Comments: not applicable														
Street: Orange														
City: Jersey City														
Postal / Zip Code: 78110														
Planroom URL: http://www.bing.com														
Broadcast Date:														
Suite: 2100														
State/Province: New Jersey														
Country: USA														
Planroom Spec: not applicable														
Bidders														
Group By: None														
Partner	Contact	Prequalification Status	Approval Status	Phone	E-Mail	Comment	Accept	Decline	Send	Internal Rating Company	Internal Rating Corporate	High Contract Company	High Contract Corporate	Number Of Contracts Company
AXIS Technologies	William Winstet			323-258-3852	stephanie@cmic.ca		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5.790	5.790	120,000.00	275,000.00	72
AXIS Technologies	Marion Palmer			323-258-3852	stephanie@cmic.ca		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5.790	5.790	120,000.00	275,000.00	72
														78

These columns are: Prequalification Status, Approval Status, Bid Contact Phone, Bid Contact Email and an Edit icon to make changes to the contact record. The contact screen that is displayed is dependent on whether the contact is project-only or system contact. If it is both a project and system contact, then the project contact screen will open up.

Filtering With CSI Codes

When adding bidders to the ITB and the Bid Package, invoking the partner LOV does not initially show any partner records. **The default view is in filter mode.** The partner records are only shown after the filter selections are made and the user clicks the [GO] button.

Filter Find: % Go Close Accept

<< Prev Set 1 - 50 of 169 Next Set >> All Add New

☐ Project List ☒ Corporate List ☐ Bidders List

Selected 0 Clear All Selections

Territory Classification

Classifiers

Prequalification

Union ☐ Yes ☐ No ☒ Ignore Company Bondable ☐ Yes ☐ No ☒ Ignore

Single Project Limit From: To:

Approval Status

- Needs Management Committee Sign-off
- Prequal Date is Blank or > 365 Days Old
- Regional Hold - Read Comments for Explanation
- Safety CAP and/or Insurance Deficiencies

Note: Union and Bondable fields are searched on regardless of Prequal Required Flag

CSI Codes - Design		
013316 - Design Data		<input checked="" type="checkbox"/>
CSI Codes - Facilities		
019400 - Facility Decommissioning		<input checked="" type="checkbox"/>
CSI Codes - Planning		
004513 - Bidders Qualifications		<input checked="" type="checkbox"/>
0173113 - Application		<input checked="" type="checkbox"/>
CSI Codes - Remediation		
00312413 - Soil Contamination Report		<input checked="" type="checkbox"/>
00312423 - Environmental Impact Study Report		<input type="checkbox"/>
01351319 - Special Project Procedures for Healthcare Facilities		<input type="checkbox"/>
01352913 - Health, Safety and Emergency Response Procedures for Contaminated Sites		<input type="checkbox"/>
02531613 - Remediation of Contaminated Soils by Thermal Desorption		<input type="checkbox"/>

If the selection is made based on CSI Codes, the user first selects the CSI Codes then click [Go]. A list of all the business partners will be shown per CSI Code.

Filter
Find: %
Go
Close
Accept

<< Prev Set
1 - 17 of 17
Next Set >>
All
Add New

☐ Project List
☒ Corporate List
☐ Bidders List

Territory

Classification

Classifiers

Prequalification

Union ☐ Yes ☐ No ☒ Ignore
Company Bondable ☐ Yes ☐ No ☒ Ignore

Single Project Limit From: To:

Approval Status
 Needs Management Committee Sign-off
 Prequal Date is Blank or > 365 Days Old
 Regional Hold - Read Comments for Explanation
 Safety CAP and/or Insurance Deficiencies

Note: Union and Bondable fields are searched on regardless of Prequal Required Flag


Partner Code	Abbreviation Code	Name	
00312413 - Soil Contamination Report			
AIMLESS	AIMLESS	Aim Leasing Corporation	<input checked="" type="checkbox"/>
BELARUS	BELARUS	new guy7	<input type="checkbox"/>
CRAPCORE	CRAPCORE	Creative Coring and Drilling Company	<input type="checkbox"/>
GOODMAN	GOODMAN	Goodman Consulting	<input type="checkbox"/>
GRAVES	GRAVES	Graves Incorporated	<input type="checkbox"/>
GUYNEW4	GUYNEW4	New Guy # 4	<input type="checkbox"/>
ITTAKES2	ITTAKES2	It Takes Two Design Group	<input checked="" type="checkbox"/>
004513 - Bidders Qualifications			
AIMLESS	AIMLESS	Aim Leasing Corporation	<input type="checkbox"/>
CRAPCORE	CRAPCORE	Creative Coring and Drilling Company	<input type="checkbox"/>
GOODMAN	GOODMAN	Goodman Consulting	<input type="checkbox"/>
013316 - Design Data			
AIMLESS	AIMLESS	Aim Leasing Corporation	<input type="checkbox"/>
GOODMAN	GOODMAN	Goodman Consulting	<input checked="" type="checkbox"/>
0173113 - Application			

Selected 3

Clear All Selections

The user will then select the business partners that bid invitations will be sent to, and then click **[Accept]**. This action will pull in the corresponding bid contacts for each business partner into the bidders screen. If the 'Group By' is set as **CSI Codes**, the screen will display the bidders per CSI Code.

The screenshot shows the 'Bidders' screen. On the left, a yellow popup window displays a list of CSI codes with checkboxes. The main table lists bidders with columns: Internal Rating Company, Internal Rating Corporate, High Contract Company, High Contract Corporate, Number Of Contracts Company, and Number Of Contracts Corporate. A red box highlights the 'Group By' dropdown menu, which is set to 'CSI Codes'.

In addition, the Edit icon  beside each record allows the user to display the CSI Codes that the business partner has been assigned in the system.

The codes that are checked are the ones that the business partner is currently filtered by. The user can select or deselect codes and update the Bidders screen using the [Update] button in the yellow popup screen (scrolling may be necessary in some browsers).

The [Search] button (only shown for longer lists) allows the user to search the CSI codes description list for codes with a given text in the description.

Standby Bidders

If you remove (uncheck) **all** the CSI Codes that were previously against a bidder in the CSI Codes popup of that bidder (see screen shots below), then the CSI Code becomes a 'Standby' code for possible re-assignment if later required. For example:

1. Click 'Edit' icon beside the bidder

The screenshot shows the 'Bid Package' screen. It displays a list of bidders with columns: Partner, Contact, Phone, E-Mail, Prequalification Status, Approval Status, Prequal Applicant, Budget Amount, Bid Amount, Budget Delta, Lowest Bidder, Accept, Decline, and Received Plans/Specs. A yellow popup window is visible, showing a list of CSI codes with checkboxes. A red arrow points to the 'Standby' status of a bidder.

2. The 'yellow' popup window displays the CSI Codes that are assigned to the bidder and in use (checked ones).

Bid Package
 Package No. BPX0001 Name: Select Bidders by CSI Code Status: New-never created

General Address Buy Out Addenda Alternates Special Pricing Inclusions Exclusions **Bidders** Notes Attachments

Bidders Group By: CSI Codes

Send	Partner	Contact	Phone	E-Mail	Prequalification Status	Approval Status	Prequal Applicant	Budget Amount	Bid Amount	Budget Delta	Lowest Bidder	Accept	Decline	Received Plans/Specs	Notes
002000: Contract Extra															
<input type="checkbox"/>	A1BLOCK							0	0	0					
<input type="checkbox"/>	test7							0	0	0					
002000: Contract Mode															
<input type="checkbox"/>	A1DOORS Name Updated							0	0	0					
<input type="checkbox"/>	test7							0	0	0					
<input type="checkbox"/>	test7							0	0	0					
004519: Non-Collusion															
<input type="checkbox"/>	test7							0	0	0					
<input type="checkbox"/>	test7							0	0	0					
006200: Contractor Insurance															
<input type="checkbox"/>	Aetna Insurance							0	0	0					
Standby															
<input type="checkbox"/>	Carpentry Specialist							0	0	0					
No CSI Code assigned															
<input type="checkbox"/>	Davis Construction							0	0	0					
<input type="checkbox"/>	Global Construction Ltd							0	0	0					
<input type="checkbox"/>	Horizon Construction Co Ltd							0	0	0					

3. Uncheck the checked CSI Codes, and click 'Update' and the grouping will show the bidder under 'Standby':

Bid Package
 Package No. BPX0001 Name: Select Bidders by CSI Code Status: New-never created

General Address Buy Out Addenda Alternates Special Pricing Inclusions Exclusions **Bidders** Notes Attachments

Bidders Group By: CSI Codes

Send	Partner	Contact	Phone	E-Mail	Prequalification Status	Approval Status	Prequal Applicant	Budget Amount	Bid Amount	Budget Delta	Lowest Bidder	Accept	Decline	Received Plans/Specs	Notes
002000: Contract Extra															
<input type="checkbox"/>	A1BLOCK							0	0	0					
<input type="checkbox"/>	test7							0	0	0					
002000: Contract Mode															
<input type="checkbox"/>	A1DOORS Name Updated							0	0	0					
<input type="checkbox"/>	test7							0	0	0					
006200: Contractor Insurance															
<input type="checkbox"/>	Aetna Insurance							0	0	0					
Standby															
<input type="checkbox"/>	Broadstreet Concrete - Updated with the privilege							0	0	0					
<input type="checkbox"/>	Carpentry Specialist							0	0	0					
No CSI Code assigned															
<input type="checkbox"/>	Davis Construction							0	0	0					
<input type="checkbox"/>	Global Construction Ltd							0	0	0					
<input type="checkbox"/>	Horizon Construction Co Ltd							0	0	0					

Broadcasting to Pre-qualification Applicants

Applicants for Vendor Pre-qualification can also be selected as bidders in Invitation to Bid and Bid Packages.

Applicant List LOV - Windows Internet Explorer

http://test4v10.cmic.ca:7785/cmictestv10x/PMProjContactPopup/PMPartnerLOVFrame.do?CompCode=SUS&projOraseq=73

Filter Find: % Go Close Accept

<< Prev Set 1 - 50 of 58 Next Set >> All Add New

Selected 0 Clear All Selections

☐ Project List ☐ Corporate List ☐ Bidders List ☒ Applicant List

Territory Classification

Classifiers

Prequalification

Union ☐ Yes ☐ No ☒ Ignore Company Bondable ☐ Yes ☐ No ☒ Ignore

Single Project Limit From: To:

Approval Status

Needs Management Committee Sign-off
Prequal Date is Blank or > 365 Days Old
Regional Hold - Read Comments for Explanation
Safety CAP and/or Insurance Deficiencies

Note: Union and Bondable fields are searched on regardless of Prequal Required Flag

Partner Code	Abbreviation Code	Name
2563717	2563717	Acme Construction
27	27	Andrew901
2520869	2520869	Brass Tacks National

As a result, the system also allows users to send ITB Broadcasts to Pre-qualification Applicant contacts.

NOTE: The edit of Applicant contact is not permitted in the ITB and Bid Package

Bidders

Customer: Guelph University

Description: more ITB Enhancements

Scope:

Comments:

Street:

City:

Postal / Zip Code:

Planroom URL:

Broadcast Date: 10/Dec/2014 05:00 AM

Invitation To Bid

Bid Date: 31/Dec/2014 12:00 AM

Suite:

State/Province:

Country:

Planroom Spec:

Bidders

Group By: None

Partner	Contact	Phone	E-Mail	Prequal Applicant	Comment	Accept	Decline	Send	Prequalification Status	Approval Status	Internal Rating Company	Internal Rating Corporate	High Contract Company	High Contract Corporate	Number Of Contracts Company	Number Of Contracts Corporate
AVIS Technologies	Brian Capstan	323-255-3852	stephanie.bromfield@cmic.ca	<input type="checkbox"/>	test # 3 - non-Applicant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On Hold Missing Date	Prequal Date is Blank or > 365 Days Old	5.790	5.790	120,000.00	275,000.00	73	79
Fiennes Upholstery	Simon Parrish		stephanie@cmic.ca	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					258,929.00	258,929.00	51	58
Rigor Consulting and Design/Build	Miles Harding			<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					266,000.00	266,000.00	59	59
Soul Operator Incorporated	Stacey Keach		stacey@rogers.com	<input checked="" type="checkbox"/>	non-Applicant YES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>								
Soul Operator Incorporated	Dani		stephanie.bromfield@cmic.ca	<input checked="" type="checkbox"/>	test # 3 - Applicant - NO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								

no 'Edit' icon for Applicant contacts

In addition, a Contacts tab is now a part of the Pre-qualification Applicant screen to allow addition of contacts for an Applicant:

First Name	Last Name	Contact Code	Bid Contact	E-mail	Action
Stacey	Keech	STK	<input checked="" type="checkbox"/>	stacey@rogers.com	+ X
Dan	Fisher	DF	<input checked="" type="checkbox"/>	dank.fisher@rogers.com	+ X
Dan	Dani	DD	<input type="checkbox"/>	dani@rogers.com	+ X
Mary	Jane	MJ	<input type="checkbox"/>		+ X

Updating Bidders

At any time after the initial setup of the invitation, you may want to add a new bidder or a new distribution list. You can do so by opening up the Invitation and using the '+' icon in the Bidders section. The parties that have already been selected will be shown. You can mark a selected party as 'Declined' to bid or to 'Send' original and re-prints of invitations to bid.

'Select All' checkboxes for 'Accept' Decline' and 'Send' are available on the Invitation to Bid (ITB) screen. These checkboxes are only visible and available in 'Edit' mode. They allow the selection of all records especially in the case where there is a large number of bidders to whom the ITB must be sent.

Printing the Invitation to Bid

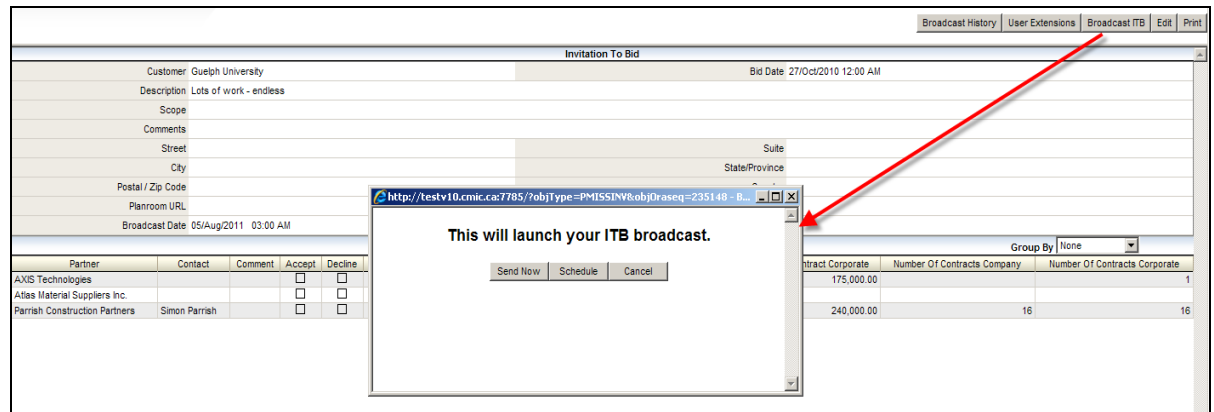
To print the Invitation to Bid, make sure the business partner company and contact are entered, and check the 'Send' flag for the contacts you wish to print an invitation for. The [Print] button is available in view mode.

Broadcasting Invitation to Bid via Email

Invitations to Bid (ITB) can be set up to be automatically emailed out to all bidders. Bidders will be able to indicate whether or not they will be bidding by pressing a button (or link) on the email itself, in response. The database will automatically update the bidder's bidding status based on this automated response.

The email can be sent out immediately or it can be scheduled through Workflow. The script [wkf_launch_ITB_scheduler.sql](#), which launches the workflow, must be run manually at any customer that is going to utilize this function. This script should only be run after consultations with CMiC personnel. It schedules the program to check every hour after a pre-defined Broadcast Date/Time – which is set in the Invitation to Bid or Bid Package screens.

[Broadcast ITB] – Button



When the user clicks the button, the resulting popup has three options for the ITB Broadcast:

Send Now – the email is sent right away to all bidders who have ‘Y’ in the Send field, and the ‘Accept’ and ‘Decline’ flags are un-checked.

Schedule – the email is scheduled via Workflow to run every hour and check the Send/Decline/Accept flags, send emails where necessary and update bidder records.

Cancel – cancel the action.

When the ITB Broadcast is launched from the Bidders Log, there is no [**Schedule**] option. The reason for this is that if multiple Bidder Log records are selected, they are from various Bid Packages which may have different Broadcast Dates, and this would be impossible to schedule.

Rules for sending ITB Emails

- Business Partner Code and Contact code (with valid email address assigned) must be entered in Bidders Log, Invitation to Bid (ITB), Bid Package
- ‘Send’ checkbox must be checked in ITB with Accept and Decline un-checked when broadcasting from this program
- Accept and Decline must be un-checked in Bid Package Bidders or Bidders Log when broadcasting from these programs
- ITB Sender Email address **must** be entered in Project Maintenance, otherwise an error message regarding this will be displayed.
- When Scheduling the ITB, the Broadcast Date **must** be entered, otherwise, an error message will be displayed and the request will be shown in the database log as PENDING, and will not go through.

Using Templates for sending ITB Emails

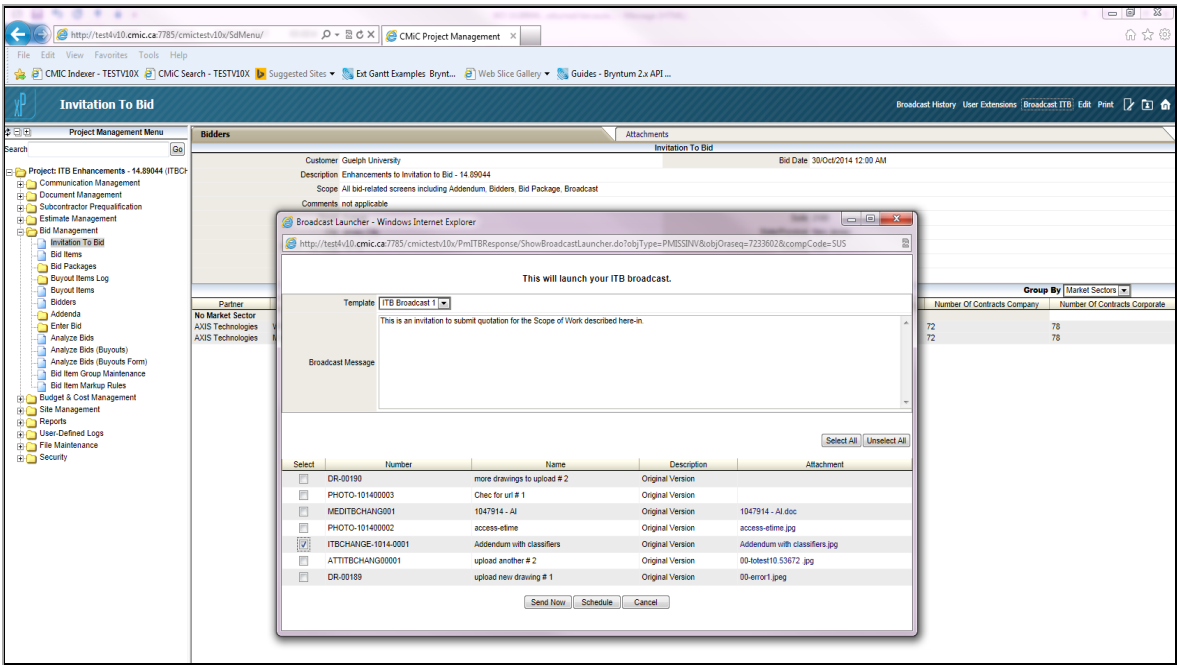
ITB Templates are maintained under File Maintenance > Local Tables > ITB Broadcast Message Templates.

When the template is selected, the text is pulled into the Broadcast Message field where the user can make changes, if desired.

Users can customize templates according to the broadcast they are sending out – ITB, Bid Package or Addendum.

If ‘No Template’ is selected and no text is entered in the Broadcast Message field, the standard CMiC broadcast text will be sent.

If 'No Template' is selected and freeform text is entered in the Broadcast Message field, this is the text that will be broadcast.

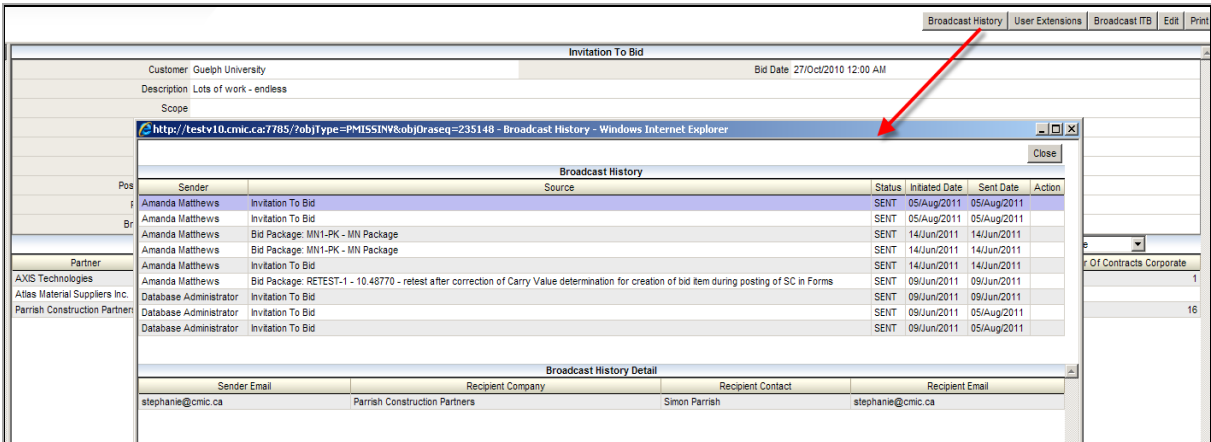


ITB Broadcast History

The ITB Broadcast History program shows detailed information about all the ITB broadcasts, including where they were initiated from: the Invitation to Bid (ITB) screen, Bid Package or Bidders Log. It shows all the recipients and provide the ability to cancel scheduled broadcasts.

To activate the program, set it at the required security role in the Assign Programs menu option in xProjects security:

When security is assigned, the **[Broadcast History]** button becomes available in the Invitation to Bid, Bid Packages and Bidders Log screens. For example:



In the case of Bid Packages, the **[Broadcast History]** only shows history records related to a particular bid package, whereas for the Invitation to Bid and the Bidders Log, all the history will be shown.

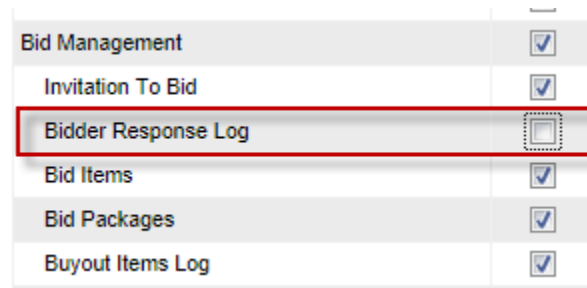
Position the cursor on a line in the top section to show the history details of that record in the bottom section.

Field security can be applied to the **Cancel Broadcast** action icon in the ITB Broadcast History popup window. The possible values are Unrestricted and Hidden.

Bidder Response Log

This program acts as a bidder activity log, showing when responses are received from each contact and what the response is (Accepted or Declined).

The security for this program is set under the Assign Menu Items security option:

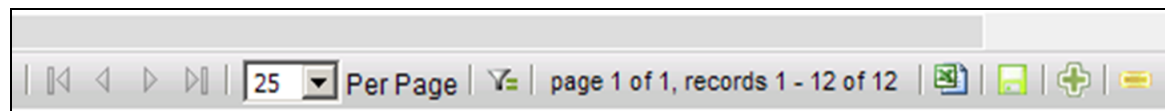


Project Management									
Project Management Menu									
Bidder Response Log									
Source	Code	Name	Partner Name	Contact Name	From Email	To Email	Response #	Response Date	Response
Invitation To Bid	ITBCHANGE	ITB Enhancements - 14.89044	AXIS Technologies	Marion Palmer	stephanie@cmic.ca	stephanie@cmic.ca	1	29/Oct/2014	Declined
Invitation To Bid	ITBCHANGE	ITB Enhancements - 14.89044	Parrah Construction Partners	Simon Parrah	stephanie@cmic.ca	stephanie@cmic.ca	1	29/Oct/2014	Declined
Invitation To Bid	ITBCHANGE	ITB Enhancements - 14.89044	AXIS Technologies	William Winslet	stephanie@cmic.ca	william@rogers.ca	1	27/Oct/2014	Accepted
Invitation To Bid	ITBCHANGE	ITB Enhancements - 14.89044	AXIS Technologies	Marion Palmer	stephanie@cmic.ca	stephanie@cmic.ca	1	27/Oct/2014	Accepted
Invitation To Bid	ITBCHANGE	ITB Enhancements - 14.89044	AXIS Technologies	Marion Palmer	stephanie@cmic.ca	stephanie@cmic.ca	1	29/Oct/2014	Declined
Invitation To Bid	ITBCHANGE	ITB Enhancements - 14.89044	AXIS Technologies	William Winslet	stephanie@cmic.ca	william@rogers.ca	1	28/Oct/2014	Declined
Total (7 rows)									
Comments									
response from William									
notes from Marion Palmer									
more notes here									
another response sent									


It shows responses to invitation to bids sent from the ITB, Bid Package or Addendum.

Bid Item Sigma Grid

Sigma Grid



The Bid Item screen has a new look which is called the Sigma Grid. This new look allows the user to directly modify bid item columns as they would a spreadsheet. There are a number of items at the bottom of the grid that allow adding, saving, deleting and exporting to spreadsheet. There is also the ability to set the number of records to display per page.

The pale  picture at the bottom-right corner of the grid allows re-sizing of the display area.

The number of records per page can be modified and retained for an entire user session.

Bid Item Entry and Import

<

Every project in has its own set of bid items, as each project may have different purchase requirements for the same item. For example, the HVAC component may have been supplied and installed by the same contractor on one project, while on this project you are having the equipment supplied separate from the installation contract. Creating your project Bid Item list is a process of selecting required items from the Corporate Bid Item List and then adding any extra items as required or importing them from a spreadsheet.

In CMiC, each bid item can track a purchase method, estimate and target price, retainage %, the related specification document and sub-section and the Cost phase/category along with taxes. Items already purchased, will show the actual purchase price.

The **Alternate Identifier** field is a numeric field with type: Number 4, 2 i.e. a maximum of 4 characters including any decimal point e.g. 44.1). The Project Role privilege '**Maintain Bid items Alter ID Low**' controls maintenance of the Alternate ID LOV, such as adding, editing or deleting Alternative IDs (standard Treeview path: *xProjects > Security > Project Roles*).

The purpose of this field is to indicate that the bid item is an alternate for an existing item that can be selected by the owner if they would like. Usually these items are less costly options – a different grade of carpet, for example. The field is to be used for custom reporting purposes only. Field security can be applied to the Alternate Identifier, if necessary (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Bid Items*). Possible values are Unrestricted, Read-only or Hidden.

[**Copy Job Structure**] will allow creation of bid items from the phase/category structure of the current project's job. Display of this button can be set by field security.

The ability to configure the fields you want to see and to query particular records based on user input, are features that the Bid Items screen afford as well.

Phase Type and Forecast Method for Bid Items

Phase Type and Forecast columns have been added to the Bid Items Sigma Grid.

The Phase Type is validated against "Phase Types" set up in Job Costing Local Tables (on a Company level). New Phase types cannot be entered on this screen. Any phase type other than the company defaults will produce an error.

The Forecast Method is validated against standard "Forecast Methods" of Amounts, Productivity and Units. The Forecast Method entered can be overridden.

These two columns have also been added to the layout of the Bid Item Import file. Bid items manually entered or imported to the Bid Items screen will auto-populate the Phase Type and Forecast Methods, which can then be overridden.

Layout for Bid Item Import showing additional fields:

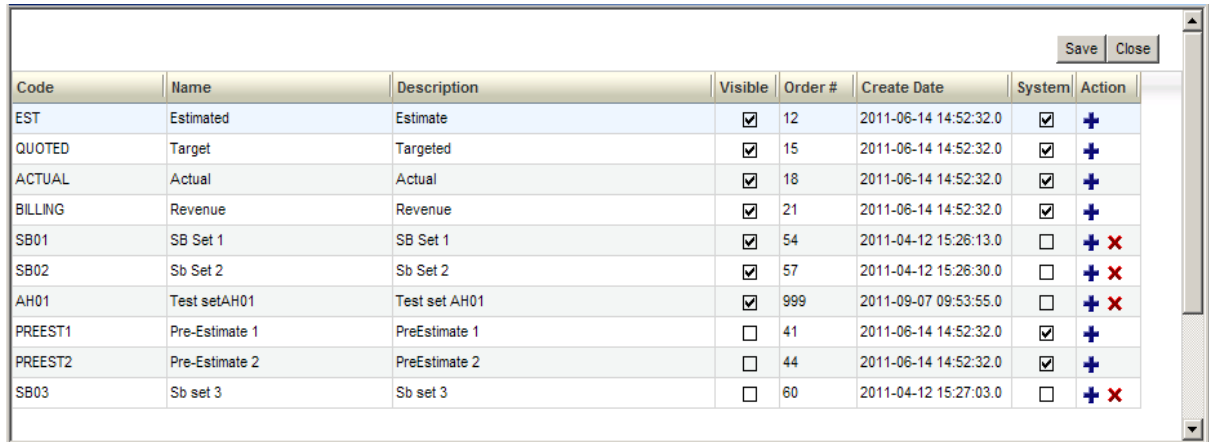
```

LOAD DATA
APPEND
INTO TABLE DA.PMFOREIGN_BIDITEM_IMPORT
FIELDS TERMINATED BY "," OPTIONALLY ENCLOSED BY "'"
(
  PMFBII_COMP_CODE,
  PMFBII_PROJ_CODE,
  PMFBII_MT_CODE,
  PMFBII_ITEM_NAME,
  PMFBII_TARGET_PURCH_DATE    DATE 'DD-MON-YYYY',
  PMFBII_WM_CODE,
  PMFBII_ITYPE_CODE,
  PMFBII_PURCH_TYPE_CODE,
  PMFBII_EST_QTY,
  PMFBII_EST_PRICE_AMT,
  PMFBII_EST_AMT,
  PMFBII_QUOTED_QTY,
  PMFBII_QUOTED_PRICE_AMT,
  PMFBII_QUOTED_AMT,
  PMFBII_HLDBK_PCT,
  PMFBII_SPEC_SECTION,
  PMFBII_SPEC_SUBSECTION,
  PMFBII_PHS_CODE,
  PMFBII_CAT_CODE,
  PMFBII_TAX1_CODE,
  PMFBII_TAX2_CODE,
  PMFBII_TAX3_CODE,
  PMFBII_CLV_CODE1,
  PMFBII_CLV_CODE2,
  PMFBII_CLV_CODE3,
  PMFBII_CLV_CODE4,
  PMFBII_CLV_CODE5,
  PMFBII_CLV_CODE6,
  PMFBII_JOB_CODE,
  PMFBII_PHS_WM_CODE,
  PMFBII_PHS_QTY,
  PMFBII_PHS_FIRST_SEGM_VALUE,
  PMFBII_BILL_QTY,
  PMFBII_BILL_PRICE,
  PMFBII_BILL_AMT,
  PMFBII_TEMP_PCI_ID,
  PMFBII_WBS_CODE1,
  PMFBII_WBS_CODE2,
  PMFBII_WBS_CODE3,
  PMFBII_WBS_CODE4,
  PMFBII_CUSTOM_PRICING_QTY,
  PMFBII_CUSTOM_PRICING_PRICE,
  PMFBII_CUSTOM_PRICING_AMT,
  PMFBII_GROUP_CODE,
  PMFBII_ALTER_ID,
  PMFBII_PHS_TYPE,
  PMFBII_FORECAST_METH
)
  
```

Configuring the Bid Items View

The Bid Item Entry screen can handle up to a maximum of 50 Pricing Sets. A pricing set is defined as one column each of Qty, Price and Amount fields plus a name and date.

The **[Pricing Set]** button replaces the original **[Configure View]**, to give a pop-up of the various pricing sets that the user can create and/or select to show on the Bid Items screen.



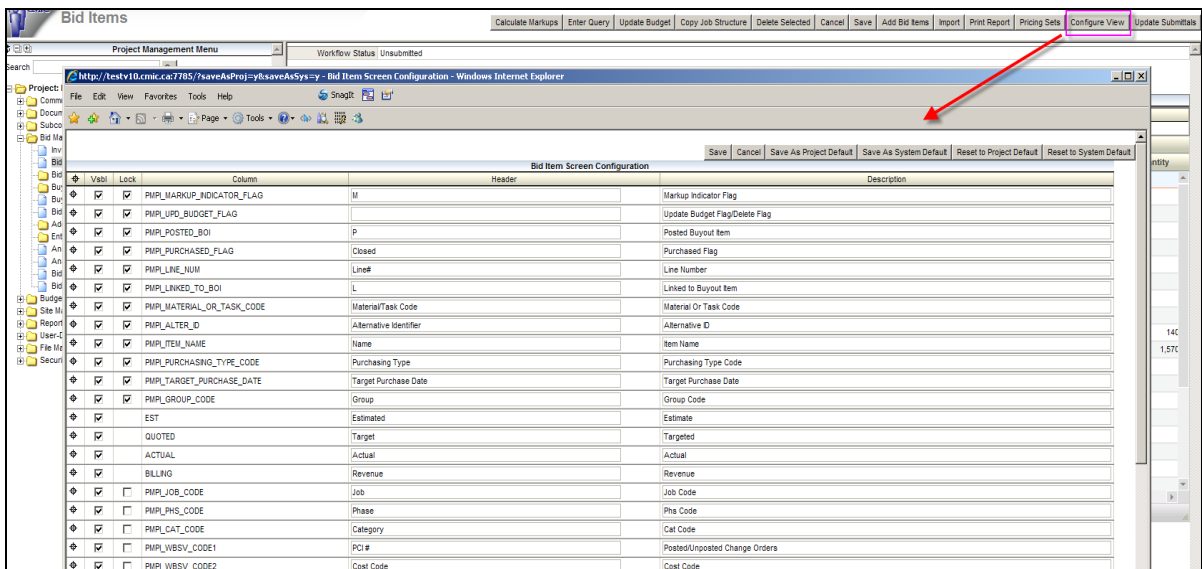
Code	Name	Description	Visible	Order #	Create Date	System	Action
EST	Estimated	Estimate	<input checked="" type="checkbox"/>	12	2011-06-14 14:52:32.0	<input checked="" type="checkbox"/>	+
QUOTED	Target	Targeted	<input checked="" type="checkbox"/>	15	2011-06-14 14:52:32.0	<input checked="" type="checkbox"/>	+
ACTUAL	Actual	Actual	<input checked="" type="checkbox"/>	18	2011-06-14 14:52:32.0	<input checked="" type="checkbox"/>	+
BILLING	Revenue	Revenue	<input checked="" type="checkbox"/>	21	2011-06-14 14:52:32.0	<input checked="" type="checkbox"/>	+
SB01	SB Set 1	SB Set 1	<input checked="" type="checkbox"/>	54	2011-04-12 15:26:13.0	<input type="checkbox"/>	+ X
SB02	Sb Set 2	Sb Set 2	<input checked="" type="checkbox"/>	57	2011-04-12 15:26:30.0	<input type="checkbox"/>	+ X
AH01	Test set AH01	Test set AH01	<input checked="" type="checkbox"/>	999	2011-09-07 09:53:55.0	<input type="checkbox"/>	+ X
PREEST1	Pre-Estimate 1	PreEstimate 1	<input type="checkbox"/>	41	2011-06-14 14:52:32.0	<input checked="" type="checkbox"/>	+
PREEST2	Pre-Estimate 2	PreEstimate 2	<input type="checkbox"/>	44	2011-06-14 14:52:32.0	<input checked="" type="checkbox"/>	+
SB03	Sb set 3	Sb set 3	<input type="checkbox"/>	60	2011-04-12 15:27:03.0	<input type="checkbox"/>	+ X

The initial popup consists of the previously defined pricing sets: Pre-Estimate 1, Pre-Estimate 2, Estimate, Targeted, Actual and Billing. These are set as system-defined and cannot be deleted.

Create and Delete actions can be secured by using field security.

User-defined pricing sets are project-specific.

The 'new' **[Configure View]** button now displays a pop-up window of all the Bid Items fields from which the user can select which fields to show or not:



This is similar to the Log Builder, and also allows the user to select fields to be 'Visible' and/or 'Locked'.

Lock means to freeze a column - it will be moved to the left side on the screen and frozen. The fields can also be moved to different positions.

The Pricing Set fields (including user-defined ones) cannot be locked but their position can be changed. They also are not editable on the Configuration screen.

The three Tax fields always go together and the Order# is calculated based on Tax1 position.

[Save] – This means that the configuration changes are saved for the **current user** and **current project**.

[Save as Project Default] - This means that the configuration changes are saved for the **current project**, for **any user**. Field security can be applied to the [Save as Project Default] and the [Configure View] buttons (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Bid Items*).

Querying Bid Items

To issue a query for retrieval of existing records, click the [Enter Query] button. This action causes a blue query line to appear just above the first bid item record of the current page.

Execute Query

Cancel

Clear Query

Workflow Status: Unsubmitted

Li	Bought	CI	Line#	Material/Task Code	Name	Target Purchase Date	WM	Item Type	Purchasing Type	Pre-Estimate 1			Pre-Estimate 2			
Quantity	Price	Amount	Quantity	Price	Amount	Quantity										

Review/Approval

Action		Role		Date		User		Notes	
No Records Found									

<input type="checkbox"/>	L	P	Clos...	Line#	Material/Tas...	Name	WM	Estimated			Revenue			Actual	
								Quantity	Price	Amount	Quantity	Price	Amount	Quantity	Price
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	bitem1	bitem1	NA								
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	bitem3	bitem3	NA	54.000	125.75	6,790.500					
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	bitem4	bitem4	EA	30.000	12.84	385.200					
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	bitem5	bitem5-carry value mo...	BX	40.000	18.70	748.000					
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8	linkitem1	linkitem1	NA								

The query is available on any field of the Bid Item.

For date fields, the format for query entry is dd-mm-yy, dd/mm/yy or dd-mmm-yyyy.

After entering the query values, click [Execute Query]. If any records exist which satisfy your input values, they will be displayed in the next screen display, and the title bar will show the word 'filtered'.


To clear the query, click on [Enter Query] again. You are brought back to the query input screen, on which the button [Clear Query] is available. Click this button to go back to view mode of the bid item list.

Adding and Editing Bid Items

Item Code	Item Name	Select
CMPPURITEM1	Purchase Item 1 - Company wide -must have phase	<input type="checkbox"/>
CMPPURITEM2	Purchase Item 2 - Company wide - with phase	<input type="checkbox"/>

While in view or query mode of bid items, you can create new bid items or edit existing ones, by clicking [**Add Bid Items**] or by modifying the field directly.

The [**Add Bid Items**] button will display an LOV of the Company level Purchase Items (defined in Forms version under Setup), as long as the Phase field has been completed.

The 'Add' icon  at the bottom of the Sigma Grid will allow an input line to be open up for adding a bid item

You can also delete selected records or 'close' items from being bid on/purchased.

If a bid item was bought through a purchase order or subcontract, it is automatically flagged as 'Closed'. If a user then tries to change this setting, a warning will be issued and the user will be given the option to proceed with the change or not. No warning is issued if the bid item was simply marked as closed, manually.

The [**Recalc. Totals**] button saves changes (if any) and fully reloads the Sigma Grid so that Total lines are recalculated. The reason for having a separate button rather than modifying the Save functionality is the performance – a full reload requires much more time and computing resources than the quick/lightweight Ajax call.

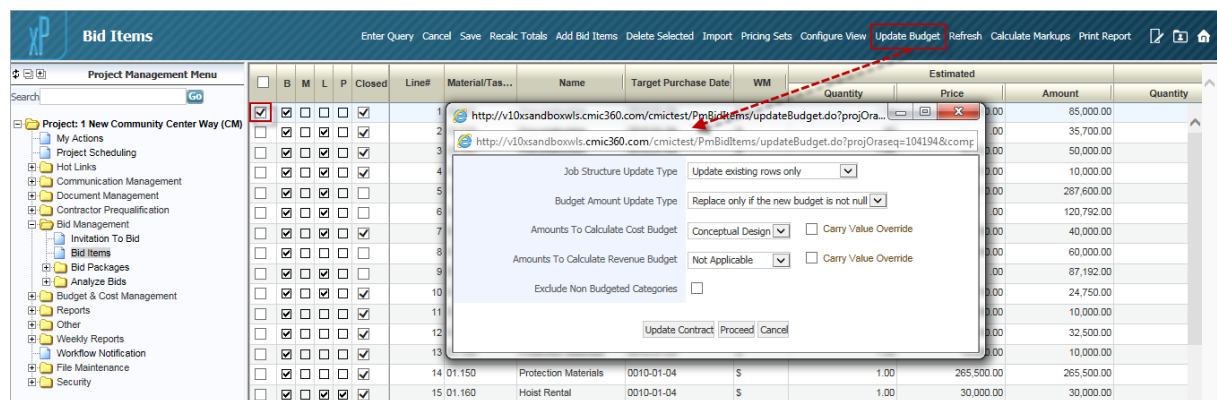
Importing Bid Items

The importation of bid items, for bid jobs as well as actual jobs, from an external source (usually a spreadsheet) can be done while in edit or view mode. Refer to the Import Utilities Manual for instructions on this.

Billing Type has been added to Bid Items Import. Field security can be applied to this field. It also includes the Alternate Identifier field.

NOTE: The default value of the Import flag 'Update Existing Bid Items' is 'unchecked'. With this default setting, new bid item records will be created for Task Codes that already exist as bid items (or duplicated in the import file) UNLESS the user overrides the default and sets it to 'checked', to update existing bid items that match the Task Code of the items being imported.

Updating the Budget with Bid Items



Standard Treeview path: *xProjects > Bid Management > Bid Items*

As your project grows, you can keep your project cost budget updated by using the **[Update Budget]** button at appropriate intervals. The function gives multiple methods of updating the associated job budget. The flag in PM Control, 'Phase Description Taken From Bid List Item', will update any new budget line with a description from the project bid item rather than the phase master.

Field security can be applied to all the buttons in the Bid Items screen except the **[Enter Query]**, **[Cancel]** and **[Print Report]**.

When the **[Update Budget]** button is pressed, a small window will appear asking how you wish to update the job cost budget or revenue budget and with which numbers: Pre-Estimate, Estimate, Target or Actual. Select the update options required and press **[Proceed]**.

Updating the Budget with Carry Value – Checkboxes

The Carry Value is stored on the corresponding Bid Item if there is a one-to-one relation between Buyout Item and Bid Item.

When updating budget from the Bid Items screen (using **[Update Budget]**), two check boxes allow the user to override Budget and Revenue amount by the Carry Value if it exists.

Field security can be applied to these checkboxes if required. The possible values are 'Unrestricted' or 'Hidden'.

Exclude Non Budgeted Categories – Checkbox

This checkbox indicates if bid items with non-budget categories should be excluded when updating the budget. By default, the flag is un-checked. When checked, bid items with non-budget categories will be excluded when the budget is being updated using the **[Update Budget]** button.

Creating JB Contract in the Budget Update

The **[Create Contract]** button allows the creation of Job Billing (JB) Contract for the current project job. It is a requirement that the Retainage Code be set up at the job or customer level, and all other pre-requisites for creating JB Contract be satisfied before this feature can be used successfully.

You need to select all the bid item lines that you need to create the JB contract bill-codes (based on job/phase/category), otherwise any phase/category combinations that are not included in the JB Contract at this point will need to be added in the JB Contract using the 'Add New Billcodes' feature in the Job Billing module.

If the job already has a contract, the **[Create Contract]** will be disabled. The **[Create Contract]** button changes to **[Update Contract]** once the Job Billing Contract is created so field security applies to both.

Bid Item and Budget Update for Lump-sum and Expense Authorization Projects

Company SM PTFV10 Company
Project Name Project for V10XJ08
Project Code V10XPROJ01
Project Control Code ALL

General Key Players Job Info Defaults Security Questionnaire Notes Attachments Review/Approval

Customer LA Guardia Mining Compa
Customer Address 100068 Yonge Street
Toronto ON L3S2S2
Canada

Start Date
Hard Bid Project
Bid Date 080512 12:00 AM
End Date
ITB Sender Email
Bid Won Lost Date
ITB Sender Name

Use Bid Item Expense Authorization
Not Applicable
Expense Authorization
Lump Sum

Project Address
Street Suite

The Expense Authorization flag is now a drop-down box with 3 options: Not Applicable, Lump-sum and Expense Authorization. The default is set at the Company Control level, but can be overridden on the project.

- Not Applicable – (to maintain standard functionality)
- Expense Authorization (for current EA function)
- Lump Sum

The selection made at the company level determines the **default** value of the project level option. The value can be overridden at the project level.

LUMPSUM

When the Lump Sum option is selected, the following apply:

1. Bid items included in a budget update would not be editable after the budget was updated.
2. Bid items that were not selected for budget update would not be available in LOV on bid items button on subcontract or subcontract change order, except in the following cases:
 - Bid items that are linked to a posted PCI will always be available to select into an SC or SCCO.
 - Breakout bid items (created from a partial purchase) would be available to select into an SC or SCCO (they would always come from a bid item that was part of the budget update or a posted PCI)
3. Analyze Bids (Buyouts): when the "Select" flag is checked for a bid item that is not available the message **‘Related Bid Item is not included in the budget’** is displayed.

EXPENSE AUTHORIZATION

When the Expense Authorization option is selected, previously programmed changes for Expense Authorization still apply, but additionally, further validation has been programmed so that bid items not linked to a posted PCI will not be available for selection into a Subcontract or Subcontract Change Order.

Budget Update Column in Bid Items

Project Management Menu										Enter Query Cancel Save Recalc Totals Add Bid Items Delete Selected Import Pricing Sets Configure View Update Budget Copy Job Structure Calculate Markups Print Report									
Search [] [

This program allows the definition of markup rules/calculations which will be generated for all bid item records based on the markup % values in the markup definitions.

Security access to the program menu item is found under ‘Assign Menu Items’ for the user or user role: ‘Bid Item Markup Rules’.

The ability to **Create, Edit and Copy** Bid Items Markup rules is also controlled by the ‘**Markup Rules – Edit**’ privilege.

The [Copy From Job] button allows the user to copy Bid Items markup rules from a source job to the current job. The Source Job LOV for the Copy only shows jobs that have bid items and have markup rules defined.

The Forms privilege “PMMRALLJOB: Allows user to create markup rules for ALL jobs”, is also used (in addition for PCI Markup rules), to determine if a user can create bid item markup rules for ALL jobs or not. If it is checked for the user, ‘ALL’ will be an option in the Job LOV of the Bid Item Markup maintenance screen.

On the Bid Items screen, the [Calculate Markups] button is used to generate the markups defined. When completed, the ‘M’ column becomes checked, and the markup lines are displayed in an orange color:

Project Management Menu

Search

Project: Standard System Project (STD)

Communication Management

Document Management

Subcontractor Prequalification

Bid Management

Inflation To Bid

Bid Items

Bid Packages

Buyout Items Log

Buyout Items

Bidders

Addenda

Enter Bid

Analyze Bids

Analyze Bids (Buyouts)

Bid Item Group Maintenance

Bid Item Markup Rules

Budget & Cost Management

Site Management

Reports

User-Defined Logs

File Maintenance

Security

Calculate Markups

Enter Query

Update Budget

Copy Job Structure

Delete Selected

Cancel

Save

Add Bid Items

Import

Print Report

Pricing Sets

Configure View

Update Submittals

Workflow Status: Unsubmitted

Review/Approval

Action				Role	Date	User	Notes								
M	L	P	Clos...	Line#	Group	Material/Tax... Alternat...	Name	Target Purchase Da...	W/M	Purchasing Type	Quantity	Price	Amount	Quantity	Actual Price
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	MP-1001		SITEWORK AND EAM...	2010-04-10	NA	Subcontracts	100.000	45.00	4,500.000		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	MP-1002		Temporary Requirem...	2010-04-10	NA	Subcontracts	200.000	50.00	10,000.000		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	MP-1003		Temporary Stormwat...	2010-04-10	NA	Subcontracts	300.000	20.00	6,000.000		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	MP-1004		Site Access Roads/Tr...	2010-04-10	NA	Subcontracts	400.000	30.00	12,000.000	1,100.000	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	MP-1005		Project Sign @ Entran...	2010-04-10	NA	Purchasing	500.000	55.00	27,500.000	1,560.000	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6	MP-1006		Temporary Fencing...	2010-04-10	NA	Purchasing	600.000	60.00	36,000.000		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7			2nd level Bid item mark...		NA				13,900.000		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8			Markup on Bid Items		NA				30,930.560		
Current Selection Total													148,438.56		
Project Total													148,438.56		

14

25

Per Page |

page 1 of 1, records 1 - 8 of 8

Bid Item Markups for Alternate Lines

Order	Description	Rounding Rule	Rounding Method	Level	Apply to Alternate Bid Items	Action
1	M1	No Rounding	Standard	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	M2	No Rounding	Standard	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	M3	No Rounding	Standard	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Calculate On		Allocate To		Budget %	Billing %	Action
Job	Phase	Job	Phase			
1155569	ALL	1155569	064000	1.000	2.000	<input checked="" type="checkbox"/>

The flag ‘Apply to Alternate Bid Items’ indicates that markups are to be calculated on Alternates as well. The Alternate ID field in the Bid Item screen needs to be populated as a pre-requisite.

Bid Items Life Editor: Glenda Simpson's Profile Home

Enter Query Cancel Save Recalc Totals Add Bid Items Delete Selected Import Pricing Sets Configure View Update Budget Copy Job Structure Calculate Markups Print Report

Workflow Status: Unsubmitted

Search: Go

Project: 11.55569 - Project (1155569-PR)

Project Management Menu

- Communication Management
- Document Management
- Subcontractor Prequalification
- Estimate Management
- Bid Management
 - Invitation To Bid
 - Bid Items
 - Bid Packages
 - Buyout Items Log
 - Buyout Items
 - Bidders
 - Addenda
 - Enter Bid
 - Analyze Bids
 - Analyze Bids (Buyouts)
 - Bid Item Group Maintenance
 - Bid Item Markup Rules
- Budget & Cost Management
- Site Management
- Reports
- User-Defined Logs
- File Maintenance
- Security

Review/Approval

Action		Role		Date		User		Notes	
No Records Found									
M	B...	P	Clos...	Line#	L	Item	Alternati...	WM	Target Purchase Da...
						Quantity	Price	Amount	Revenue
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	material1			NA	2013-03-19
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	material2			NA	2013-03-19
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	material3	1		NA	2013-03-19
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	material4	1		NA	2013-03-19
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	material5	2		NA	2013-03-19
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6	M1			HR	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	M1	2		HR	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8	M1	1		HR	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9	M2			HR	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10	M2	1		HR	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11	M2	2		HR	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12	M3			HR	
Current Selection Total									15,542.70
Project Total									15,542.70

markup lines for bid items as well as Alternates

Bid Item Group Maintenance

Bid Item Group Maintenance Save Cancel

Search: Go

Project: Superintendent Weekly Check

Project Management Menu

- Communication Management
- Document Management
- Subcontractor Prequalification
- Estimate Management
- Bid Management
 - Invitation To Bid
 - Bid Items
 - Bid Packages
 - Buyout Items
 - Bidders
 - Addenda
 - Enter Bid
 - Analyze Bids
 - Analyze Bids (Buyouts)
 - Bid Item Group Maintenance
- Budget & Cost Management

Group	Description	Action
1.0	Level 1	✕✕
1.1	Level 1 - sub category	✕✕
2.0	Level 2	✕✕
2.1	Level 2 - sub category	✕✕
2.1.0	Level 2 - lowest level	✕✕
ESTIMATING	Estimating	✕✕
LIGHTING	Lighting Items	✕✕
PLUMBING	Plumbing	✕✕

This is a maintenance screen for project-specific bid item groups, to allow grouping of bid items for reporting purposes. Code and Description are the fields to be completed.

Bid Package Entry

Bid Package Cancel Save Save Draft

Package No. Name Status New

General Address Buy Out Addenda Alternates Special Pricing Inclusions Exclusions Bidders Notes Attachments

Target Award Date Award Date CSI Code

Pre Bid Meeting Date Time AM Location

Due Date Time AM Broadcast Date Time 12:00 AM Respond By Date

Start Date End Date

Responsibility Contact Purchase Delivery Period (Days)

Scope Of Work Contract Type

Description

Summary

General Quotes

Line#	Description	Action
		✕

Here, the invitation to bid is now specific for a material or service required for a specific phase of the project: in such a case, a bid package is more convenient.

A Bid Package is a group of individual bid items assembled together under a unique code where you can apply bidders and contacts, general bid information, special pricing, inclusions and exclusions as well as maintain documents and addendum.

From the bid package screen, you can directly print, e-mail or fax the bid package to the selected bidders according to the bidders' preferred contact method.

General Bid Information

The Bid Package code field may pre-fill if your system is using automatic numbering, otherwise enter a Bid Package code. In many cases this is usually your Phase Code.

- Enter the description/scope of the bid package in the Scope of Work field
- Enter the Target Bid Date, the start and end date of the work involved in this bid package.
- Enter any Bonds or Insurance you want considered with this bid in the General Quotes section.
- If the return bid address is not the project address, or the bid package contact is not the main project contact then override the values using the Address tab.

Pre-Bid Meeting Information

If this bid package includes planning a pre-bid meeting, enter the date, time and location.

Summary

Summary amounts are updated to match the Buyout items totals for the bid package if the user chooses to. The user can still override the Bid Package summary amounts after they have been updated from the buyout items value.

Budget Amount	= Total Estimated Amount
Current Low Bid Amount	= Total Quoted Amount
Target Amount	= Total Targeted Amount
Target Delta	= Budget - Target
Awarded Amount	= Total Purchased (Actual) i.e. Subcontract created
Award Delta	= Budget - Awarded

Include Required Documents and Specifications

Using the Attachments tab, enter all the related specifications, documents, schemas... that the bidders should be aware of.

Buy Out Items

The Buy Out functionality adds flexibility to the Bid Package and subsequent purchasing process. This functionality is only available via the JSP Bid Package Program.

A Buy Out item can be created as:

- A direct 1 to 1 match to a Project Bid Item (previous Bid Package functionality)
- A multi-linked item which is 1 Buy Out Item can be linked to multiple Project Bid Items
- A manually entered Buy Out Item with no link to any Project Bid Item.

Purchasing can be done directly from the Bid Package (Bidders tab) and it is now possible to purchase the base contract, a change order, or add to an existing un-posted base contract or change order.

A Project Bid Item can now be purchased multiple times and the Project Bid Item screen will show if an item has been linked to a Buy Out Item and will indicate if an item has been purchased on at least one posted subcontract or subcontract change order.

While in Edit mode of the Buy Out tab, the user can add a buy out item by clicking on the **[Add Item]** button.

Select	Number	Material/Task Code	Description	Target Purch Date	WM	Item Type	Vendor	Quantity	Price	Amount	Quantity	Price	Amount	Quantity	Price	Amount	Quantity	Price	Amount
<input checked="" type="checkbox"/>	1	item-2.00	item2.00		NA		Parrish Constru	1.000	40,000.00	40,000.00							1.000	38,000.00	38,000.00
<input checked="" type="checkbox"/>	2	item3	item3		NA		Parrish Constru	1.000	40,000.00	40,000.00							1.000	38,000.00	38,000.00

A screen similar to the bid item 'Add' will open up for entry.

There is also the option of selecting existing bid items and using them as buy out items. This is done in View mode of the Buy Out tab by clicking on the **[Select Bid Item]** button:

Number	Material/Task Code	Description	Target Purch Date	WM	Item Type	Vendor	Quantity	Price	Amount	Quantity	Price	Amount	Quantity	Price	Amount	Quantity	Price	Amount	Ret %	Spec Section	Spec Sub-Section	Job	Phase	Category	Phase Qty	WM	Cor
1	item-2.00	item2.00		NA		Parrish Construction Partners	1.000	40,000.00	40,000.00				1.000	38,000.00	38,000.00	1.000	38,000.00	38,000.00				3047015	062000	L1			SUSP
2	item3	item3		NA		Parrish Construction Partners	1.000	40,000.00	40,000.00				1.000	38,000.00	38,000.00	1.000	38,000.00	38,000.00				3047015	064000	F1			SUSP

In order to purchase buy out items, the user must go to the Bidders tab.

The job, phase and category for each buy out item that will be purchased must be entered in order for that item to be shown on the Purchase screen when the **[Purchase]** button is clicked.

In the Buy Out tab, there is also the 'Link' icon that allows users to link project bid items to buy out items:

Option	Target Purch Date	WM	Item Type	Vendor	Quantity	Price	Amount	Quantity	Price	Amount	Quantity	Price	Amount	Quantity	Price	Amount	Ret %	Spec Section	Spec Sub-Section	Job	Phase	Category	Phase Qty	WM	Contract	Chg Code	Post Date	Action
00		NA		Parrish Construction Partners	1.000	40,000.00	40,000.00				1.000	38,000.00	38,000.00	1.000	38,000.00	38,000.00				3047015	062000	L1			SUSPAR013	000	2011-04-14	
		NA		Parrish Construction Partners	1.000	40,000.00	40,000.00				1.000	38,000.00	38,000.00	1.000	38,000.00	38,000.00				3047015	064000	F1			SUSPAR014	000	2011-04-14	

Clicking on the icon will give the following screen showing already linked items, and an **[Add Items]** button to add additional bid items:

Line Num	Material/Task Code	Description	Target Purchase Date	Actions
32	item3	item3		

NOTE: The [Add Items] button will not be displayed if the PM Company Control flag (Bid Management tab): 'One To One Relationship Between Bid Item And Buy Out Item' is checked.

Other Key Figures in Buy Out tab

Current Estimated Amount = the right-most non-null value in the order: Actual/Quoted/Target/Pre-Estimate 2/Pre-Estimate 1

Current Estimated Savings = Budget (JC) minus Current Estimated Amount (Field security for this field exists - standard Treeview path: *xProjects > Security > Project Roles.*)

Exclude From Forecast Flag – this flag is used to indicate if the data is excluded from the Buy Out Forecast (JCCFCAST2.FMX). By default, it is un-checked. (Field security for this field exists - standard Treeview path: *xProjects > Security > Project Roles.*)

Inclusions and Exclusions

Enter any required Inclusions and Exclusions on the appropriate tab.

Enter Line #, Description, Job, Phase and Category.

NOTE: Line numbers (Line #) for Inclusions and Exclusions can be edited.

Include Special Pricing

Include any special pricing requirements on the Special Pricing Tab. Enter Line #, Description, Job, Phase and Category.

NOTE: Line numbers (Line #) for Special Pricing can be edited.

Bidders

Bidders automatically get listed in the Bidders tab once the vendor field is filled in on the Buy Out Items tab. Bidders can also be added using the [Add Bidders] button or the blue '+' (while in edit mode).

The **Group By** is available on this screen and functions in the same way as it does in the Invitation to Bid.

When a bidder receives an invitation to bid (via a Bid Package) they can change their intent to bid, or not to bid, as many times as possible but ITB Responses are not accepted AFTER the Bid Package Due Date.

This screen also contains columns for Prequalification Status, Approval Status, Phone, and the Edit icon to make changes (such as email address and phone number) to the contact record. The contact screen that is displayed is dependent on whether the contact is project-only or system contact. If it is both a project and system contact then the project contact screen will open up.

Field security can be applied to the following fields in this tab and the Bidders Log: Prequal Applicant checkbox, Received Plans/Specs checkbox, Prequalification Status, and Approval Status. Field security can also be set on the 'Send' checkbox on the Bidders tab.

It is also in this tab that the user can now purchase the buy out items per vendor, using the [Purchase] button.

Purchasing Buy Out Items

Purchasing can be done directly from the Bid Package (Bidders tab) and it is now possible to purchase the base contract, a change order, or add to an existing un-posted base contract or change order.

A Project Bid Item can now be purchased multiple times and the Project Bid Item screen will show if an item has been linked to a Buy Out Item and will indicate if an item has been purchased on at least one posted subcontract or subcontract change order.

Send	Partner	Contact	E-Mail	ITB CCs	Accept	Decline	Received Plans/Specs	Notes
<input type="checkbox"/>	Parkdale Holdings				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Parrish Construction Partners	Simon Parrish	stephanie@cmic.ca		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Standard Industrial Developers				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Click on the vendor who you will be purchasing from. The record gets highlighted with a blue color.

Click the **[Purchase]** button.

If the Quoted fields were entered for these buy out items, they will be shown in the purchase screen, otherwise, the user has the option of entering or changing the values here:

	Number	Description	Vendor	Quantity	Price	Amount
<input checked="" type="checkbox"/>	2	bitem4	STANDARD	1.000	3,500.00	3,500.00

Select whether you want to Create a Contract, Create a Change Order or Add to an Existing Unposted subcontract or change order. There is also the option to create schedule of values at either the Bid Item Level or create without schedule of value (No Schedule).

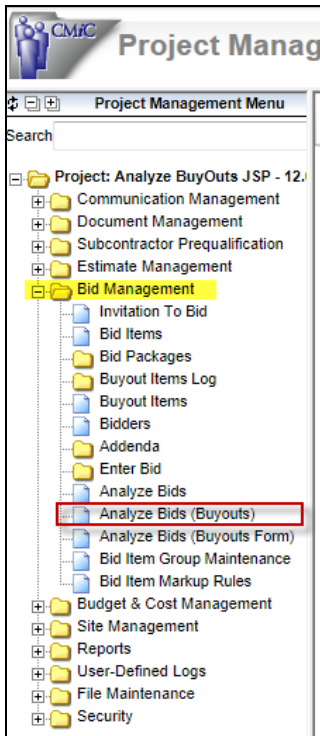
Select the record and click **[Proceed]**. The JSP Subcontract screen will be displayed with the details in the schedule of values.

Bid Analysis (Buy Out)

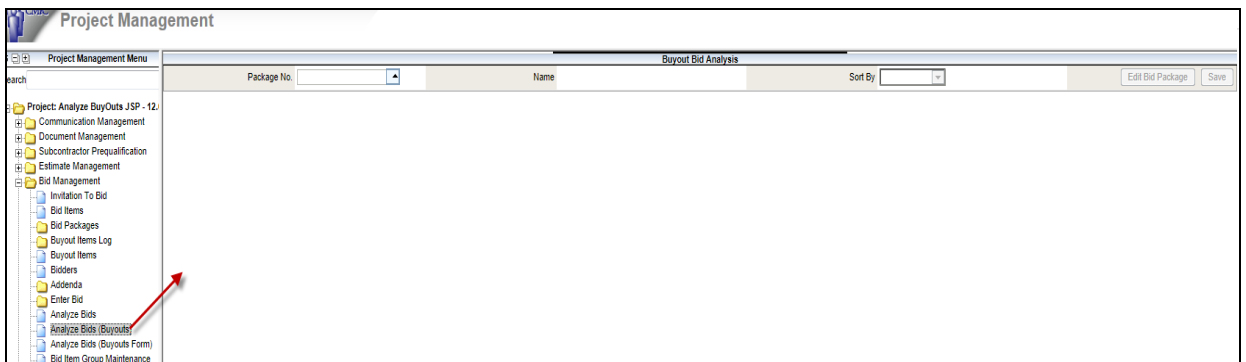
This program allows comparative analysis of bidder quotes, and purchase of the preferred quote via a PM JSP program interface. It functions in much the same way as its FORMS counterpart.

Bidders shown in the screen are those who have the 'Accept' flag checked against them in the Bidders tab of the associated Bid Package.

Security can be applied to the user/user role for the 'Analyze Bids (Buy Out)' program via 'Assign Menu Items', as well as via 'Assign Programs'. After these two security settings are applied, the program can be accessed from the standard PM JSP Treeview under the Bid Management node. For custom treeviews, the program will need to be added using Menu Maintenance.



Clicking on the program in the treeview launches the Buyout Bid Analysis screen showing a field to enter or select the Bid Package:



When the Bid Package is entered, the Name field is populated and the **[Edit Bid Package]** button becomes enabled.

Project Management

Package No: 000001 Name: 12.69201 - # 1 Sort By: Bidder

Submitted Bids

Name	WM	Purchased	Est Amt	Carry Value	Paper and Ink Incorp.				Paradise Construction Developers				Parkdale Hs
					Quantity	Price	Amount	Select	Quantity	Price	Amount	Select	
Buyout Items		<input type="checkbox"/>											
SITEWORK AND EARTHWORK_	NA	<input checked="" type="checkbox"/>	10,000.15		1.00	10,000.00	11,500.00	<input checked="" type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00
Temporary Requirements / Site Logist...	NA	<input type="checkbox"/>	4,589.27		1.00	4,589.27	4,589.27	<input type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00
Temporary Stormwater Management (...)	NA	<input checked="" type="checkbox"/>	200,000.00			0.00	210,000.00	<input checked="" type="checkbox"/>		0.00	1.00	<input type="checkbox"/>	
Site Access Roads/Tracking Pads/Par...	NA	<input type="checkbox"/>	32,760.00		1.00	0.00		<input type="checkbox"/>		0.00	11.00	<input checked="" type="checkbox"/>	
Project Sign @ Entrance_	NA	<input type="checkbox"/>	2,500.00			0.00	2,500.00	<input checked="" type="checkbox"/>		0.00	8.00	<input type="checkbox"/>	
MANUALLY ADDED BUYOUT ITEM1	NA	<input checked="" type="checkbox"/>	16,780.77		1.00	16,780.77	16,780.77	<input checked="" type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00
Subtotal		<input type="checkbox"/>											
General		<input type="checkbox"/>											
Subtotal		<input type="checkbox"/>											
Special Pricing		<input type="checkbox"/>											
special1	EA	<input checked="" type="checkbox"/>	555.45					<input type="checkbox"/>				<input type="checkbox"/>	
special2	NA	<input checked="" type="checkbox"/>	1,799.34					<input type="checkbox"/>				<input type="checkbox"/>	
Subtotal		<input type="checkbox"/>											
Inclusions		<input type="checkbox"/>											
incl1		<input checked="" type="checkbox"/>						<input type="checkbox"/>				<input type="checkbox"/>	
Subtotal		<input type="checkbox"/>											
Exclusions		<input type="checkbox"/>											
excl1		<input checked="" type="checkbox"/>						<input type="checkbox"/>				<input type="checkbox"/>	
Subtotal		<input type="checkbox"/>											

As mentioned previously, only bidders with a 'Yes' (checked) in the **Accept** field of the Bidders tab in the Bid Package will be displayed in this screen.

This screen is also updated by vendor submissions from the Bid Entry (JSP).

Buyout items can be selected for purchase in the same way as done in the FORMS version, by checking the item under the desired vendor and clicking the [**Purchase**] button beside the vendor name. **Only Subcontracts are created through this Purchase process.**

Notes can be added against each vendor quote has been added to the Buyout Analysis.

If a business partner is selected that is not previously setup as a vendor for your company and you click the 'Purchase' button beside it, a message will be displayed informing you of this and give you the option of creating the vendor record 'on the fly':

Package No: 000001 Name: 12.69201 - # 1 Sort By: Bidder

Submitted Bids

Name	WM	Purchased	Est Amt	Carry Value	Paper and Ink Incorp.				Paradise Construction Developers				Parkdale Hs
					Quantity	Price	Amount	Select	Quantity	Price	Amount	Select	
Buyout Items		<input type="checkbox"/>											
SITEWORK AND EARTHWORK_	NA	<input checked="" type="checkbox"/>	10,000.15		1.00	10,000.00	11,500.00	<input checked="" type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00
Temporary Requirements / Site Logist...	NA	<input type="checkbox"/>	4,589.27		1.00	4,589.27	4,589.27	<input type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00
Temporary Stormwater Management (...)	NA	<input checked="" type="checkbox"/>	200,000.00			0.00	210,000.00	<input checked="" type="checkbox"/>		0.00	1.00	<input type="checkbox"/>	
Site Access Roads/Tracking Pads/Par...	NA	<input type="checkbox"/>	32,760.00		1.00	30,000.00	30,000.00	<input type="checkbox"/>		0.00	11.00	<input checked="" type="checkbox"/>	
Project Sign @ Entrance_	NA	<input type="checkbox"/>	2,500.00			0.00	2,500.00	<input type="checkbox"/>		0.00	8.00	<input type="checkbox"/>	
MANUALLY ADDED BUYOUT ITEM1	NA	<input checked="" type="checkbox"/>	16,780.77		1.00	16,780.77	16,780.77	<input checked="" type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00
Subtotal		<input type="checkbox"/>											
General		<input type="checkbox"/>											
Subtotal		<input type="checkbox"/>											
Special Pricing		<input type="checkbox"/>											
special1	EA	<input checked="" type="checkbox"/>						<input type="checkbox"/>				<input type="checkbox"/>	
special2	NA	<input checked="" type="checkbox"/>						<input type="checkbox"/>				<input type="checkbox"/>	
Subtotal		<input type="checkbox"/>											
Inclusions		<input type="checkbox"/>											

Message from webpage

Partner PARADISE is not set up as Vendor for Company SUS. Do you want to create Vendor now?

OK Cancel

Also, if you try to select the same buyout item under more than one vendor you will receive a message that a quote has already been selected for the item:

Buyout Bid Analysis

Package No. 000001 Name 12.69201 - # 1 Sort By Bidder

Submitted Bids

Name	WM	Purchased	Est Amt	Carry Value	Paper and Ink Incorp.				Paradise Construction Developers				Select	Quantity	Price	Amount
					Quantity	Price	Amount	Select	Quantity	Price	Amount					
Buyout Items																
SITEWORK AND EARTHWORK	NA	<input checked="" type="checkbox"/>	10,000.15		1.00	10,000.00	11,500.00	<input checked="" type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00			
Temporary Requirements / Site Logist...	NA	<input type="checkbox"/>	4,589.27		1.00	4,589.27	4,589.27	<input type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00			
Temporary Stormwater Management (...)	NA	<input checked="" type="checkbox"/>	200,000.00			0.00	210,000.00	<input checked="" type="checkbox"/>		0.00	1.00	<input type="checkbox"/>	1.00			
Site Access Roads/Tracking Pads/Par...	NA	<input type="checkbox"/>	32,760.00		1.00	30,000.00	30,000.00	<input checked="" type="checkbox"/>		0.00	11.00	<input type="checkbox"/>	11.00			
Project Sign @ Entrance...	NA	<input type="checkbox"/>	2,500.00			0.00	2,500.00	<input type="checkbox"/>		0.00	8.00	<input type="checkbox"/>	8.00			
MANUALLY ADDED BUYOUT ITEM1	NA	<input checked="" type="checkbox"/>	16,780.77		1.00	16,780.77	16,780.77	<input checked="" type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00			
Subtotal		<input type="checkbox"/>														
General		<input type="checkbox"/>														
Subtotal		<input type="checkbox"/>														
Special Pricing		<input type="checkbox"/>														
special1	EA	<input checked="" type="checkbox"/>														
special2	NA	<input checked="" type="checkbox"/>														
Subtotal		<input type="checkbox"/>														

Message from webpage

Another quote has already been selected for this item, cannot select more than one quote.

OK

The **[Edit Bid Package]** button is a short-cut way of getting back to the current Bid Package to make changes (add bidders, add buyout items etc.), which will update the Analysis screen after the popup window is closed:

Buyout Bid Analysis

Package No. 000001 Name 12.69201 - # 1 Sort By Bidder

Submitted Bids

Name	WM	Purchased	Est Amt	Carry Value	Paper and Ink Incorp.				Paradise Construction Developers				Select	Quantity	Price	Amount
					Quantity	Price	Amount	Select	Quantity	Price	Amount					
Buyout Items																
SITEWORK AND EARTHWORK	NA	<input checked="" type="checkbox"/>	10,000.15		1.00	10,000.00	11,500.00	<input checked="" type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00			
Temporary Requirements / Site Logist...	NA	<input type="checkbox"/>	4,589.27		1.00	4,589.27	4,589.27	<input type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00			
Temporary Stormwater Management (...)	NA	<input checked="" type="checkbox"/>	200,000.00			0.00	210,000.00	<input checked="" type="checkbox"/>		0.00	1.00	<input type="checkbox"/>	1.00			
Site Access Roads/Tracking Pads/Par...	NA	<input type="checkbox"/>	32,760.00		1.00	30,000.00	30,000.00	<input checked="" type="checkbox"/>		0.00	11.00	<input type="checkbox"/>	11.00			
Project Sign @ Entrance...	NA	<input type="checkbox"/>	2,500.00			0.00	2,500.00	<input type="checkbox"/>		0.00	8.00	<input type="checkbox"/>	8.00			
MANUALLY ADDED BUYOUT ITEM1	NA	<input checked="" type="checkbox"/>	16,780.77		1.00	16,780.77	16,780.77	<input checked="" type="checkbox"/>	1.00	1.00	1.00	<input type="checkbox"/>	1.00			
Subtotal		<input type="checkbox"/>														
General		<input type="checkbox"/>														
Subtotal		<input type="checkbox"/>														
Special Pricing		<input type="checkbox"/>														
special1	EA	<input checked="" type="checkbox"/>														
special2	NA	<input checked="" type="checkbox"/>														
Subtotal		<input type="checkbox"/>														

CMIC Project Management - Windows Internet Explorer

http://test4v10.cmic.ca/7785/cmictestv10v/SysLaunchPopup/ShowLaunchPopup.do

CMIC Bid Package

User Extensions Add Bidders Purchase Link to Issue Copy From Broadcast History Broadcast ITB Add Bid Package Edit Delete Print Close

Package No. 000001 Name 12.69201 - # 1 Status New

General Address Buy Out Addenda Alternates Special Pricing Inclusions Exclusions Bidders Notes Attachments

	Send	Partner	Contact	E-Mail	Budget Amount	Bid Amount	Budget Delta	Lowest Bidder	ITB CCs	Accept	Decline	Received Plans/Specs	Notes
<input type="checkbox"/> Paper and Ink Incorp.					0	0	0			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/> Paradise Construction Developers					0	0	0			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/> Parkdale Holdings					0	0	0			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/> Parrish Construction Partners					0	0	0			<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Addendum Entry

Addendum

Check Spelling Save Cancel

Addendum No. [] Name []

Received From [] Contact []

Date 120811

Description []

Package No. [] Name [] Action []

During the bidding period, amendments (usually referred to as Addendum) can be issued by the Architects, Engineers and/or Owners of a project. These amendments indicate changes, corrections or clarifications to a bid package. Addendum can be linked to one or more bid packages as required.

When an addendum is issued, you should enter the details, link the addendum to the affected bid packages and then inform the bidders of the affected bid packages.

- Enter the Addendum number and Name.
- Enter the Received From Business Partner and Contact information and the Addendum Description.
- Link the Addendum to Bid Packages using the Bid Packages section.
- [Save] the Addendum and apply any attachments and notes if necessary.
- Print the Addendum – this will allow you to inform all the bidders on the affected bid packages about the change or clarification. The [Print] button becomes available when you save the addendum and it is in view mode.

Addendum History Tab

Addendum						
Notes		Attachments		History		
Date	Author	Recipient	Action	Description	Status	
12/Aug/2011 02:58 PM	Amanda Matthews	stephanie.bromfield@cmic.ca	Report sent via E-Mail	SYSRPOOC	SENT	
12/Aug/2011 02:58 PM	Amanda Matthews		Added Document	2485790 - EIS - document		
12/Aug/2011 02:57 PM	Amanda Matthews		Added Note No. 1	Note added today		
02/Aug/2011 03:03 PM	Amanda Matthews	stephanie@cmic.ca	Report sent via E-Mail	SYSRPOOC	SENT	

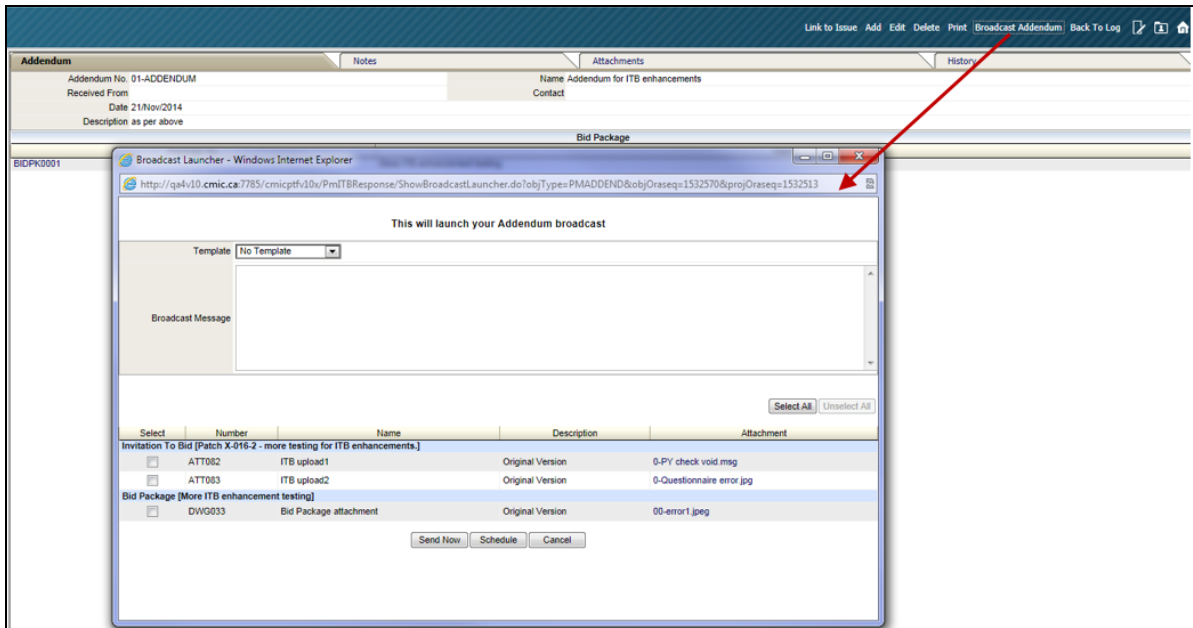
This tab shows a list of all communications of an addendum. The tab shows all reports that have been e-mailed or faxed from within the Addendum screen. When the report is being sent by fax, the history page will recognize it for custom fax destinations as well. Notes and document attachment changes are also tracked in the History tab.

Broadcasting Invitation to Bid from Addendum

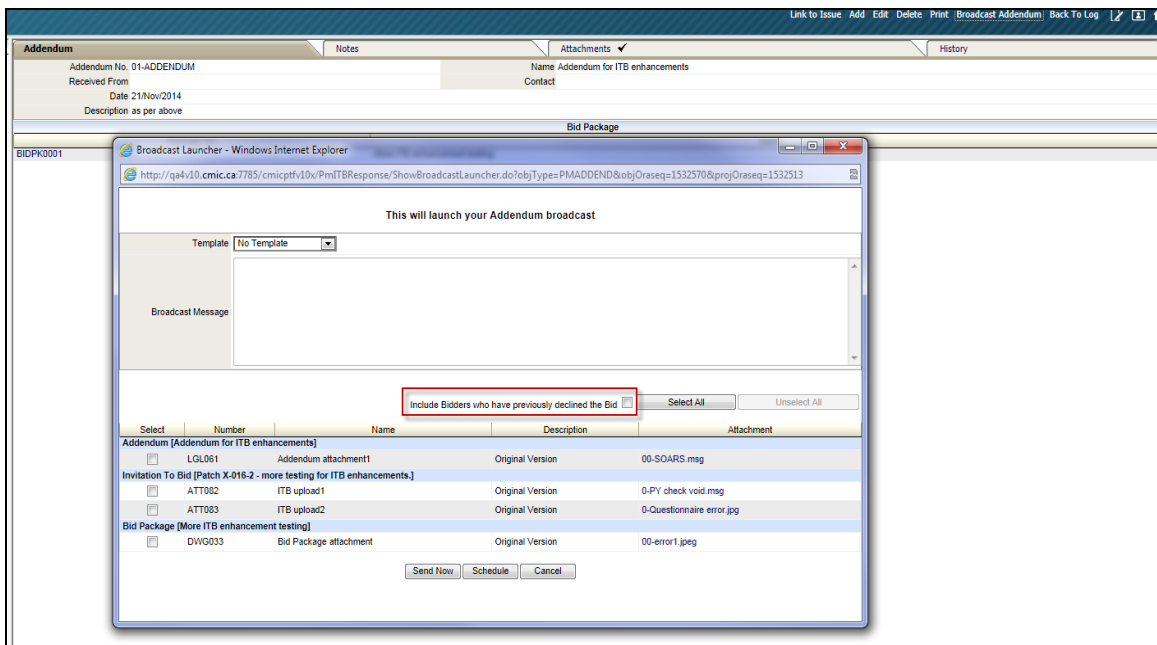
Invitation to Bid are also broadcast from addenda. In this way, the user can send important bid addenda or bid notices (as attachments) that need to be sent during the bidding process.

The user can choose a broadcast template from the Template dropdown list, which will copy the pre-defined text into the "Broadcast Message" field. The user can then modify the text as desired.

Attachments from the Addendum, ITB and associated Bid Packages will all be shown for the Addendum Broadcast.



After receiving responses with at least one decline, the flag **'Include Bidders who have previously declined the Bid'** is enabled and displayed the next time the broadcast is launched. This also shows only when there are also attachments.



If the flag is checked for the next broadcast, the system will distribute the broadcast email to all bidders from the associated Bid Packages and ITB. Otherwise, it will distribute the broadcast e-mail to the set of contacts from the associated Bid Packages and ITB who have either *accepted* or *not replied* to the ITB or Bid Package.

Entering Your Bid

This screen is used by external collaborators who are bidders, and who is entered on one or more bid packages as a bidder. When this collaborator logs into the system (after having been given the appropriate security access to the system by the CMiC client), this is the screen that will be displayed initially:



Using the Enter Bid node on the Treeview, select the Bid Package required. This will open up the Quote Summary screen.

Field security can be applied to the 'Quote Summary' tab (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Bid Entry*).

This screen allows for the following:

- Entering the Quantity and Unit Rate
- Entering a Lump Sum Amount
- Entering Notes/Comments on each bid item
- Entering Inclusions, Exclusions and Special Pricing and General Notes (Field security can be applied on all of these fields, standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Bid Entry*.)
- Attaching/Uploading your actual bid documents
- [Send To Spreadsheet] button will export all records in the Submitted Bids block to Excel

Find the bid item that you want to enter against.

- Open the item by using the [Edit] icon in the Action column.

Collaboration Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Jason Bromfield's Profile Home

Check Spelling Save Back To Log

Enter Bid

Search Go

- Project: Tryall Development - PHASE II
 - Communication Management
 - Transmittals
 - Communications (5)
 - RFIs
 - Issues
 - Document Management
 - Submittals
 - Documents
 - Bid Management
 - Review Bid Package
 - Review Addendum
 - Enter Bid
 - Bid Package for Phase II - Tryall
 - Budget & Cost Management
 - Payment Requisition
 - Compliance Status Log
 - Subcontract
 - Subcontractor SOV
 - Site Management
 - Daily Journal
 - Punchlists
 - Field Work Directives (3, 1)
 - Notices (2)

Bid Package

Company (GC) SB COMPANY (TEST 2006) Bidder (Vendor) Access Engineering & Consulting

Project Tryall Development - PHASE II Bid Package Bid Package for Phase II - Tryall

Quote Summary Vendor Attachments Quote Submission

Quote Status **PENDING** Quote Valid Until Date

Bid Item Definition				My Quote				Comment	Action
Num	Name	Desc	Qty	Sel	Qty	Rate	Subtotal		
00001	material1		100 NA	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
								<div>Comment</div> <div><input type="text"/></div>	
00002	material2		100 NA	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Sum of line item amounts							0.00		
My Total Quote For the Bid Package							<input type="text"/>	0.00	
<input type="checkbox"/> Override the sum of line items									
Inclusions					Exclusions				
<div><input type="text"/></div>					<div><input type="text"/></div>				
Special Pricing					Quote Note				
<div><input type="text"/></div>					<div><input type="text"/></div>				

- Enter the Qty, Rate and Amount as required.
- Indicate if the bid item is included in the Quote by checking the Sel checkbox. This field should be used for Lump Sum type quotes to indicate which bid items are included in the overall price. If an amount is entered and this field is checked the amount is strictly for memo purposes.
- If the Quote is a Lump Sum quote, then the Override Sum of the Lines should be checked which allows entry into the Bid Package Total field.
- Each bid item line allows for the entry of a comment.

When the line is complete, use the [Save] icon to close the line so that the next item can be entered. Inclusions, Exclusions, Special Pricing and Notes are available to be entered at any time.

Including Attachments with the Bid

Collaboration Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

CMAC Enter Bid Jason Bromfield's Profile Home

Upload New Save Cancel

Collaboration Manager

Search [] Go

Project: Tryall Development - PHASE II

- Communication Management
 - Transmittals
 - Communications (5)
 - RFIs
 - Issues
- Document Management
 - Submittals
 - Documents
- Bid Management
 - Review Bid Package
 - Review Addendum
 - Enter Bid

Bid Package

Company (GC) SB COMPANY (TEST 2006) Bidder (Vendor) Access Engineering & Consulting

Project Tryall Development - PHASE II Bid Package Bid Package for Phase II - Tryall

Quote Summary Vendor Attachments Quote Submission

Type	Number	Rev. Number	Attachment	Action
[]	[]	[]		+ X
				+

This feature allows for the inclusion of required bid documentation, such as bid bonds, proof of insurance, copies of the bid...

To add an attachment, there are three fields that need to be entered – Document Type, Number and Revision Number. Each field has a list of values that you can select from. The documents that are listed here come from the documents in your Document Log of the Treeview.

You may also choose to upload a document existing outside of the xProjects application and include it with your bid. Use the **[Upload New]** button at the top of the screen to do this.

Enter the Number and a descriptive Title for the attachment and use the **[Browse]** button to retrieve it from its location.

Once complete, you can save the attachment just the same as in every other screen.

Submitting the Bid

Collaboration Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Jason Bromfield's Profile Home

Submit Back To Log

Enter Bid

Collaboration Manager

Search [] Go

Project: Tryall Development - PHASE II

- Communication Management
 - Transmittals
 - Communications (5)
 - RFIs
 - Issues
- Document Management
 - Submittals
 - Documents
- Bid Management
 - Review Bid Package
 - Review Addendum
 - Enter Bid
 - Bid Package for Phase II - Tryall
- Budget & Cost Management
 - Payment Requisition
 - Compliance Status Log
 - Subcontract
 - Subcontractor SOV
- Site Management
 - Daily Journal
 - Punchlists
 - Field Work Directives (3, 1)
 - Notices (2)

Bid Package

Company (GC) SB COMPANY (TEST 2006) Bidder (Vendor) Access Engineering & Consulting

Project Tryall Development - PHASE II Bid Package Bid Package for Phase II - Tryall

Quote Summary Vendor Attachments Quote Submission

Quote Due Date Time

IMPORTANT: In order for a general contractor to review your quote it has to be submitted. You can submit the quote any time prior to the due date, however it is not required until the due date. When submitting your quote please be aware that once the quote has been submitted it is locked; consequently you will no longer be able to modify it in any way. Please review your quote before submission and make sure it is final and correct.

To submit your quote please check two boxes below and click the Submit button

☐ I have finished working on this quote and have verified all information such as total quote amount, inclusions, exclusions and special pricing

☐ I have verified the correctness of my quote and would like to submit it at this time

Submit Quote

Once all the bid information has been entered, verified and the required documents attached, the Bid must be submitted. Up until the bid is submitted your company has been the only one able to view the details of the bid. Once the bid is submitted the Company requesting the bid will be able to see the bid details, and no one will be able to update the details.

As Addenda can arrive at almost any time before the bid is due, it is suggested that the bid not be submitted until the due date and time.

As this is a very crucial step, the system double checks that this is the action intended. Please read the details before continuing with submitting the quote.

Analyzing Bids

There are two Forms version screens for analyzing bids: Analyze Bids and Analyze Bids (Buy Out). The Analyze Bids screen is used for bid items that are not linked to a buy out item, and can also be accessed in the Forms CMiC Enterprise – Project Management. Refer to the Project Management Manual for details on this functionality.

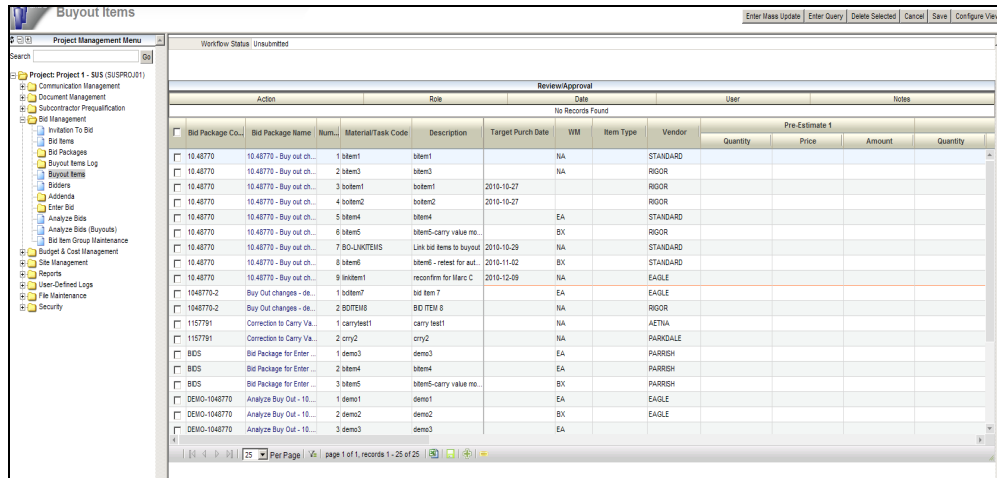
The Analyze Bids (Buy Out) is only accessible from the PM JSP Treeview, and functions similarly to the Analyze Bids. The only difference is that the bid items in this case are linked to buy out items.

Buyout Items and Buyout Items Log

Buyout Items screen

The Buyout Items program can be run from the Treeview menu or by clicking the **[Edit]** button on the Log screen.

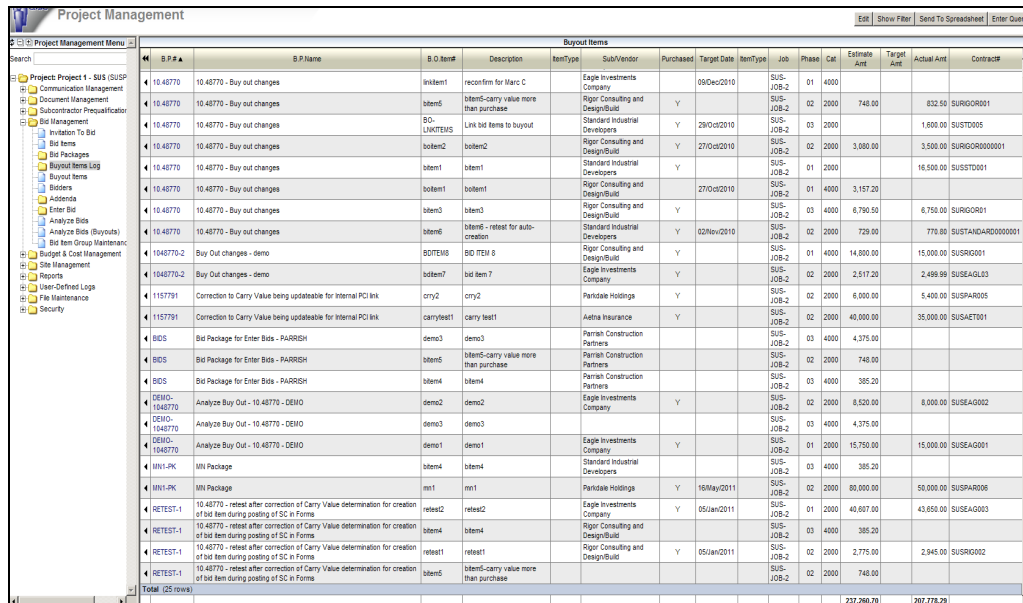
NOTE: Security access to the program 'Buyout Items' will need to be granted before the program is visible on the Treeview. Security access to the following menu items also need to be assigned: Buyout Items Log and Buyout Items.



Bid Package Co.	Bid Package Name	Num.	Material/Task Code	Description	Target Purchase Date	WM	Item Type	Vendor	Pre-Estimate 1
10.48770	10.48770 - Buy out ch...	1	bltem1	bltem1		NA	STANDARD		
10.48770	10.48770 - Buy out ch...	2	bltem3	bltem3		NA	RIGOR		
10.48770	10.48770 - Buy out ch...	3	bltem1	bltem1	2010-10-27		RIGOR		
10.48770	10.48770 - Buy out ch...	4	bltem2	bltem2	2010-10-27		RIGOR		
10.48770	10.48770 - Buy out ch...	5	bltem4	bltem4		EA	STANDARD		
10.48770	10.48770 - Buy out ch...	6	bltem5	bltem5-carry value mo...		EX	RIGOR		
10.48770	10.48770 - Buy out ch...	7	BO-LINKITEMS	Link bid items to buyout	2010-10-29		STANDARD		
10.48770	10.48770 - Buy out ch...	8	bltem6	bltem6 - retest for aut...	2010-11-02	EX	STANDARD		
10.48770	10.48770 - Buy out ch...	9	bltem1	reconfirm for Marc C	2010-10-09	NA	EAGLE		
1048770-2	Buy Out changes - de...	1	bltem7	bid tem 7		EA	EAGLE		
1048770-2	Buy Out changes - de...	2	BOITEM8	BO ITEM 8		NA	RIGOR		
1157791	Correction to Carry Va...	1	carrytest1	carry test1		NA	ACTNA		
1157791	Correction to Carry Va...	2	crry2	crry2		NA	PARDALE		
BIDS	Bid Package for Enter...	1	demo3	demo3		EA	PARRGH		
BIDS	Bid Package for Enter...	2	bltem4	bltem4		EA	PARRGH		
BIDS	Bid Package for Enter...	3	bltem5	bltem5-carry value mo...		EX	PARRGH		
DEMO-1048770	Analyze Buy Out - 10...	1	demo1	demo1		EA	EAGLE		
DEMO-1048770	Analyze Buy Out - 10...	2	demo2	demo2		EX	EAGLE		
DEMO-1048770	Analyze Buy Out - 10...	3	demo3	demo3		EA	EAGLE		

This screen has a look similar to the Bid Items screen with similar columns. The main difference is the link to the corresponding Bid Package which allows the user to drill into the bid package.

Buyout Items Log



B.P.#	B.P. Name	B.O Item#	Description	Item Type	Sub Vendor	Purchased	Target Date	Item Type	Job	Phase	Cat	Estimate Amt	Target Amt	Actual Amt	Contract#
10.48770	10.48770 - Buy out changes	bltem1	reconfirm for Marc C		Eagle Investments Company		09Dec2010	SUS-JOB-2	01	4000					
10.48770	10.48770 - Buy out changes	bltem5	bltem5-carry value more than purchase		Rigor Consulting and Design/Bid	Y		SUS-JOB-2	02	2000	748.00	832.50		SURGOR001	
10.48770	10.48770 - Buy out changes	BO-LINKITEMS	Link bid items to buyout		Standard Industrial Developers	Y	29Oct2010	SUS-JOB-2	03	2000		1,600.00		SUSTO005	
10.48770	10.48770 - Buy out changes	bltem2	bltem2		Rigor Consulting and Design/Bid	Y	27Oct2010	SUS-JOB-2	02	2000	3,000.00	3,500.00		SURGOR000001	
10.48770	10.48770 - Buy out changes	bltem1	bltem1		Standard Industrial Developers	Y		SUS-JOB-2	01	2000		16,500.00		SUSTO001	
10.48770	10.48770 - Buy out changes	bltem1	bltem1		Rigor Consulting and Design/Bid	Y	27Oct2010	SUS-JOB-2	01	4000	3,157.20				
10.48770	10.48770 - Buy out changes	bltem3	bltem3		Rigor Consulting and Design/Bid	Y		SUS-JOB-2	03	4000	6,790.50	6,750.00		SURGOR01	
10.48770	10.48770 - Buy out changes	bltem6	bltem6 - retest for auto-creation		Standard Industrial Developers	Y	02Nov2010	SUS-JOB-2	02	2000	729.00	770.80		SUSTANDARD000001	
1048770-2	Buy Out changes - demo	BOITEM8	BO ITEM 8		Rigor Consulting and Design/Bid	Y		SUS-JOB-2	01	4000	14,800.00	15,000.00		SURGOR01	
1048770-2	Buy Out changes - demo	bltem7	bid tem 7		Eagle Investments Company	Y		SUS-JOB-2	02	2000	2,517.20	2,499.99		SUSEAGL03	
1157791	Correction to Carry Value being updateable for internal PCI link	crry2	crry2		Paridade Holdings	Y		SUS-JOB-2	02	2000	6,000.00	5,400.00		SUSPAR005	
1157791	Correction to Carry Value being updateable for internal PCI link	carrytest1	carry test1		Athna Insurance	Y		SUS-JOB-2	02	2000	40,000.00	35,000.00		SUSSET001	
BIDS	Bid Package for Enter Bids - PARRGH	demo3	demo3		Parman Construction Partners			SUS-JOB-2	03	4000	4,375.00				
BIDS	Bid Package for Enter Bids - PARRGH	bltem5	bltem5-carry value more than purchase		Parman Construction Partners			SUS-JOB-2	02	2000	748.00				
BIDS	Bid Package for Enter Bids - PARRGH	bltem4	bltem4		Parman Construction Partners			SUS-JOB-2	03	4000	385.20				
DEMO-1048770	Analyze Buy Out - 10.48770 - DEMO	demo2	demo2		Eagle Investments Company	Y		SUS-JOB-2	02	2000	8,520.00	8,000.00		SUSEAG002	
DEMO-1048770	Analyze Buy Out - 10.48770 - DEMO	demo3	demo3					SUS-JOB-2	03	4000	4,375.00				
DEMO-1048770	Analyze Buy Out - 10.48770 - DEMO	demo1	demo1		Eagle Investments Company	Y		SUS-JOB-2	01	2000	15,750.00	15,000.00		SUSEAG001	
WIN1-PK	WIN Package	bltem4	bltem4		Standard Industrial Developers			SUS-JOB-2	03	4000	385.20				
WIN1-PK	WIN Package	mt1	mt1		Paridade Holdings	Y	16May2011	SUS-JOB-2	02	2000	80,000.00	50,000.00		SUSPAR006	
RETEST-1	10.48770 - retest after correction of Carry Value determination for creation of bid tem during posting of SC in Forms	retest2	retest2		Eagle Investments Company	Y	05Jan2011	SUS-JOB-2	01	2000	40,867.00	43,650.00		SUSEAG003	
RETEST-1	10.48770 - retest after correction of Carry Value determination for creation of bid tem during posting of SC in Forms	bltem4	bltem4		Rigor Consulting and Design/Bid			SUS-JOB-2	03	4000	385.20				
RETEST-1	10.48770 - retest after correction of Carry Value determination for creation of bid tem during posting of SC in Forms	retest1	retest1		Rigor Consulting and Design/Bid	Y	05Jan2011	SUS-JOB-2	02	2000	2,775.00	2,945.00		SUSRGO002	
RETEST-1	10.48770 - retest after correction of Carry Value determination for creation of bid tem during posting of SC in Forms	bltem5	bltem5-carry value more than purchase					SUS-JOB-2	02	2000	748.00				
Total (25 rows)												237,260.70	207,778.29		

The Buyout Items Log is similar to other logs in JSP. It allows filtering and exporting to spreadsheet. The columns can be configured by using the Log Builder for Buyout Items, and a pre-defined default filter can be set using the Log Filter for Buyout Items.

The log includes a link to the Bid Package Number which opens up the bid package in view mode when clicked on.

Budget & Cost Management

Owner Change Orders

This program is designed to be used by 'Internal' users within xProjects. The program allows the compilation of multiple PCIs into one Owner Change Order. Owner Change Orders can be automatically numbered by the system, so you may not be able to enter the Change Number field. This is when the auto-numbering option is selected in the Change Management Control (set up in Enterprise version). The 'Allow Override' flag for Owner Change Orders is only applicable to the PM JSP version. The flag is only available for setting if OCO auto-numbering is being used.

PCI No.	Name	Date	Amount	Days Impact	Status	Action

Standard Treeview path: xProjects > Budget & Cost Management > Owner Change Orders

- Enter the Change Number information. The Change Code and Title are the only required fields.
- **JB Contract** and **Owner's CO #**. These fields are introduced to facilitate the correct reporting of the Summary Info when there are sub-jobs with their own JB Contract. When creating an OCO, the JB Contract will default in if the project job has sub-jobs.

If the user leaves the JB Contract code on the OCO header empty or enters it for the main-job, all calculations will work as they used to work before (i.e. the old way). If the JB Contract is selected for a sub-job that has its own JB Contract, the calculations will be based only on that JB Contract.

If Owner's CO# is entered, it must be unique within the JB Contract code (if any).

Calculations of amounts (Orig. Amt., Prior Changes... etc.) and Dates / Days Impact have been adjusted to be in respect of the JB Contract Code on the OCO header.

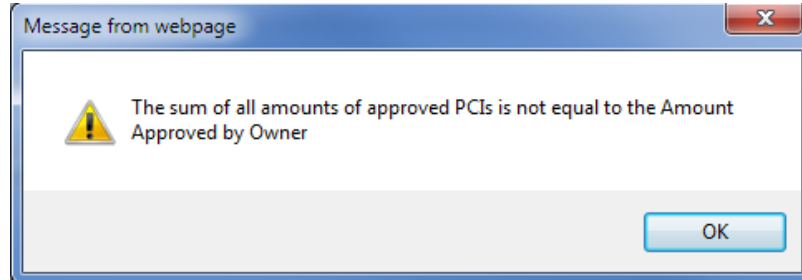
Calculations in the standard report Owner Change Number (PM1003.REP) have been adjusted to also respect the new logic and be in sync with FORMS calculations.

Field security can be applied to both fields. The default value on the JB Contract field is 'Hidden' for the *ALL* role.

- The **Amount Approved by Owner** field is mandatory and numeric - with the format 16.2 (16 digits before the decimal point, 2 decimal places). It can be secured using field security. By default, the field security is set at 'Hidden' on the *ALL* role, so it cannot be seen by any user.

When PCI details are added to the OCO, the sum of the **Approved** lines is validated against the amount in the Amount Approved by Owner field.

This validation takes place when the user clicks the **[POST]** button. If the amounts do not match, the following message will be displayed:



- Add PCIs to the Owner change by pressing the 'Add' on the Change Items lines. This will open a popup window similar to below where you can select all the PCIs to be included in this Owner Change.

Select the required PCIs by clicking the **[Add PCIs]** button. A popup window will be displayed with a multi-select LOV for the PCIs.

- Press **[Accept]** – this will return the selected PCIs to the Change Item section of the Owner Change Order screen.
- Then **[Save]**

The screen will redisplay with a summary section showing how this Owner Change affects the total contract.

Change Numbers					
OCO No. OWIN-001	Title Owner changes for approval				Post Date
Notes					
Days Impact	Date Issued 12/Aug/2011	Date Executed	Date Received		
Summary					Hide Summary
The Original Contract Sum was					\$8,001,200.00
Net Change by Previously Authorized Requests and Changes					\$9,100.00
The Contract Sum Prior to This Change Order was					\$8,010,300.00
The Contract Sum will be Increased by					\$12,150.00
The New Contract Sum Including This Change Order					\$8,022,450.00
The Original Completion Date was					
Time Changes Prior To This Change Order were					
The Completion Date Prior To This Change Order was					
The Contract Time Will Not Be Changed					
The Date of Substantial Completion as of This Change Order therefore is					
Change Items					
PCI No.	Name	Date	Amount	Days Impact	Status
HIST-002	Re-test of PCI History Audit after corrections since demo - Prompts included	30/Jun/2011	9,150.00		Pending
PBL-SCP1	Project Level Scope Amounts	27/May/2011	3,000.00		Pending

You can now:

- Create an owner transmittal.
- Edit and change the Status of each PCI. Field security exists for the **[Edit]** button (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Owner Change Order*).
- Post the Owner Change. If there are multiple PCIs in the details and they are not all approved at the time of posting, the unapproved items will not be posted, only those that are marked as approved. This applies only to the JSP version.

Field security can be added to the **[Create Transmittal]** button and the **[Delete]** button on Owner Change Orders.

A PM Role privilege **OCO Post Button** is used to restrict the posting of OCO's. By default, the flag is not set, and will need to be set for the relevant PM Role prior to carrying out any OCO posting in JSP.

The privilege **"OCO Workflow Button"** allows submission of an OCO to Workflow, provided the necessary configuration is in place. The **[Workflow]** button only shows if a workflow exists, and the privilege is turned on. In addition, if both privileges are set, the **[Workflow]** button will supersede the OCO **[Post]** button.

[User Extensions] – Button

The screenshot shows the 'Owner Change Order' screen. The 'User Extensions' button is highlighted with a red box. The screen displays a summary of the change order, including the original contract sum, net change, and new contract sum. The 'Change Items' table is empty, showing 'No Records Found'.

User Extensions can also be applied using the **[User Extensions]** button. Please refer to the System Data guide for details on defining User Extensions.

Notes & Attachments Tabs for Owner Change Orders

The screenshot shows the 'Owner Change Order' screen with the 'Notes' and 'Attachments' tabs selected. The 'Notes' tab is active, displaying a list of notes. The 'Attachments' tab is also visible. The screen displays a summary of the change order, including the original contract sum, net change, and new contract sum. The 'Change Items' table is empty, showing 'No Records Found'.

Notes and **Attachments** tabs are also available on the Owner Change Order screen. Field security can be applied to the two tabs.

Potential Change Items

From the xProjects Manager Treeview, select the PCI Log Node. This will open a log of change orders.

As a Vendor/Subcontractor to the project this log will display all change items that relate to your company. As the General Contractor this log displays all change items for the project.

As with any other log any of the columns can be sorted, just by double clicking on the column title and of course the log can be customized to your own layout in the Log Builder.

Adding a Potential Change Item

The [Add PCI] button on the PCI Log, allows the user to create a Potential Change Item. A PCI may be added in detail or summary. The summary – is just entering the ‘Scope’ of the change, while the detail area allows the user to enter more detailed costing information. PCIs are added directly to the system when saved - there is no ‘Submit’ function to this application.

- Select the Type from the LOV and enter the Date. In View mode, it is possible to modify the PCI Type in the header section. The correct numbering sequence will default into the Number field if auto-numbering by change item type is being used, and the billing amount and billing code will/will not be required depending on the change item type as well as the CM control file settings.
- A Number will default in if auto-numbering is being used, otherwise, enter a unique number for the PCI.
- A short Description is required. The Scope is the detail of the PCI.
- Select the required Status. The ‘Proceed’ and ‘Forecast’ flags will be set based on the Status definition in the Change Management setup (Local Tables).
- The **Source** field is informational only, and will show a value which represents the PM Object (communication, issue, notice etc.) from which the PCI is created. The Source Description is shown beside it, and can be displayed or hidden by setting the field security.
- The Days Impact and Owner CO # can also be entered if known and applicable. The OCO# has an LOV which allows for creation of ‘on the fly’ OCOs (use the [Add New] button).
- Field security can be applied to the 'Date Change Signed By Owner' and 'Date Change Sent to Owner' fields (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Potential Change Item*). The possible setting is Unrestricted/Read-only/Hidden.
- The **Source Type** and **Reason** fields are meant to work together to describe the origin (source and reason) of the change order (PCI). The user may input values such as ‘site change’, ‘architect change’ for Source, and then add/select the accompanying Reason. Values can be added based on the business requirements.

The fields '**Source Type**' and '**Reason**' have LOVs to themselves. This means that the user can enter any value they want or select from previously used values. The fields are included in the PCI Log views and are available for editing on a posted PCI. Field security can be applied to

them if needed. PCI Source and Type are added at the project level, but they are actually company-level texts which are available to all projects in the company. The privilege of maintaining Source and Type (Maintain Source Type LOV and Maintain Reason Text LOV) can be suitably applied to Project Roles (standard Treeview path: *xProjects > Security > Project Roles*). If the user does not have these privileges checked on his/her role, the LOVs are presented as read-only, but values can still be selected from the LOVs (no new entries are allowed).

- **Auto Calculate Markups**

The value (checked or un-checked) on the project is inherited from the Company setting by any new PCIs for that project within the company and can be overridden.

When the flag is checked in the PCI header, after entering the PCI details and pressing [**Save Draft**] or [**Save**] markup lines will be automatically generated without the user having to press the [**Calculate Markups**] button. This applies to all PCI class types.

Field security can be applied to the 'Auto Calculate Markups' checkbox in PCI if desired. The possible setting is Unrestricted, Read-only or Hidden.

- The **Status Last Updated** date tracks any status change. Field security can be applied to it and is set to HIDDEN by default on the *ALL* role.
- This is the minimum data required to save a PCI. The [**Save Draft**] button allows you to save the record but remain in edit mode, compared with [**Save**] in which the record is saved but then the screen changes to view mode.

To add detail items to the PCI, use the **+** in the Detail Lines section of the screen. This will open up a new line where the costing details are entered.

- If the PCI is related to the **Vendor/Contract** select the vendor code. The first contract on file will automatically default into the contract field along with the job/phase/category. These may be changed as required.
- Mouse-pointer over some fields will give additional information about those fields.
- The **Phase Units** field becomes available if you have a default category set for Phase Budget Changes (see Change Management Control). There is the flexibility of having a single category set to which phase units are posted, or to be able to select from any category. This is also set up in the Change Management Control.
- A PCI detail line will have a **Status** field that will use the same set of values as the header status. The default value for new detail lines will be determined by the PCI header status. The status field has been included to allow setting of the status for individual line items so some can be approved and posted and others held back from posting. If the status in the header changes, all the detail lines with matching previous values will change their statuses accordingly. If the header status changes to one of the Rejected (class) statuses all the detail line statuses will be set to the same value no matter what their previous statuses were.
- The field for **Owner Change Number** at the detail level is informational only and does not update the OCO that it references.
- '**TBD**' (to be determined) functionality for vendor, the contract code or the change code is also a feature of PM JSP. This allows you to create the next subcontract in sequence (if SC auto-numbering is on) within the PCI, if 'TBD' is placed in the contract field and the PCI is then posted. If 'TBD' is placed in the change code field for an existing contract, the next change code in sequence is created when the PCI is posted.

When 'TBD' is used for the vendor (irrespective of the 'Post Vendor Contracts With Change Item' flag on CM Control file or Change Item Entry), at the time of posting, the system only posts

the TBD vendor's PCI but does not create any subcontract. Otherwise, the system works as per usual.

These TBD vendor subcontracts are available to be pulled into any subcontract or subcontract change order for that project/job, but only in the PM JSP Subcontract program, not the Forms version.

When this happens the posted PCI is updated with the vendor, subcontract and subcontract change code.

Defaulting the PCI Change Code With TBD

There is a flag in the Project Control – Change Management tab: '**Default PCI Change Code With TBD**' which, when checked, the PCI detail will default 'TBD' in the subcontract change code field for the line that has the vendor and contract entered (**including 'TBD' in the contract field**). The default value of the flag is 'un-checked'.

NOTE: If TBD is entered as the contract code, the subcontract change code will default to '000', as per standard functionality.

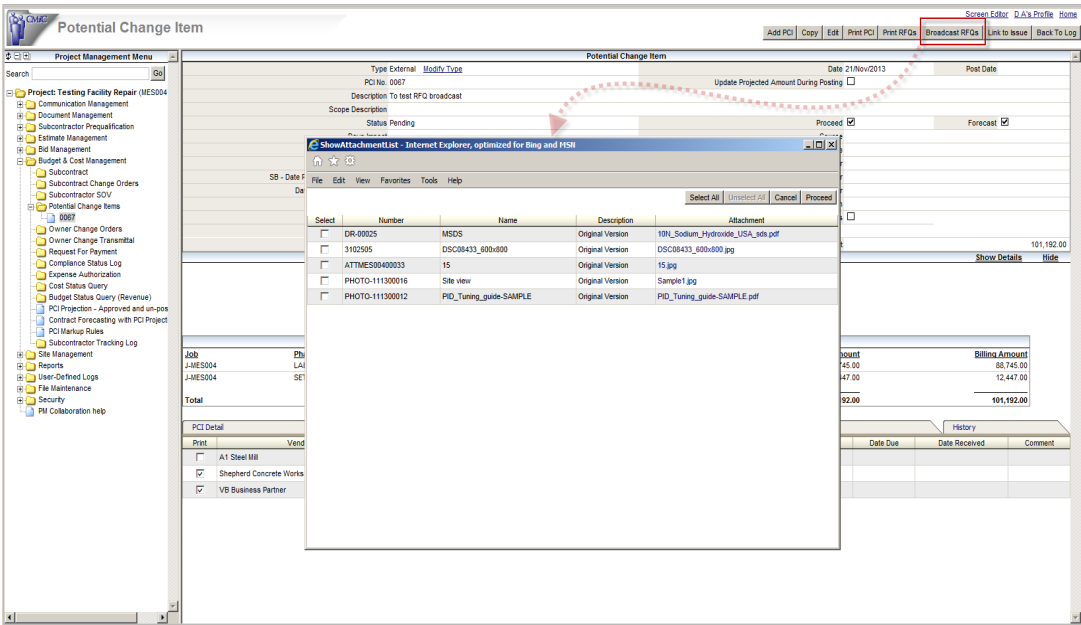
- Enter the **Budget and Billing** amounts.
- The **Seq** (Entry Sequence/entry of record) field is read-only and is used to associate PCI detail records with the corresponding lines in the RFQ tab. Field security can be applied to this field (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Potential Change Item*).

The **Seq** field is positioned just before the PCI Description field regardless of the PM Control – Change Management flag 'Show PCI Detail Description As The First Column'. It is displayed both in Edit and View modes. The PCI Description field has also been added to the **RFQ** tab.

A separate sequence is maintained for markup lines on the PCI Detail tab.

- Enter the **Description**. If the PM Control flag "**Show PCI Detail Description As The First Column**" is checked, the Description will be shown as the first detail column after the 'Print' checkbox and the 'Print' checkbox and Description columns will be frozen on the left when scrolling horizontally, otherwise, freezing is not available.
- If you wish to get a quote for this work, quote information can be entered by clicking on '**RFQs**'. The RFQ can be sent to a number of business partner contacts (with valid email addresses) by using the [**Broadcast RFQs**] button. The sender's email address needs to be set in the ITB Sender Email field of the Project Maintenance (**General** tab). Another requirement for the broadcast is that the quoted quantity, price and amount be blank.




RFQs can be sent to **multiple contacts of the same Vendor** (e.g. for cases where different scope of work – i.e. PCI-subcontract detail is managed by different contacts in the same vendor company). RFQs can also be sent with attachments. When the user clicks [**Broadcast RFQs**] the popup window opens showing the list of attachments associated with this PCI:




The attachments to be sent can be selected from the list by clicking the checkbox next to it. Upon [**Proceed**], the vendors selected with “Print” flag will receive the RFQ with corresponding documents attached.

If there are no attachments associated with current PCI, upon clicking [**Broadcast RFQ**] the RFQ broadcast will be sent to selected vendors without the attachment list window showing up.

When the Broadcast is sent, the Date Sent is updated. Date Due is updated based on the RFQ Review period default set at the project level. The recipient will receive an email that has the following look:

 Reply
  Reply All
  Forward


 Mon 4/9/2018 1:22 PM
 jason@a1doors.com
 Freshmart Office Building - Chicago II - Jason Thomas - Request for Quotation

To ☐ Jason Thomas

[Bing Maps](#)
+ Get more apps

CMiC Construction Company
 50 Maint Street
 Chicago IL 60606

 Phone: (444) 5555
 Fax: ()

REQUEST FOR QUOTATION

Date: 09-APR-18
 To: Jason Thomas, A1 Doors Inc.
 Phone: 774-565-5566
 Sent by: Mike Fernandes, Phone: 211 564 7878, Email: mike.fernandes@cmic.ca

=====

Project Information

Project Name: Freshmart Office Building - Chicago II
 Project Location:

Project Description

New office building headquarters for Freshmart in Chicago, Illinois.

Submit RFQ by: 09-APR-18

=====

Please submit the details of your quotation using the link below.

[http://testv12.cmic.ca:8888/cmictest12c/PMPciEntry/ShowBroadcastResp.do?pciOraseq=3573857&rfqOraseq=3573859&partnCode=A1DOORS&partnType=P&tenantCode=REE=\\$](http://testv12.cmic.ca:8888/cmictest12c/PMPciEntry/ShowBroadcastResp.do?pciOraseq=3573857&rfqOraseq=3573859&partnCode=A1DOORS&partnType=P&tenantCode=REE=$)

Clicking on the http link gives the Request For Quotation which must be completed and submitted:

Request For Quotation			
Project:	P15022 - Freshmart Office Building - Chicago II		
Submit Quote By:	2018-04-09		
Please enter the details of your quotation below:			
PCI/RFQ EXT0001 - External CO - Change North entrance door from single to double Dean Steel doors, model ND334-3	Quoted Quantity <input style="width: 100%;" type="text"/>	Quoted Rate <input style="width: 100%;" type="text"/>	Quoted Amount <input style="width: 100%;" type="text" value="1005"/>
Comments - door upgrade cost: \$780 - extra installation labor: 4.5 hours @50/hour = \$225			
Attachments Add Row			
<input type="button" value="Submit"/>			

Once completed and submitted, the information is updated in the PCI RFQ tab. The Date Received is also updated and Quoted figures are updated in the corresponding PCI Detail line.

- **Related Objects** can be associated with a PCI by using the [Assign Objects](#) link on the Related Objects tab. You can also add a new Communication Record within the Related Objects LOV by clicking on the **[Add New]** button.
- **Audit History** – An audit history is kept for changes made to a number of fields in the PCI Entry screen - Header: Type, PCI Number, Date, Description, Status, Start Date, OCO Number, Date Due to Owner, Date Proposal Issued to Owner, Date Proposal Signed by Owner, Date Change Sent to Owner, Date Change Signed by Owner. Total Budgeted Amount and Total Billing Amount are recorded whenever changes occur to Budgeted Amount and/or Billing Amount in the PCI details. The Audit History also records the posting of PCIs.

Printing actions are also recorded in the Audit History tab of PCI. The history record will show the fields Date and Time, Author, Recipients (if printed to email/fax), Action (print to email/fax), Description, and Status.

Markups can be calculated once amounts have been entered, and if you change amounts on an existing PCI the system will ask if you wish to re-calculate markups.

Details for Change Items may be updated and changed on a PCI until the PCI is posted.

Once a PCI is saved, the system will re-display the data with a summary section in the middle of the screen. The summary section will show all the vendors on the PCI and the markups applied, as well as a job allocation section.

There is also a summary section that is accessed by the link [Show Details](#) which shows data related to the Current Cost Budget, Revenue Budget and Revised Amounts based on the PCI details. The popup display is divided into Phase Summary and Phase/Category Summary areas:

Phase Level Summary

Current Budget Qty	= Phase Level Budgeted Units
Current Budget Amt	= Phase Level Estimated Cost Amount
Current Budget Bill Amt	= Phase Level Estimated Revenue Amount
This Change Qty	= PCI Qty for Phase
This Change Amt	= PCI Estimated Amount
This Change Bill Amt	= PCI Billing Amount
Revised columns	= Current Budget columns + This Change columns

Phase-Category Level Summary

Current Budget Qty	= Category Level Budgeted Quantity
Current Budget Amt	= Category Level Budgeted Amount
Current Budget Bill Amt	= Category Level Budgeted Revenue Amount
This Change Qty	= PCI Qty for Category
This Change Amt	= PCI Estimated Amount
This Change Bill Amt	= PCI Billing Amount
Revised	= Current + This Change

Selecting Bid Items as PCI Detail Lines

The [Select Bid Items] button, which is available if its field security is set to 'Unrestricted' on the user role, can be used to pull bid items into the PCI as PCI detail lines. Only bid items with valid job/phase/category and not purchased are listed in the LOV.

'On the Fly' Phase/Category in PCIs

The screenshot displays the 'Potential Change Item' form in the 'PCI Detail' section. The form includes fields for Type, PCI No., Date, Description, Scope Description, Status, Days Impact, Start Date, OCO No., SB - Date Proposal Issued To Owner, Date Change Sent To Owner, Source Type, Total Budgeted Amount, Proceed, Source, End Date, Date Due To Owner, Date Proposal Signed By Owner, Date Change Signed By Owner, Reason, Total Billing Amount, and a table for PCI Detail lines. A red arrow points to the 'Add New' button in the Category LOV.

Action	Vendor	Contract	Job	Phase	Category	W/M	Billing Code	Days Impact	Phase Qty	Estimated Amount	Quoted
+x			SUS-JOB-2	01	12000	NA			/NA		
+											

Find: % [Go] [Close]
[<< Prev Set] 1 - 4 of 4 [Next Set >>] [Add New]

Code	Name	Vendor
01	General Conditions	Multi Vendor
02	Site Office	Multi Vendor
03	Concrete	Multi Vendor

'On the fly' Phase/Category can be created in PCI JSP. The feature functions in the same way as its Forms counterpart.

If the user has the CMiC Enterprise privilege to create phase/category 'on the fly', then it will be created, otherwise, a message will be issued saying the phase is not on file for that company.

To create a new phase/category 'on the fly' in PM JSP in the PCI Entry screen (Detail Section), bring up the phase LOV of a detail line and click the [Add New] button (also available in the Category LOV).

The **Quick Phase/Category** Insert pop-up screen will be displayed.

Enter the code and description for the new phase and indicate the W/M etc. When the JC Control flag 'Update Controlling Phase Name' is checked, users will be able to update the controlling phase name as well, which in turn will update the controlling phase name at job level. This is applicable when using phase segmentation.

Select the category code from the LOV and enter or select the bill-code.

The **Phase Type** is a non-mandatory field is an LOV that pulls from the Phase Types set up in the FORMS *JC > Setup > Local Tables > Enter Phase Types*.

New phase types cannot be created in this popup window. It will pull the default phase type from the Phase Master for the phase entered. The user can override the phase type if a value other than the default is required, but this will not change the Phase Master.

Field security can also be applied to the Phase Type field in the popup window, if desired. The possible values are: Unrestricted, Read-only or Hidden. Unrestricted is the default setting.

The **Budget Method** can be selected from a drop-down box with the 3 types of budget methods (Amounts, Productivity, Units).

The value in the field defaults from the category entered, but is updateable.

Also, multiple category codes can be added to the new phase, by utilizing the blue plus '+'. Only the first category is defaulted in the category field when the new phase is created and saved.

On saving the changes, the [User Extensions] button is displayed.

Clicking on the [User Extensions] button gives a list of the user extensions that have been defined against table JOBPHS, which is the same as the user extensions in the JC Assign Phases form.

'On the Fly' Billcodes

Bill-codes can also be created 'on the fly' within the PCI detail. The [Add New] button in the billcode LOV is used for this purpose. Field security can also be set on the bill-code field.

Allowing Null Job/Phase/Category in PCI Details

PCI details can be created with null job/phase/category. This feature is controlled by the PM Company Control flag 'Allow Null Job/Phase/Category For PCI' which is located on the Change Management tab.

By default, the field security on this flag is 'Hidden', set on the *ALL* role:

The screenshot displays the PM Company Control interface for 'SB Urban Systems'. The 'Change Management' tab is active, showing various settings for PCI details. The 'Allow Null Job/Phase/Category For PCI' flag is highlighted with a red box, and its security level is set to 'Hidden'. Below this, the 'PM Object' table lists various objects and their security levels.

Item Name	Column/Field Security	Security Level
Phase Code Maximum Length	Unrestricted	Unrestricted
Phase Segmentation	Unrestricted	Unrestricted
Use Original Contract Amount Override On OCO	Unrestricted	Unrestricted
Project End Date Updateable With Posted OCO	Unrestricted	Unrestricted
Calculate OCO Date On Working Days	Unrestricted	Unrestricted
Calculate RFI reqd. Date On Working Days	Unrestricted	Unrestricted
Calculate Submittal Sched. Dates On Working Days	Unrestricted	Unrestricted
Calculate Issue Due Date On Working Days	Unrestricted	Unrestricted
Calculate Notice Due Date On Working Days	Unrestricted	Unrestricted
Calculate Punchlist Sched. Compl. Date On Working Days	Unrestricted	Unrestricted
Project Calendar	Unrestricted	Unrestricted
Project Only Contact (on the fly)	Unrestricted	Unrestricted
PCI Details Order	Unrestricted	Unrestricted
PCI Revenue Category	Unrestricted	Unrestricted
Allow Null Job/Phase/Category For PCI	Hidden	Hidden

PM Object	Field	Status	Proceeding	Included In Forecast
Communication		Cancelled PCI		
Document Package		Pending		
Document Revision				
Field Work Directives				
Meeting Item				
Notice		Approved		
Punch List Item				
Request For Information		Rejected		
Submittal				

When the feature is activated, it allows the user to add and save PCI detail lines for which there may not be complete J-lines. The job, phase, category are allowed to be null as long as the PCI header status is in an UN-APPROVED class status.

If the user changes the status to an APPROVED class while there are null or incomplete J-lines, a message will be issued, and the status will remain in the UN-APPROVED class it had.

If the user tries to POST the PCI in this incomplete state as well, the same message will be issued:

The validations for this feature also prevent the creation of subcontracts for null or incomplete J-lines.

The feature is also available in the FORMS version of PM Company Control (Change Management tab) and applies to the Change Management (CM) and Project Management (PM) versions of PCI Entry.

PCI Detail Posting by Owner Change Number

PCI Detail posting can be done by allowing posting of specific PCI detail lines as part of an Owner Change Order while leaving other lines to be posted at a later date, when necessary. This feature is available when the Project Control flag 'Use PCI Detail Status' is checked for the company.

If no OCO# is specified on any detail line:

If the **PCI is rejected (by the header status)** it cannot be posted – that is the current behavior, too.

If the **PCI is approved (by the header status)** and:

- Has both Approved and not Approved (Pre-Pending, Pending or Rejected) detail lines:
 - A new PCI will be created with a matching number appended with “-1” (or -2, etc.). A reference PCI will be also recorded in the new PCI record to easily tie it back to the originating PCI.
 - All the Approved lines will be moved to the new PCI leaving the Pre-Pending, Pending and Rejected lines on the original PCI.

- If the original PCI had an OCO# specified in the header, it will be copied to the new PCI and removed from the original one.
- The new PCI will be posted using the standard posting routine.

If none of the detail lines are Approved, then a “No Approved Lines to Post” message will be displayed.

- All the detail lines are Approved
 - No new PCI is created
 - The PCI will be posted using the standard posting routine.

If some (or all) detail lines have the OCO# specified:

If the **OCO# in the header is empty** then the posting is going to work exactly as described above and the detail line OCO numbers will be ignored.

If the **OCO# in the header is not empty** then the posting is going to work as described above except that only the lines with matching (or empty) OCO# will be moved to the new PCI and posted.

- Again, the OCO# on the original PCI header will be erased.
- Also, the detail lines that may have been left on the original PCI because they were not approved would have their OCO# erased if it matches the one that had just been posted.

Separate Post Privilege for Internal and External PCI

Separate privileges exist that allow posting of the different classes of PCIs:

- Post PCI – External
- Post PCI – Internal
- Post PCI - Transfer
- Post PCI - Original Budget

By default, the flags are not set, and will need to be set for the relevant PM Role prior to carrying out any PCI posting in JSP.

Allowing Posted PCIs to be Linked to Unposted OCOs

PM Roles

CMIC Field Menu

Project Roles

Role	Description	View/Create/Update/Delete All Objects	View/Create/Update/Delete All Document Types	Mobile Springboard Objects	Default Email Notification Settings
DIRECT	Project Director	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EST	Estimator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ESTSR	Senior Estimator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INV_APP0	Invoice Approver 0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INV_APP1	Invoice Approver 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INV_APP2	Invoice Approver 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEGAL	Legal Team	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MADCOLLAB	Madcollaborator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MADPM	MadPM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update Role DIRECT

☐ View/Create/Update/Delete All Objects ☐ View/Create/Update/Delete All Document Types ☐ Mobile Springboard Objects ☐ Default Email Notification Settings

☐ Restricted View All for RFIs

Send/Receive

☐ Receive Owner Change Order ☐ Receive Partner RFI

☐ Send Partner RFI ☐ Forward RFI

☐ Redirect RFI ☐ Send I/O Email

☐ Send Partner Transmittal ☐ Send Partner Communication

☐ Send Partner Issue ☐ Send Partner Notice

☐ Send Partner Punch List

Posting - Voiding

☐ Post PCI - External ☐ Post PCI - Internal

☐ Post PCI - Transfer ☐ Post PCI - Original Budget

☒ Edit Posted PCI ☐ Post OCO ☒ Allow for adding posted PCIs to unposted OCO's

☐ Post Subcontract ☐ Post Subcontract Change Order

☐ Void Subcontract ☐ Void Subcontract Change Order

Sample of Project Roles (PM Roles) screen; standard path: Security > Project Roles

This action is controlled by the PM Role privilege “Allow for adding posted PCIs to unposted OCOs”, shown above.

The System-Level flag “Allow Posted PCIs To Be Linked To Unposted OCOs” on the **Projects** tab of the System Options screen also needs to be checked:

SYSTEM OPTIONS

Checked: Posted PCI's Can Be Linked To Unposted OCOs

Table Mode Save Exit ? ? ? ? ? ? ? ?

SYSTEM OPTIONS

General Licenses Reports Global Financials **Projects** Forecast Assets Payroll Human Resource E-TimeSheet Help Logo Path

Workflows Report Options ECM Documents User Extensions

☒ System Wide Unique Job Code ☐ Store Cost Code Projection

☒ Show Reference Description On Job Cost Posting Report ☐ Minority Participation is to be kept at the Change Order Level

☐ Allow To Build JC Foreign Batch Only When All Records Are Valid ☒ Allow Posted PCIs To Be Linked To Unposted OCOs

☒ Copy Additional Fields During JC Transactions Adjustment Posting ☐ Restrict enter cost transaction by transaction type

* Job Billing Delete Invoices Never Delete Invoice Deletion Days

PCI Bill Code: PENDING_PCI

PCI Bill Type: COST Cost Plus Markup

PCI Bill Code Description: Pending PCI Below the Line Billing

☐ Do Not Add Created On The Fly Cost Codes To Cost Code Master ☒ Allow Billing Amount on Non Billing Categories

Job Billing Group Maximums Sequence Order:

Mapping Group #1

Mapping Group #2

Mapping Group #3

Mapping Group #4

Mapping Group #5

Sample of System Options screen; standard path: System > Setup > System Options

Additionally, the following events occur when this System Level flag is set:

- The **Closed** flag on OCOs becomes visible and editable for both posted and un-posted OCOs.
- The **Closed** flag's default state is un-checked, meaning "Open". When checked, the OCO is not available for linking with any posted PCIs, and will not show in the OCO LOV of posted PCIs.
- Update is not allowed if the **OCO No.** field in the PCI is not null.

When all the setup is in place the linkage of a posted PCI to an unposted owner change order can only be carried out in the PCI. As such, the user also needs to have the PM role privilege "**Edit a Posted PCI**", framed in this section's first screenshot.

In the posted PCI, the **OCO No.** field, which should be enabled, is split into sections showing unposted and posted OCOs:

The screenshot shows the 'Potential Change Item' form. The 'OCO No.' field is highlighted with a red box. A red arrow points from this field to the 'OCO LOV' window. The 'OCO LOV' window displays a list of OCOs, categorized into 'Posted' and 'Unposted' sections. The 'Posted' section lists OCOs 001 through 004, and the 'Unposted' section lists OCOs 005 through 008. The 'OCO No.' field in the PCI form is highlighted with a red box, and a red arrow points to the 'OCO LOV' window.

Once the unposted OCO is selected, the **OCO No.** field is no longer editable. If the wrong unposted OCO was selected, the user can go to the OCO screen and remove the PCI from the OCO details. This will make the **OCO No.** field in the posted PCI editable again so that the correction can be made.

The amounts in the unposted OCO will be adjusted appropriately to include the posted PCI.

NOTE: Once a posted PCI is linked to an unposted OCO, there is no way of un-linking them.

Modify PCI

The Modify PCI feature is available while in view mode of the PCI. The 'Modify Type' function no longer displays the same PCI type, in the drop-down list, as the current PCI, e.g. if PCI type is currently Ext, the dropdown list will not show Ext type. This will prevent the users from changing the PCI number only, without changing PCI type.

NOTE: This functionality cannot be used when WBS codes are being used for PCIs.

PM Systems Options flag 'Recycle PCI Number Upon Modify Type'

By default this flag is checked to maintain previous functionality. If it is un-checked, the system will not reuse PCI numbers when the Modify Type feature is executed. Therefore, if the user clicks 'Modify Type', for a particular PCI Type, the next number in sequence for that type is proposed. If the user then changes his/her mind and deletes the PCI prior to any more being created for that type, later when another Modify Type is executed for the same PCI Type, that PCI number will not be re-proposed.

Editing a Posted PCI

Some date fields of a posted PCI can be edited. These dates are: Date Proposal Issued to Owner, Date Proposal Signed by Owner, Date Change Sent to Owner and Date Due to Owner.

The pre-requisite for this is that the user has the Project Role privilege '**Edit Posted PCI**'.

Copying a Posted PCI

Copy PCI functionality has been extended to include ability to copy a **Posted PCI** with the new PCI having a Pending (P) status defaulted in. This is applicable only to the JSP version.

Deleting a PCI

The only PCI that can be deleted is a PCI that has not yet been posted. Use the xProjects Manager Treeview to find the PCI in question, then once the details are shown, use the [**Delete**] button to remove the PCI from the system.

To delete a change item on a PCI, edit the PCI then use the **✖** next to the item to remove just that item.

PCI Markup Rules Maintenance

PCI Markup Rules can be maintained in Forms as well as JSP.

The PCI Markup Rules Maintenance menu item is located under the Budget and Cost Management node.

There is also an xProjects privilege which allows the user to Edit (Insert/Update/Delete) the Markup Rules in PM JSP: '**Markup Rule – Edit**' (standard Treeview path: *xProjects > Security > Role Maintenance – Privilege/Markup Rules - Edit*).

If the user does not have this privilege, they will only be able to View the markup rules...no data manipulation is allowed.

The PCI Markup Rules screen appears as follows.

Project Management

Project Management Menu

Job: ALL

Rules

Order	Description	Rounding Rule	Rounding Method	Level	Action
1	markup 1	No Rounding	Standard	1	X

Details

Calculate On				Allocate To				Budget %	Billing %	Action
Action	Job	Phase	Category	Job	Phase	Category				
+X	SUS-JOB-2	ALL	ALL	SUS-JOB-2	03	0000		50,000	50,000	+X
+X	00-DEMO	ALL	ALL	00-DEMO	064000	L1		50,000	50,000	+X

Standard Treeview path: xProjects > Budget & Cost Management > PCI Markup Rules

The "ALL" option in the Job dropdown list is controlled by the Forms privilege: **"PMMRALLJOB - PM: Allows the user to create change item markup rules for ALL jobs."** If the user doesn't have that privilege, ALL will not be available in the list.

The [Edit] button allows the rule record to be opened up for modification. Any rule that is highlighted has its Details already in edit mode.

The [Copy From Job] button is available when a job is selected, not when it is 'ALL'.

Any validation of the job structure (phase/categories) after the copy is done if [Save] is clicked.

If the user edits markup rule details and then just navigates away to a different header record, the system will display a confirmation to the user, asking whether to Save/Ignore the changes:

Job: BASIC

Rules

Order	Description	Rounding Rule	Rounding Method	Level	Action
1	Markup - 1	No Rounding	Standard	1	X
2	Markup 2	Standard	Standard	2	X

Details

Details have changed for Markup Rule 'Markup - 1'.

Save Ignore Cancel

Calculate On				Allocate To				Budget %	Billing %	Action
Action	Job	Phase	Category	Job	Phase	Category				
+X	BASIC	ALL	ALL	BASIC	064000	G1		20	50,000	+X

Calculate Markup on Billing Amount

The screenshot shows the 'Project Management' software interface. On the left is a sidebar menu with various project management options. The main area is titled 'Job: STDJOB'. Below this is a 'Rules' table with columns: Order, Description, Rounding Rule, Rounding Method, Level, and Action. It contains two rows of markup rules. Below the rules is a 'Details' section with a 'Calculate On' table. This table has columns for Action, Job, Phase, Category, and a checkbox for 'Calculate On Billing Amount'. The 'Job' is set to 'STDJOB', 'Phase' to 'ALL', and 'Category' to 'ALL'. The 'Calculate On Billing Amount' checkbox is checked. To the right of this table are fields for 'Budget %' (10.000) and 'Billing %' (10.000).

Order	Description	Rounding Rule	Rounding Method	Level	Action
1	markup 1	No Rounding	Standard	1	<input checked="" type="checkbox"/>
2	markup2	No Rounding	Standard	2	<input checked="" type="checkbox"/>

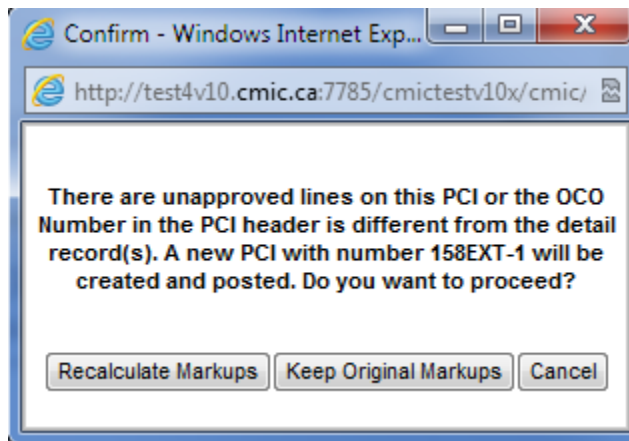
Action	Job	Phase	Category	Calculate On Billing Amount	Budget %	Billing %	Action
<input checked="" type="checkbox"/>	STDJOB	ALL	ALL	<input checked="" type="checkbox"/>	10.000	10.000	<input checked="" type="checkbox"/>

This checkbox is located in the detail section of the PCI Markups screen. When the user checks the flag, the system will apply the Budget % to the Billing Amount and allocate it to the Final Amount on the markup line. Field security can be applied to the flag.

Recalculation of Markups for 'Split Out' PCI

Markups can be re-calculated for the new PCI that is created (and split out from the original **on posting**) when the PM Control –Change Management flag 'Use PCI Detail Status' is in use.

If the 'Auto-calculate Markups' flag is un-checked and the user clicks the [POST] button while not all detail lines are APPROVED, the following popup window will be displayed:



If Auto-calculate Markups' is checked, then the system will recalculate the mark-ups automatically on the new split out PCI having only APPROVED PCI details, and based on the amounts in the new PCI.

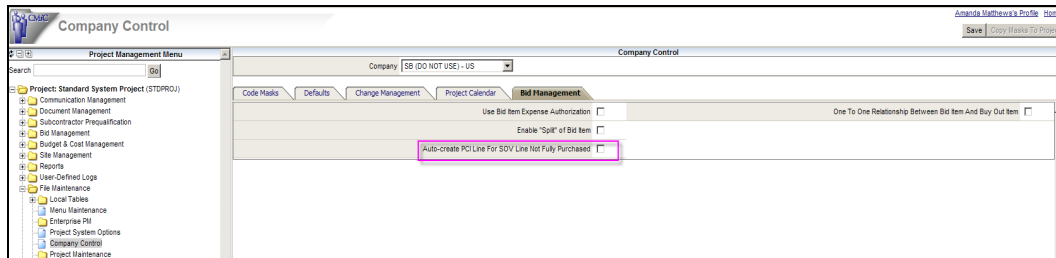
[Recalculate Markups] means that any markups which were calculated in the original PCI will be re-calculated when the PCI is split. The recalculated markups will apply to the new PCI, based on the amounts in that new PCI.

[Keep Original Markups] mean that there will be no re-calculation of markups and any markups calculated originally in the 'source' PCI will be carried to the new split out PCI.

Tracking Remaining Amount – Subcontract versus PCI

This functionality involves the creation of additional lines (for Remaining Amount after subcontract purchase) in a posted PCI that is associated with a bid item, when the bid item is not fully purchased (i.e. 'Fully Purchased' flag is not checked on the subcontract schedule of value). The Remaining Amount is the difference between the Budget Amount and the Purchase Amount.

The creation of the additional lines in the posted PCI is controlled by the flag '**Auto-create PCI Line For SOV Line Not Fully Purchased**' in the Company Control – Bid Management tab. By default, the flag is un-checked. If the flag is un-checked, no additional lines will be created in the PCI.



This flag is used in relation with the '**Enable Split of Bid Item**' flag, so the latter **must** be checked when you check the 'Auto-create PCI Line For SOV Line Not Fully Purchased'.

When checked, it controls the creation of additional lines in a posted PCI during subcontract posting, if the subcontract SOV line is not **fully purchased** when compared with the PCI Estimated Amount for the PCI detail line that it is linked with.

For **non-OBC** type PCIs, the additional lines created in the PCI details will have 'TBD' in the vendor/subcontract/chg code and will be available for selection in subcontract base contracts or change orders. When selected, the PCI detail will be updated with the vendor/subcontract/chg code.

For **OBC type** PCIs, the vendor/contract/chg code fields will remain null in lieu of 'TBD'

In the posted PCI, the Billing Amount is 0 for the new lines created, and the Final Amount is the difference between the subcontract detail line amount and the linked PCI detail line Estimated Amount.

The Process Overview

The process is that the bid item is initially linked to a PCI (any type: OBC, EXT, INT, TRF). The PCI is posted to update the cost budget. When subcontracts are later purchased against the bid item, as long as the bid item is not Fully Purchased, the summary Estimated Amounts of the bid item and its secondary bid items must equal the summary Final Amounts of all the PCI lines in the Posted PCI.

Printing PCI Reports

There are 3 different ways to print PCIs. From the RFQ tab in the details the user can print a Request for Quote directly for the specific item by using the print icon. From the main screen – the [Print RFQ] button will print Requests for Quotes for all the items listed on the current PCI and there is the [Print PCI] button which allows for printing all different types of predefined PCI reports.

Cost Status Query

fit																		Show Filter		Send To Spreadsheet		Enter Query	
Cost Status Query																							
Job Code	Phase	Phase Name	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed	Committed Remaining	Spent/Committed	Amount To Complete	Calculated Projection	Proceeding Projected	Non-Preceding CO	Pending Projection	Forecast	Projected Over/Under			
SUS-JOB-2	02	Site Office	-1,165,950.04	0.00	1,407,090.04	241,140.00	593,948.02	0.00	835,088.02	200,245.00	147,155.09	147,155.09	347,400.09	229,100.00	576,500.09	635,948.02	0.00	1,212,448.11	1,212,448.11	-377,360.11			
SUS-JOB-2	01	General Conditions	630,750.00	0.00	115,400.00	746,150.00	45,524.00	0.00	791,674.00	3,185.00	986,260.40	986,260.40	989,445.40	-111,025.00	878,420.40	47,964.00	0.00	926,384.40	887,520.40	-95,844.00			
SUS-JOB-2	03	Concrete	606,750.00	0.00	50,776.42	657,526.42	155,103.96	0.00	812,630.38	200,000.00	24,680.00	24,680.00	224,680.00	428,246.42	652,926.42	155,103.96	0.00	808,030.38	808,030.38	4,600.00			
Total (3 rows)			71,549.96	0.00	1,573,266.46	1,644,816.42	794,575.98	0.00	2,439,392.40	403,430.00	1,158,095.49	1,158,095.49	1,561,525.49	546,321.42	2,107,846.91	839,015.98	0.00	2,946,862.89	2,907,998.89	-468,606.00			

When viewing the Cost Status Query, the user has the ability to ‘drill’ down into the items that resulted in a particular value – examples include Cost or Commitment transactions or lists of PCIs and even a drill down directly into the PCI details including Budget and Billing amounts.

The Cost Status query is also available by Category.

The **Show CPR as Cost Amount** flag in the Job Maintenance program effects the way the **Spent** amount column shows the values. When checked (Set as ‘Y’), the **Spent** amount column will show the CPR amount instead of the actual cost amount.

IMPORTANT NOTE: When the CPR amount is ‘Null’ or ‘Zero’ for a specific cost transaction record, then the **Spent** column in Cost Status Query will reflect the same. Preferably, this option must be used when the posted cost transactions have the CPR amount calculated and populated in the JCDETAIL table.

Projected Final Flag – JC Control File Setting

JOB COST CONTROL FILE
Table Mode
Save
Exit
?
!
↶
↷

Projected Final Code (L- Largest of Committed or Spent, C- Committed Costs, S- Spent to Date)

SELECTION CRITERIA

Company CCC CMIC Test Construction Company Copy Control File

Job Setup
 Accounting
 Additional Charges
 Bid Setup
 Billing
 Budget
 Forecasting
 WIP
 Revenue Exceptions
 Jobs
 Change Management
 Forward Loss

Search
 Insert
 Delete
 Workflows
 Report Options
 ECM Documents
 User Extensions

Accounting Method Billing and Costs

Projected Final Flag

Largest of Spent or Committed

Revenue Generation As Costs Incurred (Without GL)

Default Job Billing Method Job Billing

Default Retainage RET10%

☒ Use Equipment Bill Rates For TM Or JB Billings
 ☒ Job Estimated Start Date Defaulted To System Date

☒ Use Payroll Bill Rates For TM Or JB Billings
 ☒ Project Manager Is Mandatory On Job

☒ Default Payroll Overhead Rates Group Required
 ☒ JB Contract Project Manager Is Synchronized With Job PM

☐ Bid Job As Default
 ☐ Job Billing Address Is Synchronized With JB Contract

☐ Mandatory Default Job Department
 ☐ Job Department Defaults PM Employee Home Department

☐ Mandatory Job Billing Rate Table For JB Jobs
 ☒ Job Work Location Defaults PM Employee Work Location

With this setting, sometimes the **Spent/Committed** column is the greatest of the **Spent** and **Committed** columns, and sometimes it combines some of the spent and committed costs. It depends on whether the spent costs correspond to the commitments. The larger of spent and committed will be selected for each commitment. If there is no commitment, the spent amount will always be included in the sum. In other words, if all spent costs correspond to commitments, then the **Spent/Committed** column must be equal to one of the other columns (**Spent** or **Committed**):

Projected ETC Budget	Forecast	Job Code	Phase	Phase Name	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed Remaining	Committed	Spent/Committed
20.00	1,234,251.00	15-0001	06510	Structural Plastic Shapes and Plate	20.00	0.00	0.00	20.00	0.00	0.00	20.00	1,234,031.00	200.00	2,000.00	1,234,231.00

When the spent costs are against commitments, the **Spent/Committed** column will not necessarily be the sum of the other two columns, but it will take the greatest of spent or committed for each commitment. In this example, some of the costs are subsumed by commitments and some are spent outside of commitments:

Cost Status Query															
Projected ETC Budget	Forecast	Job Code	Phase	Phase Name	Original Budget	Internal And Transfer CO	External CO	Current Budget	Pending CO	Prepending CO	Projected Budget	Spent	Committed Remaining	Committed	Spent/Committed
20.00	1,234,251.00	15-0001	06510	Structural Plastic Shapes and Plate	20.00	0.00	0.00	20.00	0.00	0.00	20.00	1,234,031.00	200.00	2,000.00	1,234,231.00
500.00	69,100.00	15-0001	01210	Allowances	0.00	0.00	500.00	500.00	0.00	0.00	500.00	50.00	69,050.00	69,100.00	69,100.00
2,100.00	4,222.00	15-0001	12170	Art Glass	0.00	0.00	1,100.00	1,100.00	1,000.00	0.00	2,100.00	2,000.00	2,222.00	2,222.00	4,222.00
2,750.00	10,010,122.00	15-0001	01310	Project Management and Coordination	0.00	0.00	1,250.00	1,250.00	1,500.00	0.00	2,750.00	10,003,910.00	6,322.00	7,822.00	10,010,232.00

This can be seen by going into the Spent/Committed popup:

JC Transactions (Cost and Committed) - Mozilla Firefox

https://hikuu.cmicglobal.com/cmictest/PmOwnerJSQuery/ShowJCTran.do

Enter Query

Send To Spreadsheet

Clo

Phase

Company KJ

Job 15-0001

Phase 01310

Phase Name Project Management and Coordination


JC Transactions (Cost and Committed)

Search	Post Date	Category	Type	Source Description	Ref. Description	Cost Amount	Commitment	Spent Against The Commitment	Spent Out Of Commitment	Commitment Code	Source	Transaction Number	Reference Date	Batch_Number
	2016													
	Apr 04, 2016	M	C	Brendan rules	grewgrewg	1,000.00	0.00	1,000.00	0.00	GRESGESGS 000	AP	178983	Apr 04, 2016	205998
	May 03, 2016	M	O	Aaron Test Company	321321321321-000	0.00	2,500.00	0.00	0.00	321321321321 000	SC		May 03, 2016	229459
	Jun 07, 2016	E	C			10.00	0.00	0.00	10.00		JC	198691	Mar 31, 2016	204745
	Jun 07, 2016	C	C			600.00	0.00	0.00	600.00		JC	198691	Mar 31, 2016	204745
	Jun 07, 2016	C	C			300.00	0.00	0.00	300.00		JC	198691	Mar 31, 2016	204745
	Jun 07, 2016	C	C			500.00	0.00	0.00	500.00		JC	198691	Mar 31, 2016	204745
	Jul 27, 2016	K	O	Brendan rules		0.00	100.00	0.00	0.00	TZZZ11-1	PO	266265	Jul 27, 2016	298826
	Jul 31, 2016	E	C	324	01310	1,000.00	0.00	0.00	1,000.00		AP	278263	Aug 10, 2016	311281
	Jul 31, 2016	E	C	Brendan rules		100.00	0.00	0.00	100.00		AP	278265	Aug 10, 2016	311289
	Jul 31, 2016	K	C	234	test	10,000,000.00	0.00	0.00	10,000,000.00		AP	278225	Nov 30, 2016	311237
	Nov 10, 2016	K	O	A1 Railings and Concrete	546-000 456	0.00	111.00	0.00	0.00	546 000	SC		Nov 10, 2016	311219
	Nov 10, 2016	K	O	1 Vendor Address	8765-000 345	0.00	1,000.00	0.00	0.00	8765 000	SC		Nov 10, 2016	311217
	Nov 10, 2016	K	O	234	434-000 34	0.00	500.00	0.00	0.00	434 000	SC		Nov 23, 2016	311214
	Nov 10, 2016	K	O	1APMnVn	123123-000 123	0.00	500.00	0.00	0.00	123123 000	SC		Nov 30, 2016	311208
Total (24 rows)						10,003,910.00	7,822.00	1,500.00	10,002,410.00					

Image Link to Cost Status Query

The screenshot shows the 'Project Management' application window. On the left is a 'Project Management Menu' with various options like 'Communication Management', 'Document Management', 'Subcontractor Prequalification', etc. The main area displays a 'Cost Status Query' table. The table has columns for Job Code, Phase, Phase Name, Original Budget, Internal And Transfer CO, External CO, Current Budget, Pending CO, Prepending CO, Projected Budget, Spent, Committed, Committed Remaining, Spent/Committed, Amount To Complete, Calculated Projection, and Proceeding Projected. A red arrow points to a magnifying glass icon in the 'Search' column of the table, indicating a drill-down action.

An image link from the Cost Status Query allows drill down right to the image of the invoice associated with the transaction.

The link to the invoice is accessed via the magnifying glass icon  in the Search column of the screen.

Clicking on the icon beside a transaction line will indicate whether or not there is an associated voucher.

If there is a voucher for the transaction, a popup window will display to show the active Image Searches that have been defined against the FORMS Job Cost – Transaction Query (since the detail level of the Cost Status Query is actually the JC Transactions):

The screenshot shows the 'JC Transactions (Cost)' popup window. The window has a title bar with the URL 'http://test4v10.cmic.ca:7785/ - JC Transactions (Cost)'. Below the title bar are buttons for 'Enter Query', 'Send To Spreadsheet', and 'Close'. The main area contains a table with columns for Search, Post Date, Category, PCI #, Cstctr, PCI Line Number, Source Description, Ref. Code, Ref. Description, Amount, Source, Transaction Number, Reference Date, Batch Number, Quantity, and WM. A red arrow points to a magnifying glass icon in the 'Search' column. A 'Select Image' dialog box is also visible, showing a list of image searches.

Each Image Search is defined with different criteria for searching for images. Refer to the FORMS System Data Manual for further information on setting up image searches.

When the desired image search is selected in the popup window above, the image will be displayed in the Image Manager, along with the invoice record:

The screenshot shows the Image Manager application interface. The main window displays the 'SC Pay Request Header' and 'SC Pay Request Detail' sections. The 'Invoice No.' field is highlighted with a red box, showing 'JSPMIG-3'. The 'Amount' field shows '\$2,200.00'. The 'Description' field shows 'Review Invoice via Image Manager'. The 'SC Pay Request Detail' section is a table with columns: Change Code, Task Description, Contract Amount, Prev Cert Amount, Retainage Percent, Current Retainage, Current Amount, Completed Amount, Completed Percentage, Amount Retained, Retainage Release, Inv#, and Actions.

Budget Status Query (Revenue)

Job Code	Phase	Phase Name	Original Revenue Budget	Internal And Transfer CO	External CO	Current Revenue Budget	Pending CO	Prepending CO	Projected Revenue Budget
310117	01-100	Temporary Structures	1,400,000.00	0.00	0.00	1,400,000.00	24,296.88	0.00	1,424,296.88
310117	01-103	Site Office	2,922,600.00	0.00	0.00	2,922,600.00	0.00	0.00	2,922,600.00
310117	01-104	Site Security	1,540,010.00	0.00	0.00	1,540,010.00	0.00	26,435.63	1,566,445.63
310117	01-700	Estimating	46,406.25	0.00	49,981.69	96,387.94	0.00	0.00	96,387.94
310117	01-702	Sales	56,250.00	0.00	0.00	56,250.00	0.00	0.00	56,250.00
Total (5 rows)			5,965,266.25	0.00	49,981.69	6,015,247.94	24,296.88	26,435.63	6,065,980.45

Original Revenue Budget From JC Budget Entry

Posted Transfer CO's

Posted External CO

D = A + B + C

Pending External, OB, Transfer CO

Pre-Pending

G = D + E + F

The Budget Status Query shows the expected Revenue values (based on the Job Cost Budget – Revenue values). PCI Values included would show only the Billed amounts, not the Budgeted amounts.

The Budget Status Query is also available by Category.

NOTE: Only Budgeted Revenue Amounts will be used. For Internal Change Orders, there is no Billing Amount, hence the query will not show Internal Change Order Amounts. The column title is irrelevant. Any statuses (pending status or pre-pending status) with the 'Forecast' flag checked will only be included in the query.

Calculations

Current Revenue Budget = Original Revenue Budget + Posted Changes

Projected Revenue Budget = Current revenue Budget + Unposted Changes

Owner Change Transmittals

The screenshot displays the 'Owner Change Transmittal' form within the CMiC Project Management web application. The interface includes a 'Project Management Menu' on the left with a search bar and a tree view of project components. The main form area is titled 'Owner Change Transmittal' and contains the following fields and sections:

- ID:** SBTID0039
- Submitted:** ☐
- From:** Stephanie Bromfield
- Date:** Oct 18 2006
- To:** [Empty field]
- Received:** ☐
- CC:** [Empty field]
- OCO Number:** [Empty field]
- Re:** [Empty field]
- Due Date:** Oct 18 2006
- Actions:**
 - ☒ Send
 - ☐ Forward
 - ☐ Return
 - ☐ For Approval
 - ☐ For Review and Comments
 - ☐ Returned
 - ☐ As Requested
 - ☐ Resubmit
 - ☐ Returned for Correction
 - ☐ Other [Empty field]
- Status:** By Detail Lines
- Remarks:** [Empty text area]

The Owner Change Transmittal (OCT) is similar to the Transmittal. The user can create an Owner Change Order (OCO) specific Transmittal and all the Change Items associated with the OCO will become the actual Transmittal Items. We distinguish the OCT from the regular Transmittal by the OCO Number.

Three categories of users will have access to each OCT:

- The author (the From contact)
- The recipient (the To contact) – the project contact assigned to this project
- All CC group - the other project contacts

There are two sections in the Owner Change Transmittal: Header Section and Change Items Section.

The Owner Change Transmittal can be forwarded to another qualified person or returned to the author by the “To” person.

The user can change the status of all the non-posted items to the same status by selecting the status from the “Status” drop down list in the “Actions” area.

The recipient and the CC group can only view the Owner Change Transmittal submitted by the author. The new record indicator will be available for JSP version i.e. the recipient and the CC group will see the number indicating how many new and modified Owner Change Transmittals they have not viewed.

Creating an Owner Change Transmittal

Owner Change Transmittal				
Transmittal No: 00000023				
From: Amanda Matthews	Submitted: <input type="checkbox"/>			
To: Carmen Wong	Date: 12/Aug/2011			
Cc:	Received: <input type="checkbox"/>			
OCO No: OWN-001				
Re: Owner changes for approval	Due Date: 12/Aug/2011			
Actions: <input type="radio"/> Send <input type="radio"/> Forward <input type="radio"/> Return	<input type="checkbox"/> For Approval <input type="checkbox"/> As Requested <input type="checkbox"/> Other <input type="checkbox"/> For Review and Comments <input type="checkbox"/> Resubmit <input type="checkbox"/> Returned <input type="checkbox"/> Returned for Correction			
Remarks				
Summary				
The Original Contract Sum was	\$8,001,200.00			
Net Change by Previously Authorized Requests and Changes	\$9,100.00			
The Contract Sum Prior to This Change Order was	\$8,010,300.00			
The Contract Sum will be Increased by	\$12,150.00			
The New Contract Sum Including This Change Order	\$8,022,450.00			
The Original Completion Date was				
Time Changes Prior To This Change Order were				
The Completion Date Prior To This Change Order was				
The Contract Time Will Not Be Changed				
The Date of Substantial Completion as of This Change Order therefore is				
Change Items				
#	Date	PCI No.	Description	Current Status
1	12/Aug/2011	HIST-002	Re-test of PCI History Audit after corrections since demo - Prompts included	Pending
2	12/Aug/2011	PRJ-SCP1	Project Level Scope Amounts	Pending

On the initially opened 'new' Owner Change Transmittal page, there is no **Change Items section**. At this stage, there is no item for transmitting so the **[Submit]** button will not be available for the new page.

When the author presses the Save button to save the newly created Owner Change Transmittal, each Change Item (Transmittal Item) corresponding to the PCI associated with the OCO Number will be created in the **Change Items Section**. The JSP page will be switched to the view mode and the **[Submit]** button will be available in the view mode.

The Change Items Section shows all the change items associated with the OCO Number in the Header Section.

Editing an Owner Change Transmittal

The **[Edit]** button is available while in view mode. Click this button to edit the OCT.

In Edit mode, the "From" person (the author) can modify, save, submit, delete, or cancel editing the OCT while it is not submitted. The "OCO Number" field is not editable for any existing OCT, because one OCT is only associated with one fixed OCO.

[Submit] the OCT once completed.

The "To" person can now view the OCT, change the status of the Change Items, forward or return the OCT. When the user forwards or returns an OCT, the system will create a new OCT. The "OCO Number" and "Re" fields come from the previous OCT and they are not editable.

The "To" person can only forward or return the OCT once. Once the OCT has been forwarded or returned, the "To" person will not be able to forward or return this OCT again. The "Forward" and "Return" buttons are not available when the "To" person reviews the OCT that has been forwarded or returned.

CC'd contacts can only view the OCTs when it is submitted by the author.

Deleting an Owner Change Transmittal

An un-submitted OCT can be deleted by its author, or any user with the DeleteAll privilege for this object can delete any OCT by pressing the **[Remove]** button while in View mode.

Creating a Subcontract

Managing Subcontracts is a key component of managing the project. The CMiC xProjects Suite allows the Subcontract to be created, and the associated vendor to enter the Schedule of Values for the contract.

Collaboration security privileges exist for adding, editing and deleting subcontracts and subcontracts change orders (standard Treeview path: *xProjects > Security > Role Maintenance*).

From the xProjects Manager Treeview, select the Subcontract node from within Budget & Cost Management. This will open a log showing all the existing subcontracts and their current status. From the log you can view, modify or create a new subcontract.

Creating the Contract Header

Action	Task Code*	Task Name	Unit	W/U/M*	Rate	Amount	Job*	Phase*	Category*	JB Bill Code	Tax1	Taxable	Tax2	Taxable	Tax3	Taxable	Retain %
+/-																	

When first creating a contract, the screen is split into two sections. The first section 'Options' is used to create the 'Header' information set of defaults for the contract. The second is the detail section that consists of multiple tabs that make up the details of the contract.

Unlike CMiC Enterprise it is possible to create the 'Header' only of a subcontract. Once this is done the vendor can then login to xProjects and using the Subcontractor SOV screen enter their schedule of values. These Schedule of Values lines can then be imported into the subcontract where the final details to each line such as retainage %, taxes... and of course job, phase and category should be entered.

- Select the Vendor. The Contract will default to the primary contact associated with the vendor, this can be changed by using the LOV on the contact field.
- The Contract Date will default to the current date.

NOTE: The subcontract date field for posted subcontracts is editable with field security. The default is 'Read Only'.

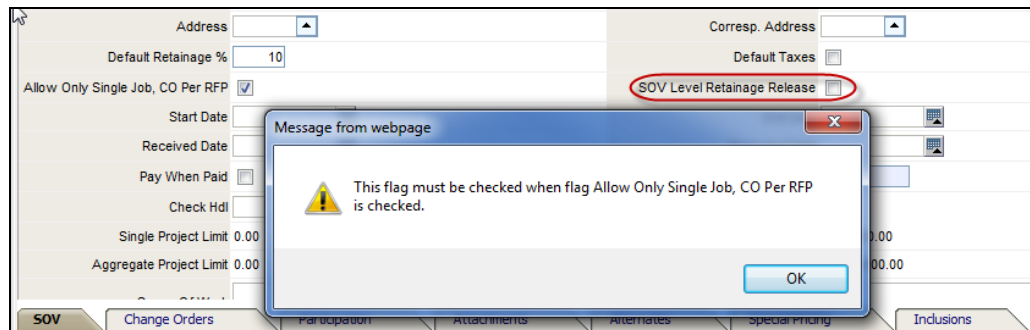
- Select the Contract Type and enter the Contract Number and a short Description.
- Select the Invoicing Method for this subcontract. The system will default a value in this field from the Enterprise Subcontract Control File.
- Select the Currency of the contract, and if bank accounts by job are being utilized, select the correct Bank Account. Field security exists for both fields (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Subcontract*).
- Select 'Address' (Project Address) and 'Corresp. Address' (Correspondence Address) codes. Field security exists for both address fields (standard Treeview path: *xProjects > Security > Role*

Maintenance – Programs/Subcontract). Security item ‘Address’ controls the access to both ‘Address’ and ‘Corresp. Address’ fields.

- Enter the Retainage default % - this will be used when creating schedule of values lines.
- Indicate if retainage is to be released uniquely against each Schedule of Value line. If this is not checked, retainage will be released against the complete SC Pay Request. Field security can be set on the SOV Level Retainage Release checkbox if needed.
- The value for the ‘**Allow Only Single Job, CO Per RFP**’ flag is defaulted from SC Control file of the company. The purpose of adding this flag is to avoid any discrepancies in the subcontract header due to the ‘**SOV Level Retainage Release**’ flag. When ‘**Allow Only Single Job, CO Per RFP**’ flag is checked, the ‘**SOV Level Retainage Release**’ flag is automatically checked by the system, because, the first flag does NOT allow ‘Contract level’ release of retainage, due to the possibility of multiple invoices produced for the same RFP due to main/sub job entries and change orders.

The following is the list of possible combinations, of which, item#4 is NOT permitted and a message is displayed.

	Allow Only Single Job, CO Per RFP Flag	Schedule Level Release Retainage
1.	Y	Y
2.	N	Y
3.	N	N
4.	Y	N (Not allowed)



- Field security can be applied to the ‘**Executed Date**’ field (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Subcontract*).
- Indicate if the ‘**Pay When Paid**’ function is applicable, and if it is, how many days are to elapse before payment is due. Field security is available on this checkbox for both a posted and un-posted subcontract. Field security is also available for the ‘**Days**’ field (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Subcontract*).
- Select ‘**Check Hdl**’ (Check Handling) code. Field security exists for this field (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Subcontract*).
- Indicate if ‘**Calculate Tax on Net Amount**’ is applicable. Field security can be applied to this field (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Subcontract*).
- Indicate if Taxes are to default from the Vendor into the schedule of values when it is created.
- The address fields allow for an Alternate Address for the vendor and for Correspondence.

- The Contractor Default Insurance (CDI) Charges functionality for Subcontracts is also in PM JSP. When the '**CDI**' flag is checked on the subcontract header, CDI will be calculated based on the rate that has been set for the CDI Risk Management codes that are on the job.

When CDI is calculated during subcontract/change order posting, two sets of posting reports are generated for the two batches created.

- The **EMR** field refers to the Safety EMR from the **Vendor Prequalification** if the Subcontractor has the 'Approved' status for the most recent year. This field gets populated from the Subcontractor Prequalification screen/Safety tab and field security can be applied (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Subcontract*).
- The **Term Code** field can have field security applied (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Subcontract*).
- User Defined Classifiers can be used in the Subcontract header (standard Treeview path: *xProjects > File Maintenance > Local Table > User-Defined Classifiers*). Field security can also be applied to the Classifiers (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Subcontract*).

After completing your input, use the [**Save**] button to save the Contract Header information. The [**Save Draft**] button will save the record but remain in edit mode, compared with [**Save**] in which the record is saved but then the screen changes to view mode.

Subcontract/Change Order Project Limits (related to Subcontractor Pre-Qualification)

In the Subcontractor Prequalification module, it is now possible to enter amounts for Single Project Limits, as well as Aggregate Project Limits.

NOTE: Field security can be set for the Pre-qualification Limit fields on both the Subcontract and Subcontract Change Order screens.

- **Single Project Limit (SPL)** refers to the total amount on all subcontracts and change orders for the specific vendor under the current project.
- **Aggregate Project Limit (APL)** refers to the total amount on all subcontracts and change orders for the specified vendor under all projects.
- **Single Project Limit Remaining** is calculated by taking SPL – sum of all contracts and change orders for the current vendor in the current project.
- **Aggregate Project Limit Remaining** is calculated by taking APL – 'Remaining to be Billed' across all projects.

When saving subcontract or change orders, if the current schedule of values including all change orders exceeds either the single project limit remaining or the aggregate project limit remaining a warning will be issued, and based on the control file this warning will either be soft (allowing the user to continue saving) or a hard stop (forcing the user to go back and make changes to the amounts before saving).

Warning messages and flags for soft versus hard stop in validation can be found in the Prequalification Control file. These warnings will not apply to projects flagged as '**Hard Bid**' projects (flag is in the Project Maintenance JSP), as well as vendors who do not have the '**Pre-qualification Required**' flag checked.

Subcontract Control Amount

User Extensions Copy From Add Edit Post Delete Print Compliance Select Bid Items Select PCs Back To Log

Subcontract

Vendor: Eagle Investments Company
Contract No: SUSEAG2014081000005
Description: 14.89516 - more testing
Invoiced Via - Subcontract
Address
Default Retainage % 10
Allow Only Single Job, CO Per RFP ☐
Start Date
Received Date
Pay When Paid ☒
Check Hid
Single Project Limit 800,000.00
Aggregate Project Limit 4,000,000.00
Scope Of Work
Bid Package Description

Contact
Contract Type
Currency US Dollars
Corresp. Address
Default Taxes ☒
SOV Level Retainage Release ☒
End Date
Executed Date
Days 3
Calculate Tax On Net Amount ☐
Single Proj Limit Remaining 133,470.55
Aggregate Proj Limit Remaining -296,898.75

Date 18/Aug/2014
Post Date
Status Pending
Bank Account
Bid Amount
Control Contract Amount 153,701.86
Issued Date
Rating
Rate It
Compliant ☐
CDI ☐
Term Code Net 30 days

SOV Change Orders Participation Attachments Alternates Special Pricing Inclusions Exclusions Text Codes Free Form

Task Code	Task Name	Unit	WM	Rate	Amount	Job	Phase	Category	JB Bill Code	Tax1	Tax2	Taxable	Tax3	Taxable	Retainage %	Expense Code	Fully Purch.	Long Description	Posted/Unposted Change Orders	Cost Center
WORK1	work1	NA	.000	100,000.00	100,000.00	V10XJOB1	01-00-02	4000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10		<input type="checkbox"/>			
WORK2	work2	NA	.000	50,000.00	50,000.00	V10XJOB1	01-00-01	4000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10		<input type="checkbox"/>			
WORK3	work3	NA	.000	500.17	500.17	V10XJOB1	01-00-02	1000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10		<input type="checkbox"/>			
WORK4	work4	NA	.000	3,200.69	3,200.69	V10XJOB1	01-00-01	4000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10		<input type="checkbox"/>			

The '**Control Contract Amount**' is used to validate that the **Total SOV Amount** (field in the subcontract Summary Section) and this value, entered by the user, are equal **upon posting** of the subcontract. Field security can also be applied to the Control Contract Amount. By default, the field security is set as 'Hidden'.

Single Project Limit 800,000.00
Aggregate Project Limit 4,000,000.00
Scope Of Work
Bid Package Description
Acknowledgement Date

Single Proj Limit Remaining 133,470.55
Aggregate Proj Limit Remaining -296,898.75
Term Code Net 30 days

Bank Code

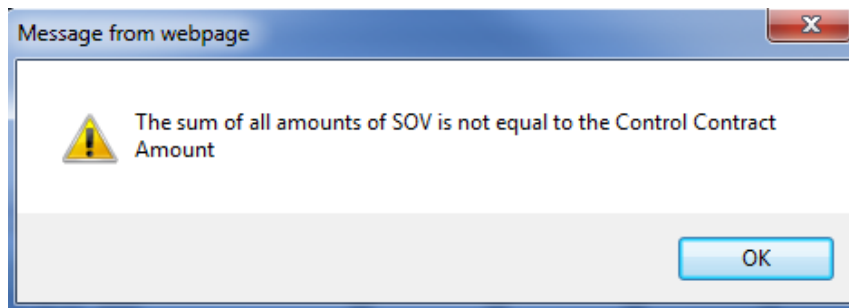
Summary Hide Summary

Original Contract Value \$153,700.86
Cost Changes \$0.00
Current Contract Value \$153,700.86
Original Completion Date
Time Changes In Days
Current Completion Date
Total SOV Amount \$153,700.86

SOV Change Orders Participation Attachments Alternates Special Pricing Inclusions Exclusions Text Codes Free Form

Task Code	Task Name	Unit	WM	Rate	Amount	Job	Phase	Category	JB Bill Code	Tax1	Taxable	Tax2	Taxable	Tax3	Taxable	Retainage %	Expense Code	Fully Purch.	Long Description	Posted/Unposted Change Orders	Cost Center
WORK1	work1	NA	.000	100,000.00	100,000.00	V10XJOB1	01-00-02	4000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10		<input type="checkbox"/>			
WORK2	work2	NA	.000	50,000.00	50,000.00	V10XJOB1	01-00-01	4000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10		<input type="checkbox"/>			
WORK3	work3	NA	.000	500.17	500.17	V10XJOB1	01-00-02	1000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10		<input type="checkbox"/>			
WORK4	work4	NA	.000	3,200.69	3,200.69	V10XJOB1	01-00-01	4000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10		<input type="checkbox"/>			

When the **[POST]** button is clicked, the system compares the values of these two amount fields and if they are equal the posting process will continue, otherwise the following message is displayed:



NOTE: These changes only apply to the main contract and do not include subcontract change orders.

Subcontract Schedule of Values

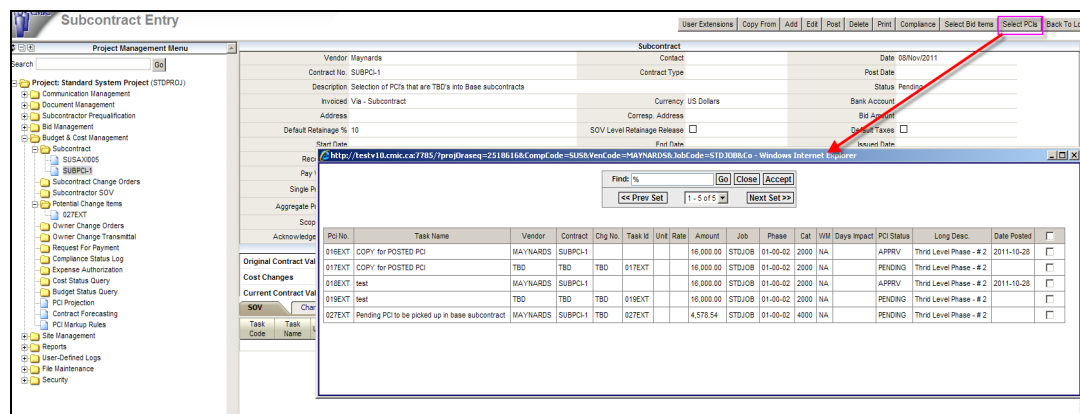
The Subcontract Schedule of Values can be entered by a number of ways:

- Using the [Select PCIs] button
- Using the [Select Bid Items] feature
- entering each line manually by using the + to insert a new line
- Entering the Subcontractor SOV (once the subcontract header is created) and then using the [Select SC Schedule] button to pull in the detail lines
- Importing the subcontract schedule of values using the [Import Schedule] feature

These methods are described in detail below.

[Select PCIs] – Button

The [Select PCIs] button allows PCI lines to be selected into base subcontracts (similar to what is done for subcontract change orders). It becomes available once the subcontract header is created.



When pressed, the system presents a multi-select LOV with all available PCI detail lines: regular (non-TBD) and “TBD”.

The system will only query those PCI detail lines where job code is either equal to the subcontract header job code or its sub-job.

NOTE: PCIs with status type “Cancelled” are not available for selection in Subcontracts (using the [Select PCIs] button in JSP version) or Subcontract Change Orders.

If the subcontract master job is BALMORAL, the LOV will show the PCI detail lines for BALMORAL and its subjobs (e.g. BALMOR.01, BALMOR.02...)

The PM Control flag “Allow Unposted PCIs To Be Assigned To Subcontract CO” will control whether the **un-posted** PCI records are shown in the LOV or not.

Upon [Accept], the selected PCI detail lines will be pulled into the base subcontract schedule of values.

The “TBD” values for Vendor/Contract/Change will be substituted with values from the current subcontract.

Task ID: If the task is specified on a PCI detail line, then that code will be used. Otherwise, if the Task ID = TBD, then the value will be replaced by the PCI No.

Once the SOV lines are created, the following fields will be protected against update:

- Task Code
- Job
- Phase
- Category
- WM

Deletion/Unlinking of schedule lines linked to PCI details

Upon deletion of an SOV line that is associated to a PCI detail, the link will be removed and the PCI line will become available to be selected to the same contract.

NOTE: This is also true for the PCI lines that were originally TBD – they will be locked to the contract that they were initially selected into (after the TBD lines get pulled into a subcontract, they become regular PCI detail lines linked to SOV records and are treated as such).

[Select Bid Items] – Button

The ‘Select Bid Items’ feature in Subcontracts JSP allows the direct association of a bid item with a schedule of value (SOV) line.

When the contract header is created and saved, and while it is in view mode, the **[Select Bid Items]** button is enabled (based on field security). Clicking this button will display an LOV of all bid items that have not yet been purchased or linked to another object (bid package, PCI etc.). The bid items listed are also only those with valid job/phase/category.

NOTE: This is the same pop-up window launched from the **[Select Bid Items]** button on the Subcontract Change Orders screen.

When a bid item is pulled into the subcontract SOV, the bid item’s ‘Closed’ flag is set to ‘Y’. In addition, the bid item’s Actual price set is updated with the values from the subcontract SOV line.

During subcontract posting, the bid item’s Actual price set is updated with the subcontract SOV line data to make sure they are the same.

If the subcontract is voided or the SOV Line is deleted, the program will change the bid item’s Closed flag to ‘N’ and remove the subcontract Contract code and Actual price set data.

Manually Entering the Subcontract Detail Lines

Task Code	Task Name	Unit	Wtd	Rate	Amount	Long Description	Action
TASK1	task1	100	EA	32.00	3,200.00		+ X
TASK2	task2	0	NA	.00	45,000.00		+ X
TASK3	task3	0	NA	.00	15,100.45		+ X

Once the header of the contract has been created, Schedule of Value lines can be manually created. To add a new line or remove existing lines use the standard + or X icons.

- Enter the Task code and Name

- Enter the Units, Weight/Measure Code and Rate – this will calculate the amount or just enter the amount.
- Enter the Costing Job, Phase and Category.

A flag on the JC Category Maintenance screen: "**Available on SC**" indicates whether the category can be used in subcontracts. When this flag is checked, the category is available for use in subcontracts, otherwise, it is not. This is only applicable to the JSP version of Subcontracts, SC Change Orders and Potential Change Items. Subcontracts that are created via the Analyze Bid program are also validated for any category that is not to be used in subcontracts.

- Enter the Billing Code (only applicable if the flag '**Allow SC Request for Payment From Billing Invoice**' located on the Job Billing Control File - Invoicing tab, along with the other required settings in the Job Billing contract, are set)
- Edit the Tax Codes and Retainage % as required.
- Modify or enter a long Description regarding the task if required.

Fully Purchased Flag

This field is used to indicate if the remaining amount on a bid item (linked to a buy out item), if not fully purchased, is to be kept as 'yet to buy' or the remaining amount is to be closed. If the remaining amount is to be kept as 'yet to buy', when the subcontract (or subcontract change order) is posted the system will create a new bid item for the remaining amount. This new bid item will be a copy of the original line (with a suffix '- 1') but only the "Estimated Pricing Set" will have an amount. The Estimated Pricing set of the original bid item is reduced by the amount of the purchase in both the Bid Item screen and Bid Package. The newly created bid item reflects the Remaining Amount. Field security can be applied to the 'Fully Purchased' flag in the Subcontract or Subcontract Change screens, if desired. The possible value is 'Unrestricted', 'Read-only' or 'Hidden'.

Once the schedule lines have been completed [**Save**] the contract. The middle section of the screen will show a summary of the contract.

The '**Rate It**' link is visible in view mode of the Subcontract header. The link has underlying field security on the user roles, and is initially set to 'Hidden'. When the '**Rate It**' link is used, it updates the subcontractor Rating based on the setup in the Subcontractor Prequalification module (Subcontractor Rating Setup).

Subcontractor Schedule of Values

Schedule of Values								Cancel	Save	Submit
Subcontract										
Not Submitted										
Vendor: Gladstone Design/Build						Contract: SUSGLA008				
Description: review attachments						Submitted: <input type="checkbox"/>				
Start Date:						End Date:				
Scope Of Work:										
Schedule of Values										
Task Code	Task Name	Unit	W/M	Rate	Amount	Long Description	Action			
TASK1	task1		NA		23000		+ x			
TASK2	task2	1000	EA	18.57	18,570.00		+ x			
							+			

This screen is designed to allow Collaborators to enter the schedule of values for their contracts. This allows both the General Contractor and the Contractor to use the same breakdown on a Subcontract.

The page starts as a log showing all contracts associated with the collaborator. From the log select the contract against which the Schedule of Values is to be entered.

- Enter the Task code and Name

- Enter the Units, Weight/Measure Code and Rate – this will calculate the amount or just enter the amount.
- Enter a long description regarding this task if required.

You can keep saving and editing this schedule of values until it is submitted. Submitting lets the GC see and use this information to complete the creation of the Subcontract. Once **[Submit]** has been activated this information is no longer updatable.

Once the Subcontractor Schedule of Values is submitted, use the **[Select SC Schedule]** button to display a list of the lines entered and submitted by the contractor. Review and select the lines to be brought into the contract.

Task Code	Task Name	Unit	W/M	Rate	Amount	Description
TASK1	task1	100	EA	32	3200	
TASK2	task2	0	NA	0	45000	
TASK3	task3	0	NA	0	15100.45	

This list is a multi-select List of Values. You may choose to bring in one, some or all of the Contractor-entered Schedule lines.

Importing Subcontract Schedule of Values

This functionality allows the user to import the subcontract schedule of values (SOV) in the **current** subcontract.

The import file layout is shown below:

Fields terminated by "," optionally enclosed by ""

(

pmsovi_task_code	varchar2(16)	Task Code
,pmsovi_task_name	varchar2(30)	Task Name
,pmsovi_unit	number	Units
,pmsovi_wm_code	varchar2(2)	Weight/Measure
,pmsovi_unit_rate	number	Rate
,pmsovi_amt	number	Amount
,pmsovi_job_code	varchar2(10)	Job Code
,pmsovi_phs_code	varchar2(16)	Phase Code

,pmsovi_cat_code	varchar2(4)	Category Code
,pmsovi_jb_bill_code	varchar2(35)	Bill Code
,pmsovi_tax1_code	varchar2(10)	Tax 1 Code
,pmsovi_tax1_taxable_flag	varchar2(1) 'Y/N'	
,pmsovi_tax2_code	varchar2(10)	Tax 2 Code
,pmsovi_tax2_taxable_flag	varchar2(1) 'Y/N'	
,pmsovi_tax3_code	varchar2(10)	Tax 3 Code
,pmsovi_tax3_taxable_flag	varchar2(1) 'Y/N'	
,pmsovi_hldbk_pct	number	Retainage %
,pmsovi_apexp_code	varchar2(10)	
,pmsovi_long_desc	varchar2(2000)	Long Description
)		

NOTE: The file must be .txt or .csv. Also note that if the file is opened using Excel, it may lose some of its original formatting. It is preferable to open and edit using Notepad.

For example, if the value of a field is “01”, editing in Excel will possibly change it to ‘1’.

Sample:

```

SCSOV.TXT - Notepad
File Edit Format View Help
IMPTASK1, IMPORT TASK1,,NA,, "14000.44", SBJOB01,1,2000,XXX,01,Y,02,N,,N,2, ,LINE ITEM 1
, IMPORT TASK1,, ,12000, ,2,3000,XXX,10,Y,, ,N,10,3000,LINE ITEM 2
IMPTASK3, ,NA,12000,SBJOB02,1, ,1000-12,01,Y,,N,, ,3000,
, IMPORT TASK1,1000, ,12, ,SBJOB01,1,2000,XXX,1, ,N,,N,10,3000,LINE ITEM 3
IMPTASK1, IMPORT TASK9,,NA,, "100230.56", SBJOB01, ,2000, ,1,Y,,N,5,N,5,3000,LINE ITEM 4
IMPTASK2, IMPORT TASK2,,NA,, ,1, ,XXX, , ,N,,N,10,3000,LINE ITEM 5
IMPTASK1, IMPORT TASK1,,NA,12000,XXX,1,2000,XXX,1,Y,,N,,N,02, ,LINE ITEM 6
, IMPORT TASK1,, ,1300, ,2,1000,XXX,1,Y,, ,N,10,3000,LINE ITEM 7
IMPTASK3, ,NA,12000,SBJOB01,1, ,3000,1,Y,3,N,, ,3000,
, IMPORT TASK1,1000, ,12, ,1,2000,XXX,1, ,N,,N,10,3000,LINE ITEM 8
IMPTASK1, IMPORT TASK9,,NA,,555.45,SBJOB01, ,XXX, , ,Y,,N,4,N,5,3000,LINE ITEM 9
IMPTASK2, IMPORT TASK2,,NA,, ,1, ,XXX,1, ,N,,N,10,3000,LINE ITEM 11

```

The Import function is accessed by clicking the **[Import Schedule]** button which is available on an **un-posted** subcontract in 'Edit' mode.

Clicking on the button will display the popup box for selecting the import file.

After selecting the file, click **[Upload]** to bring the data to the initial validation screen.

The validation log tells what the errors are. The user can make the corrections and re-import or he can accept the valid records by clicking the **[Accept Valid]** button.

When there are no initial validation errors from the import, the **[Accept]** button is used to pull the records into the subcontract SOV section.

Now that the lines have been imported they can be modified or deleted as required just as if they had been manually entered.

When the 'Save' button is clicked on the subcontract, additional validation for task code, weight/measure, job, phase, category, bill code, tax codes, expense codes etc. are carried out before the record is saved.

An import can be done for an un-posted subcontract that already has detail SOV lines. In this case, the imported records are combined with the existing records on the subcontract.

Updating Other Contract Info

After the contract Schedule has been saved, it is now possible to add Minority Participation details, Alternate Types, Attachments, Inclusions, Exclusions and Special Pricing by moving to the required tab and using the **[Edit]** button.

Alternate Types are used in both Subcontracts and Bid Packages.

If the Bid Package is purchased via Analyze Bids the Alternate tab information will flow into the subcontract when purchased but will not be available in Analyze Bids.

The Alternates tab is only editable for an **un-posted** subcontract.

Amounts associated with Alternate Types will not create an SOV line on the subcontract, because these amounts are considered to be already included in the SOV lines.

To add predefined text to the contract, **[Edit]** the contract and click on the 'Add Text' link in the Summary section. This will open a multi-select LOV that displays all predefined text codes.

To add compliances to the contract, use the **[Compliance]** button at the top of the screen. This opens a window where you can add, remove or update compliances associated with this contract.

Compl.	Date Compl.	Compliance Code	Insurance	Cert. Num.	Cert. Location	Start Date	End Date	Amount	Update	Last Updated By	Date Updated	Action
<input type="checkbox"/>	<input type="checkbox"/>	00-DSCDEF	*	*					<input type="checkbox"/>			+ x
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	QA	APX	APX100	Office Safe	010110	311213	500.00	<input type="checkbox"/>			+ x

Compliance Code Description: Insurance Bonding Company Name: Date Sensitive: ☐

Line Re-numbering for Inclusions, Exclusions and Special Pricing

Users have the option of line re-numbering for the records in Inclusions, Exclusions and Special Pricing. Depending on the 'Line Number' field security the entered lines will be re-numbered automatically (when security is set 'Read Only') or by request (when 'Unrestricted') upon [Save] or [Save Draft]:

The screenshot shows the 'Subcontract' form in a web application. At the top right, there are buttons: 'Check Spelling', 'Save Draft', 'Save', 'Cancel', and 'Import Inclusions'. The 'Save' button is highlighted with a red box. A red dotted arrow points from the 'Save' button to a confirmation dialog box. The dialog box has a title bar 'Confirm - Internet Explorer, optimized ...' and contains the text: 'Would you like to renumber all lines? If Yes then the program will recalculate the Line Num for all records'. Below the text are three buttons: 'Yes', 'No', and 'Cancel'. The background form contains various fields for subcontract details, including Vendor, Contract No., Description, Invoiced, Address, Start Date, Received Date, Pay When Paid, Check Hdl, Single Project Limit, Aggregate Project Limit, Currency, Corresp. Address, Date, Status, Bank Account, Bid Amount, Default Taxes, Issued Date, Rating, and Compliant. At the bottom, there are tabs: 'SOV', 'Change Orders', 'Participation', 'Attach', 'Inclusions', 'Exclusions', 'Text Codes', and 'Free Form'. The 'Inclusions' tab is selected, showing a table with columns 'Line#', 'Description', and 'Action'. The table has two rows: Row 1 with Line# 1 and Description 1; Row 2 with Line# 2 and Description 1.5. The 'Action' column for each row contains a blue plus icon and a red minus icon.

When "Yes" the system will re-number the records starting from the first one.

When "No" – the system will keep the user's numbering.

Free Form – Tab

The Subcontract Entry screen's **Free Form** tab has user-defined fields to enter additional subcontract details, vendor details, and any other information or comments.

This tab is disabled until its user-defined fields are set up using the Free Form Fields screen (program: PMFFSET), which can be found in the System module (standard path: *System > User Extensions > Free Form Fields*):

Field security exists for the **Free Form** tab (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Subcontract*).

Deleting Compliance Codes from a Subcontract

When deleting one or more compliance codes from a subcontract, upon 'Save', a message "Would you like to delete the corresponding compliance record(s) from all vouchers?" pops up with options Yes/No. Pressing 'Yes' will delete the compliance code(s) with same certificate number, if applicable from all vouchers for that subcontract. Pressing 'No' deletes the compliance code(s) only from the subcontract and the vouchers are not affected.

Copying From another Subcontract

Users can copy from one subcontract to another (the base contract only) by using the [**Copy From...**] button. This is available in the 'Add Subcontract' screen once the mandatory fields are filled in. A popup box will show a list of the kind of data that can be copied.

Source Subcontract	
Company	SB (DO NOT USE) - US
Project	Project 1 - SUS
Vendor	
Contract No.	
Details To Copy	
General	<input checked="" type="checkbox"/>
Schedule of Values	<input checked="" type="checkbox"/>
Text Code	<input checked="" type="checkbox"/>
Special Pricing	<input checked="" type="checkbox"/>
Inclusions	<input checked="" type="checkbox"/>
User Extensions	<input checked="" type="checkbox"/>
Exclusions	<input checked="" type="checkbox"/>
Free Form	<input checked="" type="checkbox"/>
Participation	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>
Alternates	<input checked="" type="checkbox"/>
Compliances	<input checked="" type="checkbox"/>
<input type="button" value="Process"/> <input type="button" value="Cancel"/>	

Copy can occur across companies but in such cases, tax codes, text codes, contract types, phases and categories are only copied if the same code is defined in the target company, even though the underlying description and/or 'Default Taxes' rule may be different from the source company. Documents are not copied across companies.

Creating a Subcontract Change Order

The screenshot shows the 'Subcontract Entry' screen. At the top, there is a navigation bar with buttons: User Extensions, Add, Edit, Print, Compliance, **Create SC Change** (highlighted with a red box and a red arrow), Void, Back To Log, Add SOV, and a home icon. Below the navigation bar, the 'Subcontract' section displays various details: Vendor (Broadstreet Concrete), Contract No. (MCAT000001), Description (CONCRETE), Invoiced Via (Subcontract), Address, Default Retainage % (2.2), Allow Only Single Job, CO Per RFP (unchecked), Start Date, Received Date, Pay When Paid (checked), Check Hld, Scope Of Work (Concrete delivery), Override Do Not Exceed Amount (unchecked), Contact (James Miller), Contract Type, Currency (US Dollars), Comp. Address, Default Taxes (checked), SOV Level Retainage Release (checked), End Date, Executed Date, Days (12), Date (08-03-2016), Post Date (05-04-2016), Status (Closed), Bank Account, Bid Amount, Issued Date, Rating, Compliant (unchecked), Calculate Tax On Net Amount (unchecked), and Term Code (Net 30). Below the subcontract details, there is a table with tabs: SOV, **Change Orders** (highlighted with a red box), Participation, Attachments, Alternates, Special Pricing, Inclusions, Exclusions, Text Codes, and Free Form SC. The 'Change Orders' tab is active, showing a table with columns: Change No., Description, Date, Cost, Days Impact, Post Date, PCI, and Action. The table contains four rows of data:

Change No.	Description	Date	Cost	Days Impact	Post Date	PCI	Action
003	CONCRETE	29-04-2016	2,200.00	0	29-04-2016	EXT0014	
004	CONCRETE	24-06-2016	.00				
005	CONCRETE	11-08-2016					
006	CONCRETE	07-12-2016	200.00	0			

Sample of **Change Orders** tab on Subcontract Entry screen for posted Subcontract.

As shown above, to create a Subcontract Change Order, open the posted Subcontract using the Subcontract Entry screen, then select the **Change Orders** tab and click the **[Create SC Change]** button. This launches the Subcontract Change Orders screen, shown by the following screenshot

Subcontract Change Orders Edit Print Void Add SOV Back To Log

Subcontract Change Orders Attachments Text Codes Free Form

Subcontract

Vendor: The Malcolm Company, Inc. Contract No.: 10001.002 Change No.: 002 Post Date: 10-Feb-11
 Description: Roofing Received Date: 09-Feb-11 Executed Date: 10-Feb-11 Date: 09-Feb-11 Issued Date: 10-Feb-11
 Pay When Paid: ☒ Scope Of Work: New roofing product.
 Prequalification Status: Update Prequal Approval Status: Subs Are Approved
 Single Project Limit: 1,500,000.00 Single Proj Limit Remaining: 1,280,700.00
 Aggregate Project Limit: 15,000,000.00 Aggregate Proj Limit Remaining: 8,115,095.50
 SC Cost Code:

Summary [Hide Summary](#)

Original Contract Value	180,000.00	Prior Changes	0.00	Current Change	10,000.00	Revised	190,000.00
Original Completion Date	31-JAN-12	Prior Changes Days	0	Current Change Days	0	Revised Completion Date	31-JAN-12

Schedule of Values

Item Code	Task Name	Long Description	Unit	Rate	Amount	Job	Cost Code	Cost Type	JB Bill Code	W/M	Days Impact	Tax1	Taxable	Tax2	Taxable	Tax3	Taxable	Expense Code	Fully Purch.	Area	Posted/Unposted Change Orders	Block Code
SCO00001	Roofing System	Roofing			10,000.00	10001	07610	S		LS			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>			

Using the Subcontract Change Orders screen, shown above, you can create the Subcontract Change Order by entering its description and appropriate dates in the **Subcontract** section. Note, the **Pay When Paid** flag can be edited for un-posted and posted Change Orders.

Next, add SOV Lines in the **Schedule Of Values** section using the **+** icon, or select the corresponding PCI(s) in any of these two sections:

Available PCIs – Section

These are the PCIs that have been entered in the PCI Entry using the current subcontract in one or more PCI details

Available PCIs With TBD – Section

These are PCIs that have been entered in the PCI Entry screen using:

- The current Subcontract, but have 'TBD' in their Change Order Code in one or more PCI details.

OR

- The Subcontract Code has TBD, thus indicating that the Change Order Code has 'TBD' or '000' in one or more PCI details.

For further details, see the upcoming section, [Subcontract Change Orders & PCI Details with TBD](#).

NOTE: Field security can be applied to the **+** icon if necessary.

Pay When Paid – Checkbox

The flag can be used for un-posted and posted Change Orders.

Once done, [Save] the Change Order. At this point it is possible to [Print] the change order if required. Otherwise [Close] and return to the Subcontract screen.

Rollup Change Item Lines In SC Change Orders

The Change Management Control flag, **Rollup Change Item Lines In SC Change Orders**, if set, will summarize by Job/Phase/Category/W/M any PCI lines that are pulled into a Subcontract Change Order, after being selected from the change items LOV. If the user selects the wrong PCIs or needs to add another PCI to an existing SC line, all lines on the SC Change Order will need to be deleted.

The user is able to select which PCI lines to include in the Change Order, and when the [**Accept**] button is activated on the LOV, the system builds the SC lines by combining all PCIs that have the same Job/Phase/Category and WM. The Change Order task and description is set to “Multiple”, which the user can then override.

NOTE: When this flag is set, there can be no linkage to Subcontract Change Codes within PCIs – the PCI Entry screen does not allow the user to enter a Subcontract Change Code or Task Code. The PCI can only be pulled into the Subcontract Change Order.

The PCI Column in the Change Order Details

The "PCI" column in the Change Orders tab of Subcontract JSP is a link opening a popup which then supplies a list of all PCIs that are linked with the Subcontract Change Order, with the ability to drill down into those PCIs. The text of the link is the PCI number if there is only one PCI, or a comma-separated list if there is two and a 'PCI1, PC2, more...' link if there is more than two PCIs.

NOTE: This functionality does not apply when the CM Control flag "Rollup Change Item Lines In SC Change Orders" is in use.

Field security is also available for setting on the PCI link. The possible settings are: Unrestricted, Hidden or Read-only.

Subcontract Change Orders & PCI Details with TBD

Subcontract Change Order screen (in Edit mode) has the PCI Information section split into two – those fully coded PCIs and those PCI detail lines that are set to TBD in either the Contract or Change Order field.

The following are standard pre-requisites to using the feature of linking subcontract change orders with PCI detail lines:

a) Project Management Control – Change Management tab

The flag ‘**Allow Un-posted PCIs To Be Assigned To Subcontract CO**’ must be checked for the particular company.

b) Change Management Control – SC tab

The flag ‘**Create Subcontracts from Change Management**’ needs to be checked in order to use the ‘TBD’ functionality.

In addition, Subcontract Auto-numbering must be checked and a mask set for the subcontract numbering.

Rules for linking TBD lines to SCCO:

- Vendor on the PCI and SCCO must match
- The contract code is either a TBD or a match AND change code is either TBD or empty

Potential Change Item

Add PCI | Copy | Edit | Delete | Print PCI | Select Bid Items | Calc Markup | Post | Link to Issue | Back To Log

Type External Change Orders [Modify Type](#) Date 03/04/2011 Post Date

PCI No. EXT-TBD1 Update Projected Amount During Posting ☒

Description PCI JSP - test for TBD in SCCO - 10.52296

Scope Description

Status Approved Proceed ☒ Forecast ☒

Days Impact Source

Start Date End Date

OCO No. Date Due To Owner

Date Proposal Issued To Owner Date Proposal Signed By Owner

Date Change Sent To Owner Date Change Signed By Owner

Source Type Reason

Project type Personnel

Acknowledgement Date

Total Budgeted Amount 17,844.96 Total Billing Amount 17,844.96

PCI Summary Show Details Show

PCI Detail

Vendor	Contract	Job	Phase	Category	W/M	Billing Code	Days Impact	Phase Qty	Quantity	Estimated Rate	Estimated Amount	Quoted Rate	Quoted Amount	Final Rate	Final Amount	Billing Quantity	Billing Rate	Billing Amount	Subcontract Change	Task Id	Status	OC
Twain Alliance - Massachusetts	SUSTWA030	SUS-JOB-2	01	2000	NA	JOB-2_01_2000			67	10.000	670.00	11.000	737.00	12.000	804.00	67	12	804.00	TBD	TBD-01	APPRV	
Twain Alliance - Massachusetts	SUSTWA030	SUS-JOB-2	01	2000	NA	JOB-2_01_2000			50	190.000	9,500.00	195.000	9,750.00	196.000	9,800.00	50	196	9,800.00	TBD	TBD-02	APPRV	
Twain Alliance - Massachusetts	SUSTWA030	SUS-JOB-2	02	2000	NA	JOB-2_02_2000			44	19.320	850.08	19.330	850.52	19.340	850.96	44	19.34	850.96	TBD	TBD-03	APPRV	
Twain Alliance - Massachusetts	SUSTWA030	SUS-JOB-2	02	2000	NA	JOB-2_02_2000			60	26.480	1,588.80	26.490	1,589.40	26.500	1,590.00	60	26.5	1,590.00	TBD	TBD-03	APPRV	
Twain Alliance - Massachusetts	TBD	SUS-JOB-2	01	2000	NA	JOB-2_01_2000																
Twain Alliance - Massachusetts	TBD	SUS-JOB-2	02	2000	NA	JOB-2_02_2000																

Subcontract

User Extensions | Add | Edit | Print | Compliance | Create SC Change | Back To Log

Vendor: Twain Alliance - Massachusetts

Contract No. SUSTWA030

Description FORMS SC - 10.52296

Invoiced Via - Subcontract

Address

Default Retainage % 10

Start Date

Received Date

Pay When Paid ☒

Single Project Limit 0.00

Aggregate Project Limit 0.00

Scope Of Work

Acknowledgement Date

Original Contract Value

Cost Changes

Current Contract Value

SOV Change Orders Participation

Change No. Des

Subcontract Change Orders Attachments Text Codes

Subcontract

Vendor Twain Alliance - Massachusetts

Contract No. SUSTWA030

Change No. 001

Description FORMS SC - 10.52296

Date 08/03/11 Issued Date

Received Date Executed Date

Scope Of Work

Single Project Limit 0.00 Single Proj Limit Remaining -4,163.80

Aggregate Project Limit 0.00 Aggregate Proj Limit Remaining -352,970.50

Acknowledgement Date

Summary

Original Contract Value \$4,163.80 Prior Changes \$0.00 Current Change \$0.00 Revised \$4,163.80

Original Completion Date Prior Changes Days Current Change Days Revised Completion Date

Available PCs

Select	PCI No.	Task Name	Unit	Rate	Amount	Job	Phase	Category	W/M	Days Impact	Long Description	Date Posted
<input type="checkbox"/>	EXT-TBD1	General Conditions	44	19.34	850.96	SUS-JOB-2	01	2000	NA	0	General Conditions	
<input type="checkbox"/>	EXT-TBD1	Site Office	50	196.00	9,800.00	SUS-JOB-2	02	2000	NA	0	Site Office	

Available PCs with TBD

Select	PCI No.	Task Name	Unit	Rate	Amount	Job	Phase	Category	W/M	Days Impact	Long Description	Date Posted
<input type="checkbox"/>	EXT-TBD1	General Conditions		450.00		SUS-JOB-2	01	2000	NA	0	General Conditions	
<input type="checkbox"/>	EXT-TBD1	Site Office		1,850.00		SUS-JOB-2	02	2000	NA	0	Site Office	
<input type="checkbox"/>	EXT-TBD1	General Conditions	60	26.50	1,590.00	SUS-JOB-2	01	2000	NA	0	General Conditions	
<input type="checkbox"/>	EXT-TBD1	Site Office		2,500.00		SUS-JOB-2	02	2000	NA	0	Site Office	

Schedule of Values

Action	Item Code	Task Name	Unit	Rate	Amount	Job	Phase	Category	JB Bill Code	W/M	Days Impact	Tax1	Taxable	Tax2	Taxable	Tax3	Taxable	Expense Code	Long Det
+																			

When these records are selected, they become updated with the subcontract code and change code. This is evident when the user reviews the PCI. They no longer are shown in the 'TBD' section, but they become a part of the schedule of values for the subcontract.

Sorting User Defined Fields

User Defined Fields in the Subcontract Entry and Change Order screens can be ordered by the sort order number that is used when defining the UDF. Those UDFs with no sort order number are set to come last on the Subcontract and Subcontract Change Order screens.

JSP Subcontract Integration with Workflow

The screenshot shows the JSP Subcontract interface. At the top, a menu bar includes 'Workflow' (highlighted with a pink box). The main form is divided into sections: Subcontract details (Vendor: Parisdale Holdings, Contract No.: MANUAL-01, Description: review Create Subcontract from PCI), Contract details (Contract Type: Unsubmitted, Currency: US Dollars, Status: Pending), and financials (Original Contract Value: \$1,300.00, Current Contract Value: \$1,300.00). A 'Summary' section is also visible. At the bottom, there is a tab bar with 'Review/Approval' selected.

The **[Workflow]** button in the JSP Subcontract is used to establish integration between PM JSP and Workflow, if the appropriate workflows are configured for subcontract approval. The following rules apply when using this feature:

1. The standard Workflow button and Review/Approval tab are displayed on the SC Entry JSP screen.

It is only visible if:

- There are any Subcontract Master workflows defined
- The workflow status is not Pending or Approved

2. A Workflow Status field is also displayed on the Subcontract JSP. The possible values (set by workflow) are:

- Un-submitted
- Pending
- Rejected
- Approved (Submitted)

3. If any Subcontract Master workflows are found in the database:

- The Workflow button will be visible (with a new PM Project Role privilege: 'Subcontract Workflow Button')

The new Status column will be visible

- The Post button will only be available for Submitted (Approved) subcontracts when the Subcontract Workflow privilege is un-checked (the existing privileges are still considered)
- The Review/Approval tab will be visible

Adding SOV lines to Posted Subcontract and Posted SC Change

Posting - Voiding

<input checked="" type="checkbox"/> Post PCI - External	<input checked="" type="checkbox"/> Post PCI - Internal
<input checked="" type="checkbox"/> Post PCI - Transfer	<input checked="" type="checkbox"/> Post PCI - Original Budget
<input checked="" type="checkbox"/> Edit Posted PCI	<input checked="" type="checkbox"/> Post OCO
<input checked="" type="checkbox"/> Allow for adding posted PCI's to unposted OCO's	<input checked="" type="checkbox"/> Post Subcontract
<input checked="" type="checkbox"/> Post Subcontract Change Order	<input checked="" type="checkbox"/> Void Subcontract
<input checked="" type="checkbox"/> Void Subcontract Change Order	<input type="checkbox"/> Add SOV On Posted Subcontract
<input type="checkbox"/> Add SOV On Posted Subcontract Change Order	

Two Project Role privileges allow the user to add more Schedule of Values (SOV) lines to a posted subcontract and a posted subcontract change order if the need arises (for example, if a client needs to add cost elements to the original contract after the posting because it's not possible to know in advance which cost elements will be used on the contract (e.g. gravel for civil work, landscaping)): **Add SOV On Posted Subcontract** and **Add SOV On Posted Subcontract Change Order**.

By default, these flags are un-checked.

When they are checked, an [Add SOV] button becomes visible on posted subcontracts and posted subcontract change orders:

Subcontract

Vendor: Differential Designs Inc
Contract No: SUSDF026
Description: Create and post subcontract
Invoiced Via - Subcontract
Address
Default Retainage % 6.25
Allow Only Single Job CO Per RFP ☐
Start Date
Received Date
Pay When Paid ☒
Check Hdt
Single Project Limit 0.00
Aggregate Project Limit 0.00
Scope Of Work
Bid Package Description

Contract
Contract Type
Currency US Dollars
Corresp. Address
Default Taxes ☐
SOV Level Retainage Release ☒
End Date
Executed Date
Days 3
Calculate Tax On Net Amount ☐
Single Proj Limit Remaining -100,800.00
Aggregate Proj Limit Remaining -1,189,999.36

Date 10/Feb/2014
Post Date 10/Feb/2014
Status In Process
Bank Account
Bid Amount
Issued Date
Rating
Rate It
Compliant ☐
CDI ☐
Term Code Net 30 days

Summary [Hide Summary](#)

Original Contract Value \$1,800.00

Subcontract Change Orders [Edit](#) [Print](#) [Void](#) [Add SOV](#) [Close](#)

Vendor: Differential Designs Inc
Contract No: SUSDF026
Change No: 001
Post Date 12/Feb/2014
Description: Create and post subcontract - changes
Received Date
Executed Date
Scope Of Work
Pay When Paid ☒
Single Project Limit 0.00
Aggregate Project Limit 0.00
Single Proj Limit Remaining -112,800.00
Aggregate Proj Limit Remaining -1,201,999.36

Summary [Hide Summary](#)

Original Contract Value \$1,800.00
Original Completion Date
Prior Changes \$0.00
Prior Changes Days 0
Current Change \$12,000.00
Current Change Days 0
Revised \$13,800.00
Revised Completion Date

Schedule of Values

Item Code	Task Name	Unit	Rate	Amount	Job	Phase	Category	JB Bill Code	W/M	Days Impact	Tax1	Taxable	Tax2	Taxable	Tax3	Taxable	Expense Code	Fully Purch.	Long Description	Posted/Unposted Change Orders	Cost Center
102EXT	Create and Post PCI		12,000.00		V10XJOB1	01-00-02	4000		NA	0		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			Third Level Phase - # 2	102EXT	

Click this button to add additional detail lines to the posted subcontract or subcontract change order.

A popup window is displayed for the entry of the additional records:

Unit and Amount fields are not editable, but the user can enter WM and Rate.

The **[Post]** button on the popup window is used to commit the additional records to the database without changing the overall amount of the original posted record.

Voiding of Subcontracts and Subcontract Change Orders

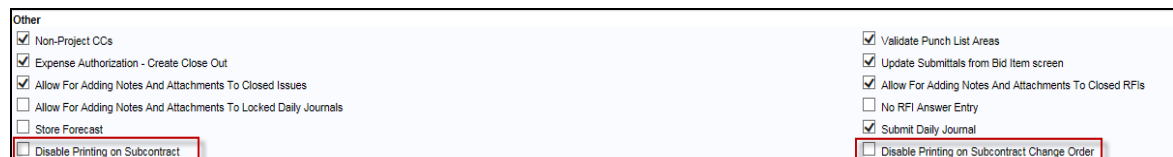
There are two PM Role privileges that are tied to the voiding action: Void Subcontract and Void Subcontract Change Order. When the user has the Void privileges, the **[Void]** button is available on posted subcontracts or posted subcontract change orders. Field security can also be applied to the **[Void]** button on both screens.

The posting reports for the voiding are not yet available in PM JSP, but can be accessed in FORMS.

If subcontracts and subcontract change orders that are **linked to PCI schedule of value lines** are voided or deleted, the PCI SOV line will be replaced with a 'TBD' line (vendor, contract, change code) which can then be available for selection into any subcontract or subcontract change order.

If a subcontract or subcontract change order that is **linked to a bid item** is voided, the bid item is marked as open and becomes available for selection into any other subcontract or subcontract change order.

Privileges to Disable Printing for Subcontract/Subcontract Change Order



There are two project-role privileges for disabling the PRINT button on Subcontracts and Subcontract Change Orders as shown in the screen shot above: **Disable Printing on Subcontract** and **Disable Printing on Subcontract Change Order**.

The default value for these privileges is 'un-checked', to allow printing.

The Subcontract Log

A number of columns relating to Change Items are shown on the SC Log: Posted SC Changes, Pending SC Changes and Total Pending Changes. The calculation of these and others are detailed below:

A: Original Amount (old name 'Amount') = Original contract ('000') amount

B: Posted SC Changes = All the posted SC CO (other than '000') amounts

C: Current Contract Amount (old name 'Current Amount') = A + B

D: Pending SC Changes = All un-posted SC CO amounts

E: Pending CM Changes (old name 'Pending Changes') = All Pending and Approved (needs to look at the detail line statuses) un-posted PCIs, not included on any SC CO

F: Total Pending Changes = D + E

G: Adjusted Contract Amount = C + F

H: Remaining To Be Paid = Posted SC + Posted SCCO's - Posted RFP (gross) - Pending SC RFP (gross)

PCI-Subcontract Tracking Log

Project Management

Glenda Simpson's Profile Home

Show Filter Send To Spreadsheet Enter Query

Project Management Menu

Search [] Go

Project: Standard System Project (STDPROJ)

- Communication Management
- Document Management
- Subcontractor Prequalification
- Estimate Management
- Bid Management
- Budget & Cost Management
 - Subcontract
 - Subcontract Change Orders
 - Subcontractor SOV
 - Potential Change Items
 - Owner Change Orders
 - Owner Change Transmittal
 - Request For Payment
 - Compliance Status Log
 - Expense Authorization
 - Cost Status Query
 - Budget Status Query (Revenue)
 - PCI Projection - Approved and un-posted PCIs
 - Contract Forecasting with PCI Projections
 - PCI Markup Rules
 - Subcontractor Tracking Log**
 - Site Management

Subcontractor Tracking

PCI Type	PCI No.	Owner Reference Number	Subcontractor Reference Number	OCO #	SCO #	Vendor Name	PCI Description	Estimated Amount	Quoted Amount	Final Amount	PCI Status Code	PCI Source	RFQ Due Date	RFQ Sent Date	RFQ Receive Date
Internal Change Orders	015INT					(SPVRK)	retest after correction #1	550.00	5,000.00	770.00	APPRV				
External Change Orders	016EXT				SUBPCI-1[000]	Maynards (MAYNARDS)	COPY for POSTED PCI	11,000.00	12,000.00	16,000.00	APPRV				
Internal Change Orders	016INT					()	FORMS - Internal CO	1,100.00	1,200.00	1,300.00	APPROVED				
External Change Orders	017EXT				SUBPCI-1[000]	Maynards (MAYNARDS)	COPY for POSTED PCI	11,000.00	12,000.00	16,000.00	APPRV				
External Change Orders	018EXT					Maynards (MAYNARDS)	test	11,000.00	12,000.00	16,000.00	APPRV				
External Change Orders	019EXT				00-TYPNQ[001]	Parkdale Holdings (PARKDALE)	test	11,000.00	12,000.00	16,000.00	APPRV				
External Change Orders	020EXT			OWNCHG1	SUSGLA009[002]	Gladstone Design/Build (GLADSTON)	Check for Copying of PCIs	1,000.00	2,000.00	4,000.00	APPRV	Estimating			
External						Gladstone	Check for								

Standard Treeview path: xProjects > Budget & Cost Management > Subcontractor Tracking Log

The Tracking Log is a Log of the PCI Details and includes PCI SOV lines with or without a subcontract/change order link, but has the vendor. Access to the log is assigned using Assign Menu Items in the Security node of the Treeview.

Drill-down can be done on the PCI No., OCO#, SCO# and Contract Code fields. Records with 'TBD' or '000' do not show a drill-down link in the subcontract change code column.

Additional fields have been added to the log: phase, category, subcontract posting date, status name and WBS codes. The fields are available for use from the Subcontractor Tracking in Log Builder.

Entering Payment Requisitions

As part of the monthly project cycle, payment requests need to be submitted. The xProjects Suite allows for the online entry of Payment Requests.

From the xProjects Manager Treeview, select the Payment Requisition Node. This will open a log of all your existing requisitions and their current status. From the log you can view, modify or create a new Payment Request.

Entering a New Requisition

Check Spelling Cancel Save

RFP Detail

Notes Attachments

Vendor: Parkdale Holdings

Contract: MN Package

Invoice No.:

Invoice Date: 120811

Due Date: 110911

Description:

		Amounts		Previously Certified Amounts	
	Net Amount			Net Amount	0.00
	Tax Amount			Tax Amount	0.00
	Invoice Amount			Invoice Amount	0.00
	Retainage Amount			Retainage Amount	0.00
	Release Amount			Release Amount	0.00
	Gross Amount			Work Completed	0.00

Schedule of Values

Task Code	Task Name	Contracted Quantity	UOM	Rate	Amt	Previously Certified Quantity	Previously Certified Amount	Completed Quantity	Current Quantity	Current Amount	Completed Amount	Retainage %	Previous Retainage Amount	Retainage Amount	Total Retainage Amount	Previous Release Amount	Outstanding Release Amount	Release Amount
mn1	mn1	1	NA	50,000.000	50,000.00		0.00						0	0		0	0	0

To enter a new payment request, from the Log screen use the **[Add RFP]** button to open the window shown above. This button is controlled by the security privilege **“Request for Payment – Create”** which can be set either at the role or user level.

When the screen first opens, there is no schedule of values detail section. This will appear after the vendor and contract have been entered.

Field security exists for the previously certified and current Tax and Invoice Amount fields (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Payment Requisition*). The available options are: Read-only or Hidden.

- The Vendor field will default to your company. If by chance you are the GC entering the RFP, then you will need to select the vendor from the list of values.
- Select the contract from the list of values. In most cases, there will only be one contract available. If a previous Payment Requisition has not been accepted (Posted) by the GC, the contract will not be available for selection. The system does not allow more than one open payment requisition at a time.
- Once the contract is entered, the 'Previously Certified' section of the screen will display the sum of all previous payment requests.
- Enter your Invoice Number, Invoice Date and Due Date. The invoice date field will default to the system date and the Due Date will default according to the contract Terms.
- The most common description is the draw number and work included until date.

To enter the actual completion units or amounts, move down to the Schedule of Values section of the screen.

Amounts or units are entered against each line item of the contract. You may enter one of the following:

- 'Completed Amount' which is the total dollar value to date
- 'Completed Quantity' which is the total units completed to date – this can be edited
- 'Current Quantity' which is only the quantity completed in for this billing – this can be edited
- 'Current Amount' which is only the amount being billed on this invoice

When any of these fields are entered the others will be calculated.

The user can override the Retainage Amount in the SOV of Request for Payments. Field security can also be set on the retainage amount field.

Scrolling to the right of the screen, users have the ability to release retainage amount against each of the SOV line as desired. The total amount release may be viewed from the header display 'Release Amount'. Also, previously certified release amounts may be viewed both at line item and at the header level.

Once everything is complete, you have two options: 'Save' or 'Submit'. The **[Save]** function will save the payment request, but leave it open to you for further editing plus the GC will not be able to see it.

The **[Submit]** button saves the request and passes it to the GC for approval and it is no longer available for you to edit.

Copying an RFP to Imaging

After completing the required setup, an RFP from PM JSP can be copied to Imaging, along with **one** of any attachments, using the **[Submit]** button on the RFP screen.

Required Setup

To use this feature, the following setup is required:

1. The WORKFLOW button in PM JSP RFP should be disabled if this feature is to be used.
2. On the Imaging Controls screen, four fields are available to be used with this feature:

The screenshot shows a configuration interface with several checkboxes and dropdown menus. The 'Copy PM RFP to Imaging' checkbox is checked. The 'Auto Submit Flag' checkbox is also checked. The 'Auto-create SC RFP Document Type' dropdown menu is set to 'SC Request For Payment (SB)'. The 'Auto-create SC RFP Source' dropdown menu is set to a value, and the 'base remaining balance on Pre-tax Amounts' checkbox is checked.

- Copy PM RFP to Imaging – Checkbox: Check this flag to indicate to the system that this feature is enabled.
- Auto Submit – Checkbox: This flag works in tandem with the ‘Copy PM RFP to Imaging’ flag. If the Copy flag is checked and this ‘Auto Submit Flag’ is also checked, the Image will automatically be submitted for workflow, and will automatically launch any active workflow that is linked to the Document Type specified. If the ‘Auto Submit Flag’ is un-checked, the workflow associated with the Document Type will not be automatically launched. The default setting is ‘un-checked’.
- Auto-create SC RFP Document Type (**Imaging Doc. Type**): Select the Imaging Document Type that is to be used for the RFP copy. Note that only document types for voucher-based RFPs that have been set up to be unsubmitted will appear on this list. The field used to enable unsubmitting is not user-maintainable. You must ask CMiC support to do that.
- Auto-create SC RFP Source (**Imaging Source**): This LOV will display value(s) based on the Imaging Document Type that is selected.

Feature Notes

RFPs are entered in PM JSP, and the related document(s) added as attachment(s). Submitting the RFP results in copying the RFP and the attachment to the Imaging system. If there is more than one attachment, the first one (based on ORASEQ) is copied to Imaging.

The RFP will enter Imaging in the Un-submitted state, which means it can be edited in Imaging. In PM JSP, the RFP will have a SUBMITTED status, and the user will be unable to edit or post it.

In PM JSP, the ‘In Workflow’ banner will also display if there is an active workflow associated with the Document Type that is selected for this feature. The banner will only show if the record in Imaging has a ‘Pending’ status. Otherwise, in PM JSP, the user will see what has happened by checking the Review/Approval section of the RFP. The user can edit the invoice in Imaging to make corrections if the status is not ‘Pending’.

If the RFP does not have any attachments when it is SUBMITTED, a dummy document record will be created and associated with the invoice. The document will be labelled ‘no_image_available’ in the Image Manager screen.

Once the Approval process is complete, the RFP in PM JSP will become post-able, i.e. the [Post] button will be enabled.

Two examples are outlined below, with supporting screenshots.

Examples

The following setup is used for the two examples described in this section.

COPY RFP to IMAGING feature is in use; standard WORKFLOW feature is not in use (i.e. the WORKFLOW privilege in PM JSP is turned OFF for the user)

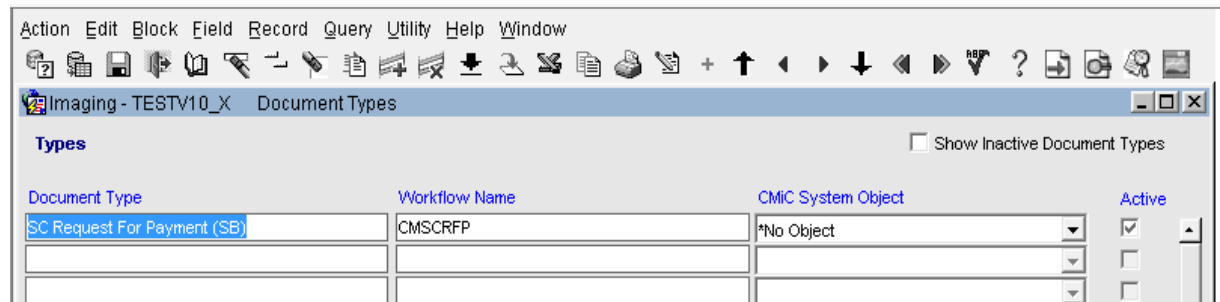
a) Setup – Imaging Control



The Imaging Controls setup screen is divided into two main sections: Invoice Validation and Imaging Roles. The Invoice Validation section contains various checkboxes for controlling the imaging process, such as RAD Invoice Amount Validation, Include Retainage Release Amount in Gross Amount, Default Tax Calculation, Update default Retainage on SOV from the last SC RFP, Use Subcontract Terms, Use Pretax Amount for Register Pay Requests, RFP Amount Cannot Exceed Contract Balance, Allow Vouchers without Details, Allow Negative Voucher RFPs, Auto Submit Flag, Allow RAD Pay Request Retainage Override, WIM Code Validation Without Conversion, Validate Discount/Retainage against Original Amount, Retainage Validation After Update on Details, PO Invoice w/o PO Number, Distributions are Required for PO Invoices, Non-PO Distribution 3 lines Posted as "Spent Outside the Commitment", Base Remaining Balance on Pretax Amounts, Copy PM RFP to Imaging, and Auto-create SC RFP Source. The Imaging Roles section shows the Auto-create SC RFP Document Type set to SC Request For Payment (SB) and the Auto-create SC RFP Source set to Test source 1.

b) Setup – Document Type and associated workflow

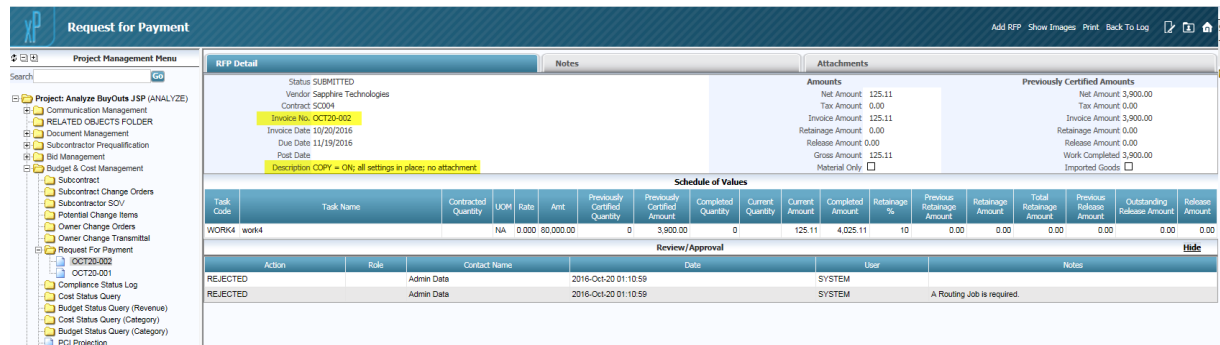
This is the active workflow that has been associated with the Document Type being used for testing this feature in the example below:



The Document Types setup screen shows a table with columns for Document Type, Workflow Name, CMIC System Object, and Active. The first row is highlighted, showing 'SC Request For Payment (SB)' as the Document Type, 'CMSCRFP' as the Workflow Name, '*No Object' as the CMIC System Object, and 'Active' checked.

EXAMPLE 1 – SUBMITTING RFP with NO ATTACHMENT (Complete process demo - from Submit to Posting)

The RFP below has been SUBMITTED in PM JSP with no documents attached to it.



The Request for Payment (RFP) Detail screen shows the RFP status as SUBMITTED. The Vendor is Sapphire Technologies, Contract 5004. The Invoice No. is OCT20-002, Invoice Date is 10/20/2016, Due Date is 11/19/2016, and Post Date is 11/19/2016. The Description is COPY = ON; all settings in place; no attachment. The Schedule of Values table shows the RFP is currently in the 'Review/Approval' stage. The Review/Approval table shows two entries: 'REJECTED' by Admin Data on 2016-Oct-20 01:10:59, and 'REJECTED' by Admin Data on 2016-Oct-20 01:10:59, with a note 'A Routing Job is required.'

In this example, the invoice is rejected by Imaging, because of errors. The user is 'informed' by the lines in the Review/Approval section of the RFP. No 'In Workflow' banner is displayed because of the failure.

In addition, because no documents were attached to the invoice, a dummy document record labelled 'no_image_available' has been created for the invoice in Image Manager.

Observe also that the 'no_image_available' document is listed under the Document Type that was set up in the Imaging Control screen (SC Request For Payment (SB)), and the invoice is associated with it:

Home Refresh Search

Source: *All Sources | Posted: *All | Types: SC Request For Payment (SR) | Status: *All

Image Manager

Request For Payment (SR) (17)

Album_2016_03_15.html

Slider_email_update.msg

Chrysanthemum.jpg

Comic.bmp

Desktop.jpg

equipment_cash_receipt.tif

equipment_cash_receipt_3416447.tif

Equipment-updateContactID.pdf

Lighthouse.jpg

Lighthouse_3454964.jpg

MARCH2016.tif

no_image_available

no_image_available

PCFile.tif

PCLogo.jpg

SRBUDGET.tif

SYSPROOC_2016_03_15_10_41_13.pdf

Document Name: no_image_available

Submit Rejected

RAD SC Pay Request Header

Company: SUS | SB URBAN SYSTEMS

Job: ANALYZE | ANALYZE BUY/OUTS JS

Routing Job: VENDOR | SAPPHIRE SAPPHIRE TECHNOLOGY

PO or Contract No: SC004 | SC004

Final NO

Invoice No: OCT20-002

Amount: 125.11

Invoice Date: 10 | 20 | 2016

Discount Date: 11 | 04 | 2016

Due Date: 11 | 19 | 2016

Description: COPY - Qty all settings in place; no attachment

Task Description	Contract Amount	Prev Cert Amount	Ret Pct	Current Retainage	Current Amount	Completed Amount	Amount Retained	Retainage Release	Actions
work4	80,000.00	3,900.00	10.00	0.00	125.11	4,025.11	0.00	0.00	+ -
Totals	80,000.00	3,900.00	0.00	0.00	125.11	4,025.11	0.00	0.00	+ -

SC Workflow Control

Invoice Type: Normal

Tracking Information

Image ID

Responsible Person: N/A

Responsible Role: Data Entry

Business Status: Incomplete Data

Audit History

Action Date: 10 | 20 | 2016

User: SYSTEM

User Action: REJECTED

Action Time: 13:21

User Title: SYSTEM

Comments

Action Date: 10 | 20 | 2016

User: SYSTEM

User Action: REJECTED

Action Time: 13:21

User Title: SYSTEM

Comments: A Routing Job is required.

The webpage cannot be found

Most likely causes:

- There might be a typing error in the address.
- If you clicked on a link, it may be out of date.

What you can try:

- Retype the address.
- Go back to the previous page.
- Go to and look for the information you want.
- More information

Any necessary corrections are made to the invoice in Image Manager and it is submitted from there. The status is updated to **Pending**:

Home Refresh Search

Source: *All Sources | Posted: *All | Types: SC Request For Payment (SR) | Status: *All

Image Manager

Request For Payment (SR) (17)

Album_2016_03_15.html

Slider_email_update.msg

Chrysanthemum.jpg

Comic.bmp

Desktop.jpg

equipment_cash_receipt.tif

equipment_cash_receipt_3416447.tif

Equipment-updateContactID.pdf

Lighthouse.jpg

Lighthouse_3454964.jpg

MARCH2016.tif

no_image_available

no_image_available

PCFile.tif

PCLogo.jpg

SRBUDGET.tif

SYSPROOC_2016_03_15_10_41_13.pdf

Document Name: no_image_available

Submit Pending

Plotted Not Plotted

V10_X.1.140

RAD SC Pay Request Header

Company: SUS | SB URBAN SYSTEMS

Job: ANALYZE | ANALYZE BUY/OUTS JS

Routing Job: VENDOR | SAPPHIRE SAPPHIRE TECHNOLOGY

PO or Contract No: SC004 | SC004

Final NO

Invoice No: OCT20-002

Amount: 125.11

Invoice Date: 10 | 20 | 2016

Discount Date: 11 | 04 | 2016

Due Date: 11 | 19 | 2016

Description: COPY - Qty all settings in place; no attachment

Task Description	Contract Amount	Prev Cert Amount	Ret Pct	Current Retainage	Current Amount	Completed Amount	Amount Retained	Retainage Release	Actions
work4	80,000.00	3,900.00	10.00	0.00	125.11	4,025.11	0.00	0.00	+ -
Totals	80,000.00	3,900.00	0.00	0.00	125.11	4,025.11	0.00	0.00	+ -

SC Workflow Control

Invoice Type: Normal

Tracking Information

Image ID

Responsible Person: Data Admin

Responsible Role: Approver 1

Business Status: Pending Approval

Audit History

Action Date: 10 | 20 | 2016

User: Data Admin

User Action: NOTIFIED

Action Time: 13:38

User Title: Approver 1

Comments

Action Date: 10 | 20 | 2016

User: Glenda Simpson

User Action: SUBMIT

Action Time: 13:38

User Title: Submitter

The webpage cannot be found

Most likely causes:

- There might be a typing error in the address.
- If you clicked on a link, it may be out of date.

What you can try:

- Retype the address.
- Go back to the previous page.
- Go to and look for the information you want.
- More information

The RFP is now updated with the **In Workflow** banner PM RFP:

Request for Payment Add RFP Show Images Print Back To Log

Project Management Menu

Search: **Go**

- Project: Analyze BuyOuts JSP (ANALYZE)
 - Communication Management
 - RELATED OBJECTS FOLDER
 - Document Management
 - Subcontractor Prequalification
 - Bid Management
 - Budget & Cost Management
 - Subcontract
 - Subcontract Change Orders
 - Subcontractor SOV
 - Potential Change Items
 - Owner Change Orders
 - Owner Change Transmittal
 - Request For Payment
 - OCT20-002
 - OCT20-001
 - Compliance Status Log
 - Cost Status Query
 - Budget Status Query (Revenue)
 - Cost Status Query (Category)
 - Budget Status Query (Category)
 - PCI Projection
 - Contract Forecasting with PCI Projection
 - PCI Markup Rules
 - Subcontractor Tracking Log
 - BIM 360 Integration
 - Site Management

RFP Detail **Notes** **Attachments**

Status SUBMITTED
Vendor Sapphire Technologies
Contract SC004
Invoice No. OCT20-002
Invoice Date 10/20/2016
Due Date 11/19/2016
Post Date
Description COPY = ON; all settings in place; no attachment

Amounts
Net Amount 125.11
Tax Amount 0.00
Invoice Amount 125.11
Retainage Amount 0.00
Release Amount 0.00
Gross Amount 125.11
Material Only ☐

Previously Certified Amounts
Net Amount 3,900.00
Tax Amount 0.00
Invoice Amount 3,900.00
Retainage Amount 0.00
Release Amount 0.00
Work Completed 3,900.00
Imported Goods ☐

Schedule of Values

Task Code	Task Name	Contracted Quantity	UOM	Rate	Am't	Previously Certified Quantity	Previously Certified Amount	Completed Quantity	Current Quantity	Current Amount	Completed Amount	Retainage %	Previous Retainage Amount	Retainage Amount	Total Retainage Amount	Previous Release Amount	Outstanding Release Amount	Release Amount
WOR04	work4		NA	0.000	80,000.00	0	3,900.00	0	125.11	4,025.11	10	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Review/Approval

Actual	Role	Contact Name	Date	User	Notes
NOTIFIED	SUS Project Manager	Stimpson Glenda	2016-Oct-20 01:10:44	Data Admin	
SUBMIT	SUS Project Manager	Stimpson Glenda	2016-Oct-20 01:10:43	Glenda Stimpson	
REJECTED	SUS Project Manager	Stimpson Glenda	2016-Oct-20 01:10:43	SYSTEM	
REJECTED	SUS Project Manager	Stimpson Glenda	2016-Oct-20 01:10:43	SYSTEM	A Routing Job is required.
REJECTED	Admin Data	Admin Data	2016-Oct-20 01:10:59	SYSTEM	
REJECTED	Admin Data	Admin Data	2016-Oct-20 01:10:59	SYSTEM	A Routing Job is required.

The appropriate Approver approves the invoice via Workflow:

Notification Details ?

To DA Sent 20-OCT-2016 13:38:44 Due 21-OCT-2016 13:38:44

Subject Please Approve Subcontract Request for Payment OCT20-002 for vendor Sapphire Technologies and Job ANALYZE

ORACLE

Data Admin [Approver 1], please code/approve the following Subcontract Request for Payment.

Invoice Header

Job	ANALYZE	Analyze BuyOuts JSP
Vendor	SAPPHIRE	Sapphire Technologies
Contract	SC004	Subcontract for testing RFPWKF/BIG
Invoice Number	OCT20-002	
Invoice Date	20-OCT-2016	Discount Date 04-NOV-2016
Due Date	19-NOV-2016	
Gross Amount	125.11	Net Amount 125.11
Description	COPY = ON; all settings in place; no attachment	

Distributions

Task Code / Description	Change	Contract Amount	Prev Certified Amount	Total Requested Amount	Remaining Balance	Current Amount	Retainage %	Contract Quantity	UOM	Rate	Prev Certified Quantity	Current Quantity	Total Retainage	Current Retainage	Retainage Released
WOR04 / work4	000	80,000.00	3,900.00	4,025.11	76,100.00	125.11	10.00		NA	0	0	0	0.00	0.00	0.00
Totals		80,000.00	3,900.00	4,025.11	76,100.00	125.11							0.00	0.00	0.00

User Comments

Date	User ID	User Name	Comments	Return?

Compliance

Complies?	Dated?	Compliance Code	Bonding Company	Certificate No.	Certificate Location	Start Date	End Date	Amount
Y	N	00-INC00PL						0.00
Total								

Image

Click Here to view image

Audit History

Date	Person	Type	Role	Action	Comments
2016-OCT-20 13:38:44	Data Admin	Approver 1		NOTIFIED	
2016-OCT-20 13:38:43	Glenda Stimpson	Submitter		SUBMIT	
2016-OCT-20 13:38:43	SYSTEM			REJECTED	
2016-OCT-20 13:38:43	SYSTEM			REJECTED	A Routing Job is required.
2016-OCT-20 13:21:59	SYSTEM			REJECTED	
2016-OCT-20 13:21:59	SYSTEM			REJECTED	A Routing Job is required.
End					

[Return to Worklist](#)

Comments Approval of invoice after corrections made and its re-submitted.

Payment Request Approval **Approve** **Reject** **Reassign...**

Once the invoice is approved, the [POST] button in the RFP screen in PM JSP is enabled:

Home Refresh Search

Sources: *All Sources | Filter: *All | Status: *All

Types: SC Request For Payment (SB) (17)

Upload Multiple Documents | Export to Excel

Document Name: no_image_available

Document Type: SC Request For Payment (SB)

Source: Test source 1

Document Date: 2016-10-20 13:21:58.0 9475311

Submit | Submitted | Posted | Posted

V10_X_1140

RAD SC Pay Request Header

Company: BUS - SB URBAN SYSTEMS

Job: ANALYZE - ANALYZE BUYOUTS JS

Routing Job: ANALYZE

Vendor: SAPPHIRE/SAPPHIRE TECHNOLOG

PO or Contract No: SC004

Final NO

Invoice No: OCT20-002

Amount: 125.11

Invoice Date: 10/20/2016

Discount Date: 04/2016

Due Date: 11/19/2016

Description: COPY = Qty all settings in place; no attachment

RAD SC Pay Request Detail

Task Description	Contract Amount	Prev Cert Amount	Ret Pct	Current Retainage	Current Amount	Completed Amount	Amount Retained	Retainage Release	Actions
Invoice Type: Normal									
Tracking Information									
Audit History									
Action Date: 10/20/2016	User: Data Admin	Action Time: 13:43	User Title: Approver 1	Approval of Invoice after corrections made and its resubmitted.					
User Action: APPROVED		Action Time: 13:38	User Title: Approver 1						
Action Date: 10/20/2016	User: Data Admin	Action Time: 13:38	User Title: Approver 1						
User Action: NOTIFIED		Action Time: 13:38	User Title: Approver 1						
Action Date: 10/20/2016	User: Glenda Stimpson	Action Time: 13:38	User Title: Approver 1						
User Action: SUBMIT		Action Time: 13:38	User Title: Approver 1						

The webpage cannot be found

Most likely causes:

- There might be a typing error in the address.
- If you clicked on a link, it may be out of date.

What you can try:

- Retype the address.
- Go back to the previous page.
- Go to and look for the information you want.

More information

EXAMPLE 2 – SUBMITTING RFP with ATTACHMENT(s) (Complete process demo - from Submit to Posting)

The RFP is created with multiple attachments and SUBMITTED:

Request for Payment

Add RFP | Show Images | Print | Back To Log

Project Management Menu

Project: Analyze BuyOuts JSP (ANALYZE)

Communication Management

RELATED OBJECTS FOLDER

Document Management

Subcontractor Prequalification

Bid Management

Budget & Cost Management

Subcontract

Subcontract Change Orders

Subcontractor SOV

Potential Change Items

Owner Change Orders

Owner Change Transmittal

Request For Payment

Compliance Status Log

Cost Status Query

Budget Status Query (Revenue)

Cost Status Query (Category)

Budget Status Query (Category)

PCI Projection

Contract Forecasting with PCI Projections

PCI Markup Rules

RFP Detail

Status: SUBMITTED

Vendor: Sapphire Technologies

Contract: SC004

Invoice No: OCT20-002

Invoice Date: 10/20/2016

Due Date: 11/19/2016

Post Date:

Description: COPY = Qty all settings in place; attachments added

Amounts

Amounts	Previously Certified Amounts
Net Amount: 3,100.28	Net Amount: 4,025.11
Tax Amount: 0.00	Tax Amount: 0.00
Invoice Amount: 3,100.28	Invoice Amount: 4,025.11
Retainage Amount: 0.00	Retainage Amount: 0.00
Release Amount: 0.00	Release Amount: 0.00
Gross Amount: 3,100.28	Work Completed: 4,025.11
Material Only	Imported Goods

Schedule of Values

Task Code	Task Name	Contracted Quantity	UOM	Rate	Am't	Previously Certified Quantity	Previously Certified Amount	Completed Quantity	Current Quantity	Current Amount	Completed Amount	Retainage %	Previous Retainage Amount	Retainage Amount	Total Retainage Amount	Previous Release Amount	Outstanding Release Amount	Release Amount
WORK4	work4		NA	0.000	80,000.00	0	4,025.11	0	3,100.28	7,125.39	10	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Review/Approval

Action	Role	Contact Name	Date	User	Notes
REJECTED		Admin Data	2016-Oct-20 02:10:09	SYSTEM	
REJECTED		Admin Data	2016-Oct-20 02:10:09	SYSTEM	A Routing Job is required.

The attachments are shown here:

Request for Payment

Upload Multiple | Add/Upload New | Show Mapping | Add Attachment | ESign Documents | Back To Log

Project Management Menu

Project: Analyze BuyOuts JSP (ANALYZE)

Communication Management

RELATED OBJECTS FOLDER

Document Management

Subcontractor Prequalification

Bid Management

Budget & Cost Management

Subcontract

Subcontract Change Orders

Subcontractor SOV

Potential Change Items

Owner Change Orders

Owner Change Transmittal

Request For Payment

Compliance Status Log

RFP Detail

Attachments

Type	Number	Name	Rev. Number	Rev. Date	Description	Notes	User	Status	Attachment	Esignings	Esign Status	Action
Attachment	ATTANALYZE00171	Jellyfish	0	History	10/20/2016	Original Version	Glenda Stimpson	SUBMITTED	Jellyfish.jpg			
Attachment	ATTANALYZE00172	Tulips	0	History	10/20/2016	Original Version	Glenda Stimpson	SUBMITTED	Tulips.jpg			
Attachment	ATTANALYZE00170	JB-Backup	0	History	10/20/2016	Original Version	Glenda Stimpson	SUBMITTED	JB-Backup.pdf			

In Image Manager, one of the attachments is listed under the Document Type that was set up in the Imaging Control screen (SC Request For Payment (SB)), and the invoice is associated with it:

Home Refresh Search

Sources: *All Sources [v] Posted: *All [v]

Types: SC Request For Payment (SB) [v] Status: *All [v]

UI Config Query Mode Doc Search

Image Manager

SC Request For Payment (SB) (18)

JB-Backup.pdf

Document Name: JB-Backup.pdf

Submit: Rejected

RAD SC Pay Request Header

Company: SUS SB URBAN SYSTEMS

Job: ANALYZE ANALYZE BUYOUTS JS

Routing Job

Vendor: SAPPHIRE SAPPHIRE TECHNOLO

PO or Contract No.: SC004 SC004

Final NO

Invoice No.: OCT20-003

Amount: 3,100.28

Invoice Date: 10 20 2016

Discount Date: 11 04 2016

Due Date: 11 18 2016

Description: COPY = City all settings in place; attachments add

Task Description	Contract Amount	Prev Cert Amount	Ret Pct	Current Retainage	Current Amount	Completed Amount	Amount Retained	Retainage Release
work4	80,000.00	4,025.11	10.00	0.00	3,100.28	7,125.39	0.00	0.00
Totals	80,000.00	4,025.11	0.00	0.00	3,100.28	7,125.39	0.00	0.00

SC Workflow Control

Invoice Type: Normal

Tracking Information

Image ID

Responsible Person: N/A

Responsible Role: Data Entry

Business Status: Incomplete Data

Audit History

Action Date: 10 20 2016

User: SYSTEM

User Action: REJECTED

Action Time: 14:09

User Title: SYSTEM

Comments

Action Date: 10 20 2016

User: SYSTEM

User Action: REJECTED

Action Time: 14:09

User Title: SYSTEM

Comments: A Routing Job is required.

In this example, the invoice requires some corrections. It is edited and corrected.

After correcting the invoice in the Image Manager and re-submitting it, the RFP appears as follows:

Home Refresh Search

Sources: *All Sources [v] Posted: *All [v]

Types: SC Request For Payment (SB) [v] Status: *All [v]

UI Config Query Mode Doc Search

Image Manager

SC Request For Payment (SB) (18)

JB-Backup.pdf

Document Name: JB-Backup.pdf

Document Type: SC Request For Payment (SB)

Source: Test source 1

Document Date: 2016-10-20 14:09:09.0 9477859

Submit: Pending

Posted: Not Posted

RAD SC Pay Request Header

Company: SUS SB URBAN SYSTEMS

Job: ANALYZE ANALYZE BUYOUTS JS

Routing Job: ANALYZE

Vendor: SAPPHIRE SAPPHIRE TECHNOLO

PO or Contract No.: SC004 SC004

Final NO

Invoice No.: OCT20-003

Amount: 3,100.28

Invoice Date: 10 20 2016

Discount Date: 11 04 2016

Due Date: 11 18 2016

Description: COPY = City all settings in place; attachments add

Task Description	Contract Amount	Prev Cert Amount	Ret Pct	Current Retainage	Current Amount	Completed Amount	Amount Retained	Retainage Release
work4	80,000.00	4,025.11	10.00	0.00	3,100.28	7,125.39	0.00	0.00
Totals	80,000.00	4,025.11	0.00	0.00	3,100.28	7,125.39	0.00	0.00

SC Workflow Control

Invoice Type: Normal

Tracking Information

Image ID

Responsible Person: Data Admin

Responsible Role: Approver 1

Business Status: Pending Approval

Audit History

Action Date: 10 20 2016

User: Data Admin

User Action: NOTIFIED

Action Time: 14:13

User Title: Approver 1

Comments

Action Date: 10 20 2016

User: Glende Simpson

User Action: SUBMIT

Action Time: 14:13

User Title: Submitter

The 'In Workflow' banner is displayed in PM RFP:

Request for Payment

Project Management Menu

RFP Detail

Status: SUBMITTED
Vendor: Sapphire Technologies
Contract: SC004
Invoice No: OCT20-003
Invoice Date: 10/20/2016
Due Date: 11/19/2016
Post Date:
Description: COPY = ON; all settings in place; attachments added

Amounts

Net Amount	3,100.28	Previously Certified Amounts	Net Amount	4,025.11
Tax Amount	0.00	Tax Amount	0.00	
Invoice Amount	3,100.28	Invoice Amount	4,025.11	
Retainage Amount	0.00	Retainage Amount	0.00	
Release Amount	0.00	Release Amount	0.00	
Gross Amount	3,100.28	Work Completed	4,025.11	
Material Only	<input type="checkbox"/>	Imported Goods	<input type="checkbox"/>	

Schedule of Values

Task Code	Task Name	Contracted Quantity	UOM	Rate	Am't	Previously Certified Quantity	Previously Certified Amount	Completed Quantity	Current Quantity	Current Amount	Completed Amount	Retainage %	Previous Retainage Amount	Retainage Amount	Total Retainage Amount	Previous Release Amount	Outstanding Release Amount	Release Amount
WORK4	work4	NA	0.000	80,000.00	0	4,025.11	0	0	3,100.28	7,125.39	10	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Review/Approval

Action	Role	Contact Name	Date	User	Notes
NOTIFIED	SUS Project Manager	Stimpson Glenda	2016-Oct-20 02:10:51	Data Admin	
SUBMIT	SUS Project Manager	Stimpson Glenda	2016-Oct-20 02:10:50	Glenda Stimpson	
REJECTED		Admin Data	2016-Oct-20 02:10:09	SYSTEM	
REJECTED		Admin Data	2016-Oct-20 02:10:09	SYSTEM	A Routing Job is required.

The invoice is approved in Workflow:

Notification Details

To: DA
Sent: 20-OCT-2016 14:13:51
Subject: Please Approve Subcontract Request for Payment OCT20-003 for vendor Sapphire Technologies and Job ANALYZE
Due: 21-OCT-2016 14:13:51

Data Admin (Approver 1), please code/approve the following Subcontract Request for Payment.

Invoice Header

Job	ANALYZE	Analyze BuyOuts JSP
Vendor	SAPPHIRE	Sapphire Technologies
Contract	SC004	Subcontract for testing RFP/WK/IMG
Invoice Number	OCT20-003	
Invoice Date	20-OCT-2016	Discount Date: 04-NOV-2016
Due Date	19-NOV-2016	
Gross Amount	3,100.28	Net Amount
Description	COPY = ON; all settings in place; attachments added	

Distributions

Task Code / Description	Change	Contract Amount	Prev Certified Amount	Total Requested Amount	Remaining Balance	Current Amount	Retainage %	Contract Quantity	UOM	Rate	Prev Certified Quantity	Current Quantity	Total Retainage	Current Retainage	Retainage Released
WORK4 / work4	000	80,000.00	4,025.11	7,125.39	75,974.89	3,100.28	10.00	NA	0	0	0	0	0.00	0.00	0.00
Totals		80,000.00	4,025.11	7,125.39	75,974.89	3,100.28							0.00	0.00	0.00

User Comments

Date	User ID	User Name	Comments	Return?

Compliance

Complies?	Dated?	Compliance Code	Bonding Company	Certificate No.	Certificate Location	Start Date	End Date	Amount
Y	N	00-RCOMPL						0.00

Audit History

Date	Person	Title	Role	Action	Comments
2016-Oct-20 14:13:51	Data Admin	Approver 1		NOTIFIED	
2016-Oct-20 14:13:50	Glenda Stimpson	Submitter		SUBMIT	
2016-Oct-20 14:09:09	SYSTEM	SYSTEM		REJECTED	
2016-Oct-20 14:09:09	SYSTEM	SYSTEM		REJECTED	A Routing Job is required.

Return to Worklist

Comments

Approval of invoice that has attachments; approval after corrections made in Image Manager.

Payment Request Approval

Approve **Reject** **Reassign...**

The approved invoice can now be posted in PM JSP – the [POST] button is now enabled:

Request for Payment

Project Management Menu

RFP Detail

Status: SUBMITTED
Vendor: Sapphire Technologies
Contract: SC004
Invoice No: OCT20-003
Invoice Date: 10/20/2016
Due Date: 11/19/2016
Post Date:
Description: COPY = ON; all settings in place; attachments added

Amounts

Net Amount	3,100.28	Previously Certified Amounts	Net Amount	4,025.11
Tax Amount	0.00	Tax Amount	0.00	
Invoice Amount	3,100.28	Invoice Amount	4,025.11	
Retainage Amount	0.00	Retainage Amount	0.00	
Release Amount	0.00	Release Amount	0.00	
Gross Amount	3,100.28	Work Completed	4,025.11	
Material Only	<input type="checkbox"/>	Imported Goods	<input type="checkbox"/>	

Schedule of Values

Task Code	Task Name	Contracted Quantity	UOM	Rate	Am't	Previously Certified Quantity	Previously Certified Amount	Completed Quantity	Current Quantity	Current Amount	Completed Amount	Retainage %	Previous Retainage Amount	Retainage Amount	Total Retainage Amount	Previous Release Amount	Outstanding Release Amount	Release Amount
WORK4	work4	NA	0.000	80,000.00	0	4,025.11	0	0	3,100.28	7,125.39	10	0.00	0.00	0.00	0.00	0.00	0.00	

Review/Approval

Action	Role	Contact Name	Date	User	Notes
APPROVED	SUS Project Manager	Stimpson Glenda	2016-Oct-20 02:10:07	Data Admin	Approval of invoice that has attachments; approval after corrections made in Image Manager.
NOTIFIED	SUS Project Manager	Stimpson Glenda	2016-Oct-20 02:10:51	Data Admin	
SUBMIT	SUS Project Manager	Stimpson Glenda	2016-Oct-20 02:10:50	Glenda Stimpson	
REJECTED		Admin Data	2016-Oct-20 02:10:09	SYSTEM	
REJECTED		Admin Data	2016-Oct-20 02:10:09	SYSTEM	A Routing Job is required.

Home Refresh Search

Sources: *All Sources [v] Posted: *All [v]

Types: SC Request For Payment (SD) [v] Status: *All [v]

[v] Confly Query Mode Doc Search

Image Manager

- SC Request For Payment (SB) (18)
- Album_2016_03_15.html
- Poster_email_update.png
- Chrysanthemum.jpg
- emp.bmp
- Cover.jpg
- equipment_cash_receipt.tif
- equipment_cash_receipt_8416447.tif
- JB-Backup.pdf
- Vcenter-updateContactID.pdf
- Lighthouse.jpg
- Lighthouse_3454564.jpg
- MARCH2016.tif
- no_image_available
- Office.tif
- POLLOO.jpg
- SEBUDDGET.tif
- TS-SERVOOC_2016_08_10_41_13.pdf

V10_X1140

RAD-SC Pay Request Header

Company: *BUS ID URBAN ID SYSTEMS

Job: *ANALYZE ANALYZE BUYOUTS JC

Rolling Job: ANALYZE

Vendor: *SAPPHIRE SAPPHIRE TECHNOLOGY

PO or Contract No.: *SC004 SC004

Fiscal MO: [v]

Invoice No.: *DCT20-003

Amount: 3,100.28

Invoice Date: 10/20/2016

Discount Date: 11/04/2016

Due Date: 11/19/2016

Description: COPY = ON; all settings in place; attachments add;

RAD-SC Pay Request Detail

Test Description	Contract Amount	Prev Cert Amount	Rat Pct	Current Retainage	Current Amount	Completed Amount	Amount Retained	Retainage Release	Actions
work#1	80,000.00	4,025.11	0.00	0.00	3,100.28	0.00	0.00	0.00	
Totals	80,000.00	4,025.11	0.00	0.00	3,100.28	7,125.39	0.00	0.00	

SC Workflow Control

Invoice Type: Normal

Tracking Information

Action History

Action Date	User	Action	Action Time
10/20/2016	User Data Admin	User Action APPROVED	14:19
10/20/2016	User Data Admin	User Action NOTIFIED	14:13
10/20/2016	User Glenda Simpson		14:13

Comments:

Approval of Invoice that has attachments; approval after corrections made in Image Manager

Request for Payment										Add RFP Show Images Print Back To Log Void																																															
Project Management Menu																																																									
search <input type="text"/> Go Project: Analyze BuyOuts JSP (ANALYZE) <ul style="list-style-type: none"> Communication Management RELATED OBJECTS FOLDER Document Management Subcontractor Prequalification Bid Management Budget & Cost Management <ul style="list-style-type: none"> Subcontract Change Orders Subcontractor SOV Potential Change Items Owner Change Orders Owner Change Transmittal Request for Payment <ul style="list-style-type: none"> Compliance Status Log Cost Status Query Budget Status Query (Revenue) Cost Status Query (Category) Budget Status Query (Category) PCI Projection Contract Forecasting with PCI Projection PCI Markup Rules 										RFP Detail Status POSTED Notes Attachments ✓ Vendor Sapphire Technologies Contract 5004 Invoice No. OCT29-003 Invoice Date: 10/20/2016 Due Date: 11/19/2016 Post Date: 10/20/2016 Description COPY = ON; all settings in place; attachments added																																															
										Schedule of Values <table border="1"> <thead> <tr> <th>Task Code</th> <th>Task Name</th> <th>Contracted Quantity</th> <th>UOM</th> <th>Rate</th> <th>Amt</th> <th>Previously Certified Quantity</th> <th>Previously Certified Amount</th> <th>Completed Quantity</th> <th>Current Quantity</th> <th>Current Amount</th> <th>Completed Amount</th> <th>Certification %</th> <th>Previous Retainage Amount</th> <th>Retainage Amount</th> <th>Total Retainage Amount</th> <th>Previous Release Amount</th> <th>Outstanding Release Amount</th> <th>Release Amount</th> </tr> </thead> <tbody> <tr> <td>WORK4-work4</td> <td></td> <td></td> <td>NA</td> <td>0.00</td> <td>80,000.00</td> <td>0</td> <td>7,125.39</td> <td></td> <td>0</td> <td>0.00</td> <td>7,125.39</td> <td>10</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>										Task Code	Task Name	Contracted Quantity	UOM	Rate	Amt	Previously Certified Quantity	Previously Certified Amount	Completed Quantity	Current Quantity	Current Amount	Completed Amount	Certification %	Previous Retainage Amount	Retainage Amount	Total Retainage Amount	Previous Release Amount	Outstanding Release Amount	Release Amount	WORK4-work4			NA	0.00	80,000.00	0	7,125.39		0	0.00	7,125.39	10	0.00	0.00	0.00	0.00	0.00	0.00
Task Code	Task Name	Contracted Quantity	UOM	Rate	Amt	Previously Certified Quantity	Previously Certified Amount	Completed Quantity	Current Quantity	Current Amount	Completed Amount	Certification %	Previous Retainage Amount	Retainage Amount	Total Retainage Amount	Previous Release Amount	Outstanding Release Amount	Release Amount																																							
WORK4-work4			NA	0.00	80,000.00	0	7,125.39		0	0.00	7,125.39	10	0.00	0.00	0.00	0.00	0.00	0.00																																							
										Amounts Previously Certified Amounts Net Amount 3,100.28 Net Amount 7,125.39 Tax Amount 0.00 Tax Amount 0.00 Invoice Amount 3,100.28 Invoice Amount 7,125.39 Retainage Amount 0.00 Retainage Amount 0.00 Release Amount 0.00 Release Amount 0.00 Gross Amount 3,100.28 Work Completed 7,125.39 Material Only <input type="checkbox"/> Imported Goods <input type="checkbox"/>																																															
										Review/Approval <table border="1"> <thead> <tr> <th>Action</th> <th>By</th> <th>Contact Name</th> <th>Date</th> <th>User</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>APPROVED</td> <td>SUS Project Manager</td> <td>Stimpson Glenda</td> <td>2016-Oct-20 02:10:07</td> <td>Data Admin</td> <td>Approval of invoice that has attachments, approval after corrections made in Image Manager.</td> </tr> <tr> <td>NOTIFIED</td> <td>SUS Project Manager</td> <td>Stimpson Glenda</td> <td>2016-Oct-20 02:10:51</td> <td>Data Admin</td> <td></td> </tr> <tr> <td>SUBMIT</td> <td>SUS Project Manager</td> <td>Stimpson Glenda</td> <td>2016-Oct-20 02:10:50</td> <td>Glenda Stimpson</td> <td></td> </tr> <tr> <td>REJECTED</td> <td>Admin Data</td> <td>2016-Oct-20 02:10:09</td> <td>SYSTEM</td> <td></td> <td></td> </tr> <tr> <td>REJECTED</td> <td>Admin Data</td> <td>2016-Oct-20 02:10:09</td> <td>SYSTEM</td> <td></td> <td>A Routing Job is required.</td> </tr> </tbody> </table>										Action	By	Contact Name	Date	User	Notes	APPROVED	SUS Project Manager	Stimpson Glenda	2016-Oct-20 02:10:07	Data Admin	Approval of invoice that has attachments, approval after corrections made in Image Manager.	NOTIFIED	SUS Project Manager	Stimpson Glenda	2016-Oct-20 02:10:51	Data Admin		SUBMIT	SUS Project Manager	Stimpson Glenda	2016-Oct-20 02:10:50	Glenda Stimpson		REJECTED	Admin Data	2016-Oct-20 02:10:09	SYSTEM			REJECTED	Admin Data	2016-Oct-20 02:10:09	SYSTEM		A Routing Job is required.		
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Home Refresh Search

Sources: "All Sources" | Filtered: "All"

Types: SC Request For Payment (SB) | Status: "All"

UI Config Query Mode Doc Search

Document Name: JB Backup.pdf
 Document Type: SC Request For Payment (SB)
 Source Test source 1
 Document Date: 2016-10-20 14:09:09.0 0477859

Submit Submitted
 Pooled Pooled

Image Manager

- SC Request For Payment (SB) [18]
 - Album_2016_10_15.html
 - Buster_email_update.mpg
 - Chrysanthemum.jpg
 - cms.bmp
 - Coverd.jpg
 - equipment cash receipt.tif
 - equipment cash receipt_3416447.tif
 - JB-backup.pdf
 - Combine-updateContactID.pdf
 - Lighthouse.jpg
 - Lighthouse_345454.jpg
 - MARCH2016.tif
 - ml_image_available
 - ml_image_available
 - Picofix.tif
 - RCL000.jpg
 - TEDUCU001.tif
 - EVSAPPOOC_2016_08_15_10_41_13.pdf

VTO_X1140

RAD SC Pay Request Header

Company *	SUB	OB URBAN SYSTEMS
JOB * ANALYZE	ANALYZE BUYOUTS .JF	
Routing Job:	ANALYZE	
Vendor *	SAPPHIRE	SAPPHIRE TECHNOLO
PO or Contract No *	SC024	
Final NO.	<	
Invoice No *	OCT20-003	
Amount		3,100.28
Invoice Date *	10 / 20 / 2016	
Discount Date *	11 / 04 / 2016	
Due Date *	11 / 11 / 2016	

Description * COPY = Only all settings in place; attachments add

JOB BILLING BACKUP WITH IMAGE LINKS

Job Details

Job ID	Job Name	Job Date	Job Time	Job User	Job Status	Job Image Link
1	JB-backup.pdf	2016-10-20	14:09:09	Source Test source 1	Submitted	JB-backup.pdf

Job Summary

Job ID	Job Name	Job Date	Job Time	Job User	Job Status	Job Image Link
1	JB-backup.pdf	2016-10-20	14:09:09	Source Test source 1	Submitted	JB-backup.pdf

RAD SC Pay Request Detail

Task Description	Contract Amount	Prev Cert Amount	Ret Pot	Current Retainage	Current Amount	Completed Amount	Amount Retained	Retainage Release	Action
Invoice Type: Normal									

Tracking Information

Audit History

Action Date	User	Title	Comments
10 / 20 / 2016	User Data Admin	Approval of invoice that has attachments; approval after corrections made in Image Manager	
10 / 20 / 2016	User Data Admin	NOTIFIED	
10 / 20 / 2016	User Glenda Simpson	SUBMIT	

Viewing an RFP

To view a payment request, select the request from the Log screen by clicking the linked field on the log. This will display the complete requisition. Any requisition entered can be viewed.

Editing an RFP

Editing can only be done from the view page. Depending on the status of the requisition 'Pending' or 'Submitted' the **[Edit RFP]** button will be available. Only requisitions with the status of 'Pending' are allowed to be modified. If the RFP has a status of POSTED, it means that the Request for Payment has been accepted.

Any of the fields available for entry are available in edit mode.

Deleting an RFP

The only RFP that can be deleted is an RFP that has not yet been submitted. Use the xProjects Manager Treeview to find the Request for Payment in question, then once the details are shown on the page use the **[Delete RFP]** button to remove it from the system.

Posting and Voiding an RFP

ALL

*Note: Not all programs have fields available with field privileges

Programs Payment Requisition

Item Name	Column/Field Security	Security Level
Retainage Amount	Unrestricted	
Previous Retainage Amount	Unrestricted (Read-Only)	
Previous Release Amount	Unrestricted (Read-Only)	
Release Amount	Unrestricted	
Outstanding Release Amount	Unrestricted (Read-Only)	
Total Retainage Amount	Unrestricted (Read-Only)	
Show Images	Unrestricted	
Post RFP	Hidden	
Void RFP	Hidden	

The ability to post and void payment requests has been added to PM JSP through the introduction of the **[POST]** and **[VOID]** buttons. Field security has been applied to both buttons by default, and has been set to 'Hidden' on the *ALL* role for both.

Request for Payment

Add RFP
Show Images
Back To Log
Post

Project Management Menu

search

Go

Project: Project for V10XJOB (V10XPROJ01)

Communication Management

Document Management

Subcontractor Prequalification

Estimate Management

Bid Management

Budget & Cost Management

Subcontract Change Orders

Subcontractor SOV

BIM 360 Integration

Potential Change Items

Owner Change Orders

Owner Change Transmittal

Request For Payment

INVOICE2

INVOICE1

RFP Detail

Notes

Attachments

Status SUBMITTED

Vendor: Libra Development Corporation

Contract: LIBRA0000000000000003

Invoice No: INV0ICE1

Invoice Date: 10/4/2013

Due Date: 10/May/2013

Post Date

Description: JSP Invoice

Amounts		Previously Certified Amounts	
Net Amount	159.30	Net Amount	0.00
Tax Amount	0.00	Tax Amount	0.00
Invoice Amount	159.30	Invoice Amount	0.00
Retainage Amount	17.70	Retainage Amount	0.00
Release Amount	0.00	Release Amount	0.00
Gross Amount	177.00	Work Completed	0.00

Schedule of Values																		
Task Code	Task Name	Contracted Quantity	UOM	Rate	Amnt	Previously Certified Quantity	Previously Certified Amount	Completed Quantity	Current Quantity	Current Amount	Completed Amount	Retainage %	Previous Retainage Amount	Retainage Amount	Total Retainage Amount	Previous Release Amount	Outstanding Release Amount	Release Amount
TASK1 task1		NA	0.000	10,000.00		0.00		0		177.00	177.00	10	0.00	17.70	17.70	0.00	0.00	0.00

Once the RFP is **submitted**, the **[POST]** button will be available to any users who have been assigned 'Unrestricted' access. Posting in PM JSP will generate the same Posting Reports as its FORMS counterpart.

The **[VOID]** button is available on a POSTED payment request when the user is assigned 'Unrestricted' field security to this button. Printing of voiding reports is done in the FORMS version for the time being, similar to the Subcontract Voiding reports for PM JSP.

Viewing Compliance Information

Compliance Status										
Vendor Name	Compliance Type	Ins. Comp. Name	Certificate Number	Certificate Location	Start Date	End Date	Amount	Compliant		
Aethna Insurance	Bonded	AXA Insurance	AE100	Safe	01/Jan/2010	31/Dec/2012	100.00	Y		
Aethna Insurance	QA Test	APX Insurance	APX100	Office Safe	01/Jan/2010	31/Dec/2013	500.00	Y		
American Gas Supply Co.	T1	AXA Insurance	AXA1	Safe			200.00	Y		
Eagle Investments Company	Bonded	Non-applicable	*		01/Jan/2010	12/Dec/2014		N		
Twain Alliance - Massachusetts	Testing Compliance Code	Non-applicable	*					N		
Twain Alliance - Massachusetts	Lien Waiver	Non-applicable	*		06/Jan/2011	28/Jan/2011		N		
Total (6 rows)							800.00			

From the xProjects Manager Treeview, select the Compliance Status node. This will open a log of compliances and their related status. These are company level compliance codes, and the log shows the compliance status at the current time.

As a Vendor/Subcontractor to the project this log will display all compliance code applicable to your company. As the General Contractor this log displays all vendor/subcontractor company level compliance codes.

As with any other log any of the columns can be sorted, just by double clicking on the column title and of course the log can be customized to your own layout in the Log Builder.

Contract Forecasting and PCI Projection

The Contract Forecast with PCI Projections may include Risk Management amounts (entered via the PCI Projection screen), which are not included in the FORMS Contract Forecast. The main differences between the two forecasts apart from several additional key figures included in the Contract Forecast with PCI Projections, is the determination of some key figures which may include amounts for risk management. Some of these include: Projected Cost Budget, Projected Cost Forecast, Projected Bill Budget, Pending Co (Revenue side), Revenue and Projected Profit.

The Contract Forecasting JSP function is governed by the standard CMiC rules in the Job Costing Control File which may restrict updating of forecasts to the defined Year/Period. The screen has the functionality that is currently available by the following buttons on the FORMS version of the Contract Forecast screen: **[Store Forecast]**, **[Clear Overrides]** and **[Refresh]**.

The PCI Projection can be accessed by drilling down on change orders amounts on a phase/category (Bill code) line in the forecast. It also includes a Risk Analysis section. Further drill down in the PCI projection will take you to the Potential Change Items (PCIs) assigned to the selected Job/Phase/Category combination of the forecast line.

[Store Forecast] – Button

The **[Store Forecast]** button is visible to those users with the PM role privilege set to 'Y' (standard Treeview path: *xProjects > Security > Project Roles*). The default is unchecked, and the button will not be visible to any of the system users until assigned to specific roles.

This function will store the forecast details as a snapshot for the Contract or Controlling Job as queried on the screen in a table named **JCONTFORECAST_JSP_ARCHIVE**. This stored data from PMJSP Contract Forecasting may be used for any analysis in the future.

Users must note the following:

1. When selecting the 'Contract Code' option and querying the stored forecast, only those details for the specific contract are queried and displayed. The 'Archive' function will store all these records in the table.
2. When a forecast is queried for a 'Controlling Job', then 'Archive' function will store details as queried for all main/sub jobs, regardless of the Contract Code.
3. Users may press the 'Archive' button as many times as required, and on a single day, the records for the Contract/Controlling Job will be overwritten and the net result will be one set of record per day will be stored on the table.
4. Subsequent pressing of the 'Archive' button on the following days will store new set of archive details with the audit information of archive date with time.
5. Any overrides must be committed and then re-queried and 'archived' again, in order to update the archive data.

Performing Contract Forecasting using Contract and Job Codes

There are two ways to perform contract forecasting: using the Contract code or using the Controlling Job option.

Contract Code:

Users can select the required **Contract** code from the LOV to display the bill codes related to the specific contract. However, more than one entry is possible when sub jobs are set up with their own billing contracts.

For Example:

Job Code	Controlling Job	Billing Contract
1491523M	ALL	1491523M
1491523-S1	1491523M	1491523M
1491523-S2	1491523M	1491523M
1491523-S3	1491523M	1491523-S3

In the case of the Contract setup shown above, there will be two entries and users will have to forecast them individually.

Controlling Job Option:

If users select a **Job** code from the LOV (theoretically, there can only be one controlling job in the list, as a project is always mapped with a single job), the **Contract** code field will be cleared and upon execution, all bill codes related to the billing contracts under this controlling job will be retrieved.

Selecting a Job code facilitates the forecasting of all billing contracts under a Controlling job at once.

Users can review, refresh, override and store forecasts, when using this controlling job mode as well. All the standard functions of forecasting are applicable to this mode as well.

NOTE: The Contract Code column in the Bill Codes (Filtered) section would display the related contract code against each of the bill code records. Field security on the 'Contract Code' column is set to 'Hidden' for the role 'ALL'. Users must set this value as 'Unrestricted (Read-Only)' in order to make this column visible in the

forecasting screen. If required, users may also set the field security at User Role levels, if required to be 'Hidden'.

Show – Checkboxes

- Zero Cost Lines, when checked, show lines with 'Zero' cost
- Zero Cost and Revenue Lines, when checked, show lines with either 'Zero' cost or 'Zero' Revenue

Hide – Checkbox

- Zero Projected Cost Lines, when checked, do not show lines with 'Zero' Projected Cost

Notes:

- Time Phased Budgeting has been deprecated.
- In the Contract Forecasting screen, Billed transactions which are un-posted or posted will be shown in the drill-down as "Billed". Only billed and posted amounts will be shown at the upper level (as Billed to Date). The posting date will determine whether the transaction shows for the contract forecast period that is entered.
- Notes can be carried forward from one period to the next if the JC Control flag “**Notes to be Carried Forward through Periods**” is checked. This flag is located on the Forecasting tab of the JC Control screen in FORMS version.
- Included in features is the ability to query and to [Send to Spreadsheet] in the transactions popup of the Contract Forecast. Field security can be set on the [Send to Spreadsheet] button in this popup screen to limit user access to perform this function.

NOTE: Override flag indicators (Y/N) have been added to the spreadsheet for Cost To Complete, Projected Cost Forecast, Projected Cost Forecast (Including Pending CO), and Revenue Forecast. The indicator is located in the column beside each column named here.

	A	B	C	D	E	F	G	H	I	J	S	T	U	V	AC	AD	AK	AL	Rev
	Freeze	Bill Code	Contract	Job	Phase	Name	Category	Phase Type	Type	Method	Cost to Complete	Override Y/N	Projected Cost Forecast	Override Y/N	Proj Cost Forecast (Incl. Pending CO)	Override Y/N	Revenue Forecast	Override Y/N	
1	N	BASIC-S1_BASIC	BASIC-S1	62000	Finish Car F1		PCCO	A			11 Y		17691 Y		17691 Y		25000 Y		
2	N	BASIC-S1_BASIC	BASIC-S1	62000	Finish Car G1		COST	A			0 N		22801.01 N		22801.01 N		0 N		
3	N	BASIC-S1_BASIC	BASIC-S1	62000	Finish Car L1		COST	U			0 N		0 N		0 N		0 N		
4	N	BASIC-S1_BASIC	BASIC-S1	64000	Arch Woo F1		COST	A			0 N		18184.8 N		18184.8 N		0 N		
5	N	BASIC-S1_BASIC	BASIC-S1	64000	Arch Woo G1		COST	A			0 N		90000 N		90000 N		0 N		
6	N	BASIC-S1_BASIC	BASIC-S1	64000	Arch Woo L1		COST	U			165 N		194580 N		213940 N		-63123.13 N		
7	N	00000-0_BASIC	BASIC	00000-01	Segment 1	3	COST	A			0 N		990 N		990 N		0 N		
8	N	01-00-0_BASIC	BASIC	01-00-01	Third Level	1	COST	A			0 N		222676 N		271976 N		110400 N		
9	N	01-00-0_BASIC	BASIC	01-00-01	Third Level	3	COST	A			0 N		199240.12 N		234140.12 N		261355.45 N		
10	N	01-00-0_BASIC	BASIC	01-00-01	Third Level 1.47E+15		COST	A			0 N		146480 N		146480 N		104006 N		
11	N	01-00-0_BASIC	BASIC	01-00-01	Third Level	3000	COST	A			0 N		137800 N		137800 N		55400 N		
12	N	01-00-0_BASIC	BASIC	01-00-01	Third Level CDI-INSURANCE		COST	A			0 N		130856.9 N		130856.9 N		0 N		
13	N	01-00-0_BASIC	BASIC	01-00-01	Third Level NOSC		COST	A			22 Y		22 Y		22 Y		2750 Y		
14	N	062000_F BASIC	BASIC	62000	Finish Car F1		COST	A			0 N		859588.8 N		1050488.8 N		265700 N		
15	N	062000_C BASIC	BASIC	62000	Finish Car G1		COST	A			0 Y		795712.78 Y		1050587 Y		1853830.34 N		
16	N	062000_L BASIC	BASIC	62000	Finish Car L1		COST	U			0 N		518543.11 N		540543.11 N		204520 N		
17	N	064000_F BASIC	BASIC	64000	Arch Woo F1		COST	A			88 Y		50488 Y		62488 Y		1100700.17 N		

- In the Contract Forecast, the Projected Cost Forecast amount will show in red and show a hint line when the value does not match with the Cost to Complete override amount entered. This will be evident when new costs are brought in and the forecast is refreshed.
- A **Phase Type** column exists, but initially has been set to 'Hidden' on the *ALL* role (standard Treeview path: *xProjects > Security > Role Maintenance*). Field security can be applied, if desired. Sorting and filtering can be used on this column. It is also included in the [Send to Spreadsheet] output.
- A Spent/Committed column is included in the Internal Change Order popup of the Contract Forecast.

- When the JC Control flag '**Copy Last Stored Forecast**' is checked, and if any overrides are made to the Cost to Complete column, then those overrides will be brought forward to the next period upon the very first entry. Users can again override the Cost to Complete amount and commit. Any subsequent new period entry will copy the previous period forecast details along with the overrides. If the [**Clear Overrides**] button is pressed, then any overrides to the Cost to Complete and the Projected Cost Forecast columns during this period will be removed and the numbers will be reverted to the previous period level. This is only applicable to 'A' lines.
- Included a **Pending Internal Change Order Cost to Complete** column to the Contract Forecast. This column is used in calculations instead of the original Pending Internal PCI column.
- **Spent/Committed Total** is a display-only field and is simply the total spent/committed (including spent/committed against pending change orders) against the bill code in question. Field security exists for this column (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Contract Forecast 1*).
- **Spent/Committed (In-Scope)** is the spent/committed (excluding spent/committed against pending change orders) against the bill code in question.
- The **Actual Cost** represents the Spent Amount (posted Costs) for the current job. Field security can be applied to this column to make it 'Hidden' or 'Unrestricted (Read-only)'.
- Field security has been added to the '**Detail Cost To Complete**' column (with search icon) on the Contract Forecast screen (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Contract Forecast 1*). This is to add more flexibility in handling the 'Cost To Complete' overrides. This allows users to set field security on the existing 'Cost To Complete' field, so that direct override into the field from main screen is NOT allowed, but users are allowed to enter overrides using the Cost Detail popup.
- Field security has also been added to the [**Contract Summary**] button on the Main Toolbar. The possible setting is 'Unrestricted' or 'Hidden'.

[Forecast Comments] – Button

The [**Forecast Comments**] button will display a popup window with any underlying User Defined Fields that are defined (header and detail level UDFs) in the Forecast UDF. Field security can be applied to the [**Forecast Comments**] button (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Contract Forecast 1*).

Forecast Comments are tied to each forecast period, for the current contract. Editing of the UDFs in the Forecast Comments is allowed only for forecast periods after and including the JC Control forecast period.

PCI Projection as Sigma Grid

PCI Projection - Approved and un-posted PCIs

Save Cancel Refresh Clear Overrides Totals Send To Spreadsheet

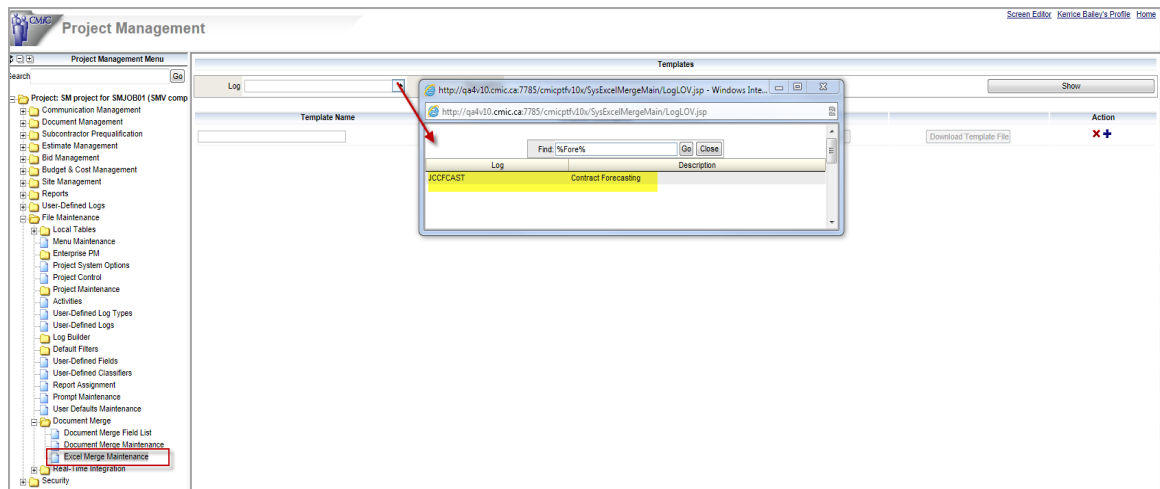
Contract V10XJOB1 Year 2013 Period 6

F...	CO	Status	PCI #	PCI Description	Phase Line Item Description	Company	Phase Code	Category	Cost Budget...	Cost Budget % at Risk from PCI	Revised Cost Budget	Spent/Committed	% Co...	Cost To Complete	Projected Final Cost	Submitted/Projected Revenue Value % from PCI	Re Bu
SUST	APPROVED	002TRF	test	Third Level Phase - # 2	Arch Woodwork		01-00-02	4000	3,400.00	0	3,400.00	0.00	0	0.00	0.00	-2,400.00	
SUST	APPROVED	002TRF	test	Arch Woodwork			064000	G1	0.00	0	0.00	0.00	0	0.00	0.00	2,400.00	
SUSE	APPRV	007EXT	Check for Modify PCI	Multiple			MULTIPLE	4000	6,000.00	0	6,000.00	0.00	0	6,000.00	6,000.00	6,000.00	
SUSE	APPRV	012EXT	Send RFQ email to pr...	Finish Carpentry	Parrish Construct...		062000	G1	55,290.00	0	55,290.00	0.00	0	55,290.00	55,290.00	55,290.00	
SUSE	APPRV	018EXT	check for calculating	Third Level Phase - # 2			01-00-02	4000	132.00	0	132.00	0.00	0	132.00	132.00	418.00	
SUSE	APPRV	018EXT	check for calculating	Third Level Phase - # 2			01-00-02	5000	240.00	0	240.00	0.00	0	240.00	240.00	760.00	
SUSE	APPRV	018EXT	check for calculating	Finish Carpentry			062000	L1	2,400.00	0	2,400.00	0.00	0	2,400.00	2,400.00	7,600.00	
SUSE	APPRV	024EXT	Use PCI Detail Status	Third Level Phase - # 2			01-00-02	4000	67,000.00	0	67,000.00	0.00	0	67,000.00	67,000.00	67,000.00	
SUSE	APPRV	025EXT	Use PCI Detail Status	Arch Woodwork			064000	G1	26,000.00	0	26,000.00	0.00	0	26,000.00	26,000.00	27,000.00	
SUSE	APPRV	027EXT	test	Finish Carpentry			062000	F1	42,000.00	0	42,000.00	0.00	0	42,000.00	42,000.00	42,000.00	
SUSE	APPRV	031EXT	Ensure that the Title i...	Arch Woodwork			064000	G1	10,000.00	0	10,000.00	0.00	0	10,000.00	10,000.00	10,000.00	
SUSE	APPRV	034EXT	test	Finish Carpentry			062000	G1	3,200.00	0	3,200.00	0.00	0	3,200.00	3,200.00	3,200.00	
SUSE	APPRV	040EXT	12.70436 - Ball in Cou...	Third Level Phase - # 2			01-00-02	4000	26,133.52	0	26,133.52	0.00	0	26,133.52	26,133.52	26,133.52	
SUSE	APPRV	040EXT	12.70436 - Ball in Cou...	Finish Carpentry	Gladstone Design...		062000	L1	14,000.00	0	14,000.00	0.00	0	14,000.00	14,000.00	14,000.00	
SUSE	APPRV	040EXT	12.70436 - Ball in Cou...	Arch Woodwork	Shelcom Partner...		064000	G1	11,500.56	0	11,500.56	0.00	0	11,500.56	11,500.56	11,500.56	
SUSE	APPRV	042EXT	review 12.70436	Third Level Phase - # 2	Differential Desig...		01-00-02	4000	12,000.00	0	12,000.00	0.00	0	12,000.00	12,000.00	12,000.00	
SUSE	APPRV	043EXT	Ball in Court and My...	Finish Carpentry	Parrish Construct...		062000	G1	21,000.00	0	21,000.00	0.00	0	21,000.00	21,000.00	21,000.00	
SUSE	APPROVED	051EXT	pci classifiers	Finish Carpentry			062000	L1	2,000.00	0	2,000.00	0.00	0	2,000.00	2,000.00	2,000.00	
Total									302,296.08		302,296.08	.00		296,896.08	296,896.08	305,902.08	

Standard Treeview path: xProjects > Budget & Cost Management > PCI Projection

This is an example of the PCI Projection screen. Field security exists on several columns (standard Treeview path: xProjects > Security > Role Maintenance – Programs/PCI Projection). Clicking the [Totals] button will show all the Amount columns in a pop-up window.

Contract Forecasting with PCI Projections – MIP Template



Contract Forecasting with PCI Projections now has Send to Spreadsheet functionality that can be used with MIP (Microsoft Integration Program). Users can now create their own templates for the Contract Forecast. The Log to select in the Excel Merge Template screen is 'JCCFCAST – Contract Forecasting'.

Modified Override Calculations

Modified override calculations of Cost to Complete, Projected Cost Forecast and Projected Cost Forecast Including Pending PCI and included overridden Cost to Complete amount while calculating revenue.

Override calculations are completed as follows:

1. Cost to complete = Current Budget – Current Spent (i.e. In Scope Spent Amount) minus Internal PCI Cost to Complete amount if the Change Management Control flag “Internal change orders update budget” is unchecked.
2. If ‘Allow Negative Cost to Complete’ is set on the Job Costing Control then if Cost to Complete calculation results in Cost to Complete being negative, the system will make it zero. The user is still allowed to override it to a negative value.
3. Revenue Forecast: For COST billing type, bill rate is also applied to the PCI Cost to Complete amount. Since PCI projections do not have quantities and are only based off of amounts, for the PCI Cost to Complete, the default line (without the job/phase/cat) is read and applied to the PCI Cost to Complete amount. So effectively the Revenue Forecast now is: Revenue forecast + (PCI Cost to Complete X Bill Rate) for COST type billing lines.

Expenditure Authorization

After a project and budget have been entered and saved, an expense authorization form can be filled out. In general, this form will allow selection of a list of work breakdown structure (WBS) codes and expense authorization amounts which will then be routed through Workflow for approval. When the approval takes place, the expense authorization amount will be updated at the project level. If an attempt is made to Spend and/or Commit above this amount at the project level, then further action is halted and an alert is sent to a pre-determined individual. Notes and attachments can also be added to an Expense Authorization.

Completing an Expense Authorization Request

Expense Authorization Header

From the Expense Authorization Log, click [**Add Expense Authorization**]. Most of the data defaults from the project and the associated job.

The EA Document Code is auto-numbered within the project with the option of changing it.

Select the EA Type, Funding Type and enter Comments if necessary. The Description field is retrieved from the Project Scope/Description on the Project Maintenance screen. Press [**Save**].

NOTE: The PM Role privilege '**Expense Authorization - Create Close Out**' has been added to allow the user with the privilege to create Expense Authorization transactions of the EA Type 'Close Out'. By default, the privilege is not set.

Review Approval

This sub-section displays the Action, Project Role, Contact name, Date and Time approved, user and Notes. These fields are updated from the WorkFlow approval process. There could be multiple entries if more than one approver is required.

Key Players

This section lists all defined key players for the project with their phone numbers.

Budget and Cost Summary

Expense Authorization Form

Project Management Menu

Search: [] Go

Project: Project 1 - SUS (SUSPROJ01)

Subcontract Change Orders

Subcontractor SOV

Potential Change Items

Owner Change Orders

Owner Change Transmittal

Request For Payment

Compliance Status Log

Expense Authorization

BA01

Cost Status Query

Budget Status Query

PCI Projection

Contract Forecasting

Site Management

Reports

User-Defined Logs

File Maintenance

Security

Header

Project Number: SUSPROJ01

Project Title: Project 1 - SUS

Client: Guelph University

PROJECT MANAGER

Date: 12/Aug/2011

Attachments: [x]

Budget and Cost Summary

Save Cancel

Summary

Cost Category	Current Approved Budget	Amount this Request	Approved Commitment	Pending Commitments	Estimate At Completion	Actual Cost
1000 - Labor	0.00		700,000.00	2,000.00	800,000.00	203,185.00
2000 - Subcontracts	0.00		422,735.49	446,312.51	647,220.49	245.00
3000 - Equipment	0.00		280.00	9,312.00	200,000.00	
4000 - Materials	0.00		35,080.00	46,728.42	60,626.42	
8000 - Grp Max. for Adjustnts - Grp1	0.00		0.00	134,853.76	200,000.00	
Grand Total	0.00	0.00	1,158,095.49	639,206.69	2,197,846.91	403,430.00

Detail

Cost Category	Current Approved Budget	Amount this Request	Approved Commitment	Pending Commitments	Estimate At Completion	Actual Cost	Notes
1000 - Site Office	0.00		0.00		400,000.00	200,000.00	
1000 - General Conditions	0.00		700,000.00	2,000.00	200,000.00	3,185.00	
1000 - Concrete	0.00				200,000.00		
Sub Total	0.00	0.00	700,000.00	2,000.00	800,000.00	203,185.00	
2000 - Site Office	0.00		147,155.09	377,204.51	176,500.09	245.00	
2000 - Concrete	0.00		4,600.00	5,800.00	207,300.00		
2000 - General Conditions	0.00		270,980.40	63,308.00	263,420.40		
Sub Total	0.00	0.00	422,735.49	446,312.51	647,220.49	245.00	
3000 - General Conditions	0.00		280.00	9,312.00	200,000.00	0.00	
Sub Total	0.00	0.00	280.00	9,312.00	200,000.00		
4000 - General Conditions	0.00		15,000.00	2,500.00	15,000.00		
4000 - Concrete	0.00		20,080.00	44,228.42	45,626.42		
Sub Total	0.00	0.00	35,080.00	46,728.42	60,626.42	0.00	
8000 - General Conditions	0.00				200,000.00		
8000 - Concrete	0.00			134,853.76	200,000.00	200,000.00	
Sub Total	0.00	0.00	0.00	134,853.76	400,000.00	200,000.00	

Cost Category

This is the phase/category

Current Approved Budget

Current budget amount

Amount this Request

Is the expense authorization request amount and is manually entered.

Approved Commitment

Refers to the combination of posted contracts (subcontracts), posted PCIs and purchase orders.

Pending Commitments

Refers to un-posted contracts, all pre-pending, pending and un-posted approved PCIs.

Estimate at Completion

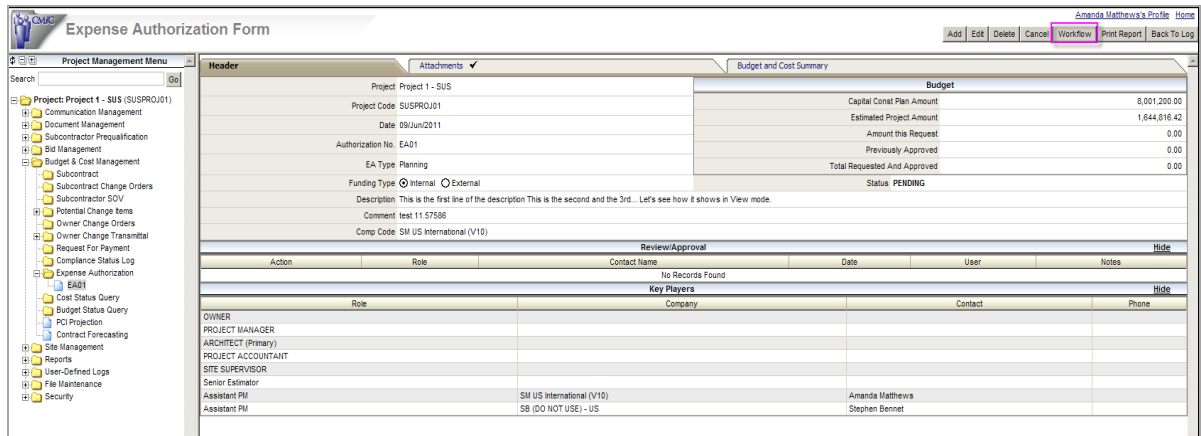
This is the Projected Cost.

Actual Cost

Refers to what has been Spent to Date

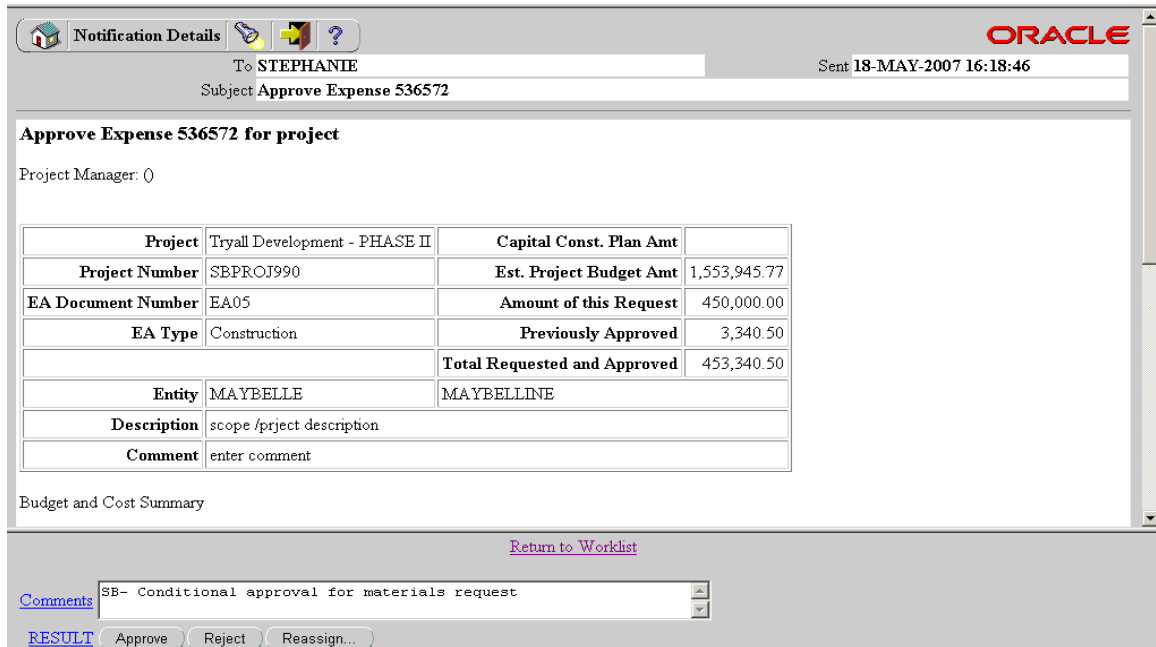
Enter the Request Amount where needed and [Save].

Go back to the EA Header tab and click the **[Workflow]** button to submit the form for approval through the Workflow process.



Once the Expense Authorization request has now been sent to Workflow for approval, the status is updated from 'Pending' to 'Submitted'. Any attachments will be submitted as well, and will be part of the workflow notification.

Below is a screenshot of how the Workflow approval screen might look:



After the approval/rejection, the JSP Expense Authorization record reflects the approval in the **Review Approval** section of the Header. Notice that the status has changed from 'Submitted' to 'Approved'.

Site Management

Daily Journal (Daily Report)

The daily journal is a record of the day's activities on the job site. This program allows the user to enter the standard information such as weather conditions, plus other organization specific information, if required. This type of information is very useful as backup if you are asked to explain costs or justify delays to the project.

The screenshots shown in the following sections contain only the default configuration fields. The overall information available to enter on the main screen may be more than shown.

When first creating a daily journal, the user has the choice of creating the journal from scratch or copying a previous journal.

Daily Journal Security

xProjects role security privileges have been created to allow/disallow user access to the Daily Journal tabs:

Add/Remove privileges from the PM_ADMIN Role	
<div> <div>Select All</div> <div>Unselect All</div> <div>Update</div> <div>Back</div> </div>	
Privilege	Granted
Access to Unsubmitted Records Of The Same Partner	<input type="checkbox"/>
Action Items - Create Public Items	<input type="checkbox"/>
Address Code - Create On The Fly	<input type="checkbox"/>
Communication - Create	<input type="checkbox"/>
Contacts - Activate/Inactivate	<input type="checkbox"/>
Contacts - Create	<input type="checkbox"/>
Contacts - Delete	<input type="checkbox"/>
Contacts - Edit	<input type="checkbox"/>
Daily Journal - Create	<input type="checkbox"/>
Daily Journal - access to Billing Units Complete tab	<input type="checkbox"/>
Daily Journal - access to Daily Work Plan tab	<input type="checkbox"/>
Daily Journal - access to Field Force tab	<input type="checkbox"/>
Daily Journal - access to Labor tab	<input type="checkbox"/>
Daily Journal - access to Material tab	<input checked="" type="checkbox"/>
Daily Journal - access to Own Equipment tab	<input type="checkbox"/>
Daily Journal - access to Safety tab	<input checked="" type="checkbox"/>
Daily Journal - access to Tasks tab	<input type="checkbox"/>
Daily Journal - access to Trade Equipment tab	<input checked="" type="checkbox"/>
Daily Journal - access to Units Complete tab	<input type="checkbox"/>
Daily Journal - access to Visitors tab	<input checked="" type="checkbox"/>

Example of Daily Journal Security Privileges

Field security also exists on many of the Daily Journal fields (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Daily Journal*).

Creating a new Journal Report

To create a new journal, select the Daily Journal node under the Site Management option on the Treeview. This will open a log of all existing Daily Journals. Use the **[Add Daily Journal]** button at the top of the log to start the new journal process.

Once this screen is open, you have two choices: create the journal from scratch, or copy the information from a previous journal. To Add from scratch, enter the journal information as required in the open section of the screen and press the **[Save]** button.

[Send I/O Email] for Daily Journals – Button

The **[Send I/O Email]** button is available for submitted and un-submitted daily journal records.

The security of the button is controlled by the project role privilege ‘Send I/O Email’ as with other similar objects (standard Treeview path: *xProjects > Security > Project Roles*).

The I/O Email feature can be used to send Notes and Attachments to an existing submitted or un-submitted daily journal by using the project, contact code and daily journal ID in the subject line of the email.

When an I/O is sent for the Daily Journal, the following email is sent:

From: CMIC I/O TestV101 [cmicotest2008@cmic.ca]
 To: Stephanie Bromfield
 Cc:
 Subject: SUSPROJ01SMV105B JOURNAL 11.57112 Daily Report for 08-JUN-11

Daily Report 11.57112

Prepared By	Amanda Matthews
Date	2011-06-08 12:00 AM
Project	Project 1 - SUS

Prepared By: Amanda Matthews
 Date: 2011-06-08 12:00 AM

Note: Please ensure that you leave "SUSPROJ01SMV105B JOURNAL 11.57112" in the subject line of all emails you send related to this Daily Report. Replies must be **above** the original message. Attachments will also be accepted.

The highlighted note in the print above is the instruction for sending notes and attachments to the record.

From: Stephanie Bromfield
 To: cmicotest2008
 Cc:
 Subject: RE: SUSPROJ01SMV105B JOURNAL 11.57112 Daily Report for 08-JUN-11

Message | Threshold.doc (142 KB) **Attachment**

Addition of attachment to DJ - test **Note**

From: CMIC I/O TestV101 [mailto:cmicotest2008@cmic.ca]
 Sent: Wednesday, June 08, 2011 11:21 AM
 To: Stephanie Bromfield
 Subject: SUSPROJ01SMV105B JOURNAL 11.57112 Daily Report for 08-JUN-11

Daily Report 11.57112

Prepared By	Amanda Matthews
Date	2011-06-08 12:00 AM
Project	Project 1 - SUS

Prepared By: Amanda Matthews
 Date: 2011-06-08 12:00 AM

Note: Please ensure that you leave "SUSPROJ01SMV105B JOURNAL 11.57112" in the subject line of all emails you send related to this Daily Report. Replies must be **above** the original message. Attachments will also be accepted.

Notes and Attachments cannot be sent to a locked daily journal, unless the user also has the 'Admin' flag checked on his xProjects security role. Otherwise, the system sends back an email indicating that the Daily Journal is locked and notes/attachments can no longer be added.

Copy Previous Journal – Button

To copy from a previous record, use the [Copy Previous Journal] button at the top of the screen.

This will display a box where you can select from which previous journal to copy and which information to copy.

http://testv10.cmic.ca:7785/?compCode=SUS&projOraseq=235148&djOraseq=272470&djId=02-04-11....

Source Daily Report

Daily Journal: 00000002 04/FEB/2011 Amanda Matthews

Detail To Copy

General <input checked="" type="checkbox"/>	Materials <input checked="" type="checkbox"/>
Labor <input checked="" type="checkbox"/>	Visitors <input checked="" type="checkbox"/>
Only Labor Force <input checked="" type="checkbox"/>	Safety <input checked="" type="checkbox"/>
Field Force <input checked="" type="checkbox"/>	Notes <input checked="" type="checkbox"/>
Only Field Force Companies <input checked="" type="checkbox"/>	Attachments <input checked="" type="checkbox"/>
Own Equipment <input checked="" type="checkbox"/>	Phase Units <input checked="" type="checkbox"/>
Only Equipment On Job <input checked="" type="checkbox"/>	
Trade Equipment <input checked="" type="checkbox"/>	
Tasks <input checked="" type="checkbox"/>	

Proceed Cancel

- Select the Journal to copy from by selecting the correct journal from the List of Values.

- Use the checkboxes to select the types of data that you want to duplicate.
- The **Phase Units** checkbox must be selected if the Phase units from the **Billing Units Complete** tab are to be copied. The default value is taken from the project level but can be overridden. During the copy process, if this checkbox is checked on the journal pop-up, only the phase codes and related data are copied, not the previous/entered quantities.

When complete, use the **[Proceed]** button to create the new Journal.

Adding Information to the Journal

Standard Treeview path: *xProjects > Site Management > Daily Journal*

Once the Journal has been created, you can add, modify or delete information in any one of the detail tabs. The **Safety** tab is a user-defined free-form classifier which is defined in the Forms version of Project Management. Security can be set for a number of these tabs, at the xProjects role level (Role Maintenance).

To add a new record to a section, use the 'Edit' link to open the fields. Use the icon to add a new row, or to remove a record. Once a section is complete save the records by using the 'Save' link. Only one tab can be edited at a time. If another edit section is opened without saving the previous one, the system will automatically save the first section for you.

The **[Save Draft]** button, when pressed, will save the current data and then the screen is returned to edit mode so the user can continue entering data, compared with **[Save]** in which the record is saved but then the screen changes to view mode.

In view mode, the 'Units Complete Status' is displayed. It also shows on the log. The field is not updateable. When there are no units complete on a particular daily journal, the status is **EMPTY**, if there are un-posted units the status is **UNPOSTED** and if all units have been posted then the status is **POSTED**.

Once a journal is complete, it should be submitted to ensure that it cannot be changed or updated without the right privilege. To do this, use the **[Submit]** button at the top of the page. There is a Project Role privilege which determines whether or not a user can **SUBMIT** daily journal records (standard Treeview path: *xProjects > Security > Project Roles*). A submitted journal cannot be edited or deleted unless you have the privilege to do so.

General Information – Tab

The **General** tab's **Activity** and free-form (user-defined) fields are used to record the day's events.

In addition to the **Activities** field, you can add up to six user-defined fields using the Free Form Fields screen (program: PMFFSET), which can be found in the System module (standard path: *System > User Extensions > Free Form Fields*):

FREE FORM FIELDS CONFIGURATION

OBJECTS

View | Freeze | Detach | Search | Workflows | Report Options | Export | ECM Documents | User Extensions

Project Management Object

- Able & Billings - General Section
- Daily Report - General Tab**
- Daily Report - Safety Tab
- Grounds Up-Keep - General Section
- Patch Testing - General Section
- Project Only - General Section
- Safety Procedures - General Section
- Subcontract - Free Form Tab
- Super Checklist - General Section
- Super's checklist - General Section
- TYPE1 Check List - General Section
- Type2 AZ - General Section
- cleaning - General Section

FIELDS

Search | Previous | Next | Workflows | Report Options | ECM Documents | User Extensions

Field 1 Prompt	Equipment(s)
Field 2 Prompt	Visitor(s)
Field 3 Prompt	Delivery(ies)
Field 4 Prompt	Self Performed work
Field 5 Prompt	Occasional Sub's Work
Field 6 Prompt	Mail Event(s)(Heath&Security)

Tasks – Tab

This tab allows you to record the number of workers and the man-hours worked.

The calculation of daily man hours is calculated as:

(Number of Workers X Man Hours) + (Number of Workers X OT Hours) + (Number of Workers X DOT Hours).

Total Regular Man-Hours = No of workers * Regular hours

Total OT hours = No. of workers * OT hours

Total DOT hours = No. of workers * DOT hours

Totals are kept both at the daily report level and the project level.

These three Total columns (Total Overtime Man Hours, Total Double Overtime Man Hours and Total Regular Man Hours) have field security with a default setting of 'Hidden' on the *ALL* role (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Daily Journal*).

Labor – Tab

Use this tab to record the hours worked by individual employees. Timesheets can be created using the [**Create Timesheet**] button. If your company is also running the CMiC Payroll system, you can save double entry of timesheets by submitting these timesheets directly to the payroll system.

Field security can be assigned to the [**Create Timesheet**] button, as well as the **Validate** and **Select All** checkboxes on this tab and Daily Journals.

The default value for the [**Create Timesheet**] button is set at 'Hidden' for the *ALL* role, and will need to be reset on the roles for users who were previously able to see the button.

Field Force – Tab

This tab allows for the recording of your own crews or subcontractor crews that worked on the job during the day. None of the fields are validated.

The Company field has an LOV that will display all the project contract companies to assist in recording the data. This field can also be directly typed in.

Own Equipment – Tab

This tab is designed to allow for the entry of your own corporate equipment. This information is designed to be used as a proof of equipment charges posted to the project.

The screenshot shows the 'Daily Report' interface. At the top, there are buttons for 'Get Equipment on Job' and 'Transfer Equipment', both highlighted with red boxes. Below these buttons is a table with columns: Select, Comp, Equip, Equip Name, Tran Code, Job, Phase, Cat, Hours, and Notes. The table contains one row with the following data: Select (checkbox), SUS, SUS-TRACT1, Tractor # 1, V10KJOB1, 062000, F1, and empty cells for Hours and Notes. The interface also includes a sidebar with a 'Project Management Menu' and a top navigation bar with various report and user management options.

The [**Get Equipment on Job**] and [**Transfer Equipment**] buttons are available while on the **Own Equipment** tab of Daily Journal in view mode.

[Get Equipment on Job] – Button

This action allows the system to pull in the list of equipment on the job from their current location. Thereafter, the user will exercise the option of transferring out any equipment if necessary.

[Transfer Equipment] – Button

This allows the movement of equipment from one job site to another, or from one location on a job site to another location on the same job site, and is used to keep track of where equipment is located.

This transaction is integrated with the Equipment Costing (EC) Module in Enterprise, as the EC Automatic Charge Out program is completely reliant on the actual location transfers for the appropriate job cost allocations for billing purposes. An actual transfer must occur for an automatic charge out to be created.

1. First select the equipment to be transferred.
2. Click the [**Transfer Equipment**] button.

- The Equipment Transfer pop-up window will be displayed. Enter the details for the transfer. The **Charge Job** flag must be checked if this transfer is to be included for automatic charge out:

The screenshot shows the 'Daily Report' interface with a 'Transfer Equipment' pop-up window. The pop-up window has a title bar 'Transfer Equipment - Internet Explorer' and a URL. It contains a 'Transfer Equipment' table with the following data:

Line#	Transfer Date	Comp	Eqp#	Current Location	Start Date	New Location	Job	Phase	Cat	Charge Job
1	12/19/2016	SUS	SUS-TRACT	SUS-SITE01	08-Jul-2014	GENERAL	ANALYZE	GENERAL	4000	<input checked="" type="checkbox"/>

Below the table, there is a text field 'Equipment' with the value 'Tractor # 1'. The pop-up window also has 'Proceed' and 'Cancel' buttons.

- Click **[Proceed]**.

- When the transfer is successfully completed, a message will be displayed:

The screenshot shows the 'Daily Report' interface with a 'Message from webpage' dialog box. The dialog box has a title bar 'Message from webpage' and a URL. It contains a message 'Transfer was successful!' and an 'OK' button. The background interface shows the 'Transfer Equipment' table with the 'Charge Job' flag checked for the first row.

In addition, the Equipment Costing – Actual Location Transfer Posting Report (EM102) is available for printing in CMiC Forms version:

Action Edit Block Field Record Query Utility Help Window

System Tables Ma Clear Field TESTV10_X Posting Reports

Company

Company: SUS SB Urban Systems

Batch

Printed	Batch	Name	User	Date	Print	Delete
<input type="checkbox"/>	39472	Daily Report 5819486	SMUSER6	12/19/2016	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	31398	SMUSER6 2015-12-15 ACTLOC	SMUSER6	12/15/2015	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	31396	SMUSER6 2015-12-14 AC	SMUSER6	12/14/2015	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	31395	SMUSER6 2015-12-14 ACTLOC	SMUSER6	12/14/2015	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	31393	SMUSER6 2015-12-14 ACTLOC	SMUSER6	12/14/2015	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	21370	Daily Report 00000125	SMUSER7	08/20/2014	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	20745	EC equip transfer	SMUSER7	07/16/2014	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	20744	Daily Report 00000140	SMUSER7	07/16/2014	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	20743	Daily Report 6146969	SMUSER7	07/16/2014	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	20621	Daily Report 6388101	SMUSER7	07/09/2014	<input type="checkbox"/>	<input type="checkbox"/>

Process

User Extensions +

User Extension 1

User Extension 2

User Extension 3

User Extension 4

User Extension 5

User Extension 6

User Extension 7

More Extensions....

Related Screens +

Related Screen 1

Related Screen 2

Related Screen 3

Related Screen 4

Related Screen 5

Related Screen 6

Related Screen 7

More Related ...

SUS - SB Urban Systems

Page: 1 of 1
Date: 12/19/2016
Time: 09:33 AM

EQUIPMENT COSTING - ACTUAL LOCATION TRANSFER POSTING REPORT

Tran Num	Date	Transfer Ref.#	Equipment	Qty	Location	Company	Job	Phase	Category	Status	Customer
8810	12/19/2016		SUS-TRACT1		From SUS-SITE01 To GENERAL	SUS SUS	FORECST ANALYZE	064000 GENERAL	L1 4000		

END OF REPORT

Report Parameters

Batch:	39472	Run Date:	12/19/2016
Jobid:	1177595	Run Time:	09:33 AM
Report Code:	EM102	Operator:	SMUSER6

The transaction is also available in the relevant reports/queries in the Equipment Costing module. For example:

Equipment/Location

Company: SUS SB Urban Systems

Transaction Code:

Equipment Class:

Query By: Equipment

Equipment:

From Date: To Date:

Total Bulk Quantity:

History

From Date	Time	To Date	Time	Tran Code	Comp	Equipment	Location	Customer	Job	Phase	Cat	Exp Qty
12/19/2016	00:00				SUS	SUS-TRACT1	GENERAL		ANALYZE	GENERAL	4000	
12/14/2015	00:00			REV1	SUS	SUSEQUIP	SUS-SITE02	GUELPH	ANALYZE	CAULKING	3000	
07/08/2014	00:00				SUS	CYCLE-01	GENERAL	GUELPH	STDJOB	01-00-01	1000	
07/08/2014	00:00				SUS	CATERPIL	GENERAL	GUELPH	STDJOB	CAULKING	2000	
05/26/2014	00:00				SUS	SAND-MILL	QUARRY-2	SUNRISE	QUARRY	SANDPRD	PROD	
03/19/2014	00:00			REV1	SUS	SM-TRUCK	GENERAL	GUELPH	V10XJOB1	01-00-01	2000	
03/17/2014	00:00				SUS	FORKLIFT	GENERAL		STDJOB	01-00-02	3000	
02/21/2014	00:00				SUS	BICYCLE	GENERAL		FORECAST	01-00-02	4000	
01/08/2014	00:00			REV1	SUS	SM-VAN1	SUS-SITE01	GUELPH	V10XJOB1	062000	3000	
02/24/2012	00:00				SUS	SM-SAND2	QUARRY-2	SUNRISE	QUARRY	SANDPRD	PROD	

Equipment Name: Tractor # 1 Transfer Number:

Location Name: General Location Transaction Name:

Company Code:

Record: 1/? ... <OSC>

Trade Equipment – Tab

This tab gives you the facility to enter the types and quantity of equipment used by your subcontractors or rental equipment.

Materials – Tab

The **Materials** tab is for recording deliveries to the jobsite. You have the option of entering any of the fields. Again, this is meant as a log of details, you may wish to enter only your own material purchases, or deliveries of any materials, including subcontractor deliveries.

Visitors – Tab

This tab is for recording who visited the site during the day, the time they arrived and the reason for the visit. The **Visitor Name** field has an LOV to allow the user to select contacts from existing business partners, or to add them 'on the fly' using the **[Add New]** button (once the user has the appropriate security). You can also add a free-form Visitor Name.

Safety – Tab

Cancel

Save

Save Draft

Submit Journal

Copy Previous Journal

Back To Log

XP

Daily Journal

Daily Journal

Notes

Attachments

Not Submitted

Journal No. DAY-00001

Date 20122016 06 TUESDAY

Prepared By Databases Administrator

Sky Gloomy skies

Rain Day ☐

Units Complete Status Empty

Low Temperature TEST

Precipitation

High Temperature

Crew Code

Bulletin

Concrete

General

Tasks

Labor

Field Force

Own Equipment

Trade Equipment

Materials

Visitors

Safety

Billing Units Complete

Units Complete

Daily Work Plan

Date

Nov. 22, 2015

Incident Description

Timmy slipped on loose material and scraped his knee.

Parties Included

Timmy Bouch (laborer), Jenny Manner (site manager)

Action Taken

Jenny Manner was notified of incident due to her messy site, and disciplined.

Followup Required

Jenny's site will be inspected at random to ensure she continues to maintain her site.

This tab is used to enter safety related incidents on site for the specified date.

200 • Site Management

User Reference xProjects v10x

This tab's user-defined fields are set up using the Free Form Fields screen (program: PMFFSET), which can be found in the System module (standard path: *System > User Extensions > Free Form Fields*):

FREE FORM FIELDS CONFIGURATION

OBJECTS

- Project Management Object
- Able & Billings - General Section
- Daily Report - General Tab
- Daily Report - Safety Tab**
- Grounds Up-Keep - General Section
- Patch Testing - General Section
- Project Only - General Section
- Safety Procedures - General Section
- Subcontract - Free Form Tab
- Super Checklist - General Section
- Super's checklist - General Section
- TYPE1 Check List - General Section
- Type2 AZ - General Section
- cleaning - General Section

FIELDS

- Field 1 Prompt: Date
- Field 2 Prompt: Incident Description
- Field 3 Prompt: Parties Included
- Field 4 Prompt: Action Taken
- Field 5 Prompt: Followup Required
- Field 6 Prompt: I Can Write Anything Here

Billing Units Complete – Tab

This tab automatically displays all lines of a contract that are defined with the billing type of UPHS – “Phase Unit Billing”.

Each billing line will show the bill code, the bill code name, the billing Weight Measure, the contracted Units and the Previously Invoiced (Billed). There is one enterable field: ‘Today’s Units’.

The Job Billing ‘Prepare Bill’ reads the values entered on this tab as the units to bill when the billing is created. This is the ‘Override Qty’ column. This procedure will find the last daily journal where the date of the journal is not after the ‘Include up to date’ and bring the units from the journal into the bill.

Units Complete – Tab

Selecting Phases in the Units Complete Tab

In view mode of the Units Complete tab the **[Select Phases]** button is available and displays a multi-select LOV to allow adding of phases. The **[Select Phases]** button is enabled on the tab for ‘EMPTY’ and ‘UNPOSTED’ daily journal records.

When selecting phases, if there are more than 50 phases and the user opts to **[Select All]**, then a warning message is displayed, indicating that performance could be compromised.

In addition, a Delete Phase icon will display against the phases if the user has field security for it (i.e. value = Unrestricted). When the field security is set as 'Hidden' for the Delete icon, no red 'X' is shown against phases in view mode.

Use the **[Select Phases]** button to select the phases. Phases are commonly Unit or Productivity based, but if the associated Project Control (Defaults) flag is checked to include Amounts, then phases for Amount type are included.

The tab shows the job code (as there could be sub-jobs associated to the job on the project), the phase code, phase name, Crew Code, the phase WM, Today's Qty and the Phase Units To Date.

The **Crew Code** has an LOV and validation against 'Real Crews' defined in the Payroll module, and will only be mandatory if there are 'Real Crews' defined. This field will default to the Crew Code entered in the header of the Daily Journal. If Real Crews are not being used this field will not be visible to the user.

The **[Post Units]** button is displayed while in view mode and only on this tab.

The posting of the units will automatically create a JC batch number, and post all of the units entered just as if the Phase Units Complete had been entered via the 'Forms' version of this transaction.

The Notes field next to the Phase to Date can accommodate up to 2000 characters.

There is drill down capability on the Phase to Date column which will open a window with the following information: the first section will show the Job, Phase Code and Phase name from the record being drilled down on; the detail section will show Journal Number, Journal Date, Prepared By Name, Submitted (Yes or No), Transaction Qty, Posted Qty, Phase To Date Qty, WM and Note. Units not posted from the Daily Journal will show 'NA'.

Calculations

Forecasted Projected Qty = Budgeted Units (phase level)

Original Estimate Qty = Budgeted Units at the time the job is *started*, and remains unchanged throughout the life of the job.

When the **[Post Units]** button is selected if the value of Today's Qty + Phase to Date exceeds the Forecasted Projected Qty, then a warning appears:

“WARNING: One or more Phase to Date Quantities will exceed the Current Projected Quantity. Do you want to continue? YES or NO”

If the **[OK]** button is selected the posting process is carried through. If the **[Cancel]** button is selected the posting process is cancelled, and the record remains in the Units Complete tab (view mode).

Field Security in the Daily Journal

Field security can be set for the Labor tab - Expense Code, Quantity, Rate and Amount, and to Tasks tab – OT (overtime) and DOT (double overtime) fields.

Field security for the following columns in the Tasks tab: Total Overtime Man Hours, Total Double Overtime Man Hours and Total Regular Man Hours can also be set. These have a default setting of 'Hidden' on the *ALL* role.

Privilege to Edit Own Record

The xProjects security privilege: **'Daily Journal - Edit Own Records'** allows the Author of a Daily Journal record to edit the record once it is submitted, without requiring the 'UpdateAll' project role privilege to do so.

Deleting a Daily Journal

To delete a journal, use the **[Remove]** button at the top of the view page. This button is only available if the Daily Journal has not been submitted.

Printing the Journal

Sometimes it is necessary to have a hard copy of a journal. Any Journal regardless of the status can be printed. There are two different types of Journal Reports: one is a standard report type the other is a printable version of the screen. To print a journal report, open the view page of the required Journal and use the **[Print]** button. This brings up the standard printing dialog box and prints a pre-defined report. To create a printable copy of the screen, press the **[Printable]** button. This will build an HTML Page of the screen that can then be printed.

Daily Journal Audit and Email Notification for Changes

The screenshot shows the 'Contact Maintenance' window with the 'E-mail Notifications' tab selected. The 'Project Contact Info' section shows 'Object Description' as 'Daily Report'. The 'E-mail Notifications' table has columns for 'To', 'Cc', and 'All'. The 'To' column is set to 'None' for all rows. The 'Cc' column is set to 'None' for all rows. The 'All' column is set to 'None' for all rows.

Object Description	To	Cc	All
Communication	None	None	None
Daily Report	None	None	None
Field Work Directives	None	None	None
Issue	None	None	None
Meeting	None	None	None
Notice	None	None	None
Punch List	None	None	None
Request For Information	None	None	None
Transmittal	None	None	None

If a user other than the author of a Daily Journal makes any change to it, an email notification will be sent to the author, once the **Email Notification** tab (Daily Report object must be set to **'Modified'**) of his Project Contact record is configured accordingly.

The notification e-mail will contain detailed information when the header gets updated (who made the change and when, field, old value, new value):

The email notification is from 'CMIC PTF2006 Notifications [cmicptf2006@cmic.ca]' to 'Stephanie Bromfield'. The subject is 'Daily Journal SBDLY004 has been modified'. The body contains the following information:

Daily Journal

Date Sent: Thursday July 30 2009 at 1:36 PM
Project: check defaults of key players- very long name for a project - extending the description to see how much is printed on a document
Journal ID: SBDLY004
To: MAHATMA GHANDI [stephanie.bromfield@cmic.ca]

Daily Journal SBDLY004 was modified by MAHATMA GHANDI on Thursday Jul 30, 2009 13:36

1. Date: 27-NOV-06 ==> 14-NOV-06

[Click here to log into CMiC Collaboration](#)

If anything changes in the detail tabs, the information will be limited to the author, date and the tab where the change has occurred:

The email notification is from 'CMIC PTF2006 Notifications [cmicptf2006@cmic.ca]' to 'Stephanie Bromfield'. The subject is 'Daily Journal SBDLY001 has been modified'. The body contains the following information:

Daily Journal

Date Sent: Thursday July 30 2009 at 2:04 PM
Project: check defaults of key players- very long name for a project - extending the description to see how much is printed on a document
Journal ID: SBDLY001
To: MAHATMA GHANDI [stephanie.bromfield@cmic.ca]

Daily Journal SBDLY001 was modified by Mavis Haynes on Thursday Jul 30, 2009 14:04

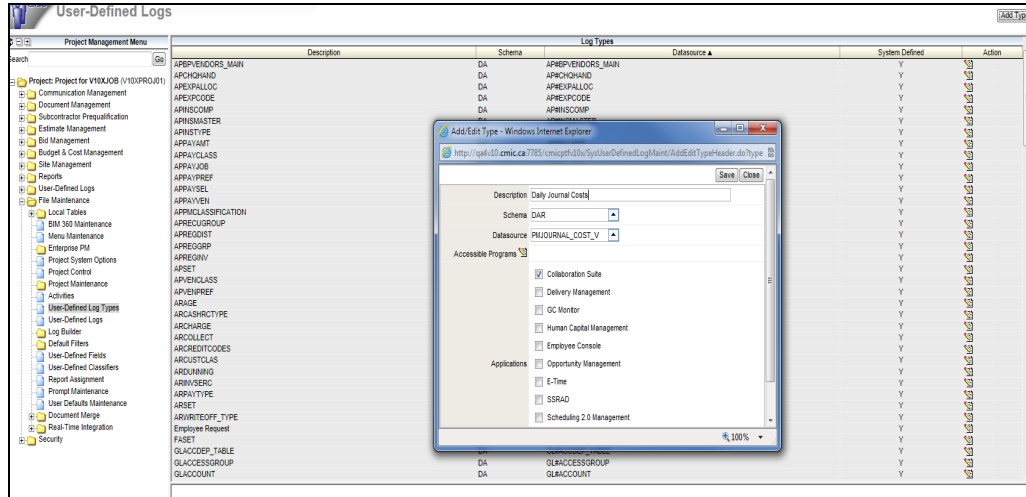
The information on the General tab has been modified

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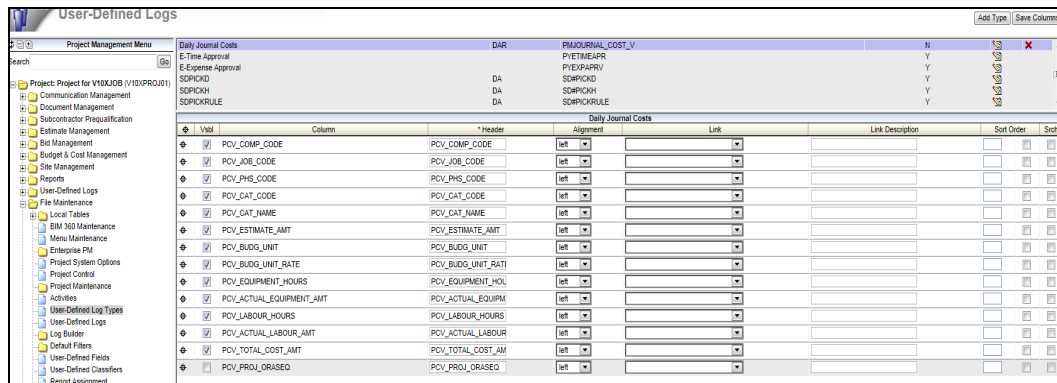
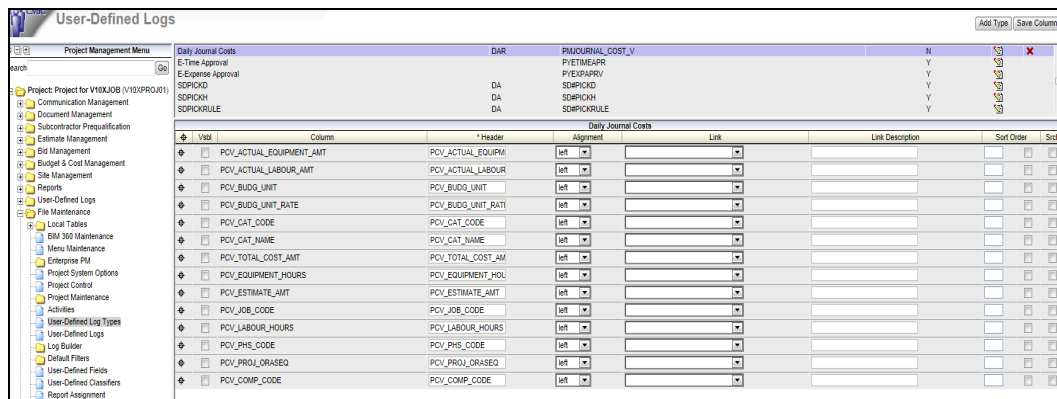
Daily Journal Log View for Equipment and Labor Costs

A new Daily Journal view associated with Equipment and Labor costs is now available. The view has been defined for use in User Defined Logs. The source name is PMJOURNAL_COST_V under schema DAR.

For example, in the screen shot below a User Defined Log Type is defined based on this new view:

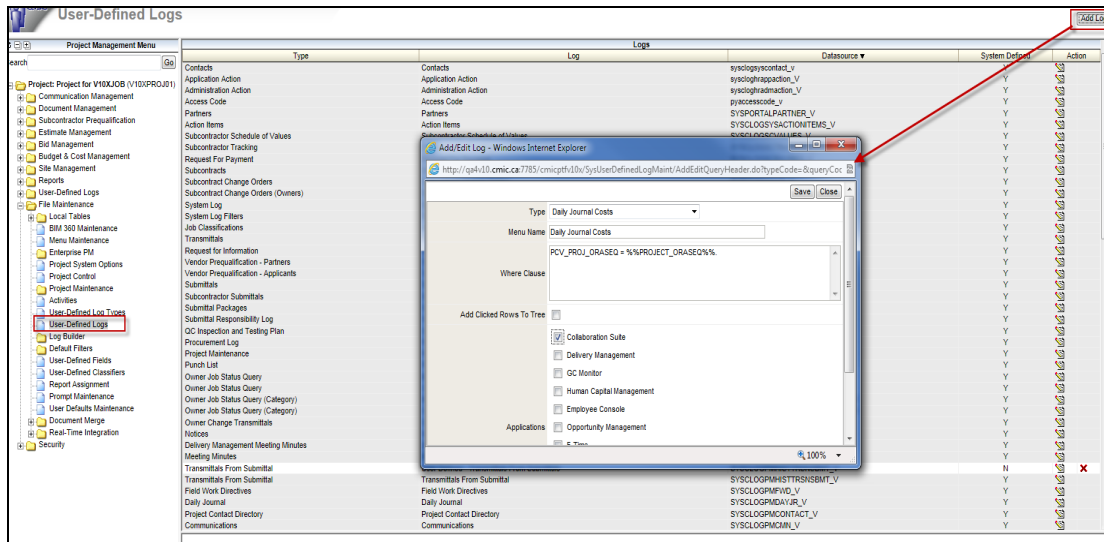


Once the definition is saved, the user can see the underlying columns of the view and select the desired columns and apply other attributes (alignment, link, sort order, etc.), and re-positioning:



This log type is now available to be used to create user-defined logs.

It is also not restricted to a specific project so the WHERE clause will also need to be setup like **PCV_PROJ_ORASEQ = %%PROJECT_ORASEQ%%**:



The view groups the records based on Job/Phase/Category so all data is summed up across all the Daily Journal records for a given project (when WHERE clause is applied).

Punch List Log

A punch list is a deficiency list generally processed as follows:

- An owners' rep inspects the site and produces a list of deficiencies.
- The GC reviews the list and assigns each deficiency to a Vendor code, Contract Number and contact code.
- Subcontractor is alerted of the responsibility and assigns a start date to the punch list item to repair the deficiency.
- The subcontractor marks the deficiency as repaired.
- The GC alerts the owner of the repair.
- The punch list item is re-inspected by the owner's rep and is signed off on.

As a Vendor/Subcontractor to the project, this log will display all punch lists applicable to your company as either the TO partner or as a responsible partner. As the General Contractor, this log displays all punch lists.

As with any other log, any of the columns can be sorted, just by double-clicking on the column title and of course the log can be customized to your own layout using the Log Builder.

Punch lists are slightly different in their security model. It is the responsibility of the company to determine if a user can see a punch list item rather than the contact person. This allows a punch list item to be assigned to a vendor without knowing the exact person within the organization who will actually take responsibility for the item.

The screenshot displays the 'Project Maintenance - Defaults' tab in the xProjects application. The 'Project Areas' section at the bottom is highlighted with a pink box. It contains four rows, each with an 'Area' label and an 'Edit' icon (a small square with a diagonal line). The areas are labeled 'Area 1', 'Area 2', 'Area 3', and 'Area 4'. Above this section, there are various configuration options for project defaults, including 'Default Delivery Period', 'Default RFQ Review Period', 'Default Notice Review Period', 'Default RFI Review Period', 'Default Meeting ID Mask', 'Default Agenda Item ID Mask', and 'Project End Date Updateable'.

Standard Treeview path: *xProjects > File Maintenance > Project Maintenance – Defaults tab, Project Areas section*

Project Area Defaults for Punch Lists can be created and set in the Defaults tab of a project (in Project Maintenance).

The 'Edit' icon beside each Area launches a pop-up window in which users can add, edit or delete the list of available values which will later be displayed in the Area LOV in Punch List objects for that project.

The screenshot shows the 'Area Names Maintenance' pop-up window. It has a title bar with the URL 'http://testv10.cmic.ca:7785/ - Punch List Area Names - Windows Internet Explorer'. The window contains a table with two columns: 'Area Name' and 'Action'. The 'Area Name' column has two rows: 'Building' and 'Floor'. The 'Action' column has two rows, each with a red 'X' icon. The window also has 'Cancel', 'Save', and 'Close' buttons at the top right.

Example of pop-up window launched from Edit icon beside Project Area

Status update at the Punch List Item Level

The status drop-down list at the item level will be automatically updated as follows:

When a responsibility is entered AND Issued On date is entered

=> **Issued**

When a Inspected Date is entered

=> **Inspected**

When a Completed Date is entered

=> **Complete**

When drop down is set to PASS

=> **Pass**

When drop down is set to FAILED

=> **Failed**

When status is 'Closed'

=> **Closed**

In addition, there are two Project Role privileges for Punch List Areas: one allows validation of Area LOV values in Punch List details and the other allows the user to create 'on the fly' values for the Area LOVs.

When the '**Validate Punch List Areas**' privilege is set, the area values will be validated when entering or editing a punch list.

The '**Create Punch List Area On the Fly**' privilege, if set, will issue a confirmation message to the user "Area XXX is not on file. Would you like to add it to the project list?". If the answer is "Yes", the value will be stored for the current project, after the user clicks the **[Save]** or **[Save Draft]** button. If the answer is "No", the value will be erased from the field. This privilege is only applicable when the Validation privilege is set, otherwise, the system functions in the usual way.

These changes also only affect Project Management JSP. They have no effect on the FORMS version.

NOTE: When using the COPY FROM feature in Punch Lists, if the source project is different from the current project (target), the Area LOVs that are shown are for the current project, even though the area labels displayed are from the source project. Also, the values selected from the area LOVs will be repeated for every punch list detail being copied from the source.

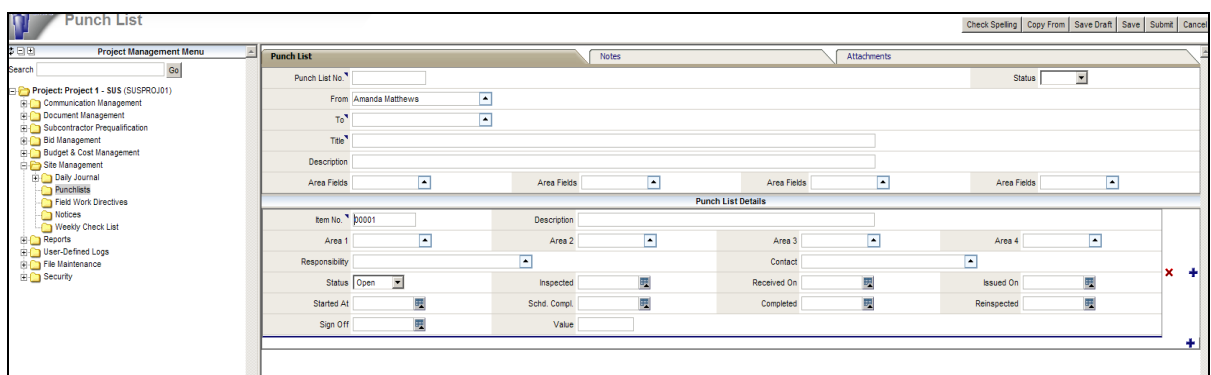
Auto-numbering for Punch List Headers and Items

Auto-numbering of Punch List headers and items can be set at either the PM Control level (Code Masks tab) or on the Project (Defaults tab – **[Masks]** button).

Paging in the Details Section

When there are more than 30 detail records in a Punch List, the paging feature takes effect in both view and edit modes.

Creating a Punch List



Standard Treeview path: *xProjects > Site Maintenance > Punch List*

To create a new Punch List, open the Punch List node under the Site Management option on the Treeview. This will open a log of all existing Punch Lists. Use the **[Add Punch List]** button at the top of the log to start the new Punch List. Field security exists for many of the Punch list fields (*xProjects > Security > Role Maintenance – Programs/Punch List*).

Punch List Header – Section

- Enter the **Punch List No.** – this is any code that you want, that has not already been used. Otherwise, if you have set autonumbering for the Punch List Header at either the PM Control level (Code Masks tab) or on the Project (Defaults tab – **[Masks]** button), it will default here.
- Select the **Status** from the LOV. The entries for the LOV are maintained in Local Tables (standard Treeview path: *xProjects > File Maintenance > Local Tables > Punch List Status*).
- Select the **To Partner** from the LOV and enter a **Title**.
- Enter a **Description** for the Punch List. This is not a required field.
- The area fields indicate areas of the project site. The data can be selected from a List of Values or a new value can be entered directly in the field.
- **[Save]** the Punch List Header.

Punch List Details – Section

- Once the Punch List Header is complete and saved, use the **+** to open up the item area. There can be an infinite number of items on a punch list.
- Enter the **Item No.** – this is any code that you want, that has not already been used. Otherwise, if you have set autonumbering for the Punch List Items at either the PM Control level (Code Masks tab) or on the Project (Defaults tab – **[Masks]** button), it will default here.
- The **Description** is not a required field. It can be entered directly, or it can be selected from the LOV. The entries for the LOV are maintained in the Local Tables (standard Treeview path: *xProjects > File Maintenance > Local Tables > Punch List Item Description*).
- **Responsibility** for each item can be assigned, along with any of the dates (usually Inspected, Received and Issued on a new punch list item) and current **Status** of the item. The Area fields can also be unique per item. Notes and Attachment icons at the Punch List item level allow the addition of notes and or attachments.

- **[Save]** the Punch List. Review and **[Submit]** if complete. The **[Save Draft]** button, when pressed, will save the current data and then the screen is returned to edit mode, so the user can continue entering data, compared with **[Save]** in which the record is saved but then the screen changes to view mode.

While in view mode, some additional fields are shown in the header section of the punch list. These are the totals for the punch list detail lines (items):

- **Total Items.**
- **Open** (detail items that are not Closed)
- **Closed** - if the status of detail records is 'Closed'; when the Sign Off date is entered, the status of the punch list item is changed to 'Closed' and the number of Closed items in the header is updated as well.
- **Percent Complete:** (# Closed Items/Total Items X 100)
- **Total Value of Open Items:** this is the total of the VALUE (cost of the item) field on all detail items for which the status is not 'Closed'.

Updating a Punch List

Anyone associated with the punch list and having the right privilege can view and **[Edit]** the punch list that has been submitted (seeing only the details applicable to their company). Items that are updateable are the line item details of responsibility, contact, status and the date fields associated.

When a line item is updated on a punch list the system will indicate that the punch list has been updated, on both the log and the treeview count.

Copying a Punch List Detail Item

Punch list items can be copied from each other by using the 'Copy Previous Row' icon shown in the picture below:

The screenshot displays the 'Punch List' interface. At the top, there are tabs for 'Punch List', 'Notes', and 'Attachments'. Below these are fields for 'Punch List No.' (PL-EMAIL), 'From' (Amanda Matthews), 'To' (Simon Parrish), 'Status' (Submitted), and 'Received' (08/Jun/2011 02:31 PM). The main section is titled 'Punch List Details' and contains two rows of detail items. The first row (Item No. 00002) is selected, and a red arrow points to a 'copy item' icon (a blue plus sign with a red 'x') on the right side of the detail row. The second row (Item No. 00001) is shown below it. The interface includes fields for Item No., Description, Area 1-4, Responsibility, Contact, Status, Started At, Sign Off, Inspected, Schd. Compl., Received On, Completed, Issued On, and Reinspected.

The icon becomes available after the insert **+** icon is clicked on. A message is issued if the user attempts to 'insert and copy previous' for the very first record in the punch list items.

Use the copy icon to copy the detail item selected, and make the necessary changes. Click [Save].

'Copy From' Functionality

The screenshot shows a 'Copy From' dialog box with a title bar containing 'Check Spelling', 'Copy From', 'Cancel', and 'Save'. The dialog has three tabs: 'Punch List', 'Notes', and 'Documents'. The 'Punch List' tab is active. It contains the following fields: 'Punch List Code' (text box), 'Status' (text box), 'From' (dropdown menu showing 'Stephanie Bromfield'), 'To' (dropdown menu), 'Title' (text box), 'Description' (text box), and four 'Area Fields' (dropdown menus). Below these fields is a section titled 'Punch List Details' with a blue header bar and a '+' icon on the right.

You can selectively copy the details of a Punch List to another one, using the "Copy From" which is only available in Add mode.

The screenshot shows a web browser window with the address bar displaying 'http://wintest2006.cmic.ca:7779 - Copy From Existing Punch Lists - Microsoft Internet Explorer'. The browser window contains a dialog box with a title bar showing 'Check Spelling', 'Copy From', and 'Cancel'. The dialog box has the following fields: 'Project Code' (dropdown menu showing 'SBPROJ990'), 'Punch List' (dropdown menu), 'Punch List Code' (text box), and a section titled 'Punch List Details' with a blue header bar. The 'Punch List Details' section contains the following fields: 'Status' (dropdown menu showing 'Leave As Is'), 'Responsibility' (dropdown menu), 'Contact' (dropdown menu), 'Area 1' (dropdown menu), 'Area 2' (dropdown menu), 'Area 3' (dropdown menu), 'Area 4' (dropdown menu), 'Inspected' (dropdown menu showing 'Leave Empty'), 'Received On' (dropdown menu showing 'Sep 25 2007'), 'Issued On' (dropdown menu showing 'Sep 25 2007'), 'Started At' (dropdown menu showing 'Sep 25 2007'), 'Schd. Compl.' (dropdown menu showing 'Leave Empty'), 'Days to Add' (text box), and 'Days to Add' (text box). At the bottom of the dialog box are 'Proceed' and 'Cancel' buttons. A red arrow points to the 'Copy From' button in the title bar.

The user has the option of leaving fields from the source punch list 'As Is' or 'Empty' or selecting other values in the LOV.

In the case of the date fields, they can be left empty or as is or select a date. The Started At and Scheduled Completion dates have an additional option 'Add Days to Issued On' and "Add Days to Start At"

respectively, which, if selected, allows you to add additional days ('Days to Add' field becomes enabled) to the Issued On and the Started At dates, which then become the Started At and Scheduled Completion dates respectively.

Printing a Punch List

Sometimes it is necessary to have a hard copy of a Punch List. Any Punch List regardless of the status can be printed. There are two different types of Punch List Reports: one is a standard Report type the other is a printable version of the screen. To print a report open the view page of the required Punch List and use the **[Print Report]** button. This brings up a report selection screen. Select the required format and options, then press **[Print]** to continue with the standard printing dialog box and printing. To create a printable copy of the screen, press the **[Printable]** button. This will build an HTML Page of the screen that can then be printed.

CMiC I/O for Punch Lists

Prior to using this function, make sure to read the CMiC I/O Manuals (technical and user guide) which give details on the system requirements and configuration required to use CMiC I/O.

CMiC I/O Emails can now be sent from the Punch List JSP. You can use the CMiC I/O email to populate the detail section of an existing Punch List. To do this, while in view mode of the Punch list, use the **[Send I/O Email]** button to send an email to the person who will be submitting the punch list details. If the punch list was un-submitted, once you select the I/O email button, the status will change to 'Submitted'. The CMiC I/O popup box includes instructions on what to do.

There are some requirements for the way in which the details should be entered by the person who will respond to the email that was originally sent by CMiC I/O:

- The only fields that can be returned to CMiC IO are the **mandatory** description and up to four **optional** location fields (representing the 'Area' fields for punch list details).
- Each punch list item is delimited by '<>'
- Area fields are prefixed by the word 'Location:' (upper or lower case, colon included) and are separated by a comma, for example,

Location: Building A, 15th Floor, Unit 1509, Kitchen

Thus Area 1 = "Building A"

Area 2 = "15th Floor"

Area 3 = "Unit 1509"

Area 4 = "Kitchen"

The location is optional, so it is possible to simply enter a description with no special prompts.

If the user wants to send several items at once the response will look something like the following:

Fix the hole in the wall.
Location: Building A, 15 th floor, Unit 1509, Kitchen
◇
Check that all electrical outlets have plates on them.
◇
Repaint.

The following fields will be populated automatically when the item is created:

- Item # will be the next sequential number.
- Status will be “open”;
- “Received On” will be the current date.

To keep adding additional punch list items to the same punch list via CMiC I/O, responses will have to be made each time to the original CMiC email that was received. Similarly, attachments can also be made, by attaching documents to the reply email.

Punch List Details Export

The Punch List details can be exported using the **[Export]** button. The file that is exported from details is in CVS format. The export at this level differs from the **[Send to Spreadsheet]** which is on the Punch List Log screen, and creates a CSV file of the punch list headers, not the details.

Punch List Import

Large numbers of punch lists can be entered using the Import option. To use this option, the user must already have the punch list header as the current screen.

User Extensions				Send VO Email	Add	Copy	Edit	Delete	Import	Export	Printable	Print Report	Back To Log
Punch List													
Punch List No. PL-EMAIL										Status			
From Amanda Matthews										Submitted <input checked="" type="checkbox"/> 08/Jun/2011 02:31 PM			
To Simon Parrish										Received <input type="checkbox"/>			
Title email notification on creation etc.													
Description													
Area Fields Area 1				Area Fields Area 2				Area Fields Area 3				Area Fields Area 4	
Total Items 1				Open 1				Closed 0				Percent Complete 0 %	
Total Value Of Open Items 0.00													
Punch List Details													
Item No. 00001				Description details									
Area 1				Area 2				Area 3				Area 4	
Responsibility Parrish Construction Partners				Contact Simon Parrish									
Status Open				Inspected				Received On 09/Jun/2011				Issued On	
Started At				Schd. Compl.				Completed				Reinspected	
Sign Off				Value				Change #				Create Change Link Change	

Clicking the **[Import]** button will open the file selection form:

Once the file is selected, click [**Upload**] to bring the data in prior to validation. The screen displayed below is presented to the user:

Edit the data. All fields shown with a non-white background include an error and must be corrected to be imported. Placing the mouse-pointer over the colored area will give details of the error. Individual records may be deleted from the Import by checking the Delete flag on the right side of the display.

Use the [**Re-Validate**] button to update changes and review any further errors. Once all records are corrected, click the [**Accept**] option. Existing punch list items will be updated and new ones will be created by the import, if they do not already exist.

The Punch list import file consists of the following fields in the order listed:

Column Separator ", "

Column delimiters - optional "*****"

No	Database Column	Description	Data Type	Required
1	PMFPDI_COMP_CODE	Company Code	CHAR 2	Yes
2	PMFPDI_PROJ_CODE	Project Code	CHAR 10	Yes
3	PMFPDI_PMPL_CODE	Punchlist Header	CHAR 10	Yes
4	PMFPDI_ITEM_CODE	Item No	NUM 5	Yes
5	PMFPDI_AREAL_VALUE	Areal Value	CHAR 10	

6	PMFPDI_AREA2_VALUE	Area2 Value	CHAR	10	
7	PMFPDI_AREA3_VALUE	Area3 Value	CHAR	10	
8	PMFPDI_AREA4_VALUE	Area4 Value	CHAR	10	
9	PMFPDI_DESC	Description	CHAR	4000	
10	PMFPDI_STATUS_CODE	Status	CHAR	10	Yes
11	PMFPDI_PARTN_ABBREV	Responsibility	CHAR	8	
12	PMFPDI_CONTACT_CODE	Contact	CHAR	10	
13	PMFPDI_AUTH_PARTN_ABBREV	Author Comp.	CHAR	8	
14	PMFPDI_AUTH_CONTACT_CODE	Authored By	CHAR	10	
15	PMFPDI_INSP_PARTN_ABBREV	Inspection Comp	CHAR	8	
16	PMFPDI_INSP_CONTACT_CODE	Inspected By	CHAR	10	
17	PMFPDI_INSPECTED_DATE	Inspected On	DATE	DD-MON-RRRR	
18	PMFPDI_RECEIVED_DATE	Received On	DATE	DD-MON-RRRR	
19	PMFPDI_ISSUED_DATE	Issued On	DATE	DD-MON-RRRR	
20	PMFPDI_START_DATE	Started On	DATE	DD-MON-RRRR	
21	PMFPDI_SCHD_COMPL_DATE	Schd. Compl.	DATE	DD-MON-RRRR	
22	PMFPDI_REINSPECTED_DATE	Re-Inspected	DATE	DD-MON-RRRR	
23	PMFPDI_COMPLETED_DATE	Completed	DATE	DD-MON-RRRR	
24	PMFPDI_SIGNED_OFF_DATE	Signed-Off	DATE	DD-MON-RRRR	
25	PMFPDI_VALUE	Value	NUM		
26	PMFPDI_CLV_VALUE_CODE1	Classifier 1	CHAR	16	Classifier Dependent
27	PMFPDI_CLV_VALUE_CODE2	Classifier 2	CHAR	16	Classifier Dependent
28	PMFPDI_CLV_VALUE_CODE3	Classifier 3	CHAR	16	Classifier Dependent
29	PMFPDI_CLV_VALUE_CODE4	Classifier 4	CHAR	16	Classifier Dependent
30	PMFPDI_CLV_VALUE_CODE5	Classifier 5	CHAR	16	Classifier Dependent
31	PMFPDI_CLV_VALUE_CODE6	Classifier 6	CHAR	16	Classifier Dependent

Punch List Notes and Attachments

The screenshot displays the 'Meeting Minutes' application interface. On the left is a 'Project Management Menu' with options like 'Project: Standard System Project (STD)', 'Communication Management', 'Document Management', 'Subcontractor Prequalification', 'Bid Management', 'Budget & Cost Management', 'Site Management', 'Reports', 'User-Defined Logs', 'File Maintenance', and 'Security'. The main area shows 'Meeting Detail' for 'Track Progress Meeting' (Meeting No: ALTH0005, Status: SUBMITTED). Below this is an 'Agenda' section with two items. The first item, 'Minute 62-MAR-12 (SB) same as agenda subject', has a 'Status' of 'Open' and a 'Responsibility' of 'SMV10 - Amanda Matthews'. It includes a 'Comments' field with a checkmark icon and a 'Due Date' of '09/Mar/2012'. The second item, 'Minute 62-MAR-12 (SB) same as agenda subject - to check BIC report', has a 'Status' of 'New' and a 'Responsibility' of 'SMV10 - Amanda Matthews'. It also includes a 'Comments' field with a checkmark icon and a 'Due Date' of '12/Mar/2012'. Both items have 'Create Change', 'Link Change', and 'Link to Issue' buttons.

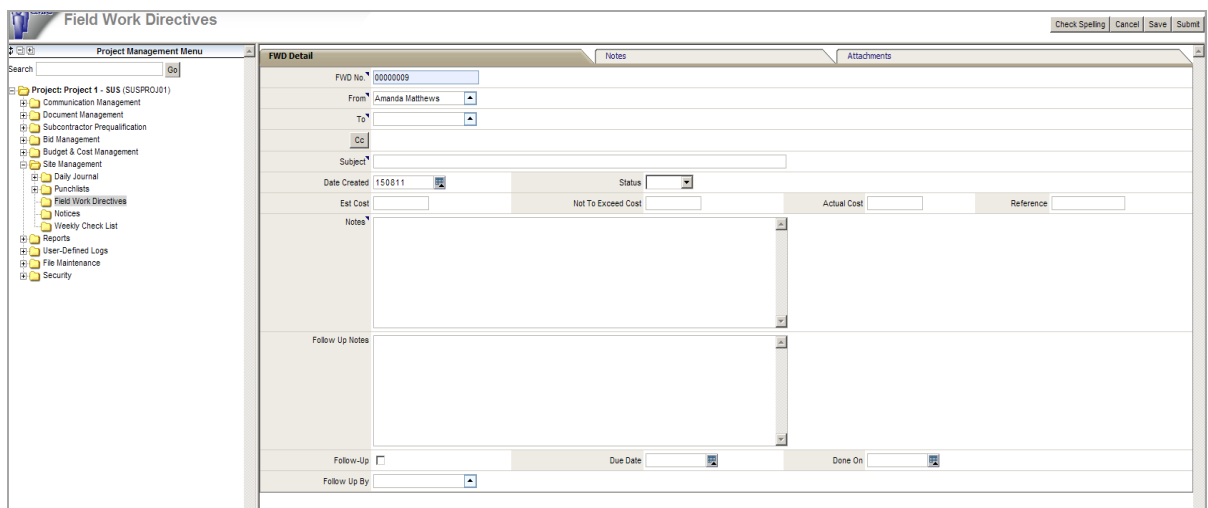
Example of Punch List Item with Notes and Attachments

A checkmark indicator will display if a Punch List Item has Notes or Attachments, as shown in the screenshot above.

Field Work Directives

Field Work Directives communicate small changes required to either a completion date or a subcontract task. They are usually issued before formal documentation is completed so work on the project is not stalled waiting for approval for a small change. Field Work Directives have an estimated cost, not to exceed cost, and an actual cost associated with them. FWDs can only be viewed by the 'To' contact.

Creating a FWD

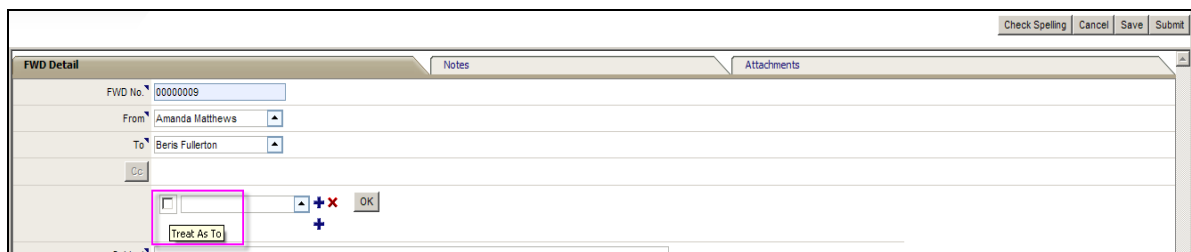


Standard Treeview path: *xProjects > Site Management > Field Work Directives – FWD Detail*

To create a new Field Word Directive, open the Field Work Directives node under the Site Management option on the Treeview. This will open a log of all existing FWDs. Use the **[Add FWD]** button at the top of the log to start the new one.

- Enter the **To** contact.
- Verify the automatic **CC**'s and add anyone else, if required.
- Enter a short description/subject matter, Document Creation Date, Estimated Cost information and Description of the change.
- If follow-up is required, check the **Follow-up** checkbox and enter the follow-up **Due Date**.
- The **Follow Up By** field gets populated when the **Follow Up Notes** is updated, but the value can be overridden. Field security can be applied to this field.
- When complete, **[Save]** the FWD, then review and add any related objects to the **Related Objects** tab, which is available once the FWD record is saved.
- Click the **[Submit]** button.

'Treat as To' – Checkbox



Example of 'Treat as To' checkbox on the Field Work Directives screen

The **'Treat as To'** checkbox allows the definition of contacts, other than the main contact (in the 'To' section), usually for legal purposes, when it comes to responsibility for Field Work Directives.

The 'Treat as To' checkbox is available in the [CC] distribution list of Field Work Directives. This functionality is also available in the FORMS version. Any contacts indicated as 'Treat as To' will be shown beside the 'Treat as To' label on the printed Field Work Directive. When the FWD is e-mailed to the distribution, the 'To' contact and the 'Treat as To' contacts will be shown in the 'To' section and the other 'CC' contacts without 'Treat as To' indicator will be shown in the 'CC' section.

Updating a FWD

Once the Field Work Directive has been submitted, the only update the 'To' contact can do, is view it, which marks the item as received by the contact. The Issuer of the FWD can edit and update a submitted record.

External Collaborator Update of Follow-up Notes

External Collaborators can edit a Field Work Directive without having full access to 'Edit' in general. Follow-up Notes, Status and Done On fields are available to edit if the 'Update All' privilege is OFF for the user.

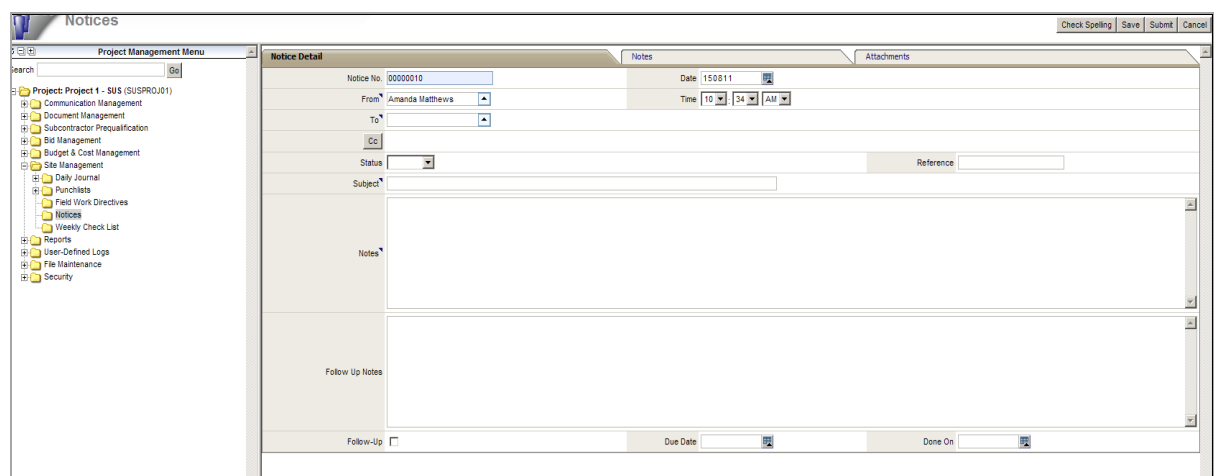
Printing a FWD

Sometimes it is necessary to have a hard copy of a Field Work Directive. Any FWD, regardless of the status can be printed. To print, open the view page of the required FWD and use the [Print Report] button. This will show a drop-down list of the available types of reports. Select the required report, then press [Print].

Notices

Notices communicate Non Compliances. They are formal notification that something is not complying with the project specifications, such as safety standards or that there is a deficiency in the work being performed. Normally, there is a specific number of days allocated to rectify the situation. Usually, the recipient will be required to provide details of the corrective action taken.

Creating a Notice



Standard Treeview path: xProjects > Site Management > Notices – Notice Detail

- Enter the **To** contact.
- Verify the automatic **CCs** and add anyone else, if required.

- Enter a short description/subject matter, **Status** and **Reference** if known, plus the **Date** and **Time**.
- In the **Notes** area, enter the details of the non-compliance.
- If follow-up is required, check the **Follow-Up** box and enter the follow-up **Due Date**.
- When complete, [Save] the Notice, then review and click on [Submit].

Updating a Notice

Once the Notice has been submitted, the only update the 'To' contact can do, is view it, which marks the item as received by the contact. The Issuer of the Notice can edit and update a submitted record.

Printing a Notice

Sometimes it is necessary to have a hard copy of a Notice. Any Notice, regardless of the status can be printed. To print a Notice, open the view page of the required Notice and use the [Print Report] button. This will show a drop-down list of the available types of notice Reports. Select the required report, then press [Print].

Days to Resolution in Notices Log

The value of the **Days to Resolution** column in the Notices Log is determined in the following way:

- If the Follow-up Due Date is empty, then the value is empty
- If the Follow-up Due Date is not empty then:
 - If the Follow-up Date is empty, then the result is System Date – Follow-up Due Date
 - If the Follow-up Date is NOT empty, then the result is Follow-up Date – Follow-up Due Date

Units Complete

This program does not have any link/association with the Daily Journal. However, the Total Units Complete will be impacted by the units entered in Job Costing (Units Complete menu), Daily Journal and this Units Complete program.

In addition, the PM Control flag '**Restrict Daily Journal Units Complete selection**' will also apply to the Units Complete program (standard Treeview path: *xProjects > File Maintenance > Project Control – Defaults tab*). The label of the checkbox (and its associated hint line) can be changed in Prompt Maintenance to make it more generic, for example to 'Restrict Units Complete Selection'.

Security will need to be assigned in both the 'Assign Programs' and 'Assign Menu Items' screens before it can be made available to users. Custom menus will require updating using the Menu Maintenance program.

Below are the features of the program:

- A separate Mask ID with auto-numbering function can be maintained for this PM object (Units Complete), similar to other PM objects. The masks can be set at the Company Control and/or the Project level.

PM Control - Masks

Check List No. (TYPE1)	mmddyy-***	112814-123	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QC Inspection & Testing Item No.	qqccppp**	000SUBAS12	<input type="checkbox"/>	<input type="checkbox"/>
Units Complete No.	ccppppqqq*****		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

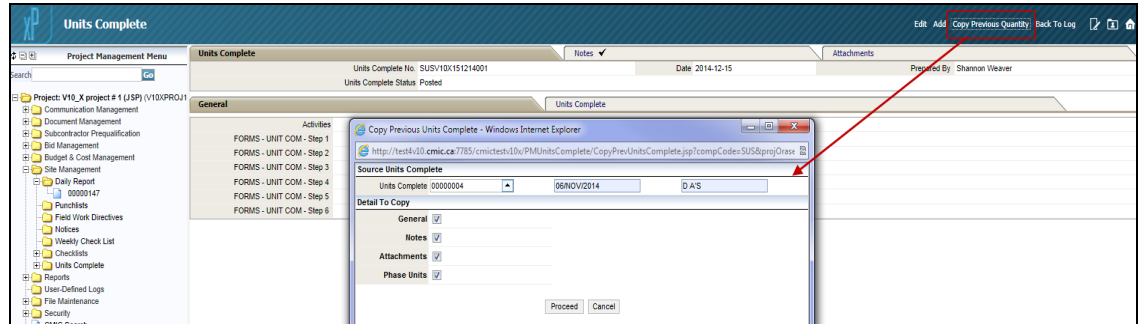
Project Maintenance - Masks

Checklist No. (SAFETY)			<input type="checkbox"/>	<input type="checkbox"/>
Check List No. (TYPE1)	mmdyy-***	112814-123	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Units Complete No.	ccppppddmmyy***		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Include Partner Abbreviation In External RFI ID <input checked="" type="checkbox"/>			Include Partner Abbreviation In External Transmittal ID <input checked="" type="checkbox"/>	
c=Company Code, p=Project Code or j=Job Code, y=Year, m=Month, d=Day, *=Next Available Number				
Leave Empty to Disable Autonumbering				

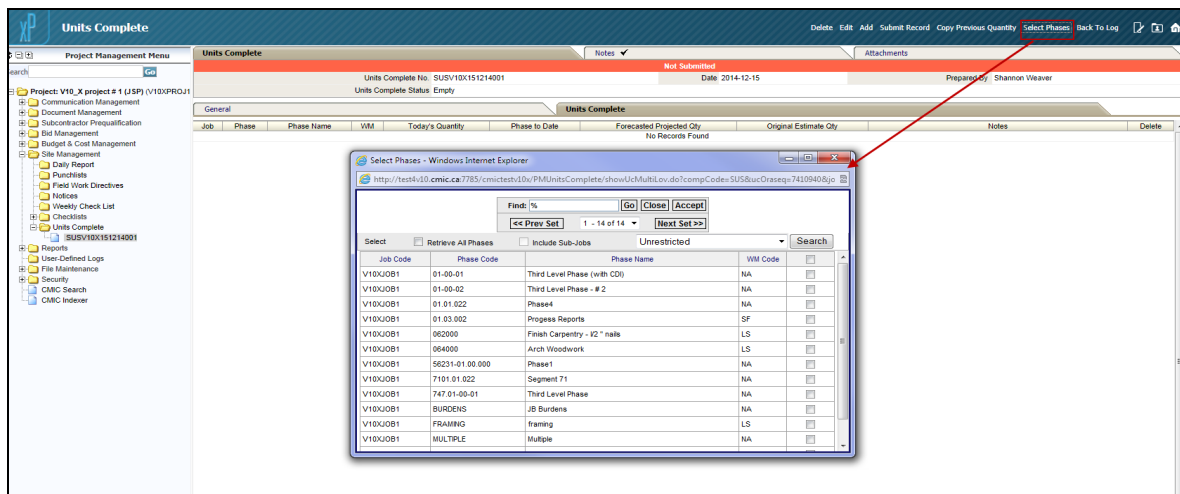
- The Units Complete program has two tabs: (i) General (ii) Units Complete.

- The **General** tab is similar to the **General** tab that exists in Daily Journal, and has its own separate set of freeform classifiers that are only associated with Units Complete. The classifiers are defined in FORMS version:

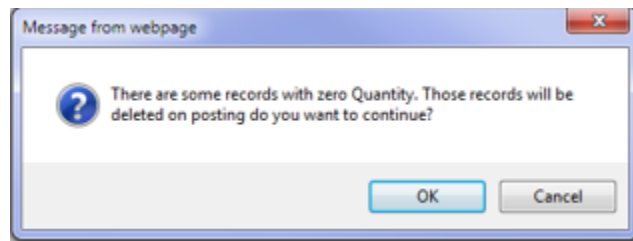
- The program also has the [Copy Previous Record] functionality where it allows the user to copy all phases existing in the previous units complete record (by default, or record to be copied can be selected from an LOV) and the General tab information.



- When in the Units Complete tab and selecting the Phases, there is an option to 'Include Sub-job'. This is available when "Retrieve All Phases" is checked. There is also a drop-down box provided to select budget method: Unrestricted, Restrict to Budget Method P/U, Restrict to Budget Method "A".



- Units Complete can be posted once the record is **submitted**. It is then that the [Post Units] button is available.
- The posting of units completed is not restricted to financial period dates and does not consider period open/close. The Units entered are posted to the date entered in the header.
- Once records get posted, all records where no quantity was entered for a phase will be removed after posting. A message will be displayed informing the user of this:



- Drilldown is available on the Phase to Date quantity field, displaying the transaction details:

Units Complete Transaction History - Windows Internet Explorer

http://test4v10.cmic.ca:7785/cmictestv10x/PMUnitsComplete/showUcTranHist.do?compCode=SUS&jobCode=V10XJOB1&phsCode=MYPHASE&wmCode=NA&projOraseq=2691970

Close

Company Code: SUS		Job Code: V10XJOB1		Phase Code: MYPHASE		Phase Name: phase on the fly	
Units Complete Phase Units Transaction History							
Units Complete No.	Units Complete Date	Prepared By	Submitted	Post Date	Transaction Qty	Posted Qty	Phase to Date
N/A							70.77
SUSV10X080115002	08 Jan, 2015	Glenda Stimpson	YES	08 Jan, 2015	0	15.5	108.27 NA
SUSV10X080115001	08 Jan, 2015	Glenda Stimpson	YES	08 Jan, 2015	0	22	108.27 NA

Notes: Not entered via Units Complete

Checklists

Checklists Types are firstly defined and maintained in the Checklist Maintenance screen in Local Tables (standard Treeview path: *xProjects > File Maintenance > Local Tables > Checklist Maintenance*).

Checklists of any of these defined types can then be created. Some features of checklists are outlined below.

- The Checklist Status bar/status field is used to show un-submitted/submitted checklist.
- The **[Submit]** button allows users to submit the **completed** Checklist. If it is incomplete, validation errors will be highlighted.
- When a Checklist is submitted, the Status changes from 'Pending' to 'Submitted'.
- The **[Save]** and **[Save Draft]** buttons will only validate the mandatory Date field in the header. **[Save]** will return the checklist in View mode even though it might be incomplete and **[Save Draft]** will return the record in Edit mode.
- Field security can be applied to the **[Submit]** button on any defined Checklist type.
- Users can create/link an issue from/to a checklist item.

Checklist Details | Notes | Related Objects | Attachments

Checklist No. 00000001 | Created By Stephanie Bromfield | Created Date 28/3/2017 | Status Pending

General

Comments

Checklist

Overview	Y	N	NA	Comments	Date	Issue
Check-in and Due diligence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			Create Issue Link Issue
Materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			Create Issue Link Issue
Resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			Create Issue Link Issue
Schedule	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			Create Issue Link Issue
Locations under analysis/inspection etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			Create Issue Link Issue
First Steps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
Process 1 details to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			Create Issue Link Issue
Process 2 details to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			Create Issue Link Issue
Process 3 details to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			Create Issue Link Issue
Conclusion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
Give a summary of all of the above	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			Create Issue Link Issue

Issue can be created or linked

Example of Issues created or linked for Checklist Item

Checklist Details		Notes	Related Objects	Attachments
Checklist No. 00000001		Not Submitted		
Created By Stephanie Bromfield		Created Date 28/3/2017		
		Status Pending		
General				
Comments				
Checklist				
Overview	Y	N	N/A	
Check-in and Due diligence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Schedule	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Locations under analysis/inspection etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
First Steps	Y	N	N/A	
Process 1 details to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Process 2 details to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Process 3 details to follow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Conclusion	Y	N	N/A	
Give a summary of all of the above	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Link can be removed

Example of Link being removed for Checklist Item

The checklist item is shown in the Related Objects tab of the Issue.

Issue Detail	Text Codes	Attachments	Linked Objects	Related Objects	History
Related Objects					
Object Type	Object ID	Description	Contact	Date	Action
Safety Procedures	00000001-200	Check-in and Due diligence	Stephanie Bromfield	2017-07-28 11:21 AM	<input checked="" type="checkbox"/>

Checklist item in Related Object tab of the issue

Example of Checklist Item shown in the Related Objects tab of the Issue

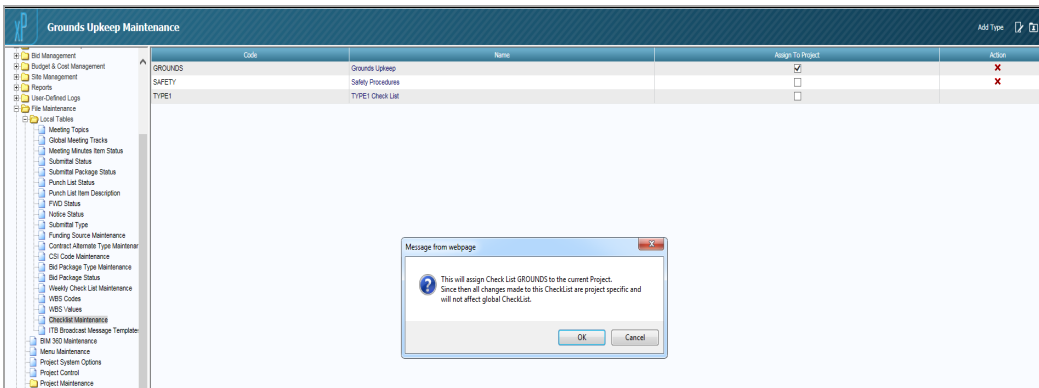
Project-Specific Checklists

Checklists can also be differentiated into system level and project-specific. This can be achieved by using the 'Assign to Project' checkbox in the Checklist Maintenance screen (standard Treeview path: *xProjects > File Maintenance > Local Tables > Checklist Maintenance*):

Checklist Maintenance				Add Type	Print	Refresh
Project Management Menu	Code	Name	Assign To Project			
Project: Analyse Bay Data project (ANALYZE)	GROUND	Grounds Upkeep	<input type="checkbox"/>			<input checked="" type="checkbox"/>
Project: Analyse Bay Data project (ANALYZE)	SAFETY	Safety Procedures	<input type="checkbox"/>			<input checked="" type="checkbox"/>
Project: Analyse Bay Data project (ANALYZE)	TYPE1	TYPE1 Check List	<input type="checkbox"/>			<input checked="" type="checkbox"/>

Project Management Menu
 Project: Analyse Bay Data project (ANALYZE)
 Communication Management
 Document Management
 Infrastructure Preparation
 Mgt Management
 Budget & Cost Management
 File Management
 Reports
 User Defined Logs
 File Maintenance
 Local Tables
 Meeting Topics
 Capital Meeting Tracks
 Meeting Minutes Item Status
 Submittal Status
 Submittal Package Status
 Punch List Status
 Punch List Item Description
 PWD Status
 Notice Status
 Submittal Type
 Funding Source Maintenance
 Contract Alternate Type Maintenance
 CSI Code Maintenance
 Bid Package Type Maintenance
 Bid Package Status
 Weekly Check List Maintenance
 WBS Codes
 WBS Values
 Checklist Maintenance
 PPS Broadcast Message Templates

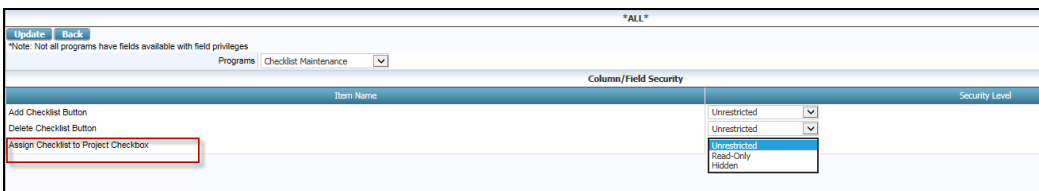
When the checkbox is checked, the following message is displayed:



When the assignment is carried out, the words 'Project-Specific' are appended to the checklist name:



Field security can be applied to the 'Assign to Project' checkbox:



Other features of Project-Specific Checklists

- Project-specific checklists are based on the same mask ID as the non-project-specific checklists.
- Project-specific checklists are only available for use on the treeview menu of the **current project**.
- Field security exists for the Edit button for each Checklist **Type**, to prevent editing by some users, if desired:



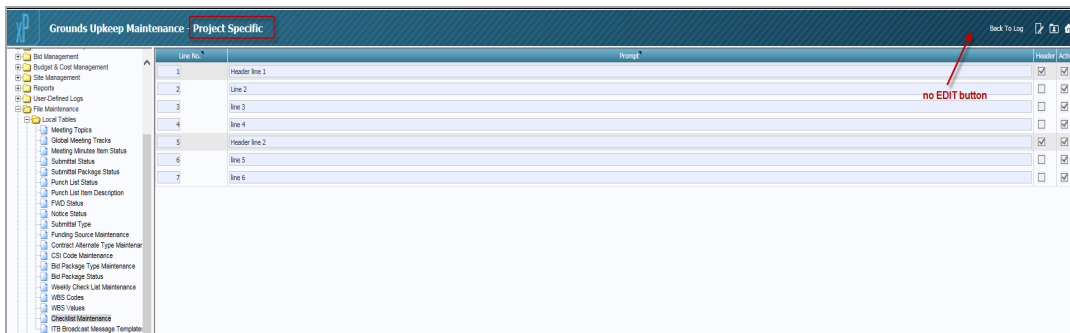
Example:

Defined checklist type = Grounds Upkeep

Prior to applying field security to the EDIT button, it is visible:



After applying field security the EDIT button is not visible:



IMPORTANT NOTE:

Once Checklist records are created for a particular Checklist Type, if the field security on the [EDIT] button in the Checklist is changed to 'Hidden', it cannot be changed back to being visible unless **all** the checklist records under that checklist type are first deleted.

The 'Assigned to Project' checkbox is also disabled from update. These precautions prevent any updating of the checklist type layout while records already exist for that type, thereby preventing data inconsistency errors.

Showing Only Project-Specific Checklists on the Treeview

The PM Systems Options flag ‘Show Only Project-Specific Checklists’, when checked, will allow users to see only project-specific Checklists on the Treeview menu:

The screenshot shows the 'Project System Options' dialog box with the 'General' tab selected. The 'Show only Project-Specific Checklists' checkbox is located at the bottom of the list of options and is highlighted with a red rectangular box.

Standard Treeview path: *xProjects > File Maintenance > Project System Options – General tab*

The user has to refresh the Treeview menu in order to see changes when assigning/un-assigning Checklists to/from the project.

Related Objects – Tab

The screenshot shows the 'Safety Procedures' application interface. The 'Related Objects' tab is selected, showing a checklist titled 'Checklist No. SPY0003' with a status of 'Not Submitted'. The checklist details are visible, including a table with columns for 'Overview', 'Comments', and 'Date'.

Overview	Comments	Date
Checklist and Due diligence		
Materials		
Resources		
Schedule		
Locations under analysis/inspection etc:		
Process 1 details to follow		
Process 2 details to follow		
Process 3 details to follow		
Conclusion		
Give a summary of all of the above		
End of Procedures		

Standard Treeview path: *xProjects > Site Management > Checklists – Related Objects*

The ‘Related Objects’ tab allows Checklists to be linked to other PM objects including other Checklist Types.

Object Type	Object Id	Description	Contact	Date	Action
Drawings	05.00219	Document record creation	Glenda Stimpson	2015-07-21 05:19 PM	X
Maintenance	00000003	00000003 - Maintenance	Glenda Stimpson	2015-07-16 11:27 AM	X
Communication	COMM.X0502150001	Check for email notifications	Glenda Stimpson	2015-07-21 05:19 PM	X
Daily Report	00000010	Daily report for 28-JUL-15	Glenda Stimpson	2015-07-21 05:19 PM	X
Field Work Directives	00000002	Fieldwork - check for notes editing and deletion	Glenda Stimpson	2015-07-21 05:19 PM	X
Notice	00000004	Check for Notes field - increase size	Glenda Stimpson	2015-07-21 05:19 PM	X
Request For Information	00000009	RFI and RFIs - size of Answer RFI	Glenda Stimpson	2015-07-21 05:19 PM	X
Submittal	00000005	Check for I/O in submittals - automatic updates	Glenda Stimpson	2015-07-21 05:19 PM	X

Field security can be applied to the Related Objects tab.

Locking Checklists

Checklists can be locked, similar to how Daily Journals can be locked. The locking setup is defined in the 'Locking' tab of PM Systems Options:

Project System Options	
General	Locking
<input type="checkbox"/> Lock Closed Communications <input type="checkbox"/> Lock Submitted Daily Journals <input type="checkbox"/> Lock Closed Issues <input type="checkbox"/> Lock Closed Meeting Minutes <input type="checkbox"/> Lock Closed Notices <input type="checkbox"/> Lock Closed RFIs <input checked="" type="checkbox"/> Allow Update Business Partner Info in SS Prequal <input type="checkbox"/> Lock Submitted Checklists	

Standard Treeview path: *xProjects > File Maintenance > Project System Options – Locking tab*

Only users with the 'Admin' flag set to 'Yes' (checked) on their xProjects security role (standard Treeview path: *xProjects > Security > Role Maintenance*) can edit a locked checklist (similar functionality to locked Daily Journals).

Rules Governing Checklists

Below is an outline of the rules regarding security and editing of Checklists.

- User can edit user's own [pending Checklist] or [submitted + not locked] without having Edit privilege
- User with Edit privilege AND Admin flag checked on user's role can edit ANY Checklist
- User with Edit privilege and without Admin flag checked on user's role can edit any non-locked Checklist
- User can submit Checklist if user can edit it (based on previous three rules) AND unrestricted Field Security for Submit button

Reports

Printing Reports

The system has 3 ways to print reports – some screens have a [**Printable**] button that will create a printable HTML version of the current screen, some have a [**Print Report**] button that will print pre-defined reports for the current screen's data and the third way is to select the required report from the Treeview. Reports on the Treeview are Open reports, and allow for the printing of multiple records, while from the screens the reports are limited to the current data record.

Printable Pages

On some screens, such as the Communication log, there is a [**Printable**] button. When this is activated, the system will create a printable page of the current record. The page will display for review where you then have the choice to print it or not by using the [**Print**] button. The print button opens the standard windows printing options screen.

The screenshot shows a window titled 'Communication Detail' with a 'Print' and 'Cancel' button in the top right. The window contains the following fields:

Communication No.	00000018	Closed	<input type="checkbox"/>	Type	FaceBook
From	Amanda Matthews	Submitted	<input checked="" type="checkbox"/>	2011-07-20 08:54 AM	
To	Will Smith	Received	<input type="checkbox"/>		
CC					
Subject	test for displaying closed items				
Message	as above				
Follow Up Notes					
Follow Up Required	<input type="checkbox"/>	Follow Up By			
Due Date			Done On		
Comments					

Below the 'Communication Detail' section is a 'Responses' section with the following text:

Author: Amanda Matthews Date: 2011-07-20 08:55 AM
no further action required

Printing a Report

The **[Print Report]** button will in many cases allow the user to select the format of the report to be printed, plus allow the user to send the report to different destinations such as email or fax.

When the **[Print Report]** button is activated, it will display a screen similar to that below if there is more than one format of the report available for printing. If there is only one report available, the system will skip this screen and open the standard report printing window as shown in the next picture.

The screenshot shows a dialog box titled 'Print Multiple Form-Letter'. It contains the following options:

- Group By Report Type: ☐
- Report Name: Communication Record (dropdown menu)
- Server Type: Jasper Server (dropdown menu)
- Embed Attachments: ☐ Select ☐ Select All ☒ None

At the bottom of the dialog box are two buttons: 'Print' and 'Close'.

- Reports (particularly Form Letters), based on the same Report Type are grouped together when the **'Group By Report Type'** checkbox is checked. This makes it easier to locate a particular report from a long list.
- Select the required report type from the drop-down list.
- Press **[Print]**. This opens the standard printing window.

On the standard printing window, you can now select which Print Server, and what type of destination and format are required.

Report Config	
Print Server	testv10
Destination	Preview
Name	Dell5350dnDEV
Format	PDF
<div> <input type="button" value="Run Report"/> <input type="button" value="Close"/> </div>	

Normally you would just leave the print server as the one that defaults, unless explicitly told to change this value.

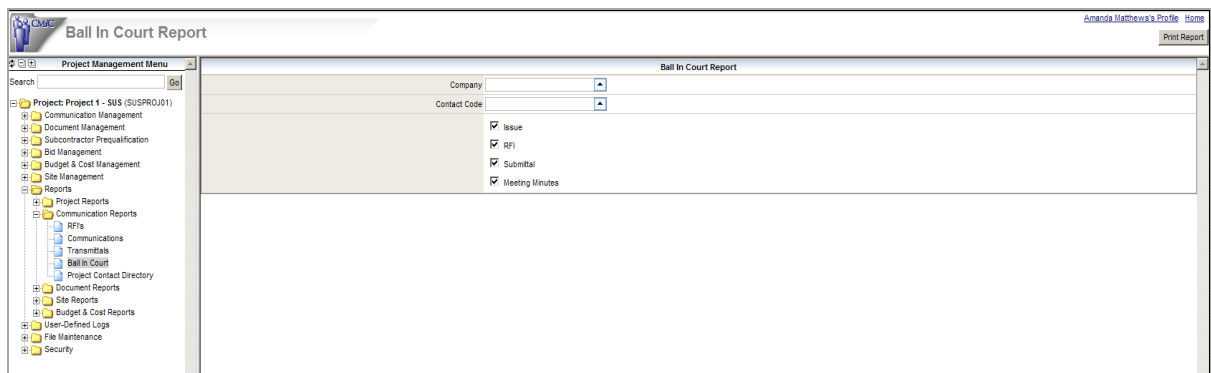
The Destination field allows for the following options:

- **Preview** – displays the report in PDF format, which you can then decide to print or email.
- **Preview with Cold Storage** – This option is only available if the third-party software, Cold Storage Software, has been purchased and integrated with xProjects. Select **Preview with Cold Storage** from the Destination drop-down list. In the Cold Storage Information pop-up window, select the document type, and edit the description fields as preferred. Use the [Send] button to create and preview the report through Cold Storage.
- **Printer** - sends the report directly to the selected printer
- **File** – will save the report in PDF format using the name file name entered in the next field
- **E-mail** – This opens a new window where the user may select multiple contacts from a LOV. The **Report File Name** (which has the main file attachment as the default name) can be changed by the user to a more user-friendly name. The file extension **MUST** be kept.
- **Fax** – This option opens a popup screen from which the user can select multiple contacts to send the report to.
- **Cold Storage** - This option is only available if the third-party software, Cold Storage Software, has been purchased and integrated with xProjects. Select **Cold Storage** from the Destination drop-down list. In the Cold Storage Information pop-up window, select the document type, and edit the description fields as preferred. Use the [Close] button to close the window, and the [Send] button to create and send the report to the configured Cold Storage destination.
- **Preferred Contact Method** – This option allows users to directly e-mail or fax the report to the selected contacts according to the contacts' preferred contact method.

Ball in Court Report

The "Ball in Court" report (PM3100.REP) shows the responsible contact for Meeting Minutes, RFIs, Submittals and Issues. This report can be run manually, or it can be scheduled as an overnight process. For the latter case, it will send an e-mail alert to the responsible contact, based on certain date conditions.

Running Report Manually

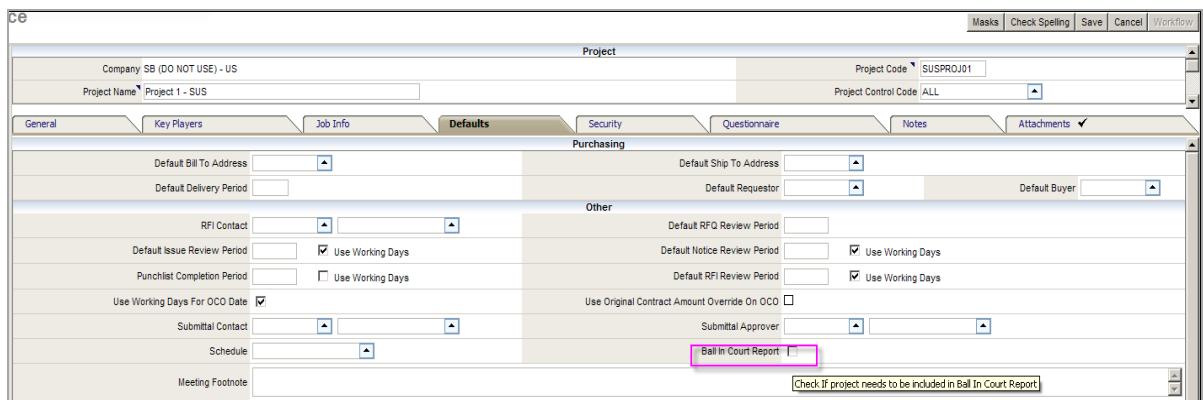


Standard Treeview path: *xProjects > Reports > Communication Reports > Ball in Court*

If run manually, a single report is generated containing all 'Ball in Court' information for the current project based on the input parameters. The Preferred Contact Method printing option will not work for this report.

Running Report via Nightly Process

To run the report by the Nightly Process, the Project Level flag "Ball in Court Report" located on the Defaults tab, needs to be checked for every project that is to be included in the process:



Example of Project Level 'Ball in Court Report' checkbox on Defaults tab

The Report will run for the projects and will contain information for all contacts who are responsible for any of the objects (i.e. RFI, RFQ, Submittal, Issues and Meeting Minutes) which are not Closed and Due within 5 days/ Due today/ Overdue. When run this way via the nightly process, a separate "Ball in Court" report will be generated for each responsible contact. Each contact will get only those objects for which they are responsible.

Selection criteria for each object:

- **Issues:** On Issue screen, Responsibility and Due Date will be taken if they are not null and the issue is not yet closed.
- **RFIs:** On RFIs (not closed) the Date Required will be considered as the due date for the report and the Responsible contact will be based on *Answered by* field...if this is null then the "To" contact will be used.
- **Submittals:** On the Submittal screen "Current Responsibility" field will be used for Responsible Contact. The "Overdue" field will be used to determine the due dates for the report. The submittal status should not be closed.

- **Meeting Minutes:** For open meeting minutes the program will look for all non-closed agenda items where the responsibility is not null and will take either the Revised Date or Due Date (if Revised Date is null) to determine due dates on the report.
- **Request for Quotation (PCI):** The Due Date on the RFQ is the main determining field, but the record must also have the Subcontractor and Contact fields populated as well. If the Date Received is also populated along with the three fields previously mentioned, the RFQ record will not be shown on the report.

Print For All Projects Option

The screenshot shows a software window titled "Ball In Court Report". At the top, there are two dropdown menus labeled "Company" and "Contact Code". Below these, there is a list of checkboxes. The first checkbox, "Print For All Projects", is highlighted with a red rectangle. A tooltip is visible next to it, stating: "When checked projects with the BIC Report flag checked will be considered as well as the current project". Below this checkbox are three more checkboxes: "Submittal", "Meeting Minutes", and "RFQ".

Standard Treeview path: xProjects > Reports > Communication Reports > Ball in Court

When the 'Print For All Projects' checkbox is checked, all projects (across companies - if company is not selected) with the BIC Report flag checked in the Project Maintenance screen will be considered, in addition to the current project.

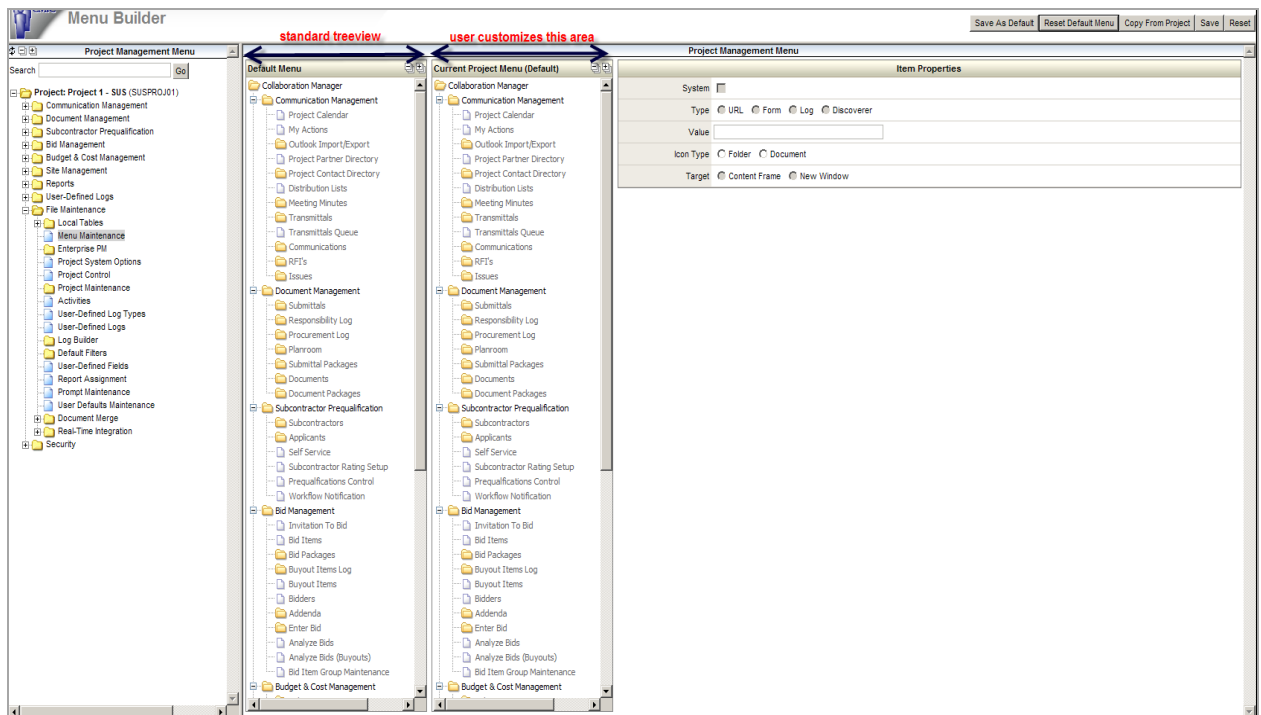
File Maintenance

Overview – File Maintenance

File Maintenance is the area of the xProjects program that deals with the definition of the Log and Query Filters for the various functionality in xProjects.

Users can customize their PMJSP Treeview, reports and form letters can be assigned by project and or company. In addition, the Project Control, Project Maintenance and User-Defined fields are defined in this section.

Menu Maintenance

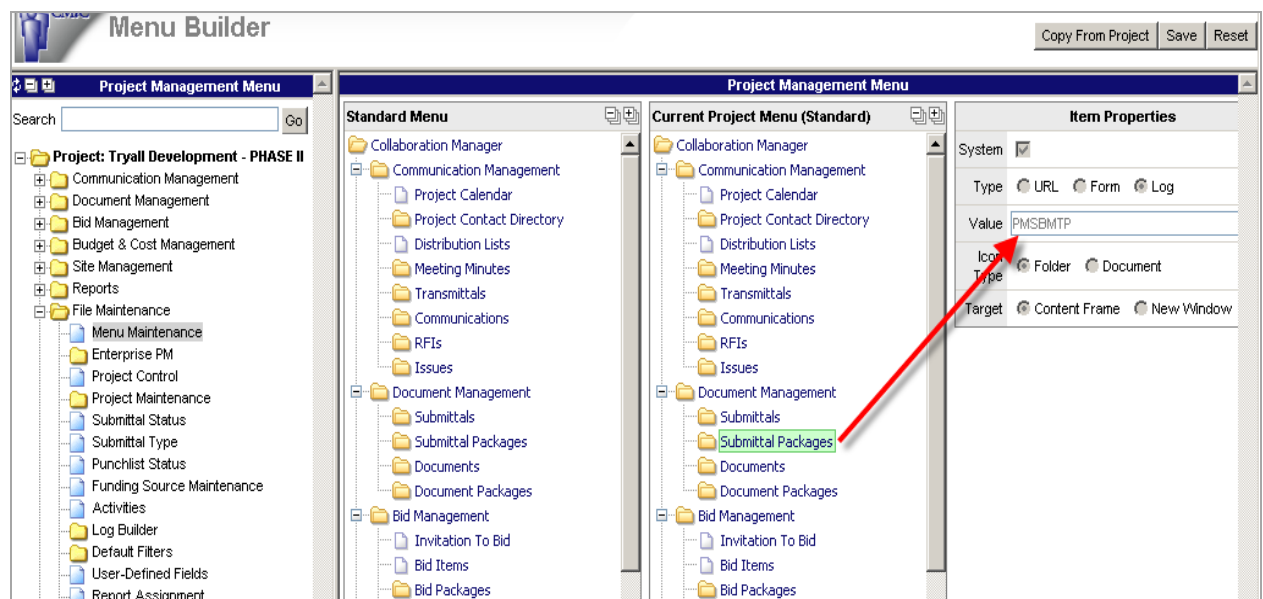


Standard Treeview path: xProjects > File Maintenance > Menu Maintenance

Menu Maintenance allows you to 'tailor' your PM JSP Treeview to suit your needs. Depending on the functions you perform as a user, your Treeview can be set up to reflect what you do on a daily basis. It can incorporate Forms from the Enterprise system, web pages (internal and external) and logs.

Menu Maintenance JSP has the following features:

- Allows for editing menus by project in PM and by user in all the other modules (OM, HR, DM)
- Allows for adding standard and custom forms and logs, internal and external URLs to the menu
- Drag & Drop between the standard menu and the custom one
- Drag & Drop within the custom menu
- Drop on an item adds the dragged item as a child
- When holding Shift while dragging the item(s) – item(s) will be placed before the drop target
- Multi-Select functionality
- Right-Click menu functionality

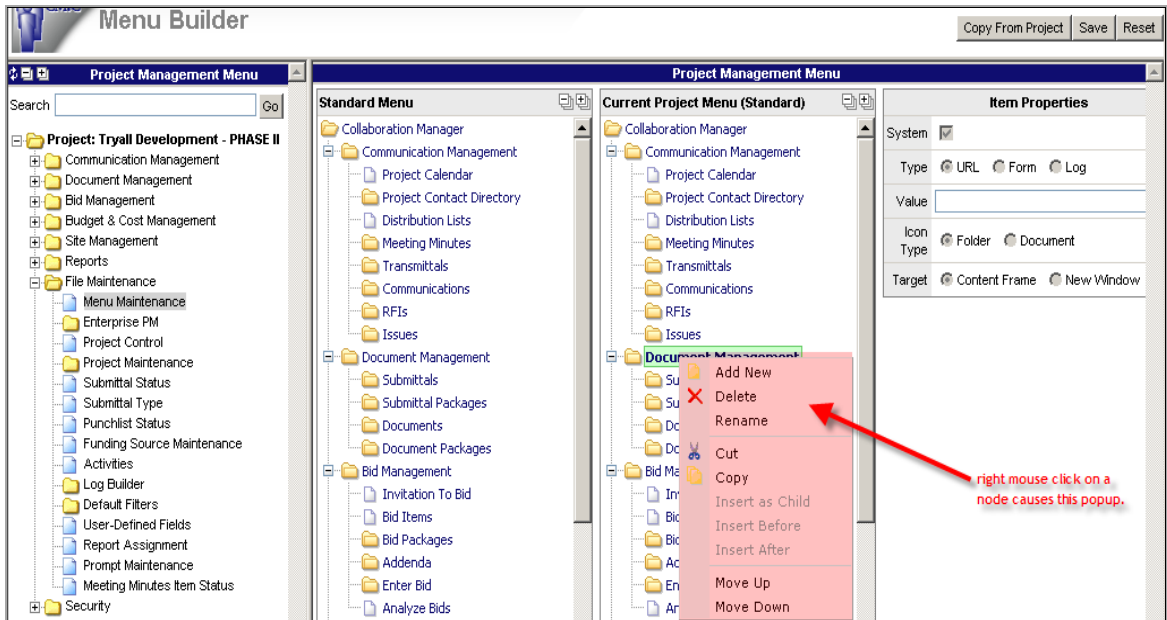


In the screenshot shown above, for example, the Default Menu is the standard PM JSP Treeview showing all the functions available and the various lower levels.

The Current Project Menu is your work-area for dragging items from the standard menu and dropping them wherever you wish in the current project area. If you click on an item in the Current Project Menu, it becomes highlighted in green, and the Item Properties (rightmost frame) will show the various property values for that item. As is shown by the red arrow, the item selected is a system file of 'Log' type. The icon pictured for this menu item is a 'Folder', and if it should be selected from the Project Treeview on saving, the log will come up in the 'Content Frame'.

Right-Click Functionality

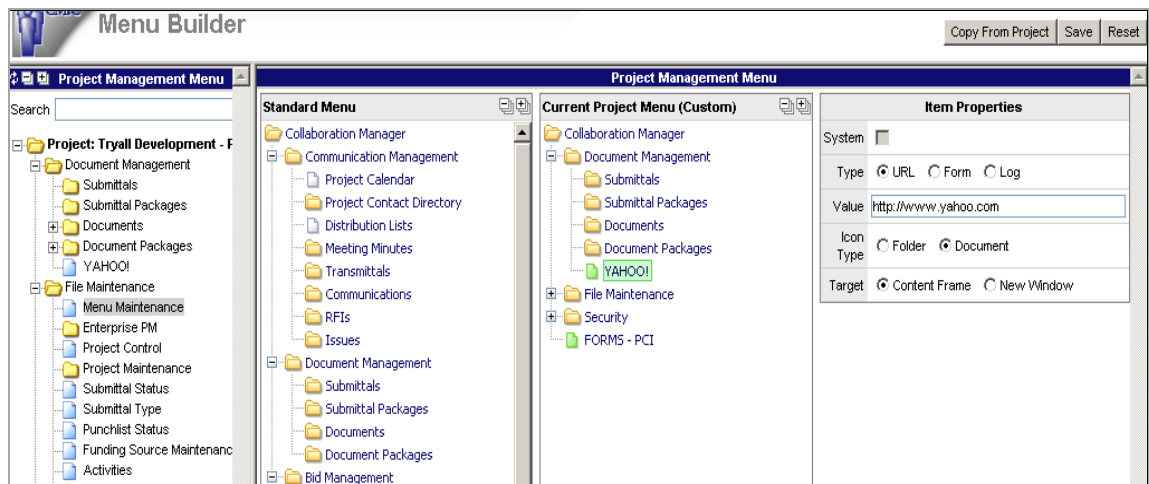
Click the right mouse button on a node while in the 'Current Project Menu' area. A similar screen to one pictured below is shown.



From this pop-up menu, you can add a new node, delete an existing one, rename, cut, copy, etc. Actions become enabled or disabled depending on the node level you are on.

EXAMPLE:

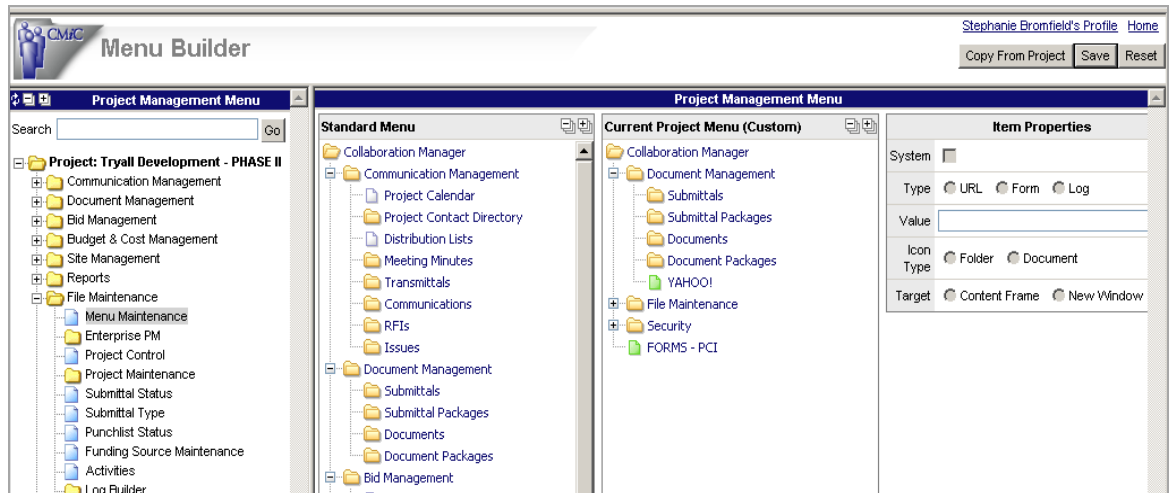
If you click on 'Add New', the New Node text comes up and you can give the node an appropriate name, e.g. YAHOO!. Then select type = URL; value = <http://www.yahoo.com>. Set the icon type = Document, and the Target = Content Frame.



Once you have completed re-configuring your PM JSP Treeview, click [Save].

You can also copy the Treeview configuration from an existing project by using the [Copy From Project] button.

Refresh your JSP session so that the change can take effect.

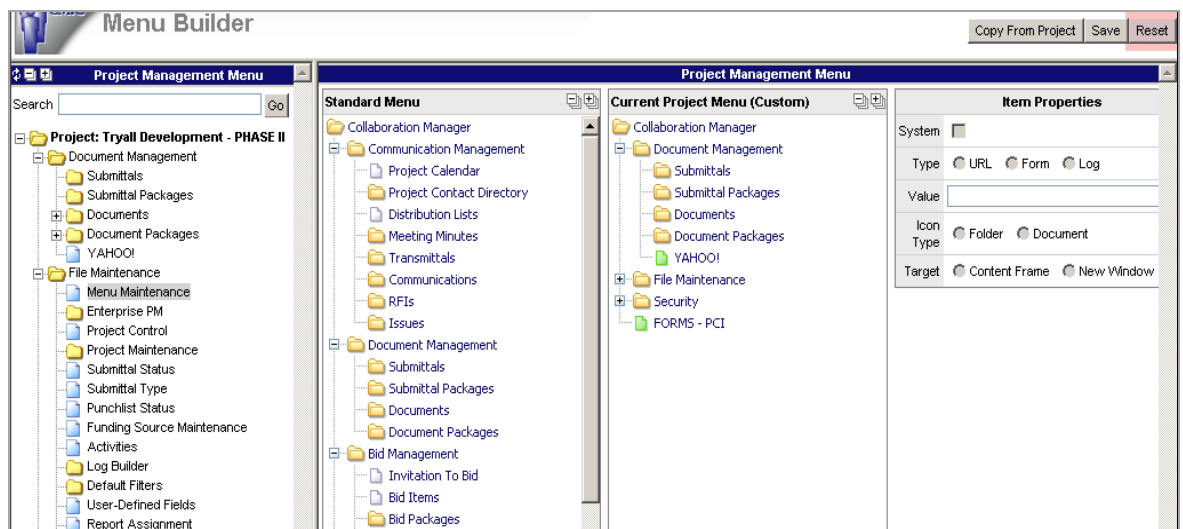


The custom Treeview created above, when saved and the session refreshed, is shown in the following screenshot.



Resetting Custom Treeview to the Standard (Default)

To reset the PM JSP Treeview back to the standard (default) look, go to the Menu Maintenance of your custom menu and click the **[Reset]** button.

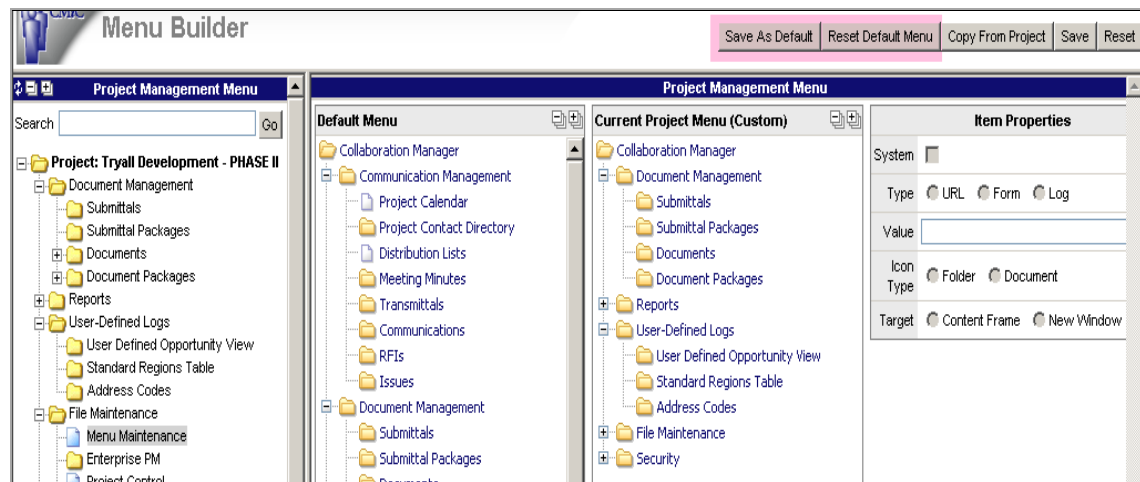


Security Settings for Menu Maintenance

Add/Remove privileges from the PM_ADMIN Role	
Privilege	Granted
Access to Unsubmitted Records Of The Same Partner	<input type="checkbox"/>
Action Items - Create Public Items	<input type="checkbox"/>
Address Code - Create On The Fly	<input type="checkbox"/>
Communication - Create	<input type="checkbox"/>
Logs - Set Defaults For Query Configurations	<input type="checkbox"/>
Logs - Set Defaults For Query Filters	<input type="checkbox"/>
Meeting Minutes - Create	<input type="checkbox"/>
Meeting Minutes - Edit Own Records	<input type="checkbox"/>
Menu Maintenance - Assign Security to Custom Items	<input type="checkbox"/>
Menu Maintenance - Set System Default	<input type="checkbox"/>
Messages - Update text messages for different users	<input type="checkbox"/>
Notes - Delete Own Notes	<input type="checkbox"/>

Resetting Custom Treeview to the CMiC Standard

The privilege: 'Menu Maintenance - Set System Default' allows the user with this privilege to save a system-wide default menu configuration. Two buttons on the Menu Maintenance screen become enabled for the user with this privilege - they are [Save as Default] and [Reset Default Menu].

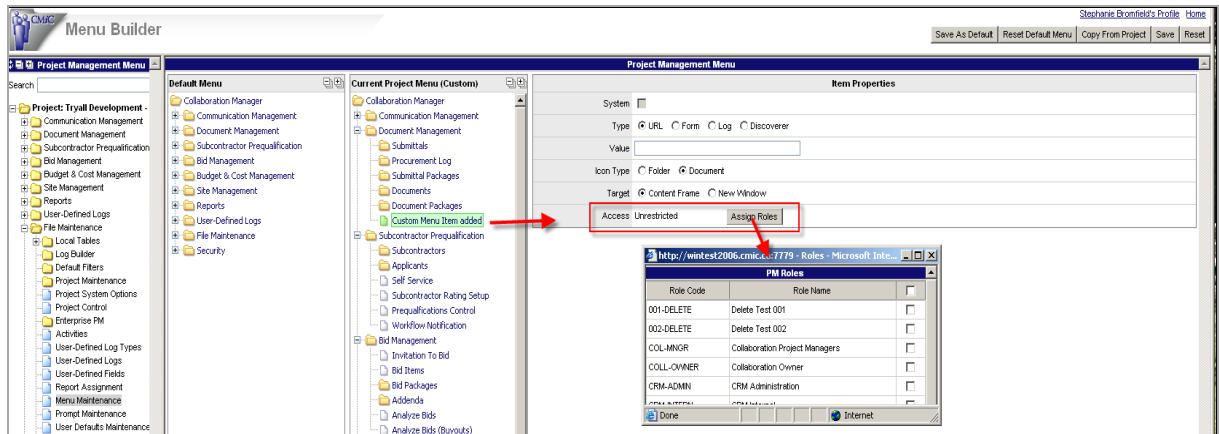


Example of [Save As Default] and [Reset Default Menu] buttons on Menu Maintenance screen

The [Save as Default] button will save the current menu as the new system-wide default menu. The [Reset Default Menu] will reset the system default menu back to the CMiC Default.

Assigning Security to Custom Items

The xProjects Security privilege "Menu Maintenance – Assign Security to Custom Items" can be set at either the role or the user level. When checked, the user with this privilege will be able to assign security roles to custom items defined in Menu Maintenance.



Example of assigning security to Custom Menu Item

Users with the privilege will have access to the [Assign Roles] button which is displayed when a custom menu item is selected in Menu Maintenance.

If no roles are assigned to a custom menu item, it is available to anyone. Otherwise, it is only available to users with the selected roles.

Defining Custom Menu Items for Documents and Document Packages

An added feature to the Menu Maintenance is the ability to launch specific document and document package types (**Forms version**) from the PM JSP Menu, using the Menu Maintenance custom item definition, and passing the document type (defined in Document Options), as a parameter in the Value property of the item:

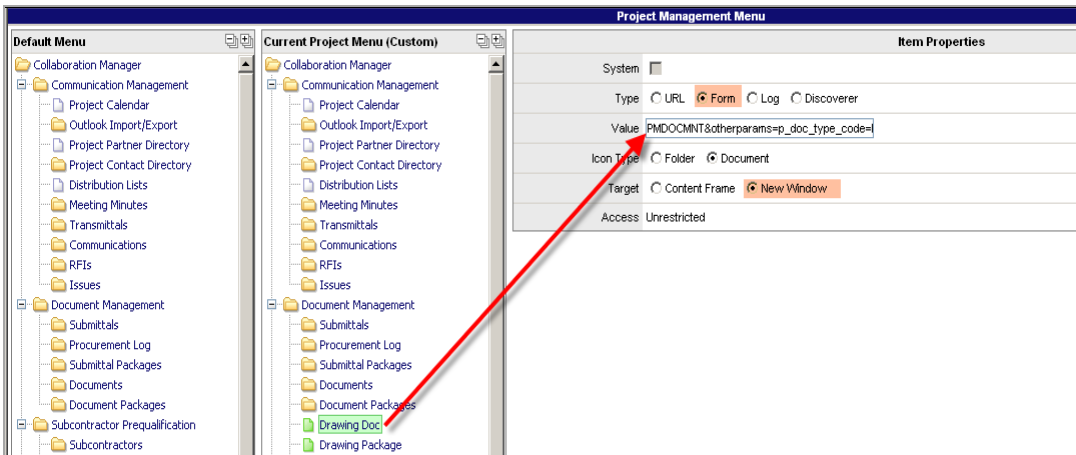
PMDOCMNT&otherparams=p_doc_type_code=DRAW+term=cmicweb.res

NOTE: The forms SHOULD NOT be set up to load in the CONTENT frame, use NEW WINDOW.

Additional Note: The parameter term=cmicweb.res only needs to be used in conjunction with "otherparams". If "otherparams" is not used, it is not necessary to specify the term=cmicweb.res part.

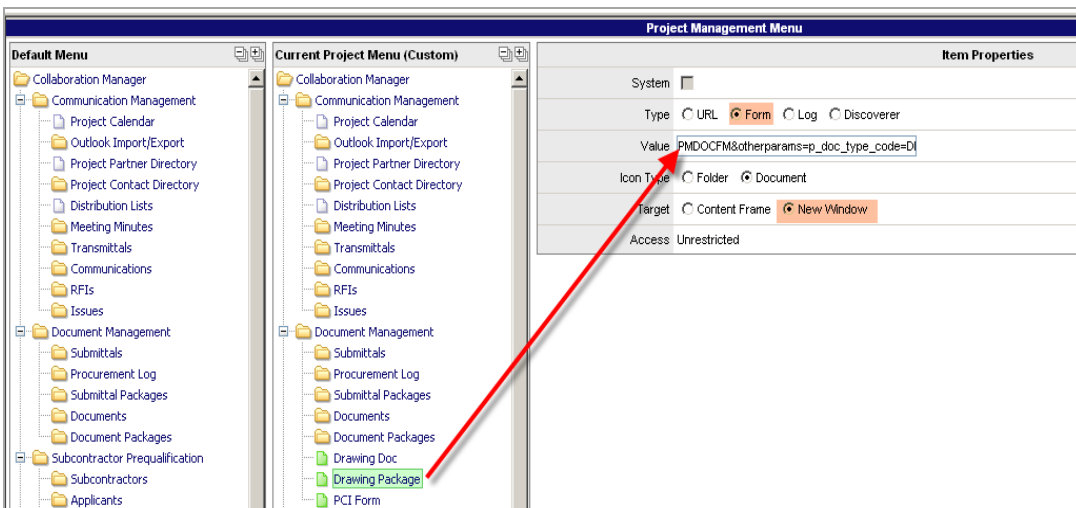
Example:

For **Documents**: PMDOCMT&otherparams=p_doc_type_code=DRAW+term=cmicweb_res



Example of Defining Custom Menu Items for Documents

For **Document Packages**: PMDOCFM&otherparams=p_doc_type_code=DRAW+term=cmicweb.res



Example of Defining Custom Menu Items for Document Packages

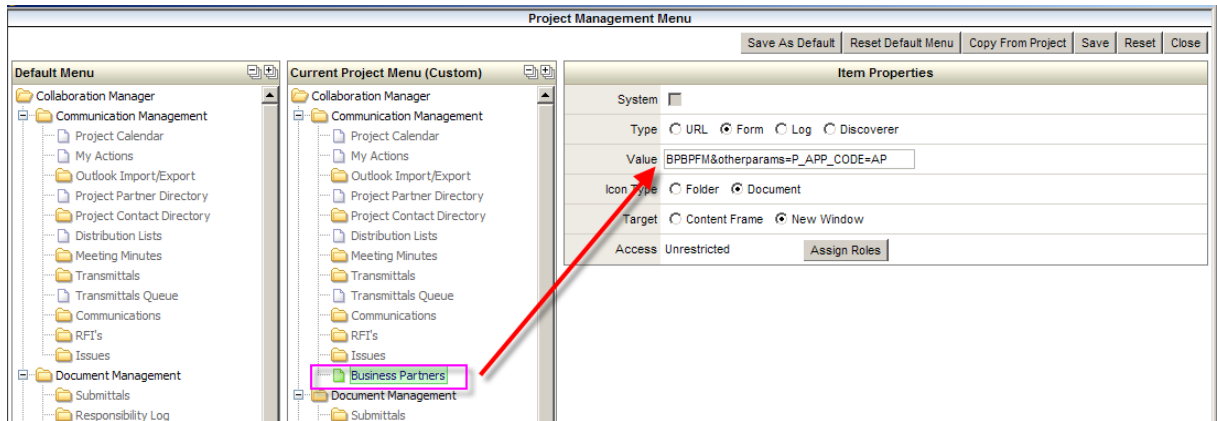
Attaching Business Partner Form to JSP Treeview

Adjustments have been made so that the Business Partner form can be called from the JSP Treeview by specifying application code as well. This is needed because the form may behave differently based on where it is called from (PM, AP...). By default, when the form is attached it will show buttons applicable to PM. To get the additional buttons applicable to the AP module for instance, additional parameters are required.

For example, calling the Business Partner form from the AP application, the user would enter:

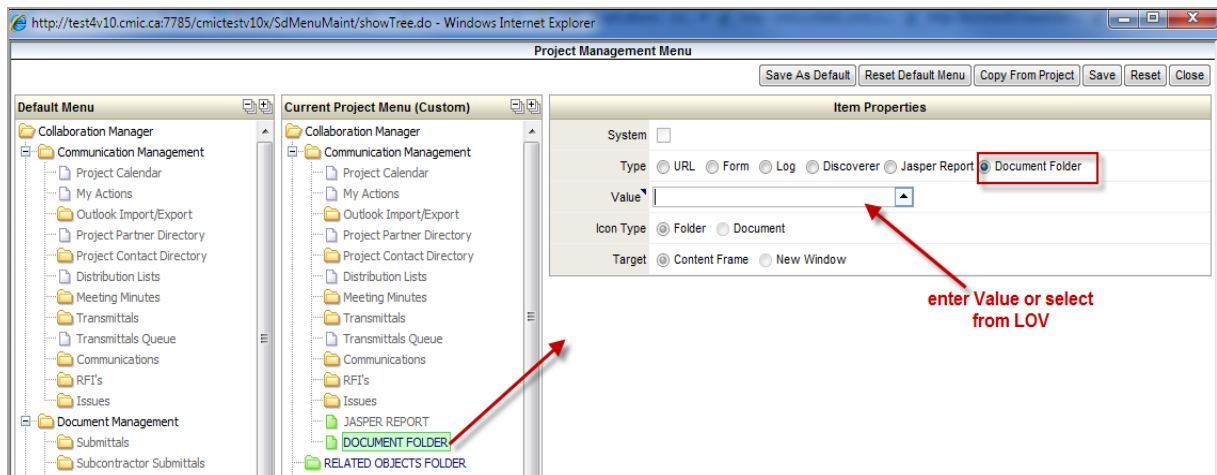
BPBPFM & otherparams = P_APP_CODE = AP

See the screenshot below.

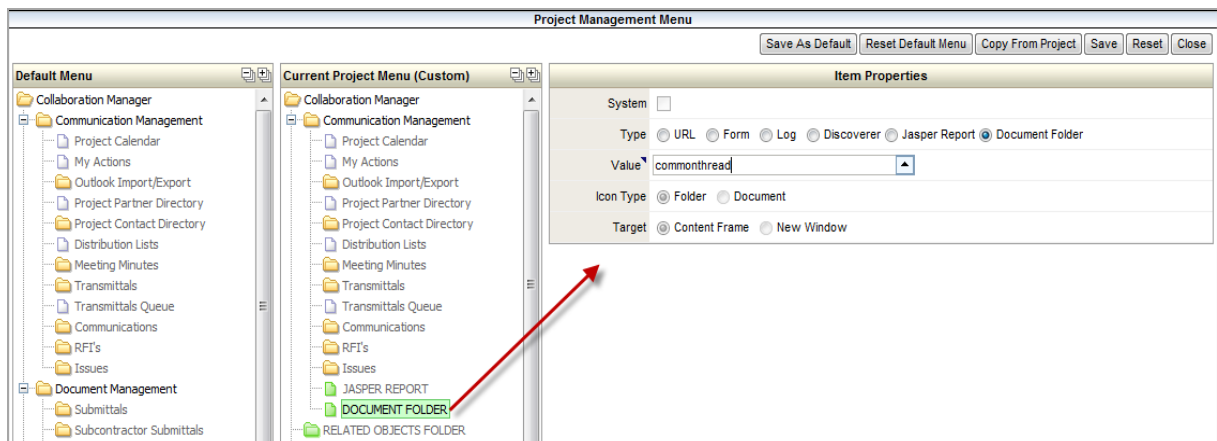


Example of attaching a Business Partner Form to JSP Treeview

Document Folders

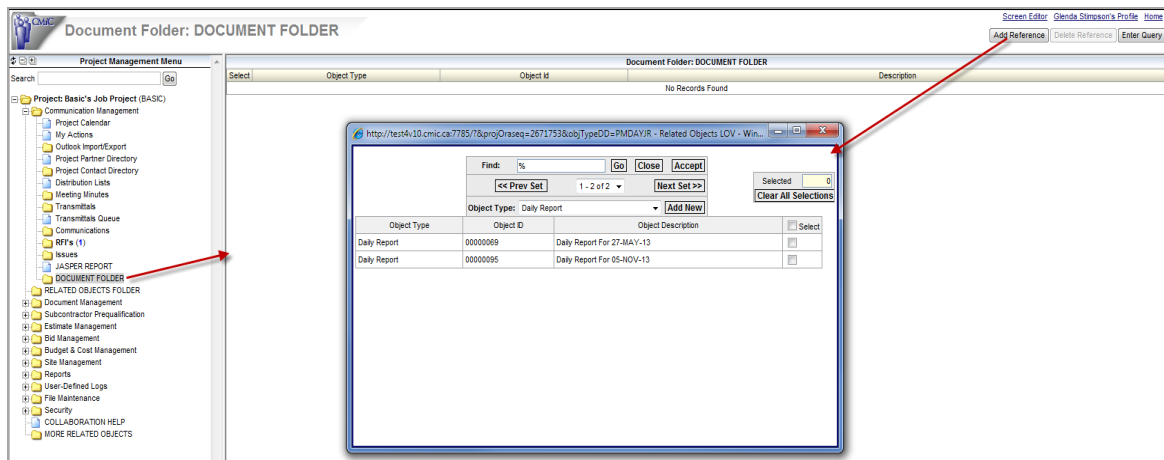


The Document Folder Menu Maintenance **Type** allows creation of a menu item for Document Folder under which different related PM objects can be listed, similar to a log.

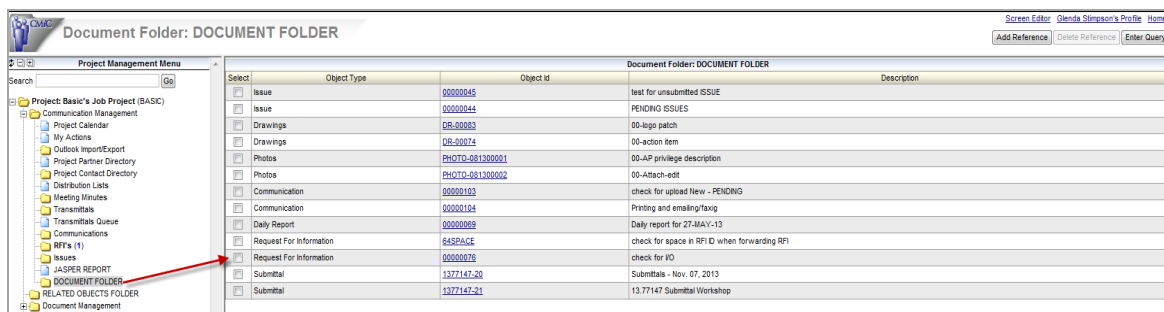


Once the document folder is created and saved, the user can assign xProjects security to it using the **[Assign Roles]** button in Menu Maintenance.

To assign various related PM objects to the newly created document folder, simply access the folder on the Treeview as you would for any other program/log.

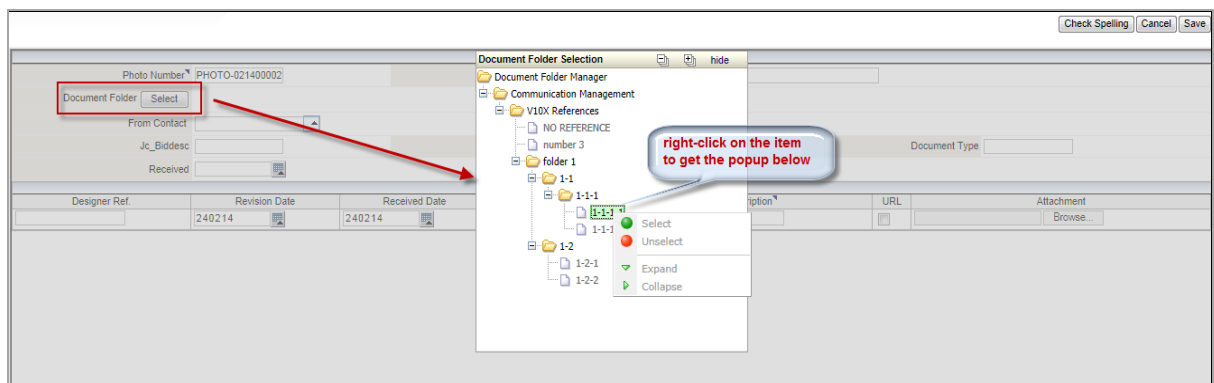


Click the **[Add Reference]** button which will display a pop-up window of various types of related object type. Check the boxes for your selection and click **[Accept]**. The objects selected will be saved to the document folder and can be accessed directly by their Object ID link:



To remove one or more referenced object from the log, first select them using the checkbox to the far left and then click **[Delete Reference]**.

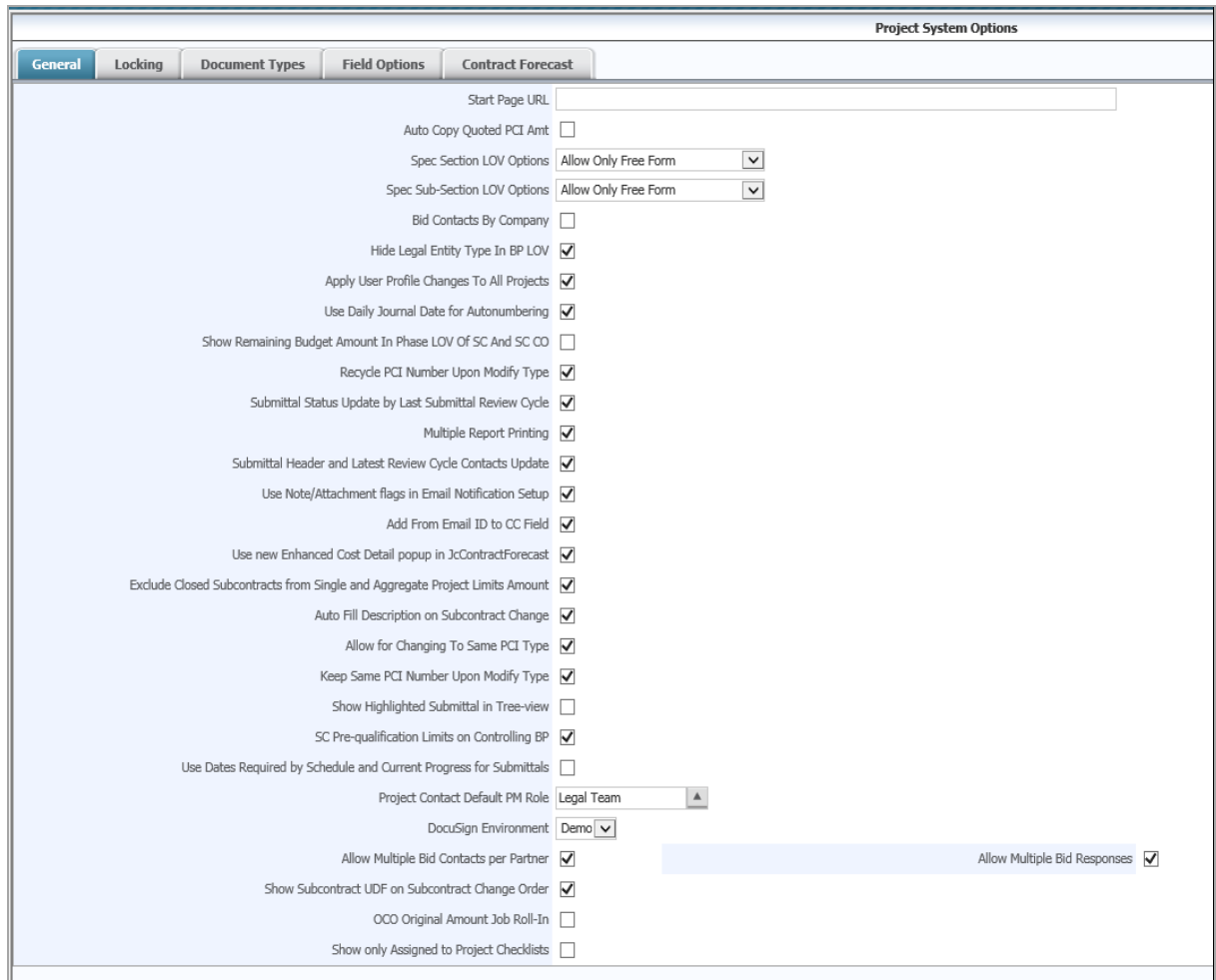
A shortcut way of assigning a document record to a Document Folder is via the **Document Folder** field in the header of document records (see screenshot below).



To select a Document Folder, click the **[Select]** button first to get the Document Folder Selection pop-up window, then right-click on the desired item to get a pop-up to 'Select' or 'Unselect'.

The Document Folder field is only available when uploading documents, that is, during Add/Upload New or Upload Multiple mode of document records either directly in Document Management or via the Attachments tab of PM objects. The field can be 'Hidden' via field security, if required.

Project System Options



Standard Treeview path: *xProjects > File Maintenance > Project System Options*

This program must be used to define system-wide project options that affect the entire Project Management JSP, regardless of company or project.

The Project Options screen consists of the following tabs: General, Locking, Document Types, Field Options, and Contract Forecast.

General – Tab

Project System Options

General Locking Document Types Field Options Contract Forecast

Start Page URL

Auto Copy Quoted PCI Amt ☐

Spec Section LOV Options

Spec Sub-Section LOV Options

Bid Contacts By Company ☐

Hide Legal Entity Type In BP LOV ☒

Apply User Profile Changes To All Projects ☒

Use Daily Journal Date for Autonumbering ☒

Show Remaining Budget Amount In Phase LOV Of SC And SC CO ☐

Recycle PCI Number Upon Modify Type ☒

Submittal Status Update by Last Submittal Review Cycle ☒

Multiple Report Printing ☒

Submittal Header and Latest Review Cycle Contacts Update ☒

Use Note/Attachment flags in Email Notification Setup ☒

Add From Email ID to CC Field ☒

Use new Enhanced Cost Detail popup in JcContractForecast ☒

Exclude Closed Subcontracts from Single and Aggregate Project Limits Amount ☒

Auto Fill Description on Subcontract Change ☒

Allow for Changing To Same PCI Type ☒

Keep Same PCI Number Upon Modify Type ☒

Show Highlighted Submittal in Tree-view ☐

SC Pre-qualification Limits on Controlling BP ☒

Use Dates Required by Schedule and Current Progress for Submittals ☐

Project Contact Default PM Role

DocuSign Environment

Allow Multiple Bid Contacts per Partner ☒

Show Subcontract UDF on Subcontract Change Order ☒

OCO Original Amount Job Roll-In ☐

Show only Assigned to Project Checklists ☐

Allow Multiple Bid Responses ☒

Standard Treeview path: *xProjects > File Maintenance > Project System Options – General tab*

Start Page URL

The **Start Page URL**, if defined, will load whenever the user logs into PM JSP.

The defined URL will be used for all projects unless it is overridden on the project level.

To use the 'My Actions' page as the project start page, enter the following in the **Project Start Page URL**: `../PmMyActions/`

CAUTION: If the My Actions program URL is set at the system level, it will affect ALL PM JSP users, and will display the message “**You are Not Authorized to Access This Program**”, if the program and menu item have not been assigned to the user’s role. The same message will occur at the project level if the user accesses a project which has this URL defined but the user’s role has no security for the program.

Auto Copy Quoted PCI Amt – Checkbox

If checked, will move the right-most, non-empty value in a PCI detail line to the Final Amount if the PCI status on the header is changed to Approved, on saving the record.

Spec Section LOV Options

This replaces the former 'Use CSI Code for Spec Section LOV' flag. A drop-down box is now used with more flexible options:

- a) Allow Only CSI Codes
- b) Allow Only Free Form
- c) Allow Both CSI Code & Free Form (Default by Free Form)
- d) Allow Both CSI Code & Free Form (Default by CSI)

These selections apply to both the Submittal Spec Section and the Spec Sub-Section, and also Submittal Packages in the case of Submittal Spec Section.

WARNING: Switching from one option to another may render the current values invalid, as they will be validated against the selected value type (Free Form or CSI Codes), if the user edits and saves submittals and or submittal packages with different value types. A confirmation is displayed when the value is set.

Spec Sub-Section LOV Options

This drop-down option box displays the same options as those for the Spec Section - i.e. to display the LOV with Free Form text only, CSI Codes only or both Free Form text and CSI Codes as radio button options in the Spec Sub-section LOV of Submittals.

The Spec Section LOV and the Spec Sub-section LOV behave independently of each other.

Bid Contacts By Company – Checkbox

When checked, multiple bid contacts can be assigned to a company. It allows for the specification of department as well (see screenshot below).

When the '**Bid Contacts By Company**' checkbox is checked, the [Assign Companies](#) link becomes available in the System Contacts screen:

The screenshot shows the 'System Contact Info' form. The 'Company Name' is 'Access Engineering & Consulting'. The 'Contact Code' is 'RJ'. The 'First Name' is 'Ronald' and the 'Last Name' is 'Jenkins'. The 'Main E-mail' field is empty. The 'Primary Contact' checkbox is checked. The 'Collab User' checkbox is unchecked. The 'Cellular Number' field is empty. The 'Contact Active' checkbox is checked. The 'Bid Contact' checkbox is checked, and the 'Assign Companies' link is highlighted with a pink box. The 'PM Role' is 'Subcontractor' and the 'Additional Roles' link is visible. The 'Photo' section shows 'Photo is not on file' with 'Upload Photo' and 'Remove Photo' buttons. The 'Address' field is empty.

Standard Treeview path: xProjects > Security > Contacts – System Contract Info tab

Clicking on this link displays a pop-up screen by which the companies and departments to which the system contact can be assigned as a bid contact. The 'Bid Contact' checkbox is automatically updated for the contact if this popup is filled in. Likewise, if all company assignments are removed, the Bid Contact flag gets un-checked.

The screenshot shows the 'System Contact Info' form for 'Access Engineering & Consulting'. The 'Assign Companies' checkbox is checked. A pop-up window titled 'Assign Bid Contact Companies' is open, showing a table with columns for Company, Department, and Action. The table lists 'CMC Construction Inc. (CC)' and '01 CMC Construction Inc.'. A red arrow points to the 'Assign Companies' checkbox in the main form.

Example of pop-up window launched from 'Assign Companies' link on the Contacts screen

CAUTION: When this option is ON, the Project Contact and System Contact 'Bid Contact' flag is disabled. When the option is set ON, the Bid Contact value of Project Contacts and System Contacts is cleared out. Project Systems Options flags should not be switched ON/OFF at will, but recommended to be a one-time setting.

Hide Legal Entity Type in BP LOV – Checkbox

When this flag is checked, all business partners with a Legal Entity Type of 'Internal' will be excluded from business partner LOVs in PM JSP only. However, manually typed in values are still accepted.

When the flag is checked, the 'Internal' type Legal Entity business partners are also excluded from the logs for Subcontractor Prequalification.

Apply User Profile Changes To All Projects – Checkbox

With this flag on, any changes made in the User Profile screen will be pushed down to all projects to which the current user is assigned.

Use Daily Journal Date for Autonumbering – Checkbox

When this flag is checked, the actual daily journal date will be used in the generation of the daily journal ID, instead of the system date. This is only applicable to Add mode of Daily Journal.

The screenshot shows the 'Daily Journal' form. The 'Journal No.' is '12-07-10.0001'. The 'Date' is '071210'. The 'Prepared By' is 'Amanda Matthews'. The 'General' tab is selected. A red box highlights the 'Journal No.' and 'Date' fields. Another red box highlights the 'Actual system date is February 04, 2011' message in the 'Activities' section.

For example, when the project mask is set at mm-dd-yy.***, and this Systems Options flag is checked, the first daily journal record created for September 10, 2009 will have the code 09-10-09.0001, even though the current system date might be September 12, 2010.

The Forms version of Daily Journal has been changed to work with this new method as well.

Show Remaining Budget Amount in Phase LOV of SC and SC CO – Checkbox

By default, this flag is un-checked. If checked, the Phase LOV in subcontract and subcontract change order programs will display the remaining budget amount by category in two sections: zero and non-zero.

The Remaining Budget Amount = Budget Amount – Committed to Date

Recycle PCI Number Upon Modify Type – Checkbox

By default, this flag is checked to maintain previous functionality. If it is un-checked, the system will not reuse PCI numbers when the Modify Type feature is executed. Therefore, if the user clicks 'Modify Type', for a particular PCI Type, the next number in sequence for that type is proposed. If the user then changes their mind and deletes the PCI prior to any more being created for that type, later when another Modify Type is executed for the same PCI Type, that PCI number will not be re-proposed.

Submittal Status Update by Last Submittal Review Cycle – Checkbox

By default, this checkbox is un-checked. If checked, the submittal Status field is updated from the status of the last submittal review cycle record added that has a non-blank Status, when it is saved.

Multiple Report Printing – Checkbox

This flag allows printing of multiple form letters with attachments. When the flag is checked and the **[Print Report]** button in any PM JSP screen is clicked, the pop-up window displays the 'Print Multiple Form-Letter' link:



The **[Print]** button allows the conventional single report printing.

The **'Print Multiple Form-Letter'** link will take the user to a selection screen where all the report types are listed with an 'Embed Attachments' checkbox, if the user wishes to print the attachments as well. Further details are given in the Addendum of this manual.

Submittal and Last Review Cycle Contacts Update – Checkbox

By default, this flag is un-checked. When checked, it will synchronize any updates in the contacts for the Submittal Header and the History tab for the latest review cycle (standard Treeview path: *xProjects > Document Management > Submittals*).

Use Note/Attachment flags in Email Notification Setup – Checkbox

By default, this flag is un-checked. When checked, the drop-down boxes in the Email Notifications tab of contact entry (Project Contact or System Contact) are replaced by checkboxes. In addition, there are checkboxes for indicating whether an email notification must be sent when a Note or Attachment is added to the object.

There is an additional checkbox against RFI in the Email Preferences of the Project Contact to indicate whether the contact should receive an email notification when an **RFI is answered** and the contact is the 'To' contact on the RFI.

Add From Email ID to CC Field – Checkbox

When this flag is checked, the FROM email ID is copied into the CC field when printing to email.

Use new Enhanced Cost Detail popup in JC Contract Forecast – Checkbox

When this flag is checked, the **Enhanced** Cost Detail pop-up will be displayed in the Contract Forecast with PCI Projections screen:

Description	Burdened Rate	Quantity Of Rate	Frequency	From Date	To Date	Rem. Duration	Cost To Complete

Total Cost To Complete 0.00
Projected Cost Forecast 55750.00
Projected Variance 145550.00

Exclude Closed Subcontracts From Single and Aggregate Project Limits Amount – Checkbox

This flag indicates whether Closed contracts should be included when determining the Single Project Limit and the Aggregate Project Limit in Subcontracts. By default, the flag is un-checked, to maintain original functionality.

Auto-Fill Description on Subcontract Change – Checkbox

When checked, this flag will cause the Description field in Subcontract Change Orders to be auto-filled with the description from the subcontract header. By default, the flag is checked to maintain original functionality.

Allow for Changing To Same PCI Type – Checkbox

By default, the flag is un-checked. When checked, it allows users to modify an existing PCI to another PCI of the same class type (they may have different auto-numbering masks).

Allow Cancelling PCIs with Posted SCOs – Checkbox

By default, this flag is checked (to preserve previous functionality). If it is un-checked, users are not allowed to change the PCI header status to a 'Cancelled' type if there are PCI details that are linked to any posted subcontract change orders. These changes do not apply to the FORMS version of PCI Entry.

Field security is available for this checkbox as well, and has a default setting of 'Hidden':

Item Name	Security Level	Security
Allow Cancelling PCIs with Posted SCOs	Unrestricted Read-Only	Hidden

Keep Same PCI Number Upon Modify Type – Checkbox

When this flag is checked, the system keeps the number of the PCI while type is being modified.

The flag 'Recycle PCI Number Upon Modify Type' in the Project System Options has to be checked as well to allow the system to use the same PCI number.

Show Highlighted Submittal in Tree-view – Checkbox

When checked, the Submittals in the current user's responsibility will be highlighted in the Treeview.

SC Pre-qualification Limits on Controlling BP – Checkbox

This flag allows the user to use the subcontractor prequalification limits set at the controlling business partner level to apply to the lower level business partners when subcontracts and subcontract change orders are written. Further details are available in the Subcontractor Prequalification guide.

Use Dates Required by Schedule and Current Progress for Submittals – Checkbox

This flag is used to allow users to switch between the new submittal schedule look and the older look. By default, the flag is un-checked.

When the flag is checked, the Submittal Entry screen – Schedule section has an additional row of schedule dates which represent Current Progress. There is a new **Onsite** column representing the date that the materials are due to be at the job site. In addition, in view mode of the Submittal, there are two new fields: 'Days Until Due' and 'Days Until Required'.

Project Contact Default PM Role

This role will be used for the newly created PM contact if there are no project roles assigned.

Assume the default PM role has been set to "DEFAULT":

Example 1:

If the User is assigning a project contact from system contacts: the PM Role on the system contact is "ARCH". The system will assign "ARCH" to the contact at the project level.

Example 2:

If User is assigning a project contact from system contacts: the PM Role on the system contact is not specified (NULL). The system will assign "DEFAULT" to the contact at the project level since it is the default PM Role specified in Project System Options.

Example 3:

If User is creating a new contact (project-only or otherwise): the system will assign "DEFAULT" to the contact at the project level since it is the default PM Role specified in Project System Options.

DocuSign Environment

This setting is used to indicate which environment is being used for the DocuSign integration.

NOTE: The CMiC DocuSign integration provides the easiest and most robust Enterprise electronic signing solution. Layered on top of CMiC ECM, the solution allows users to quickly prepare documents for signing by selecting project documents and specifying recipients. Then with the click of a button, the documents are locked and transmitted to DocuSign's eSignature transaction management platform. Recipients are notified to complete the signing process in DocuSign. After completing the signing process, the signed document, with signatures, is made available in CMiC as a new revision.

Allow Multiple Bid Contacts per Partner – Checkbox

When this flag is checked, the system will allow users to assign the 'Bid Contact' designation to more than one contact of the same business partner.

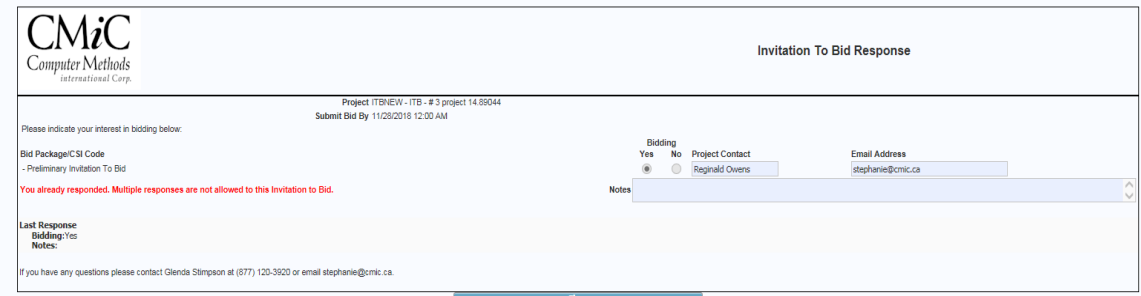
This also means that the Invitation to Bid Broadcast can be sent to multiple bid contacts of the same business partner.

The default value of the checkbox is ‘un-checked’ to maintain the previous functionality of having only one bid contact per business partner.

This flag must not be confused with the flag ‘**Bid Contacts By Company**’ which is solely to allow multiple bid contacts within the same Company/company department.

Allow Multiple Bid Responses – Checkbox

By default, this checkbox is checked. When it is un-checked, contacts will not be allowed to respond to the same ITB broadcast more than once. Any attempt to do this will be met with a message similar to the one below:



Show Subcontract UDF on Subcontract Change Order – Checkbox

This flag is used to indicate whether the UDFs from the main subcontract header should be available on any subcontract change orders. By default, the flag is checked (= Yes), preserving previous functionality. When the flag is un-checked, the UDFs from the main subcontract header are not available on any subcontract change orders.

OCO Original Amount Job Roll-in – Checkbox

This checkbox has been added as a follow-up enhancement to address the problem whereby some users may want to include the sub-jobs with the controlling job when considering the Original Contract Amount of Owner Change Orders (regardless of JB Contract), as opposed to showing separate amounts when the sub-jobs have their own Job Billing contract. By default, the checkbox is un-checked, to reflect the latter case, which is the default functionality.

Show Only Project-Specific Checklists – Checkbox

When checked, will allow users to see only project-specific Checklists on the Treeview menu.

NOTE: The user has to refresh the Treeview menu in order to see changes when assigning/unassigning Checklists to/from the project.

Payment Response Flag – Checkbox

If checked, user can enter amount values against LOV line level at self billed screen.

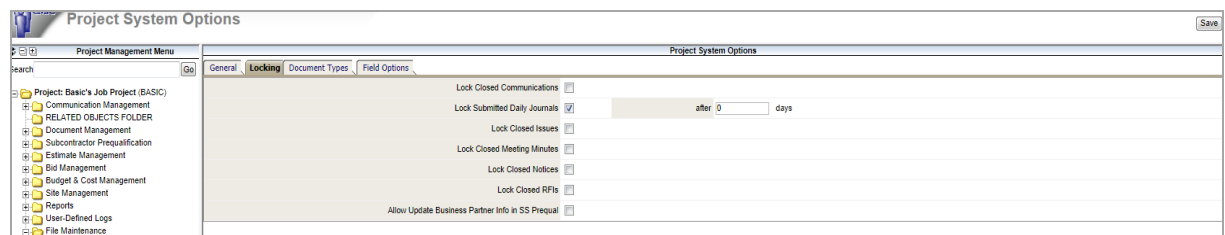
Add Additional Submittal Reviewers to CC List – Checkbox

When checked, the additional reviewers will be added to CC list on Submittal.

Ball in Court – Due Within(Days)

The value entered here will set the default number of days for Ball In Court Report’s ‘Due Within(Days)’ field on the Ball in Court report screen (Standard Treeview path: *xProjects > Reports > Communication Reports > Ball in Court*).

Locking – Tab



Standard Treeview path: *xProjects > File Maintenance > Project System Options – Locking tab*

Locks can be placed on a number of PM objects based on a status (Closed) or period of time. The objects include RFIs, Issues, Communications, Meeting Minutes, Notices, Daily Journals, and Checklists.

For all the objects except Daily Journal and Checklists, the decision is based on the status (status class if applicable).

For **submitted** Daily Journals and Checklists, it is a user-defined period of time (days) from the daily journal date (but it still includes an on/off switch).

The lock overrides any privileges (Update all, etc.) except for users with an admin role (i.e. Admin flag is checked on the role) – the new settings do not apply to them.

Un-checking any of these checkboxes will put the object back in an un-locked status.

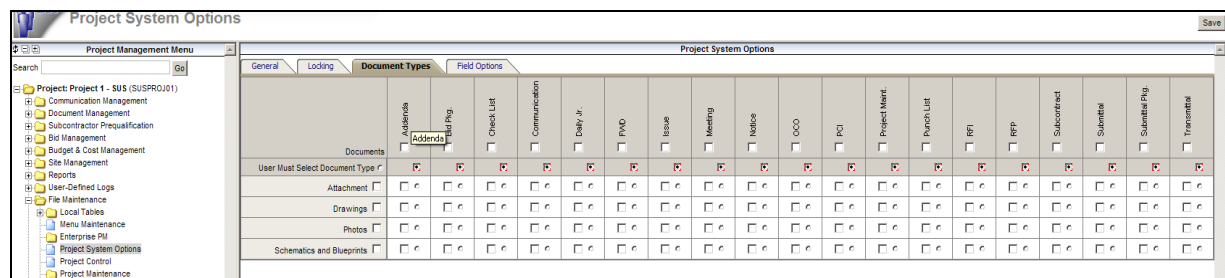
While the object is locked, adding a new record, copying and printing are still available, but the Link to Issue, and Create Change, Link Change, Remove Link and Add to Change links are not available.

Allow Update Business Partner Info in SS Prequalification – Checkbox

By default, this flag is checked, to preserve standard functionality. When it is un-checked, the user is unable to make changes to the business partner information fields in the Subcontractor Prequalification Self Service screen.

NOTE: The Business Partner information fields are not locked until the Applicant becomes an Approved Subcontractor.

Document Types – Tab



Standard Treeview path: *xProjects > File Maintenance > Project System Options – Document Types tab*

This screen contains a matrix which is used to define the default Document Type as well as assign various Document Types to selected PM Objects.

By default (initially installed), the default document type is set at 'Attachment'.

If there is no data setup in this screen for the specific object, then the system will function as it usually does.

If a new document type is added to the system, it will not be available for any object that has active document types until security is assigned, as well as assignment performed in the Systems Options matrix.

When the setting 'User Must Select Document Type' is ON, then the prompt "**Please Select a Document Type**" is displayed in the drop-down selection for [Upload Multiple] and [Upload New] pop-up boxes to ensure the user chooses a document type instead of having a default value.

Field Options – Tab

Program	Field	Days Past	Days Future	Default
Daily Journal	Date			<input checked="" type="checkbox"/>
Field Work Directive	Date Created			<input checked="" type="checkbox"/>
Issue	Date			<input checked="" type="checkbox"/>
Meeting Minutes	Meeting Date			<input checked="" type="checkbox"/>
Notice	Date			<input checked="" type="checkbox"/>
Owner Change Order	Date Issued			<input checked="" type="checkbox"/>
Potential Change Item	Date			<input type="checkbox"/>
RFI	Date Created			<input checked="" type="checkbox"/>
Transmittal	Date			<input checked="" type="checkbox"/>

Standard Treeview path: xProjects > File Maintenance > Project System Options – Field Options tab

This screen allows the user to specify whether the current date should be defaulted in the defined date fields for the PM objects shown. By default, this flag (Default) is checked for every object shown except Potential Change Item, to maintain current functionality.

Two other fields are shown:

Days Past = number of days before the current date, by which this date can be back-dated on the objects shown

Days Future = number of days after current date, by which this date can be brought forward on the objects shown

The PM objects affected are: Daily Journal, Field Work Directives (FWD), Issues, Meeting Minutes, Notices, Owner Change Orders (OCO), Potential Change Items (PCI), Request For Information (RFI), Transmittals, Weekly Checklists and Standards for Safety.

NOTE: Field security can be applied to these date fields if required; however, note that if the Default flag is un-checked, and the field security on the date field is set at 'Read-only' then the date field will remain blank, and on saving the record for the object an error will be encountered.

Contract Forecast – Tab

Project System Options

Project Management Menu

Search: [Go]

- Project: V10_X project # 1 (JSP) (V10XPROJ1)
 - Communication Management
 - Document Management
 - Subcontractor Prequalification
 - Bid Management
 - Budget & Cost Management
 - Site Management
 - Reports
 - User-Defined Logs
 - File Maintenance
 - Local Tables
 - Menu Maintenance
 - Enterprise PM
 - Project System Options**
 - Company Control

Project System Options

General | Locking | Document Types | Field Options | **Contract Forecast**

Filter: **Projected Cost**

Show Zero Lines: **None**

Hide Zero Projected Cost Lines: ☒

Rows: **Both**

Standard Treeview path: xProjects > File Maintenance > Project System Options – Contract Forecast tab

The fields on this tab allow the user to set the default system parameters for the PM JSP Contract Forecast filter. These default settings can be overridden at the time when the Contract Forecast with PCI Projection will be executed.

Contract Forecast with PCI Projections

Forecast Comments | Clear Overrides | Store Forecast | Refresh | Contract Summary | Notes | Attachments | Send To Spreadsheet | Archive Forecast | [Go]

Project Management Menu

Search: [Go]

- Project: New Kaiser Auditorium (T&M)
 - Communication Management
 - Document Management
 - Contractor Prequalification
 - Bid Management
 - Budget & Cost Management
 - Contract Forecasting**
 - Contractor Change Orders

Contract

Contract: 10001 | Job: [] | Year: 2016 | Period: [] | Filter: **Cost & Revenue**

Show: ☐ Zero Cost ☒ Zero Cost & Revenue

Hide: ☐ Zero Projected Cost ☐ Zero Projected Cost

Rows: ☐ Recoverable ☐ Non-Recoverable ☒ Both

Project Forecast

Freeze	Contract Code	Job	Cost Code	Name	Cost Type	Type	Method	Current Cost Budget	Spent/Committed Total	Actual Cost	Complete %	Pending Internal PCI	Pending External PCI
<input checked="" type="checkbox"/>	10001	10001	00015	Soil Sample	B	OOST	A	23,785.00	24,082.09	24,082.09	99.18	0.00	200.00

Example of system parameters on PM JSP Contract Forecasting filter (standard Treeview path: xProjects > Budget & Cost Management > Contract Forecasting)

Company Control

Code Masks – Tab

Mask	Sample	Allow Override	Sequence Within Project
Bid Package No. #####	P448957123	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Submittal No. CCyyj****	CC17P41234	<input type="checkbox"/>	<input type="checkbox"/>
Submittal Package No. CCyyj****	CC17P41234	<input type="checkbox"/>	<input type="checkbox"/>
Communication No. CID****	CID1234	<input type="checkbox"/>	<input type="checkbox"/>
Report No. DLY****	DLY1234	<input type="checkbox"/>	<input type="checkbox"/>
Field Work Directive No. FWD****	FWD1234	<input type="checkbox"/>	<input type="checkbox"/>
Notice No. NOT****	NOT1234	<input type="checkbox"/>	<input type="checkbox"/>
RFI No. RFI-****	RFI-1234	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Transmittal No. TRN-****	TRN-1234	<input type="checkbox"/>	<input type="checkbox"/>
Issue No. ISS-****	ISS-1234	<input type="checkbox"/>	<input type="checkbox"/>
Punch List No.		<input type="checkbox"/>	<input type="checkbox"/>
Punch List Item No.			
Checklist No. (ADMIN)		<input type="checkbox"/>	<input type="checkbox"/>
Checklist No. (EXECUTION)		<input type="checkbox"/>	<input type="checkbox"/>
Checklist No. (GROUND)		<input type="checkbox"/>	<input type="checkbox"/>
Checklist No. (MISCELL)		<input type="checkbox"/>	<input type="checkbox"/>
Checklist No. (SAFETY)		<input type="checkbox"/>	<input type="checkbox"/>
Checklist No. (TEMPORARY)		<input type="checkbox"/>	<input type="checkbox"/>
Check List No. (TYPE1)		<input type="checkbox"/>	<input type="checkbox"/>
QC Inspection & Testing Item No.			
Units Complete No.		<input type="checkbox"/>	<input type="checkbox"/>
media.id		<input type="checkbox"/>	<input type="checkbox"/>

Standard Treeview path: xProjects > File Maintenance > Company Control – Code Masks tab

The Company Control screen allows setting of Company Level Masks for auto numbering of Projects and related items, and setting other defaults which are then populated in a new project on creation, but which can be overridden.

To copy the Company level masks to all existing Projects, use the [Copy Masks To Project] button.

Sequencing within a Project is set by the individual items. To select this option, click the ‘**Sequence Within Project**’ flag for the particular object type to have the auto numbering sequenced within the project.

Submittal Auto-numbering by Spec Section

The Submittal Mask allows the specification of a lowercase ‘s’ to be replaced with the Spec Section selected in a **newly created** submittal, if auto-numbering is being used. The mask will default to the project level where it can be overridden.

Defaults – Tab

Standard Treeview path: *xProjects > File Maintenance > Company Control – Defaults tab*

This tab allows definition of default values including Meeting and Communication Footnotes, Markup Rule, Lien Waiver Text (which displays when a payment request is submitted), Submittal Lead Times, and Daily Journal defaults for ‘Copy From’ and Text Types.

The Defaults tab is divided into the following sections: Other, Phase Segmentation, Submittal Lead Time in Days, Submittal – Automatic Notifications, Copy From Previous Daily Journal Defaults, and Text Types.

Other – Section

Show Transmittal Contents – Checkbox

When entering a transmittal, the 'Contents' section will only be displayed when the ‘Show Transmittal Contents’ checkbox is checked.

Document Revision Designer Ref. Mandatory – Checkbox

When adding a New Document, the Designer Ref. field under Revision Info is only mandatory if the flag ‘Document Revision Designer Ref. Mandatory’ is checked.

Project Photo Document Type & Code

The Project Photo Document Type and Code defined here are for clients who also have the **Dashboard** module. It allows you to define what type of document the project photo is and the associated document code for the record (will be stored in Document Management).

When specified and configured for Dashboard, the project photo will be picked up when the user logs into Collaboration.

Use Working Days – Checkbox

The checkbox **‘Use Working Days’** is used to indicate whether working days as set in the Project Calendar should be used in determining the Required Date for Notices, RFIs, Punch Lists, Submittals and Issues, as opposed to using calendar days. A checkbox is positioned beside the related fields (Default Review Period) for RFIs, Issues, Punch lists and Notices, and in the Submittal Lead Times section for Submittals.

Accept RFI Suggestion Confirmation Message

When answering an RFI, the [**Accept Suggestion**] button is used to accept a suggestion which was made when the RFI was created without re-typing the text. The button will copy the suggestion into the answer.

It is possible to have a confirmation message displayed prior to accepting a suggestion, so that greater care is taken with the answer that is selected. The confirmation is set up in this field. This message will pop up when the [**Accept Suggestion**] button in any RFI for that company is pressed.

Lien Waiver Text

The text entered in this field is the lien waiver text which displays when a payment request is submitted.

Default Communication Footnote

Enter a unique footnote to be used on all Communication reports.

Meeting Footnote

Enter a unique footnote to be used on all Meeting Minute reports.

Default Meeting ID Mask / Default Agenda Item ID Mask

Users can define both the Meeting ID and Agenda Item ID masks here, as well as in the Project Maintenance Defaults tab. The values entered here will be used as defaults for the Project level, which in turn will be used as defaults at the Meeting Track level.

Restart Meeting Items Numbering Within New Meeting

Indicates if you want to restart meeting items from the number 1 for each new meeting.

Project Only Contact – Checkbox

The **‘Project Only Contact’** checkbox allows setting a default for Project Contacts when they are being created. When checked, this flag denotes that contacts created in the Project Contacts screen will have a default value of ‘checked’, meaning that the contact is a ‘Project Only’ contact. The hint line for this new checkbox will be displayed when the mouse-pointer is positioned on the checkbox.

Project Only Contact (On the Fly) – Checkbox

The **‘Project Only Contact (On the Fly)’** checkbox allows setting a default for Project Contacts ‘on the fly’ when they are being created. When checked, this flag denotes that contacts created in the Project Contacts ‘on the fly’ screen will have a default value of ‘checked’, meaning that the contact is a ‘Project Only’ contact. Field security for the Project Only Contact ‘on the fly’ flag can be applied, if desired. By default, it is set to ‘HIDDEN’ on the *ALL* role.

Display Subcontract Long Description after Task Name

If checked, displays the Long Description field in PM Subcontract directly after the Task Name.

Restrict Daily Journal Units Complete selection – Checkbox

This checkbox applies to the Units Complete program. Uncheck this checkbox to allow Units Complete to be entered via the PM JSP Daily Journal for A types, as well as P and U types.

Allow Manual Entry of RFI Answer By/Answer Date

(EXTENDED FUNCTIONALITY) Previously coded with only 'Y' or 'N' values, when these fields are set to 'Y', this allows the user to enter the RFI Answer By/Answer Date, regardless of the setting of the privilege 'No RFI Answer Entry' (standard Treeview path: *xProjects > Security > Project Roles*) or field security (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/RFI*).

When set to 'N', the fields are closed to user input but the default rules (privileges, field security) apply.

When set to 'NA' (not applicable), the fields are open to user input but the rules for related privileges /field security apply.

The settings of these fields at the Control file level are inherited by any new projects and can be overridden.

Phase Segmentation – Section

Phase Segmentation provides a mechanism to automatically build a hierarchy of phases within the Phase Master. This feature is only available in the JSP version of Project Management, and when used, is applicable to both the Bid Items and the Potential Change Item (detail section) screens via the 'create on the fly phase' pop-up feature in both screens.

The configuration fields related to Phase Segmentation are entered here. These fields are used in combination to direct the system how to break up the phase codes into segments and the maximum length of the total phase code.

The sum of all the numbers in the **Phase Segmentation** field must equal the **Phase Code Maximum Length**, and the segmentations are defined by a comma.

For more detailed information on completing the fields in this section, please refer to the [Phase Segmentation](#) section.

Submittal Lead Times In Days – Section

Define the project submittal process lead times. These are defaults when entering a submittal but can be overridden.

Submittal – Automatic Notifications – Section

The two fields '**Send Reminder Email**' checkbox and the numeric field '**Days Prior to Preparation Start**' (found here on the PM Control –Defaults tab, as well as Project Maintenance –Defaults tab, and Submittal Entry screen), allow reminder email notifications to be sent to the external collaborator during the Submittal Preparation stage.

When the checkbox is checked, it indicates that a reminder email must be sent. A value in '**Days Prior to Preparation Start**' indicates the number of days prior to the Preparation Start Date that the email notification must be sent.

Copy From Previous Daily Journal Defaults – Section

Text Types – Section

Text Types		
Owner Change Order <input type="text"/>	Subcontract <input type="text"/>	Issue <input type="text"/>
Attachment <input type="text"/>	Drawings <input type="text"/>	Photographs <input type="text"/>
Schematics and Blueprints <input type="text"/>		

Change Management – Tab

Standard Treeview path: xProjects > File Maintenance > Company Control – Change Management tab

This control level tab is used to set defaults relating to change orders. These defaults are carried to the project when it is being created, but they can be overridden.

Markup Rounding Rule

Select the default Markup Rounding Rule. A markup rule is used to mark up the amounts on a change item based on certain criteria. Markup calculation lines use a rounding rule. Options are No Rounding, Round to nearest dollar, Round to nearest ten dollars, and round to nearest hundred dollars.

Rounding Method

Select the default Rounding Method. Options are 'Standard', 'Up' and 'Down'. In the Standard rounding method, standard 5's are rounded up and 4's down. For example, .50 would round up and .49 would round down.

Default RFQ Review Period

The **Default RFQ Review Period** is added to the Sent Date to automatically update the Due Date in the RFQ tab of PCIs. If the default value is null at the project -level, then the system will then check the company-level default and use that value if it is not null as well. The Due Date that is calculated is based on the Project Calendar working days.

Use PCI Detail Status – Checkbox

This flag applies to both the Status and the OCO Number at the PCI Detail level. When it is checked, the Status and the OCO Number at the PCI detail level are both available, and the user has the ability of setting the status and OCO Number for individual PCI lines. Those that are approved at the time of posting are moved to a new PCI (with the extension '-nnn'), and the unapproved lines remain in the original PCI.

NOTE: This flag can be used with WBS codes (especially PCI) and WBS mapping. The previous restriction has been removed. The Copy PCI restriction for a posted PCI was also removed.

Show PCI Detail Description As The First Column – Checkbox

The '**Show PCI Detail Description As The First Column**' flag indicates whether the Description field for Potential Change Item details (PCI or change orders as they are commonly called), occurs as the first column in the details section of the change order or remains in the original position (i.e. as the last field).

PCI Details Order

This drop-down box allows the user to choose the sort option for PCI details, when the PCI Detail Description is selected as the first column. By default, the details are listed according to the entry of the record (Entry of Record), but can be sorted by the Long Description field as well.

Default PCI Change Code With TBD – Checkbox

When checked, the PCI detail will default 'TBD' in the subcontract change code field for the line that has the vendor and contract entered (including 'TBD' in the contract field). The default value of the flag is 'un-checked'.

NOTE: If TBD is entered as the contract code, the subcontract change code will default to '000', as per standard functionality.

Default PCI Task Code With Value From PCI Code – Checkbox

When checked, the PCI detail will default with the PCI# in the Task ID field. This is a default value and can be overridden. The default value for the flag is 'un-checked'.

If the Type of the PCI is modified (using Modify Type), the Task ID of the new PCI detail is updated with the new PCI number.

Show Additional PCI Tracking Fields – Checkbox

This flag determines if additional fields are shown in the PCI Details. The additional fields include **Owner Reference Number** and **Subcontractor Reference Number**. It also controls the display of the **Subcontractor Pricing Status Code** which is located on the RFQ tab, and has an LOV which allows the user to maintain the entries (Add, Edit, Delete). The project role privilege '**Maintain Subcontractor Pricing Status LOV**' can be applied to the user's project role to limit the ability to maintain the LOV.

The Subcontractor Reference # and the Owner Reference # can be made editable for a POSTED PCI. This is done using field security:

The screenshot shows a web application interface for PCI details. At the top, there are buttons for 'Update' and 'Back'. Below them is a note: '*Note: Not all programs have fields available with field privileges'. There is a dropdown menu for 'Programs' and a 'Potential Change Item' dropdown. A table titled 'Column/Field Security' is visible, with columns for 'Item Name' and 'Security'. The table lists 'Owner Reference # for POSTED PCI' and 'Subcontractor Reference # for POSTED PCI', both with a security level of 'Unrestricted'.

Use Original Contract Amount Override On OCO – Checkbox

'Use Original Contract Amount Override On OCO' indicates whether Owner Change Orders should use the Original Contract Override Amount.

Project End Date Updateable – Checkbox

'Project End Date Updateable' indicates whether the Project End Date is updateable when an Owner Change Order is posted.

The default value of these two flags is OFF and ON respectively, to retain original functionality. The values will default to any new projects (Defaults tab of Project Maintenance) created for that company.

Calculate OCO Date on Working Days – Checkbox

The 'Calculate OCO Date on Working Days' flag indicates whether calendar or business days are used to determine the day impact calculations in the OCO JSP. The Project Calendar in JSP is used in the calculations. Field security can be applied to this checkbox, if needed.

Auto Calculate Markups – Checkbox

By default, the flag is un-checked. The value (checked or un-checked) is inherited by any new projects for that company and can be overridden.

The value (checked or un-checked) on the project is inherited by any new PCIs for that project within the company and can be overridden.

When the flag is checked in the PCI header, after entering the PCI details and pressing [Save Draft] or [Save], markup lines will be automatically generated without the user having to press the [Calculate Markups] button. This applies to all PCI class types.

Field security can be applied to the 'Auto Calculate Markups' checkbox in PCI, if desired (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Potential Change Item*).

Default TBD on Subcontract PCI Details – Checkbox

When this flag is checked, for all External, Internal, and Transfer PCIs, if the vendor field is left blank on a PCI detail line where the category is flagged as 'Available in SC', the system will default TBD as vendor and TBD as subcontract. The change code is automatically set to '000'.

Launch Posting Report popup on POST – Checkbox

When this flag is checked for the company, the Posting Report window will appear upon posting Subcontract, PCI, Request For Payment, Subcontract Change Order, and Owner Change Order. By default, this flag is set to OFF.

Allow PCIs on An Owner Change Order – Checkboxes

There is now more flexibility in the types of PCIs (external, internal, transfer, original budget) that can be selected for inclusion in an owner change order (no longer restricted to only external and original budget).

These 4 checkboxes have been used to replace the single checkbox which was used in the FORMS version (but also applied to PM JSP) to allow both External and Original Budget Change orders on Owner Change Orders.

PCI Revenue Category

This field is used to suppress calculation of Billing Amounts for a selected category set in the Project Maintenance. The value is inherited from the PM Control, but can be overridden.

Initially the value is null to preserve standard functionality, but the user can select a value from the LOV, which lists only the categories which allow billing.

This default value set for the company will default to new projects created in that company. At the project level, the value can be set/overridden in the **PCI Revenue Category** field in the **Defaults tab** of the Project Maintenance record.

When the value is set for the project, PCI detail records created using any category other than the designated Revenue Category will have the Billing Qty, Billing Price and Billing Amount suppressed (i.e. these values will be zero). For the PCI detail lines using the Revenue Category, the Billing Qty, Billing Price, and Billing Amount will be determined in the standard way (i.e. the rightmost-value from Estimated, Quoted and Final).

Self-Performed Work

This is the self-performed vendor code for work to be carried out by the company itself, instead of using outside vendors/subcontractors.

Allow Un-posted PCIs to be Assigned to Subcontract CO – Checkbox

When checked, un-posted potential change items will be available to be assigned to subcontract change orders.

Populate PCI Name On SCCO – Checkbox

When checked, use the PCI Name as the subcontract change order Task Description. When unchecked, it will use the PCI Long Description if it exists.

Post OCOs when Posting Linked PCIs

By default, it is checked to maintain standard functionality, whereby if a Posted PCI is linked to an unposted OCO, the entire OCO gets posted as long as every other PCI linked to the OCO has already been posted.

When unchecked, the OCO will not be posted if a Posted PCI is linked to the unposted OCO, even though every other PCI linked to the OCO is already posted.

Post Vendor Contract with the Change Item

When checked, any un-posted vendor contract that is part of the PCI detail will be posted when the change item is posted, provided all the necessary data is completed.

Change Item Entry Mode

This indicates the mode of entry for PCI details – whether they are entered as Amounts or Quantities.

Lump Sum PCI Phase

This is the Phase Code that is to be used for Internal Lump Sum PCIs

Lump Sum PCI Category

This is the category code that is to be used for Internal Lump Sum PCIs.

Category Code For Entry of Phase Budget Changes

This is the category code that is to be used in Bid Items entry and PCI entry when entering Phase Budgets. The value is defaulted from the Change Management Control.

Category Name for Entry of Phase Budget Changes

This is the category name that defaults from Category Code For Entry of Phase Budget Changes. The value is defaulted from the Change Management Control.

Allow Job/Phase/Category Null on PCI – Checkbox

This flag will allow PCI details with null job/phase/category to be created in the PCI entry program. By default, the field security on the flag is 'Hidden' and set on the *ALL* role. When the feature is activated, it allows the user to add and save PCI detail lines for which there may not be complete J-lines. The job, phase, category are allowed to be null as long as the PCI header status is in an UN-APPROVED class status.

The feature is also available in the FORMS version of PM Company Control (Change Management tab) and applies to the Change Management (CM) and Project Management (PM) versions of PCI Entry.

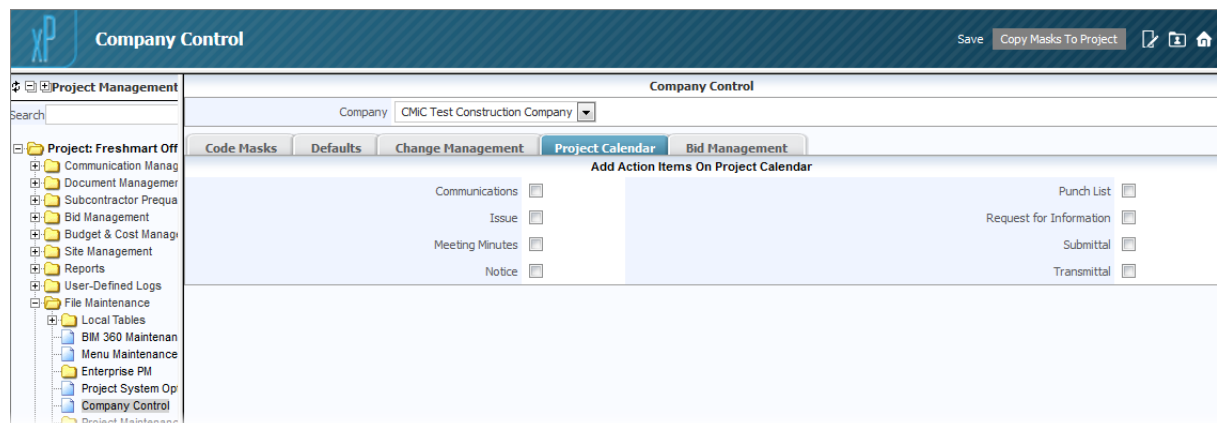
The **Project Management (PM) Object** refers to the different types of objects that can be created in Project Management, and from which a change item (change order) can be created.

The **Change Management (CM) Type** and **Status** refers to the Type of change order and the Status of the change order that should default, if a change order is to be created from any of the various object types listed.

The **'Proceeding'** flag indicates whether the change order will be carried out or not.

The **'Included in Forecast'** flag indicates whether the change order is to be included in the Contract Forecast or not.

Project Calendar – Tab



Standard Treeview path: *xProjects > File Maintenance > Company Control – Project Calendar tab*

This tab allows the user to indicate whether Action Items are to be created automatically for each of the following objects: RFIs, Communications, Notices, Issues, Meeting Minutes, Punch List, Submittals, and Transmittals (each controlled independently of the others).

Field security can also be applied to the Project Calendar tab, by setting it at the security role level (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Project Control*).

The action item will be created in the calendar for the Responsible person and will be shown under the appropriate **Due Date**.

Determining Action Item Due Date

The following section explains how the **Due Date** field of an action item is determined for each of the following objects:

Meeting Minutes – Agenda Items

Agenda Item's **Due Date** or **Revised Date** field is used to set the action item's **Due Date**: if the **Due Date** is not null and the **Revised Date** is not null, then the **Revised Date** is used; if the **Revised Date** is null, but the **Due Date** is not null, then the **Due Date** is used.

Submittal

Submittal's **Required Start** field is used to set the Action Item's **Due Date**.

Punch List - Items

A Punch List Item's **Scheduled Completion** field is taken as the Action Item's **Due Date**.

RFI

RFI's **Date Required** field is used to set the Action Item's **Due Date**.

Bid Management – Tab

Standard Treeview path: xProjects > File Maintenance > Company Control – Bid Management tab

This tab is used to set company-specific bid items' related parameters that are used to determine the relationship between bid items and buyout items, bid items and PCIs, and how bid items should be treated if the Estimated Amount exceeds the amount for which a bid item has been bought out.

Company Control – Section

Use Bid Item Expense Authorization

This flag indicates if Bid Item Expense Authorizations are to be used. This is a default value that will be inherited by the projects within the company, but can be overridden. The flag is important in the Expense Authorization process (PCIs of OBC class that are linked to bid items). The user cannot 'Select' to purchase a bid item that does not have a related **posted** PCI associated if the 'Bid Item Expense Authorizations' flag on the project is set to 'Y'.

One To One Relationship Between Bid Item And Buy Out Item – Checkbox

This indicates whether there is a one to one relationship between a Bid Item and a Buy Out item. When there is a 1:1 relation, the bid item cannot be mapped to more than one buyout item, and the corresponding LOV has been modified to facilitate this.

Enable “Split” of Bid Item – Checkbox

When this flag is checked, it enables the creation of a secondary bid item (usually with the suffix '-1' appended to the original bid item), when posting the subcontract created during the purchase of a buyout item that has been linked to a bid item (1:1) mapping, and if the Estimated Amount of the bid item is more than the Purchase Amount. The secondary bid item created is the difference between the Estimated and the Purchased Amount. In addition, during the posting process the Estimated Amount of the original bid item gets updated with the value of the Purchased Amount.

Auto-create PCI Line For SOV Line Not Fully Purchased – Checkbox

By default, the flag is un-checked. If the flag is un-checked, no additional lines will be created in the PCI.

This flag is used in relation with the 'Enable Split of Bid Item' flag, so the latter **must** be checked when you check the 'Auto-create PCI Line For SOV Line Not Fully Purchased'.

When checked, it controls the creation of additional lines in a posted PCI during subcontract posting, if the subcontract SOV line is not **fully purchased** when compared with the PCI Estimated Amount for the PCI detail line that it is linked with.

Update Budget Defaults – Section

The first four fields in this section are the same as those in the Update Budget pop-up window launched from the [Update Budget] button on the Bid Item screen.

Bill Code Update Type

This drop-down menu has the following options:

- Add New Bill Codes Only
- Add New Bill Codes and Reset All Groups
- Add New Bill Codes and Reset All Groups and Bill Code Budgets
- Reset All Bill Code Budgets

These are the same options that are available in the Job Billing Contract of CMiC Enterprise and function in the same way (refer to Job Billing guide).

The default values can be set in Project Control, after which they will be inherited by any new projects.

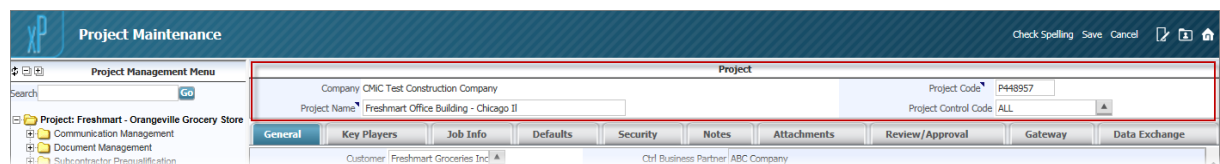
Project Maintenance

xProjects has the option to create or edit a Project. This is the equivalent of the PM Project Entry form as used in Forms. These options are tied to xProjects security privileges which have to be assigned to the user before they are able to create or view projects. Assignment of Create, Edit or Delete Project privileges must be done in the xProjects Security screen. Refer to the Security section of this manual for further information.

The Project Management system allows projects to be created even if all of the details are unknown at setup time. You may return to project entry, at any time to add, delete and/or revise information.

This is the main project screen where all the default information for a project is stored. It is broken into separate tabs to help organize the information. It is also possible to add attachments such as project overviews or bid documents directly to the project, keeping all this information in one central place.

Project Information



Enter the Company, Security Group, Project Code, Project Name and Project Control Code. The Project Control Code should be set to 'ALL' if not being used, otherwise select an already existing project.

Select the Customer Code from the list of values. If the customer has multiple addresses, you can enter the address code applicable for this project. If the 'Automatically Create Bid Job for a New Project' flag is set (Pgm: JCCTRLFM – Job Costing Control File; standard Treeview path: *Job Costing > Setup > Local Tables > Control File – Jobs tab*), then the customer field is mandatory and the Terms (in Job Setup) is updated automatically from the customer record.

NOTE: The fields in this section need to be completed and saved before the remaining tabs on this screen become enabled. Until these fields are saved, only the General tab is enabled.

General – Tab

The screenshot shows the 'Project Maintenance' window with the 'General' tab selected. The left sidebar contains a treeview with categories like 'Project: Freshmart - Orangeville Grocery Store', 'File Maintenance', and 'BIM 360 Maintenance'. The main area is divided into sections: 'Project' (Company: CMIC Test Construction Company, Project Name: Freshmart Office Building - Chicago II, Project Code: P448957), 'Customer' (Freshmart Groceries Inc., 289 Main St, Springfield MS, UNITED STATES), 'Start Date' (010117), 'End Date' (121721), 'Hard Bid Project' (checkbox), 'Broadcast Sender Email' and 'Name' fields, 'Bid Date' and 'Bid Won Lost Date' fields, 'Use Bid Item Expense Authorization' (Not Applicable), 'Allow Manual Entry of RFI Answer By' (NA), 'Project Address' (Contact Name, Street, City, Postal / Zip Code, Phone, Corresp. Address, Suite, State/Province, Country, Fax), 'Description', 'Key Words', 'Collaboration' (Start Page URL, Project Photo URL, Lien Waiver Text), and 'BIM Project Mapping' (Mapped BIM Project, Default Change Order Type).

Standard Treeview path: *xProjects > File Maintenance > Project Maintenance – General tab*

On the General tab, the fields **Bid Job Department** and **Bid Job Effective Date** only become available for entry when creating a new project and the flag 'Automatically Create Bid Job for a New Project' is checked (in PM Control) and if the '**Store Cost Code Projection**' flag is also set in **System Options** (standard Treeview path: *System > Setup > System Options – Projects tab*), respectively. The Job tab will be updated with the bid job department and the effective date will default in, once the project is created.

Start/End Date

Enter the estimated Start and End dates for the project.

Hard Bid Project – Checkbox

The Hard Bid Project flag is used with Subcontract and subcontract change orders Single and Aggregate Project Limits in the Subcontractor Pre-qualification Module. This flag bypasses any pre-qualification requirements on the job with regards to creating a contract.

Bid Date and Bid Won/Lost Date

If you are currently in the Bid Process, you should enter the Bid Date and Time here, or if you have won the Project and know the bid date, time and when you won the bid, enter the information here for reference purposes only.

Broadcast Sender Email and Name

The Broadcast Sender Email is the email address for the user who will be sending Invitation to Bid broadcasts to bidders of the project.

The Broadcast Sender Name is an alias which will show in the ITB email that is sent, and will show as the 'From', instead of the email address.

Use Bid Item Expense Authorization

For new projects, the value of this flag is inherited from the PM Company Control flag of the same name (standard Treeview path: *xProjects > File Maintenance > Company Control – Bid Management tab*). The flag is used to indicate that a PCI that is linked to a bid item must be posted before the bid item can be purchased as a buy out item.

Allow Manual Entry of RFI Answer By/Answer Date

(EXTENDED FUNCTIONALITY) Previously coded with only 'Y' or 'N' values, when these fields are set to 'Y', this allows the user to enter the RFI Answer By/Answer Date, regardless of the setting of the privilege 'No RFI Answer Entry' (standard Treeview path: *xProjects > Security > Project Roles*) or field security (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/RFI*).

When set to 'N', the fields are closed to user input but the default rules (privileges, field security) apply.

When set to 'NA' (not applicable), the fields are open to user input but the rules for related privileges /field security apply.

The settings of these fields at the Control file level are inherited by any new projects and can be overridden (standard Treeview path: *xProjects > File Maintenance > Local Tables > Company Control – Defaults tab*).

NOTE: Project Roles are different than xProjects Roles. Project Roles do not define which programs or privileges the user has within the application, rather they define what type of action the user can take on existing data, and what data they can see within the system. For example, the Project Role Privilege 'No RFI Answer Entry' allows a user to apply a sort of field security, but on the project role level. The idea is that either Field Security is used for those fields, or the Project Role Privilege, not both.

If the Project Role Privilege is 'N' (unchecked), the Answer By/Date fields are open. If the Project Role Privilege is 'Y' (checked), the Answer By/Date fields will be read-only.

If Field Security is applied to the RFI Status field, the field can be set to 'Unrestricted', 'Read-only' or 'Hidden'.

[Workflow] – Button

The [Workflow] button is used for approval of the project provided the underlying workflow is defined. It is controlled by the Project Role privilege: '**Workflow Button – Project**'.

Project Address – Section

In this section, enter the name of the person within your organization to whom correspondence about this project should be directed. This is not necessarily the project manager. Plus, ensure that the mailing address for the project is correct. If you leave the address blank, the project address will be assumed to be your company address.

The **Corresp. Address** (Correspondence Address) field is available for use if your company has various offices. If a correspondence address is entered, it will dictate which address is shown on some Project Management correspondence, whether the company address or the office address.

Description (Project Description) – Section

Enter the Project Description. The description can be up to 200 alphanumeric characters. This is a long text field where you can type or cut and paste a long description about the project. This is information only. Users can spellcheck this description by double-clicking in the field to launch the spellcheck program.

The **Key Words** field allows the user to enter lookup words that can later be used to search for projects with those words. For searching, the words are typed in the 'Search' field that is located above the Treeview menu.

Collaboration – Section

The Collaboration section will bring the lien waiver as defaulted from PM control but can be edited as required.

BIM Project Mapping – Section

This section relates to BIM 360. Building Information Modeling (BIM) has been incorporated into CMiC Project Management using the Autodesk BIM integration tool to present and manage 3D models to support decision makers in communicating design, construction and operational changes to their projects. These changes are created in CMiC through Requests For Information (RFI) and Potential Change Items (PCIs). For more information, please refer to the CMiC BIM 360 guide.

Mapped BIM Project

Allows the user to select the Autodesk project that the current project is to be mapped to. This field is editable based on a BIM collaboration privilege.

Default Change Order Type

This field is used to set the PCI Type for BIM 360, but can be overridden in the BIM 360 Maintenance – Mappings screen (standard Treeview path: *xProjects > File Maintenance > Local Tables > BIM 360 Maintenance*).

Key Players (Assignment) – Tab

The screenshot shows the 'Project Maintenance' window with the 'Key Players' tab selected. The left sidebar contains a treeview menu with various project management options. The main area displays project details for 'CMiC Test Construction Company' and 'Freshmart Office Building - Chicago II'. Below this, a table lists key players with columns for Role, Company, Contact, Print Order, Cc, and ESign Order.

Role	Company	Contact	Print Order	Cc	ESign Order
Owner (OWNER - FL)				<input type="checkbox"/>	
Project Manager (MNGR - FL)	A1DOORS - 'Company RRR'	Andy Murray		<input type="checkbox"/>	
Project Manager (MNGR - FL)	PV Concrete	Lullie Loo		<input type="checkbox"/>	
Architect (ARCH - FL)				<input type="checkbox"/>	
ACCOUNTING (Alerts)				<input type="checkbox"/>	
Site Supervisor (SUPER - FL)				<input type="checkbox"/>	

Standard Treeview path: *xProjects > File Maintenance > Project Maintenance – Key Players tab*

The CMiC system allows as many Key Player Roles as required. These roles will have already been set up according to your corporate standards. Key Player Roles are PM Roles with the **Key Player** checkbox checked.

Key Players are a way of automatically including specific parties on documentation such as transmittals.

- Select the Key Player Organization from the List of Values.

- Enter the Contact for the Key Player.
- Indicate the order in which to print these key players and if they should be automatically included on transmittals by checking the ‘CC’ flag.
- Default DocuSign signers are set up in the **ESign Order** column.
- If additional key players have been added to a particular role, the second one can be deleted using the delete function in the Action column.
- To add or remove PM Roles designated as Key Players (PM Role with **Key Player** checkbox checked) to a project, use the [Add/Delete Roles] button along the top of the screen; the PM Roles designated as Key Players available to be added to a Project are maintained via the Project Roles maintenance screen.

Key Players and Form Letters

There are 4 special Key Player Roles used in Form Letters as ‘replacement fields’. When a Form Letter with these special Key Player Roles is generated for a Project, the information about the Key Players associated to the special Key Player Role is printed.

The following are the codes for these 4 special Key Player Roles:

1. **ARCH** (*Architect*)
2. **MNGR** (*Project Manager*)
3. **OWNER** (*Owner*)
4. **SUPER** (*Site Supervisor*)

Multiple Contacts can be assigned to any Key Player Role. However, if multiple Contacts are assigned to any of these 4 special Key Player Roles, when printing a Form Letter that uses them, more than just one version of the Form Letter will be generated.

Example: Project with 2 MNGR, 3 OWNER, 3 ARCH and 0 SUPER roles assigned produces 18 Form Letters: 2 versions, each printed 9 times.

To prevent more than one version of a Form Letter from being printed, create and use additional codes for these 4 special Key Player Roles, such as: **MNGR_1**, **MNGR_2**, **ARCH_1**, **ARCH_2**.

Key Players and Alerts

Alerts have been created for the following special Key Player Roles. The Key Players assigned these special Key Player Roles will receive alerts.

Accounting Role Alerts in PM

System Data Maintenance - TEST2006 Alert Maintenance

Group or User

☐ Define by Alert Group rather than User

User ID:

Alert Type

Alert Type Description	Master	Enable	Create
Action Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
Change Order to be Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
Database Tablespace	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
E-time Sheet to be App	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
Expense to be Approvi	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
Job Billing Contract to k	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
CRM OM Action Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
PM Request for Inform	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
Purchase Order to be Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
Purchase Order Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
Payment Request to be Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
Requisitions to be Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
Voucher Invoices to be approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>

Alert Instances

Del	Alert Type Description	User	Enable	Esc
<input type="button" value="v"/>	Batch Posted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
<input type="button" value="v"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>
<input type="button" value="v"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>
<input type="button" value="v"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>
<input type="button" value="v"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>
<input type="button" value="v"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>

PST parameters

PM Role:

Receive E-mail: ☒

User Extensions

User Extension1
User Extension2
User Extension3
User Extension4
User Extension5
User Extension6
User Extension7
User Extension8
User Extension9
User Extension10
User Extension11
User Extension12
User Extension13
User Extension14
User Extension15
User Extension16
User Extension17
User Extension18
User Extension19
User Extension20
User Extension21
User Extension22
User Extension23
User Extension24
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User Extension81
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User Extension84
User Extension85
User Extension86
User Extension87
User Extension88
User Extension89
User Extension90
User Extension91
User Extension92
User Extension93
User Extension94
User Extension95
User Extension96
User Extension97
User Extension98
User Extension99
User Extension100

Pgm: SDALRTMT – Define Simple Alerts screen – BATCH POSTED Set Parameters Option

The system has an alert routine to automatically send an email to the person that has been identified as being the contact for the Accounting role on a Project. Posting of a subcontract/change, subcontract void, owner change and potential change item will trigger the email alert.

Note that the PM Role must be “**ACCOUNTING**” (case sensitive).

SC Change Without Owner Change Alerts

The screenshot shows the 'SDALRTMT - Define Simple Alerts' dialog box. The 'Alert Type' tab is selected. On the left, there is a list of alert types. On the right, the 'SCO parameters' section is visible, showing fields for 'Recipient PM Role 1' through '6'. A red arrow points to the 'Subcontract Change without Owner Change' alert type, which is checked. The 'Set Params' button is at the bottom right.

Pgm: SDALRTMT – Define Simple Alerts; standard Treeview path: SD > Alerts > Define Simple Alerts

The system is set up with an alert that will send a message to one or more Key Players when there has been a Subcontract Change Order entered where there is no Owner Change Order associated. This link between the SC Change Order and the Owner Change order will be validated via the PCI table.

This alert will be sent if the SC Change Order has no related PCI or no Related Owner Change order.

The text of the alert message will indicate if the PCI is missing or the Owner Change is missing.

Job Info – Tab

Please refer to the Project Management manual for details on this section.

Some further details have been provided regarding the following fields: **‘Original Contract Amount’**, **‘Current Contract Amount’** and **‘Original Contract Override Amount’**. The latter is only used in Owner Change Orders (OCO) if the OCO Override flag is checked on the project.

Rules governing these fields

- If a job is not associated with the project, the ‘Original Contract Amount’ can be updated at any time.
- If a job is assigned to the project, the ‘Current Contract Amount’ will be updateable and will adjust ‘Original Contract Amount’ with the same amount until the job is started.
- If a job is created from the project, the ‘Original Contract Amount’ on the project will be copied to the job.
- If the ‘Original Contract Amount’ on the job is updated, it will update the ‘Original Contract Amount’ on the project.

- When the job is started, the 'Current Contract Amount' field on the project will become display only.
- If the new Original Contract Amount Override flag on the project is checked, when an OCO is posted it will lock down the flag and the Original Contract Amount Override so that neither field can be updated.
- If the Project End Date Updateable flag on the PM Control file is un-checked, when an OCO is posted, it will also lock down the Project End Date.

Defaults (Project Specific) – Tab

Copy Project Masks Add Edit Delete Print Back To Log

Project

Company: SB (DO NOT USE) - US Project Code: GENERAL

Project Name: Project GENERAL Project Control Code: ALL

General Key Players Job Info **Defaults** Security Questionnaire Notes Attachments Review/Approval

Purchasing

Default Bill To Address Default Ship To Address

Default Delivery Period Default Requestor Default Buyer

RFI Contact Default RFQ Review Period Other

Default Issue Review Period ☒ Use Working Days Default Notice Review Period ☒ Use Working Days

Punchlist Completion Period ☐ Use Working Days Default RFI Review Period ☒ Use Working Days

Use Working Days For OCO Date ☒ Use Original Contract Amount Override On OCO ☐

Submittal Contact Submittal Approver Auto Populate Transmittal From Submittal ☐

Schedule Ball In Court Report ☐

Meeting Footnote

Default Meeting ID Mask Default Agenda Item ID Mask Project End Date Updateable ☐

Limit CSI code usage by group Track 'In Scope' and 'Out of Scope' Amounts ☐ Synchronize SCO And PCI Amounts ☐

Auto Calculate Markups ☐

Submittal Lead Time In Days

Delivery Fabrication Float

Approval Review Preparation

Use Working Days ☒

PCI Detail Classifiers

Classifier1 Classifier2 Classifier3

Classifier4 Classifier5 Classifier6

Copy From Previous Daily Journal Defaults

General ☐ Materials ☒

Labor ☒ Only Labor Force ☒ Visitors ☒

Field Force ☒ Only Field Force Companies ☒ Safety ☒

Standard Treeview path: xProjects > File Maintenance > Project Maintenance – Defaults tab

This area has a mixture of items used in the PM system that can be customized by project.

Purchasing – Section

In many cases, the purchasing of materials through the use of POs will require the materials to be shipped directly to the job site or job storage location, and the invoice for the PO - you may want shipped directly to your regional office. The project may also have its own requestor and buyer. All these settings for Purchase Orders can be entered under the Purchasing section.

Default Bill To and Ship To Address

Enter the Bill To and Ship To Address Codes. These Codes will have already been defined via the Address Maintenance screen in Global Tables and represent alternate addresses for your company. Select the correct ones from the LOV.

Default Delivery Period

Enter the expected number of days between ordering and receiving the materials.

Default Requestor and Buyer

Enter the default requestor and buyer for this project.

Other – Section

RFI Contact

Enter the default RFI Contact information.

Default RFQ Review Period

The **Default RFQ Review Period** is added to the Sent Date to automatically update the Due Date in the RFQ tab of Potential Change Items (PCIs). If the default value is null at the project level, then the system will then check the company-level default (on the PM Control). The Due Date that is calculated is based on the Project Calendar working days.

Punch List Completion Period

Enter the default number of days for the completion of a punch list item. This number is the standard for most punch list items and can be overridden in the punch list screen.

Default RFI Review Period

Enter the standard **RFI (Request for Information) Review Period** that you want to try to adhere to for this project. This again can be overridden at the time of entry.

Use Working Days – Checkboxes

“**Use Working Days**” checkboxes indicate whether working days should be used for the determination of a number of dates: RFI Required Date, Punch list Schedule Completion Date, OCO Date, Issue Due Date, Notice Due Date, and Submittal Schedule Dates.

The checkbox values for RFI, Punch list, Issue, Notice and Submittals default from the Company Control-Defaults tab, but can be overridden at the project level.

Meeting Footnote

Enter a unique footnote to be used on all Meeting Minute reports. The system will automatically default the standard corporate footnote, but you may alter it at this point.

Track ‘In Scope’ and ‘Out of Scope’ Amounts – Checkbox

By default, this flag is un-checked. When checked, the In Scope Amount and Out of Scope Amount fields will be displayed in the PCI Details (JSP only).

The sum of these two amounts must match the Billing Amount of the PCI. Field security can be applied to these two fields if necessary.

These items are purely for custom reporting purposes. The idea is that they are used to record how each PCI affects an original budget that is tracked outside of CMiC (or stored in a custom pricing column in bid items).

- **In scope amount** represents the portion of the billing value which was included in this external budget. In other words, even though it is an increase to the revenue budget in CMiC, that item was included in the offline budget so there would be no change.

- **Out of scope amount** represents the portion of the billing value which was not included in the external budget. In other words, this increase to the revenue budget in CMiC will also increase the offline budget.

In order to ensure that these fields are used, the system requires that every PCI line with a billing value be allocated as either 'in scope' or 'out of scope'. This is why the application forces in scope + out of scope = billing value.

Synchronize SCO and PCI Amounts – Checkbox

The default value of this flag is initially set in the Change Management Control File (SC tab), but can be overridden here.

When the flag is checked on the project, if a PCI is created, any subcontract change order associated with the PCI detail line will not allow editing of the Amount that is passed from the PCI to the subcontract change order. Additionally, the PCI Final Amount is not updated by any T&M Allowance amounts updates.

If the subcontract change order Amount is modified, that amount is passed back to the PCI detail line Final Amount. If the subcontract change order is posted while linked to a PCI line detail, the Final Amount for that PCI line is locked.

PCI Revenue Category

When the value is set for the project, PCI detail records created using any category other than the designated Revenue Category will have the Billing Qty, Billing Price and Billing Amount suppressed (i.e. these values will be zero). For the PCI detail lines using the Revenue Category, the Billing Qty, Billing Price, Billing Amount will be determined in the standard way (i.e. the rightmost-value from Estimated, Quoted and Final).

Auto-Populate Transmittal from Submittal (Content and Actions)

By default, this flag is unchecked. When checked, it ensures that the content and actions from the Submittal is populated into the Transmittal that is created from it.

The following outlines the updates that will take place.

When the Submittal Action is '**Sent**':

- i) The Via checkbox is checked for 'Attached'.
- ii) The Content checkbox for Submittal(s) is checked.

iii) The Actions checkbox 'For Approval' is checked. See screenshot below.

The screenshot displays the 'Submittal' form in the xProject software. The 'Via' checkbox is checked for 'Attached', and the 'Content' checkbox is checked for 'Submittal(s)'. The 'Actions' section shows 'For Approval' checked. The 'Transmittal Details' section shows 'Transmittal No. 0000042' and 'Date: 22/Dec/2011'.

The Via and Content settings are kept in the resulting transmittal when the collaborator [**Returns**] or [**Forwards**] the transmittal. The Action can be manually updated to an appropriate setting.

When the Submittal Action is '**Forwarded**':

- i) The Via checkbox is checked for 'Attached'.
- ii) The Content checkbox for Submittal(s) is checked.
- iii) The Actions checkbox value 'Approved as Submitted' for the new transmittal is the same as for the Actions checkbox in the previous transmittal [**Return**] from the collaborator.

Submittal Lead Times In Days – Section

Define the project submittal process lead times. These are defaults when entering a submittal but can be overridden.

PCI Detail Classifiers – Section

Define the PCI detail classifiers. These will appear on the scrolling line of Potential Change Items and can be overridden

Copy From Previous Daily Journal Defaults – Section

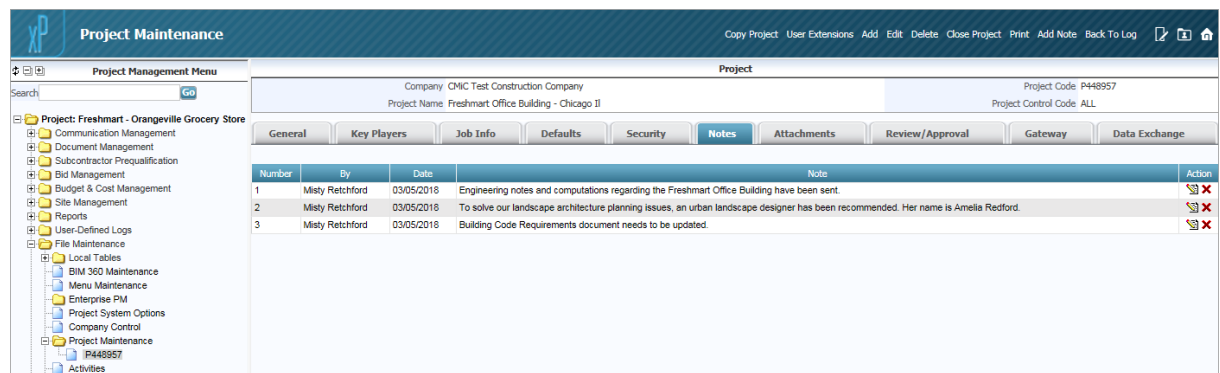
Define the Daily Journal Defaults to be used when copying from one journal to another.

Phase Units must be selected if the Phase units from the **Units Complete** tab are to be copied. The default value is taken from the company level but can be overridden.

Security (Project Security) – Tab

The security tab will display the Job/Project Security group(s) that apply to this project and associated job.

Notes – Tab



Standard Treeview path: *xProjects > File Maintenance > Project Maintenance – Notes tab*

To add a new note, click on the **[Add Note]** button to open up a text area where the note text can be entered. Any notes already entered will display a check box next to the title of the Notes tab.

Enter the text of the note, then press **[Save]** to save the note.

Notes entered via the notes tab can be deleted by the user who created the note by using the delete icon next to the note.

Attachments – Tab

The Attachments tab is used for the assignment of various project-related documents to a Project.

Review/Approval – Tab

The Review/Approval tab appears if CMiC Workflow is being used with JSP Subcontract. It works in conjunction with the **[Workflow]** button. The **[Workflow]** button in the JSP Subcontract is used to establish integration between PM JSP and Workflow, if the appropriate workflows are configured for subcontract approval.

For more information, please refer to [JSP Subcontract Integration with Workflow](#) in this document.

User Defined Fields (UDF) – Tab

The screenshot shows the 'Project Maintenance' window with the 'Defaults' tab selected. The 'User Defined Fields' tab is highlighted with a red box. The window displays project information for 'Company: SB Urban Systems' and 'Project Name: Review update of Orig. Contract on Job'. The 'User Defined Fields' tab is currently empty.

The UDF tab will appear for the project only when the associated Opportunity also has UDFs in its UDF tab:

The screenshot shows the 'Opportunities' window with the 'User Defined Fields' tab selected. The window displays various attributes for the opportunity, including 'Organization: Guelph University', 'Opportunity: Review update of Orig. Contract on Job', and 'Shawn Yes'. The 'User Defined Fields' tab is highlighted with a red box. The window displays various attributes for the opportunity, including 'Organization: Guelph University', 'Opportunity: Review update of Orig. Contract on Job', and 'Shawn Yes'. The 'User Defined Fields' tab is highlighted with a red box.

Project Maintenance – Auto-numbering Masks

The screenshot shows the 'Project Maintenance' window with the 'Defaults' tab selected. The 'Masks' pop-up window is displayed, showing a table of masks and their settings. The table has columns for 'Mask', 'Sample', 'Allow Override', and 'Sequence Within Project'. The 'Masks' pop-up window is titled 'http://testv10.cmc.ca:7785/ - Default Masks - Windows Internet Explorer'.

Mask	Sample	Allow Override	Sequence Within Project
Bid Package No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Submittal No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Submittal Package No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communication No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Journal No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
FWD No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Notice No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
RFI No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Transmittal No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Issue No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punch List No.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punch List Item No.	PLI***		
Check List No.	mmddyy-***	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Include Partner Abbreviation In External RFI ID ☒ Include Partner Abbreviation In External Transmittal ID ☒
c=Company Code, p=Project Code or j=Job Code, y=Year, m=Month, d=Day, *=Next Available Number
Leave Empty to Disable Autonumbering

Example of pop-up window launched from [Masks] button on the Project Maintenance – Defaults tab

An added functionality in xProjects is 'project specific' numbering masks.

Auto-numbering permits setting of masks by individual Project. New projects will default the Company Values, however, they may be changed for any project through the Project Maintenance > Defaults >

[**Masks**] option. Field security exists for the [**Masks**] button (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Project Maintenance*).

The ‘Allow Override’ option allows the user to change the automatically generated number prior to saving the object and is only available in the JSP version.

Sequencing within a Project is set by the individual items. To select this option, click the flag for the particular object type to have the auto-numbering sequenced within the project.

Users can increase the number of asterisks for numeric mask with a confirmation message for updating existing records (for both RFIs and Submittals). This only applies when the new mask is bigger than the old one, and the old one is numeric. This is carried out in the Project Maintenance - Defaults tab [**Masks**] button.

The two checkboxes: **Include Partner Abbreviation in External RFI ID** and **Include Partner Abbreviation in External Transmittal ID** give the internal CMiC user control over how external RFIs and Transmittals are prefixed when created by their external collaborators.

If the appropriate flag is checked, then the partner abbreviation will be included in the generated ID (this is the current functionality). If unchecked, the mask that is defined for RFIs and Transmittals will be used as is.

Project Funding Sources

The Funding Source for a job assigned to a project is accessed via the [**Funding Sources**] button on the Job tab of the project in Project Maintenance. This is only available for Projects that have an actual Job. The funding sources should already be set up in the Funding Source Maintenance screen (standard Treeview path: *xProjects > File Maintenance > Local Tables > Funding Source Maintenance*).

http://testv10.cmic.ca:7785/?pmpJobCode=SUS-JOB-2&pmpJobName=FIRST JOB FOR THIS COMPANY - UF - ...

Save Close

Funding Sources

Job FIRST JOB FOR THIS COMPANY - UF Budgeted Amount 1,644,816.42

Primary Funding Sources Add Source

Code	Description	Percent	Amount	Action
PRIM-SRC1	Primary Source 1	33	542,789.42	✖
PRIM-SRC2	Primary Source 2	33	542,789.42	✖
PRIM-SRC3	Primary Source 3	34	559,237.58	✖
Total		100	1,644,816.42	

Secondary Funding Sources

Description	Percent	Amount	Total Amount Paid To Date	Amount Remaining	Action
one	30	493,444.93	25,000.00	468,444.93	+ ✖ 🗑
two	30	493,444.93	56,444.00	437,000.93	+ ✖ 🗑
three	30	493,444.93	400,000.00	93,444.93	+ ✖ 🗑
four	10	164,481.64	164,000.00	481.64	+ ✖ 🗑
Total		100	1,644,816.42	999,372.42	

Done Internet 100%

Example of pop-up window launched from [Funding Sources] button on the Project Maintenance – Job Info tab

Click the 'Add Source' link to select sources from the LOV displayed next.

Once a funding source is selected, the user can enter a percentage for that funding source. An amount will then be calculated based on the total budget of the job.

The [Close] button will return the user to the previous screen.

Closing/Reopening Projects

Owner Change Order - Create	<input type="checkbox"/>
PCIs - Create from and Link to other objects	<input type="checkbox"/>
Projects - Close	<input type="checkbox"/>
Projects - Create	<input type="checkbox"/>
Projects - Delete	<input type="checkbox"/>
Projects - Edit	<input type="checkbox"/>
Punchlists - Create	<input type="checkbox"/>

Users can Close, Create, Delete or Edit projects in Project Maintenance JSP once they have been assigned the appropriate security privilege. The privilege is assigned within the Security node of xProjects at the user or role level.

When a project is 'Closed', no accounting transactions are created – it is only a status change.

In the LOV for default project, the user can choose to see closed projects by checking the 'Show Closed Projects' checkbox in the LOV:

Company Code	Project Code	Project Name
SB	00000001	implosion of old apartment
SB	00000002	new project with proj auto-numbering on
SB	00000003	project mask is not being used
SB	00000004	another project

Once a project has been marked 'Closed', the [Reopen Project] button becomes enabled. When the project is reopened, it again becomes editable.

Project Maintenance Log window showing project details for '0-DEMO-PRJ'. The 'Reopen Project' button is highlighted. The 'Closed' checkbox is checked.

Viewing the Current Project

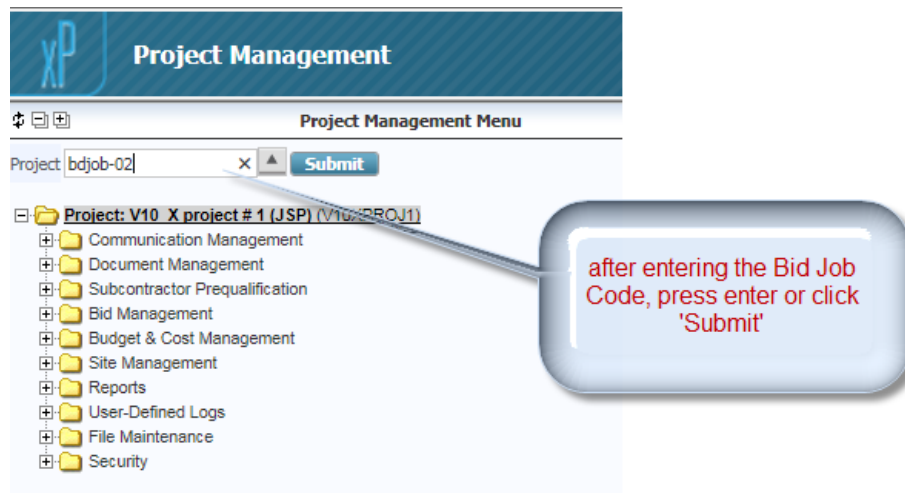
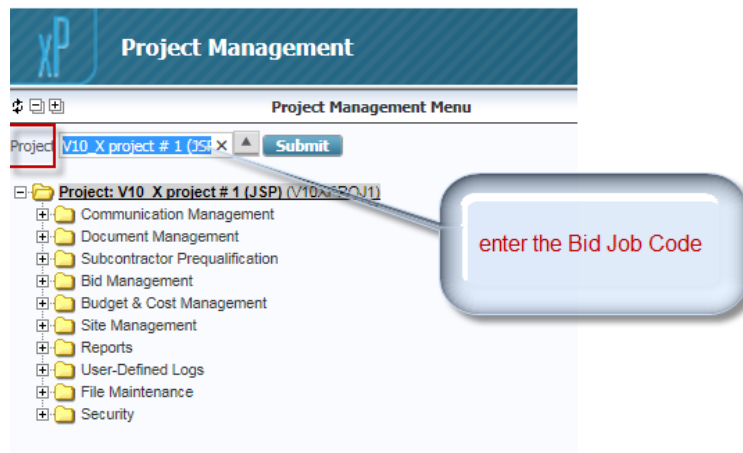
Project Management Menu window showing a list of projects. The 'View Current Project' link is highlighted.

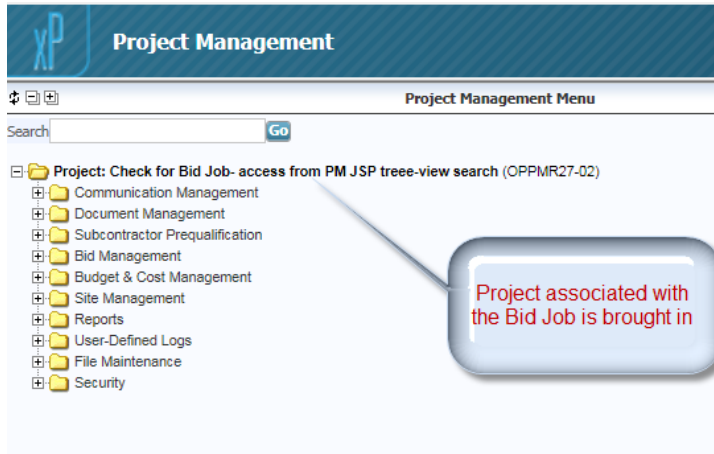
There is a feature for viewing the current project without having to go to the Project Maintenance Log and query it up. The launch for the current project can be done by the link **“View Current Project”**. This link is available between the "Menu Maintenance" link and project "top 10" list (right-click mouse on the project link).

Access Project Using Associated Bid Job Code

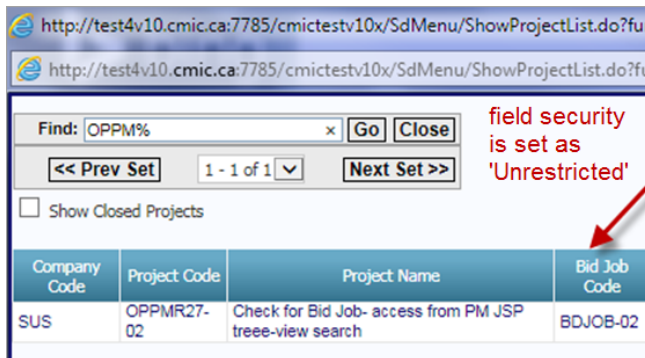
CMiC has the ability to bring in the project associated with a Bid Job to the Treeview by entering the Bid Job code, instead of the project code in the 'Project' field of the PM JSP Treeview. Once the Bid Job is won, it is no longer possible to bring up the project in that way.

In the PM JSP Treeview, the 'Search' box becomes the 'Project' box when the user clicks on the current project link:

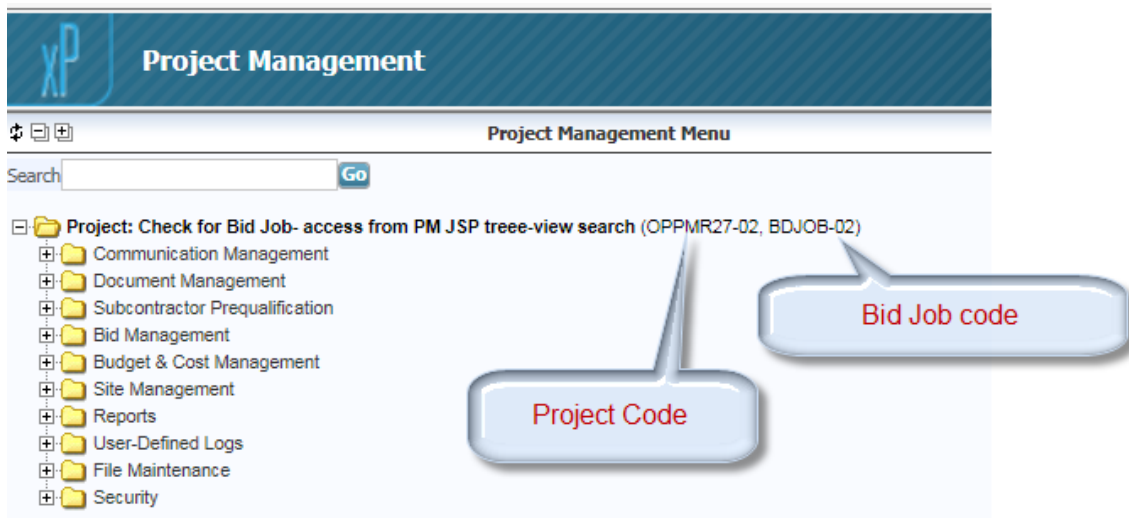




Field security can also be set for the Bid Job in the Project Section LOV, the default setting is 'Hidden' (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/PM Menu – Project Selection*). When the field security is 'Unrestricted' the Bid Job Code is shown in the Project Selection LOV as well as beside the project code in the Treeview:



NOTE: The **Bid Job Name** field does not appear in the Project Selection LOV.



Local Tables

Meeting Minutes Agenda Item Status Maintenance

Status	Description	Class	Action
C	Closed	Closed	✗
D	Deferred	Deferred	✗
H	On Hold	On Hold	✗
N	New	New	✗
O	Open	Open	✗
P	Pending	New	✗

Standard Treeview path: xProjects > File Maintenance > Local Tables > Meeting Minutes Item Status

The Meeting Minutes Item Status maintenance screen allows user-defined item statuses which are then **classified** as New, Open, Closed, On Hold, Deferred.

Agenda items that have a 'On Hold' class will carry forward as on hold when a [Next Meeting] is created. This is a permanent deferral until manually changed.

When creating next meeting, all non-closed items will be copied to the new meeting. Their status will change to an open one, except for the ones that are 'On Hold', where the status remains unchanged.

When printing the meeting reports, the 'Show Deferred Agenda Items' option will apply to both 'Deferred' and 'On Hold' status classes.

Global Meeting Track Maintenance

Code	Name	Action
BUDG	Budget	✗
PROG	Progress Meeting	✗

Standard Treeview path: xProjects > File Maintenance > Local Tables > Global Meeting Tracks

The Global Meeting Tracks Maintenance is used for creating meeting tracks that can be utilized by any project in any company. The global tracks are available for selection when creating Meeting Minutes in any project and will be copied down to the project level when used.

Meeting Topics

Order Number	Topic	Action
1	Progress	X
2	Drawings and Specs	X
3	Project Budget	X

Standard Treeview path: *xProjects > File Maintenance > Local Tables > Meeting Topics*

Agenda Item topics can be maintained at both the global level, as well as at a project-specific level.

The Meeting Topic Maintenance screen allows users to add, edit and delete meeting (agenda item) topics that can be used by any project.

To add a new topic, click [**Add**], enter the Sort Order Number and the Topic then click [**Save**].

Delete a topic record from the log by clicking the 'X' next to it.

Submittal Status & Submittal Package Status

Status Code	Name	Class	Delete
CLOSED	Closed	Closed	X
OPEN	Open		X
PENDING	Pending		X
REJECTED	Rejected		X

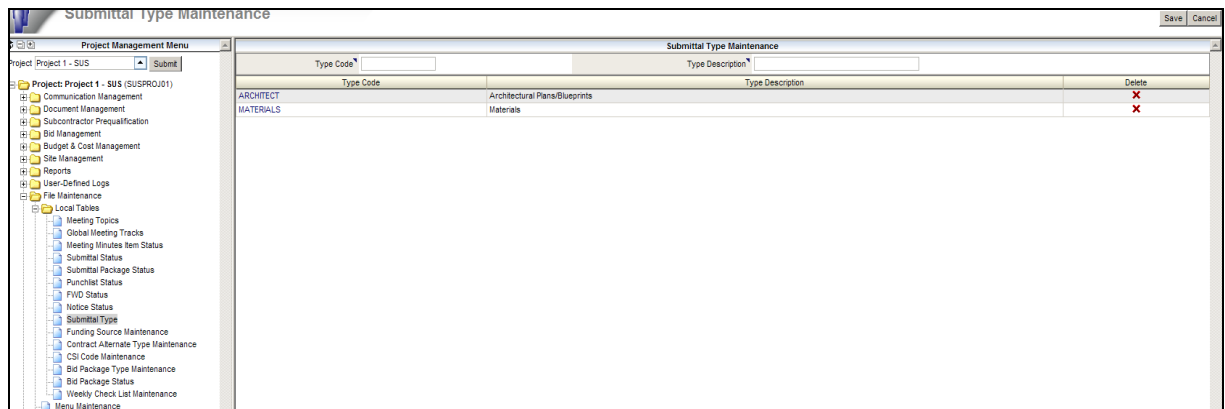
Standard Treeview path: *xProjects > File Maintenance > Local Tables > Submittal Status*

The Submittal Status used in submittals is created and maintained in the Submittal Status Maintenance screen.

To add a new submittal status, click [**Add**], enter the Status Code, Name (description) and select the Class: Open/Closed/Rejected, etc., then click [**Save**].

Delete a submittal status record from the log by clicking the 'X' next to it.

Submittal Type



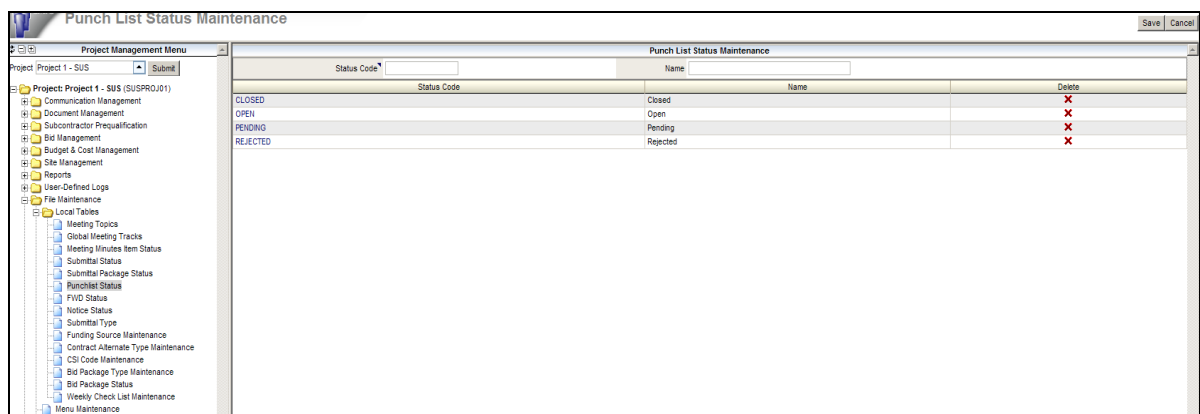
Standard Treeview path: *xProjects > File Maintenance > Local Tables > Submittal Type*

The Submittal Type used in submittals is created and maintained in the Submittal Type Maintenance screen.

To add a new submittal type, click [**Add**], enter the Type Code and a suitable Type Description, then click [**Save**].

Delete a submittal type record from the log by clicking the 'X' next to it.

Punch List Status



Standard Treeview path: *xProjects > File Maintenance > Local Tables > Punch List Status*

The Punch List Status used in punch lists is created and maintained in the Punch List Status Maintenance screen.

To add a new punch list status, click [**Add**], enter the Status Code and a suitable Name (description), then click [**Save**].

Delete a punch list status record from the log by clicking the 'X' next to it.

Punch List Item Description

This program provides a maintenance screen by which punch list item descriptions can be entered and maintained on a **project by project** basis.

The program is hidden by default and users will have to be given security access to it using the Assign Programs and Assign Menu Items security options:

Assign Programs

Punch List	COLLAB	<input checked="" type="checkbox"/>
Punch List Item Description	COLLAB	<input type="checkbox"/>
Punch List Status	COLLAB	<input checked="" type="checkbox"/>

Assign Menu Items

File Maintenance	<input checked="" type="checkbox"/>
Local Tables	<input checked="" type="checkbox"/>
Meeting Topics	<input checked="" type="checkbox"/>
Global Meeting Tracks	<input checked="" type="checkbox"/>
Meeting Minutes Item Status	<input checked="" type="checkbox"/>
Submittal Status	<input checked="" type="checkbox"/>
Submittal Package Status	<input checked="" type="checkbox"/>
Punchlist Status	<input checked="" type="checkbox"/>
Punch List Item Description	<input type="checkbox"/>
FWD Status	<input checked="" type="checkbox"/>

Punch List Item Description Screen

Code	Description	Delete
00001	PL Description 1	X
00002	PL Description # 2	X
00003	PL description number 3	X
00004	Description for punchlist item - 4	X

Standard Treeview path: *xProjects > File Maintenance > Local Tables > Punch List Item Description (by Project)*

In the Punch List Item Description Maintenance screen, there are two options for creating the Punch List Item Code: auto-generated or user-defined. To create an auto-generated code, leave the **Code** field blank and the code will be auto-generated when you click the **[Save]** button (e.g. 0001). To create a user-defined code, enter your desired code in the Code field and click on the **[Save]** button.

In both cases, the Code field will be non-editable once the record is saved. Once the Descriptions are entered, they are then available on Punch list items (for the current project), where the Description field has been changed to be an LOV (standard Treeview path: *xProjects > Site Management < Punch List*).

Punch List Header

Punch List No. PL-DESC1

From: [Erica Vilson] To: [Erica Vilson]

Title: 14.0010 - test for punchlist description

Description: [Area Fields]

Status: [Open]

Submitted: 26/Nov/2014 10:29 AM

Received: []

Punch List Details

Item No. PL1001 Description: Description for punchlist item - 4

Area 1: [Area Fields] Area 2: [Area Fields] Area 3: [Area Fields] Area 4: [Area Fields]

Responsibility: Shelcom Partners Inc.

Inspection Company: []

Status: [Open]

Started At: []

Sched. Compl: []

Inspected By: []

Reserved On: 26/11/14

Completed: []

Issued On: []

Reinspected: []

Item No. PL1002 Description: change this description to freedom

Area 1: [Area Fields] Area 2: [Area Fields]

Responsibility: Shelcom Partners Inc.

Inspection Company: []

Status: [Open]

Started At: []

Sched. Compl: []

Inspected By: []

Reserved On: []

Completed: []

Issued On: []

Reinspected: []

Item No. PL1003 Description: PL Description # 2

Area 1: [Area Fields] Area 2: [Area Fields]

Responsibility: Shelcom Partners Inc.

Inspection Company: []

Status: [Open]

Started At: []

Sched. Compl: []

Inspected By: []

Reserved On: []

Completed: []

Issued On: []

Reinspected: []

Find %

Find % [] [Go] [Close]

[cc Prev Set] 1 - 4 of 4 [Next Set >>]

Code Description

00001 PL Description 1

00002 PL Description # 2

00003 PL description number 3

00004 Description for punchlist item - 4

This LOV also allows the user to enter free-form descriptions. Values entered as free-form are not added to the Punch List Item Description maintenance table, nor are they available for repeated selection in other punch list items.

Field Work Directives Status Maintenance

FWD Status Maintenance

Status Code: [] Name: [] Class: [Open]

Status Code	Name	Class	Delete
CLOSED	Closed		X
OPEN	Open		X
PENDING	Pending		X
REJECTED	Rejected		X

Standard Treeview path: xProjects > File Maintenance > Local Tables > FWD Status

The FWD Status used in Field Work Directives is created and maintained in the FWD Status Maintenance screen.

To add a new FWD status, click **[Add]**, enter the Status Code and a suitable Name (description), then click **[Save]**.

Delete a FWD status record from the log by clicking the 'X' next to it.

Notices Maintenance

Status Code	Name	Class	Delete
CLOSED	Closed	Open	X
HOLD	Hold	Open	X
OPEN	Open	Open	X
REJECTED	Rejected	Open	X

Standard Treeview path: *xProjects > File Maintenance > Local Tables > Notice Status*

The Notice Status used in Compliance Notices is created and maintained in the Notice Status Maintenance screen.

To add a new Notice status, click [**Add**], enter the Status Code and a suitable Name (description), then click [**Save**].

Delete a Notice status record from the log by clicking the ‘X’ next to it.

Funding Source Maintenance

Code	Description	Action
PRM-SRC1	Primary Source 1	X
PRM-SRC2	Primary Source 2	X
PRM-SRC3	Primary Source 3	X

Standard Treeview path: *xProjects > File Maintenance > Local Tables > Funding Source Maintenance*

The Funding Source Maintenance screen is used to record various sources of funding for a job associated with a project.

To create a source record, click on the Funding Source Maintenance node of the Treeview and enter a suitable Code and Description. [**Save**] the record.

To delete an existing funding source record, click the ‘X’ to the right of the record. It will be removed, provided there are no dependent records.

Alternate Types

Alternate Types are used in both Subcontracts and Bid Packages (JSP version only).

The maintenance screen is used to maintain Alternate Types, by allowing the user to add/edit Alternate Type Codes and Descriptions.

If the Bid Package is purchased via Analyze Bids, the Alternate tab information will flow into the subcontract when purchased but will not be available in Analyze Bids.

Amounts associated with Alternate Types will not create an SOV line on the subcontract, because these amounts are considered to be already included in the SOV lines.

CSI Code Maintenance

Standard Treeview path: *xProjects > File Maintenance > Local Tables > CSI Code Maintenance*

The CSI Codes defined here are used in the Spec LOV of Submittals and Submittal Packages, depending on the Project System Options flag Allow CSI Code for ‘**Spec Section LOV Options**’ (standard Treeview path: *xProjects > File Maintenance > Project System Options – General tab*).

One or more CSI Code can be assigned a **CSI Group Code**.

The blue ‘+’ is used to create a new CSI Group.

Select one or more CSI Codes to assign to an existing group code, by clicking the **[Assign to Groups]** button.

A group can also be assigned to a CSI Code by using the ‘Edit’ icon beside the CSI Code Name.

User Extensions can be associated with a CSI Code, by using the User Extension link. The user extensions are based on the ‘CSI’ attached table.

Bid Package Types

PM Bid Package Type Maintenance			
Type Code	Type Name	Display Order	Delete
PLUMBING	Plumbing	1	
ELECTRICAL	Electrical	2	
ROOFING	Roofing	3	
DRAWINGS	drawings	4	
ASPHALT	Asphalt	5	
LANDSCAPING	Landscaping	10	
RENOVATIONS	Renovations		
MECHANICAL	Mechanical		
WIRING	Wiring		

Standard Treeview path: *xProjects > File Maintenance > Local Tables > Bid Package Type Maintenance*

This maintenance screen allows the definition of various bid package types which may possibly fall into categories such as Plumbing, Electrical, Mechanical, Waste Management, etc.

A **Display Order** can be assigned to each type, which determines where in the list of values the type is displayed.

The Bid Package Type is a field in the header of bid packages. Any values defined in the maintenance screen will be displayed in the Type LOV in the bid package header.

Bid Package Status

Status Code	Name	Class	Class
N	New	New	New
P	In Process	In Process	In Process
A	Awarded	Awarded	Awarded

Standard Treeview path: *xProjects > File Maintenance > Local Tables > Bid Package Status*

The underlying source of the LOV for Bid Package Status is no longer taken from hard-coded values, but by using the local table 'Bid Package Status'. The table is pre-populated with three system-defined records, representing the existing status codes 'N - New', 'P - In Process' and 'A - Awarded'.

The validation of a bid package status is now based on a **class** code (classes New, In Process, Awarded), instead of the status code.

ITB Broadcast Templates Maintenance

This program is used to set up message templates which can be customized according to the type of proposal and the type of bidders to which the ITB broadcast relates. This gives the user more control over the email message that is sent when the ITB is broadcast.

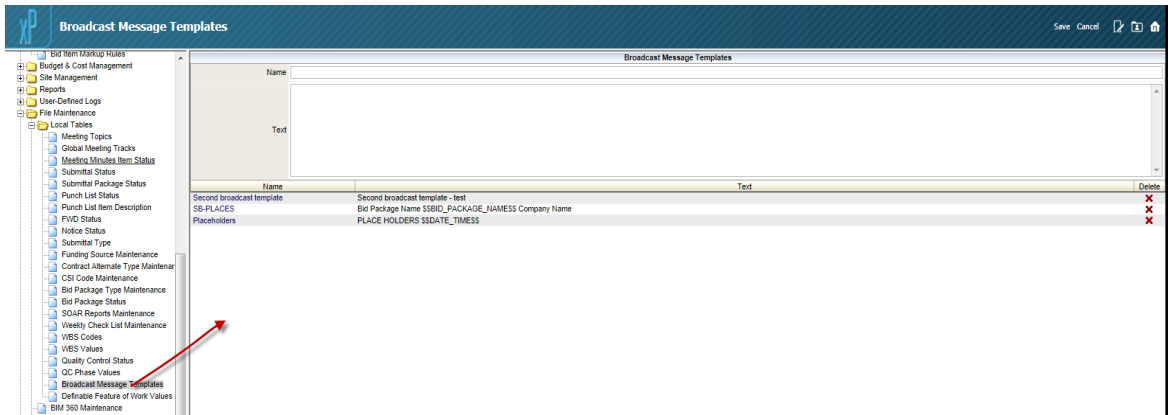
User security will need to be assigned to the program using both the Assign Programs and Assign Menu Items security options:

Assign Programs

Funding Source Maintenance	COLLAB	<input checked="" type="checkbox"/>
Grounds Up-keep	COLLAB	<input checked="" type="checkbox"/>
ITB Broadcast History	COLLAB	<input checked="" type="checkbox"/>
ITB Broadcast Message Templ	COLLAB	<input type="checkbox"/>
Invitation To Bid	COLLAB	<input checked="" type="checkbox"/>
Issue	COLLAB	<input checked="" type="checkbox"/>

Assign Menu Items

File Maintenance	<input checked="" type="checkbox"/>
Local Tables	<input checked="" type="checkbox"/>
Meeting Topics	<input checked="" type="checkbox"/>
Global Meeting Tracks	<input checked="" type="checkbox"/>
Meeting Minutes Item Status	<input checked="" type="checkbox"/>
Submittal Status	<input checked="" type="checkbox"/>
Submittal Package Status	<input checked="" type="checkbox"/>
Punchlist Status	<input checked="" type="checkbox"/>
Punch List Item Description	<input checked="" type="checkbox"/>
FWD Status	<input checked="" type="checkbox"/>
Notice Status	<input checked="" type="checkbox"/>
Submittal Type	<input checked="" type="checkbox"/>
Funding Source Maintenance	<input checked="" type="checkbox"/>
Contract Alternate Type Maintenance	<input checked="" type="checkbox"/>
CSI Code Maintenance	<input checked="" type="checkbox"/>
Bid Package Type Maintenance	<input checked="" type="checkbox"/>
Bid Package Status	<input checked="" type="checkbox"/>
Weekly Check List Maintenance	<input checked="" type="checkbox"/>
WBS Codes	<input checked="" type="checkbox"/>
WBS Values	<input checked="" type="checkbox"/>
Quality Control Status	<input checked="" type="checkbox"/>
Checklist Maintenance	<input checked="" type="checkbox"/>
QC Phase Values	<input checked="" type="checkbox"/>
Definable Feature of Work Values	<input checked="" type="checkbox"/>
ITB Broadcast Message Templates	<input type="checkbox"/>
BIM 360 Maintenance	<input checked="" type="checkbox"/>
Menu Maintenance	<input checked="" type="checkbox"/>

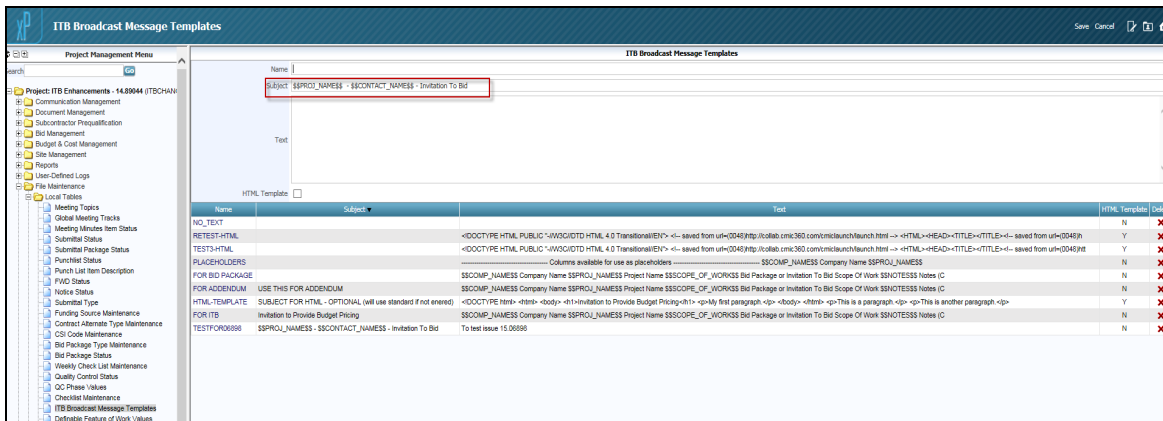


Standard Treeview path: *xProjects > File Maintenance > Local Tables > ITB Broadcast Message Templates*

The templates defined in the maintenance screen are then available for selection in the Template LOV of the Broadcast Launcher.

Subject

Users can add to and manipulate the subject line for an Invitation to Bid broadcast email by making use of the **Subject** field in the Broadcast Template screen.



Example of Subject Field in the ITB Broadcast Message Template

When adding a new template, the **Subject** field is initially pre-populated with "\$\$PROJ_NAME\$\$ - \$\$CONTACT_NAME\$\$ - Invitation To Bid" placeholder. This can be overridden by the user at this point or at the point of sending a broadcast, if left intact. Otherwise, if it is left blank, it will be replaced by the standard subject line that is sent for ITB broadcasts.

Example

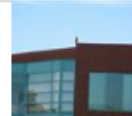
If the following template is used to send a broadcast:

ITB Broadcast Message Templates	
Name	TESTFOR06898
Subject	\$\$\$PROJ_NAME\$\$\$ - \$\$\$CONTACT_NAME\$\$\$ - Invitation To Bid
	Review for email subject
Text	
HTML Template	<input type="checkbox"/>

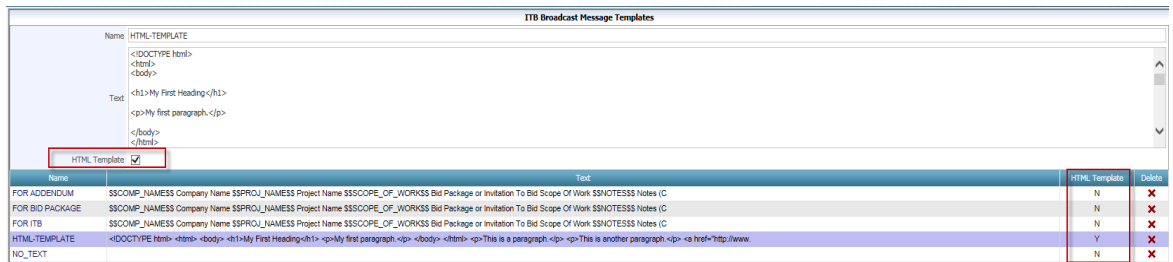
The subject is pulled in with all other text from the template, and can be changed:

Bidders		Attachments		
Customer: Guelph University		Invitation To Bid		
Description: Enhancements to Invitation to Bid - 14.89044		Bid Date: 12/18/2016 12:00 AM		
Scope: All bid-related screens including Addendum, Bidders, Bid Package, Broadcast				
Comments: not applicable				
Street: Orange		Suite: 2100		
City: Jersey City		State/Province: New Jersey		
Postal / Zip Code: 78110		Country: USA		
Planroom URL: Please see National Archives (Planroom URL)		Planroom Spec: not applicable (Planroom)		
Broadcast Date: 11/28/2014 10:00 AM				
Partner	Contact	Phon		
Parrish Construction Partners	Simon Parrish			
Parrish Construction Partners	Andrejs Zuravels			
Broadcast Launcher - Internet Explorer				
http://test4v10.cmic.ca:7785/cmictestv10x/PmtTBResponse/ShowBroadcastLauncher.do?objType=PMISSINV&objOraseq=7233602&compCode=SUS				
This will launch your ITB broadcast.				
Template: TESTFOR06898				
Subject: \$\$\$PROJ_NAME\$\$\$ - \$\$\$CONTACT_NAME\$\$\$ - Invitation To Bid				
Review for email subject				
Broadcast Message				
<input type="button" value="Select All"/> <input type="button" value="Unselect All"/>				
Select	Number	Name	Description	Attachment
<input type="checkbox"/>	ATTITBCHANG00001	upload another # 2	Original Version	00-test110.53672.jpg
<input type="checkbox"/>	DR-00189	upload new drawing # 1	Original Version	00-error1.jpeg
<input type="checkbox"/>	DR-00190	more drawings to upload # 2	Original Version	

If it is broadcast as is, the result becomes:

	Fri 31/07/2015 2:47 PM
XXX1489044 <stephanie.bromfield@cmic.ca>	
ITB Enhancements - 14.89044 - Simon Parrish - Invitation To Bid	
To <input type="checkbox"/> Stephanie Bromfield	
Review for email subject	

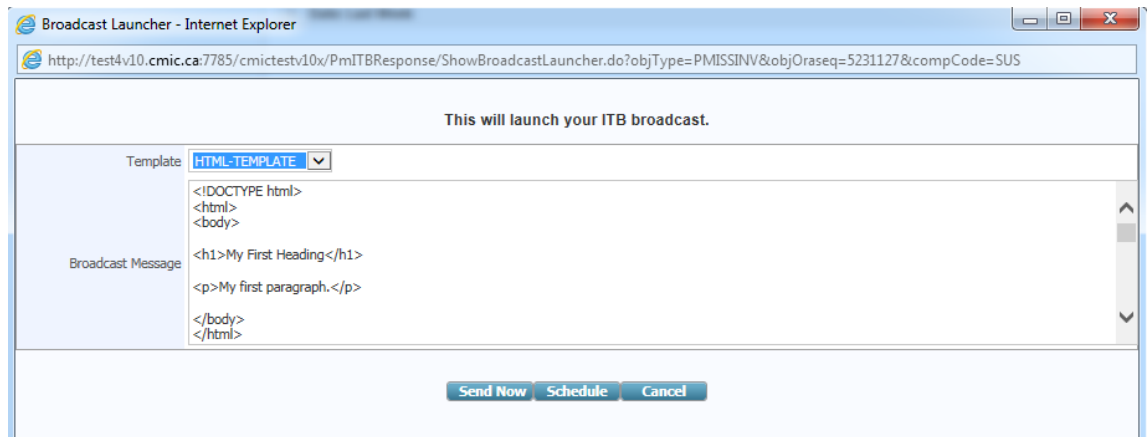
HTML Template (ITB) – Checkbox



Name	Test	HTML_Template	Delete
FOR ADDENDUM	\$\$\$COMP_NAME\$\$\$ Company Name \$\$\$PROJ_NAME\$\$\$ Project Name \$\$\$SCOPE_OF_WORK\$\$\$ Bid Package or Invitation To Bid Scope Of Work \$\$\$NOTES\$\$\$ Notes (C	N	X
FOR BID PACKAGE	\$\$\$COMP_NAME\$\$\$ Company Name \$\$\$PROJ_NAME\$\$\$ Project Name \$\$\$SCOPE_OF_WORK\$\$\$ Bid Package or Invitation To Bid Scope Of Work \$\$\$NOTES\$\$\$ Notes (C	N	X
FOR ITB	\$\$\$COMP_NAME\$\$\$ Company Name \$\$\$PROJ_NAME\$\$\$ Project Name \$\$\$SCOPE_OF_WORK\$\$\$ Bid Package or Invitation To Bid Scope Of Work \$\$\$NOTES\$\$\$ Notes (C	N	X
HTML_TEMPLATE	<!DOCTYPE html> <html> <body> <h1>My First Heading</h1> <p>My first paragraph.</p> </body> </html>	Y	X
NO_TEXT		N	X

The 'HTML Template' flag is used to indicate if an ITB Broadcast Template is HTML. When checked, the template will be validated as HTML and interpreted accordingly.

The screenshot below shows the HTML template after being pulled in to the ITB Broadcast popup:



Broadcast Launcher - Internet Explorer

http://test4v10.cmic.ca:7785/cmictestv10x/PmITBResponse/ShowBroadcastLauncher.do?objType=PMISSINV&objOraseq=5231127&compCode=SUS

This will launch your ITB broadcast.

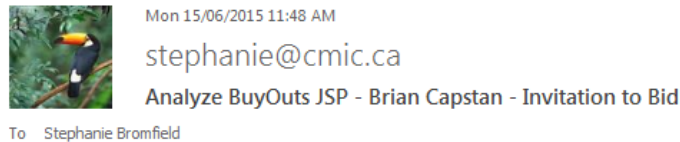
Template: **HTML_TEMPLATE**

Broadcast Message:

```
<!DOCTYPE html>
<html>
<body>
<h1>My First Heading</h1>
<p>My first paragraph.</p>
</body>
</html>
```

Send Now **Schedule** **Cancel**

HTML interpretation when broadcast is sent:



My First Heading

My first paragraph.

This is a paragraph.

Placeholders for ITB Templates

Placeholders are available for some related fields, and can be used when defining the templates, or used directly in the Broadcast Message. The placeholders are:

Columns available for use as placeholders

\$\$\$SCOPE_OF_WORK\$\$\$	Bid Package or Invitation To Bid Scope Of Work
\$\$\$NOTES\$\$\$	Notes (Comments on Bidder record in BidPackage or InvToBid)
\$\$\$PARTN_NAME\$\$\$	[To:] Partner Name

\$\$PHONE_NUM\$\$	[To:] Contact Phone Number
\$\$CONTACT_NAME\$\$	[To:] Contact Name
\$\$EMAIL_ADDR\$\$	[To:] Email Address
\$\$SENDER_EMAIL\$\$	[From:] Sender Email
\$\$SENDER_NAME\$\$	[From:] Sender Name
\$\$SYS_DATE\$\$	System Date
\$\$RESPONSE_URL\$\$	Response URL
\$\$SYS_TIME\$\$	time portion of system date
\$\$BID_TIME\$\$	time portion of bid date

\$\$PROJ_NAME\$\$	Project Name
\$\$PROJ_ADDR1\$\$	Project Address Line 1
\$\$PROJ_ADDR2\$\$	Project Address Line 2
\$\$PROJ_ADDR3\$\$	Project Address Line 3
\$\$PROJ_REGION_CODE\$\$	Project Regional Code
\$\$PROJ_POSTAL_CODE\$\$	Project Postal Code
\$\$PROJ_COUNTRY\$\$	Project Country
\$\$PROJ_DESC\$\$	Project Description
\$\$BID_DATE\$\$	Bid Date

\$\$COMP_NAME\$\$	Company Name
\$\$COMP_ADDR1\$\$	Company Address Line 1
\$\$COMP_ADDR2\$\$	Company Address Line 2
\$\$COMP_ADDR3\$\$	Company Address Line 3
\$\$COMP_REGION_CODE\$\$	Company Regional Code
\$\$COMP_POSTAL_CODE\$\$	Company Postal Code
\$\$COMP_PHONE_COUNTRY_CODE\$\$	Company Phone Country Code
\$\$COMP_PHONE_AREA_CODE\$\$	Company Phone Area Code
\$\$COMP_PHONE_NUM\$\$	Company Phone Num
\$\$COMP_FAX_COUNTRY_CODE\$\$	Company Fax Country Code
\$\$COMP_FAX_AREA_CODE\$\$	Company Fax Area Code
\$\$COMP_FAX_NUM\$\$	Company Fax Num
\$\$COMP_TELEX_NUM\$\$	Company Telex Num
\$\$COMP_LEGAL_NAME\$\$	Company Legal Name

Bid Package Specific:

\$\$BID_PACKAGE_NAME\$\$	Bid Package Name
\$\$BIDP_DUE_DATE\$\$	Bid Package Bid Due Date (Submit Bid by). Date format 'MM/DD/YYYY HH:MI:PM'
\$\$BIDP_RESPOND_BY_DATE\$\$	Bid Package Respond By Date (Reply Indicating Interest by)
\$\$BIDP_DESCRIPTION\$\$	Bid Package Description
\$\$BIDP_CSI_CODE\$\$	CSI Code Name

Pre-Bid Meeting / Job Walk Information:

\$\$BIDP_PREBID_MEET_DATE\$\$	Meeting Date
\$\$BIDP_PREBID_MEET_TIME\$\$	Meeting Time
\$\$BIDP_PREBID_MEET_LOC\$\$	Meeting Location

Invitation To Bid Specific:

\$\$ITB_COMMENT\$\$	Invitation To Bid Comments
\$\$ITB_PROJ_DESC\$\$	Invitation To Bid Project Description
\$\$ITB_PLANROOM_URL\$\$	Planroom URL
\$\$ITB_PLANROOM_SPEC\$\$	Planroom Specification

Addendum Specific:

\$\$ADDEND_NAME\$\$	Addendum Name
\$\$ADDEND_RECEIVED_DATE\$\$	Addendum Received Date
\$\$ADDEND_DESC\$\$	Addendum Description
\$\$ADDEND_FROM_PARTN_NAME\$\$	Addendum From Partner Name
\$\$ADDEND_FROM_CONTACT_NAME\$\$	Addendum From Contact Name

WBS Codes/Values Maintenance

The screenshot shows the 'Project Management' application window. On the left is a 'Project Management Menu' tree. The main window is titled 'WBS Codes Maintenance'. It has a 'Company' section with 'Company' (SUS) and 'Name' (SB (DO NOT USE) - US). Below that is a 'Job' section with 'Job' (STDJOB) and 'Name' (Job for Standard system). The main table is titled 'WBS Codes' and has columns: Code, Name, User Defined Field, Required, Editable, and Action.

Code	Name	User Defined Field	Required	Editable	Action
PCI	PCI #	PCI	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AREA	Cost Code	CSTCODE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WBS3	JC WBS company based	JCVBSV	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
JOBWBS	CSI Code	CSL_CODE	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The maintenance of WBS Codes and WBS Values are available in both Forms and JSP. In the JSP version of WBS Codes Maintenance, the **Job** field has been introduced to support job-specific WBS codes.

Checklist Maintenance

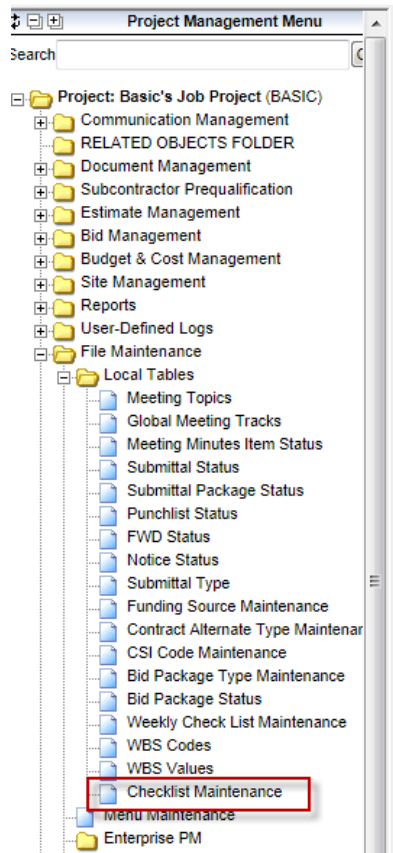
Additional Checklist Types can be defined in CMiC (the Weekly Checklist was already a part of the product offering). These types can be defined under the menu item File Maintenance > Local Tables > Checklist Maintenance. For example, checklists can be defined for Cleanup, Safety, Site Preparation, etc.

An outline of how to set up the Checklist Maintenance for use is provided in the following sequence of steps:

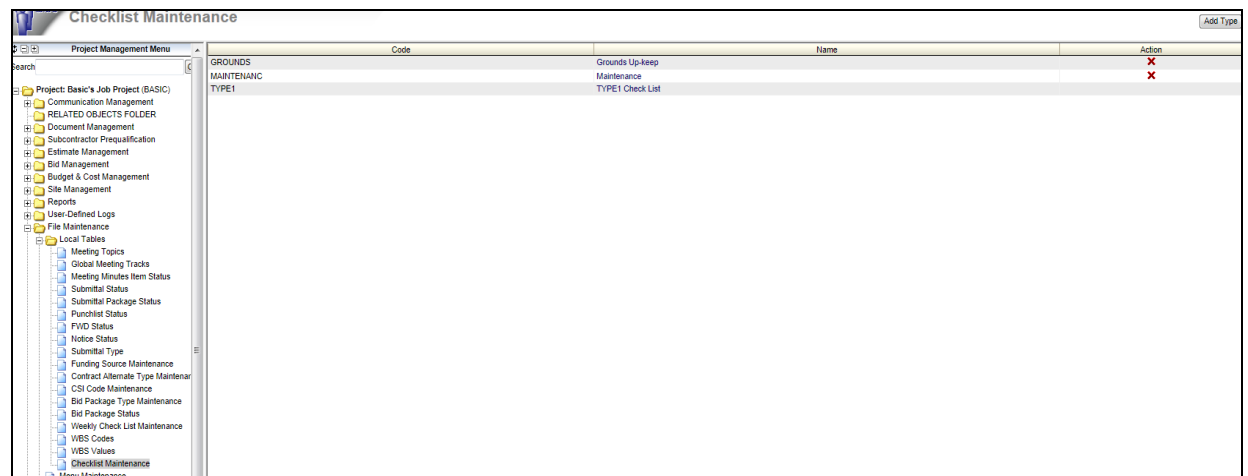
1. Assign security access to the Checklist Maintenance program via the 'Assign Menu Items' option.

Daily Journal Costs	<input checked="" type="checkbox"/>
File Maintenance	<input checked="" type="checkbox"/>
Local Tables	<input checked="" type="checkbox"/>
Meeting Topics	<input checked="" type="checkbox"/>
Global Meeting Tracks	<input checked="" type="checkbox"/>
Meeting Minutes Item Status	<input checked="" type="checkbox"/>
Submittal Status	<input checked="" type="checkbox"/>
Submittal Package Status	<input checked="" type="checkbox"/>
Punchlist Status	<input checked="" type="checkbox"/>
FWD Status	<input checked="" type="checkbox"/>
Notice Status	<input checked="" type="checkbox"/>
Submittal Type	<input checked="" type="checkbox"/>
Funding Source Maintenance	<input checked="" type="checkbox"/>
Contract Alternate Type Maintenance	<input checked="" type="checkbox"/>
CSI Code Maintenance	<input checked="" type="checkbox"/>
Bid Package Type Maintenance	<input checked="" type="checkbox"/>
Bid Package Status	<input checked="" type="checkbox"/>
Weekly Check List Maintenance	<input checked="" type="checkbox"/>
WBS Codes	<input checked="" type="checkbox"/>
WBS Values	<input checked="" type="checkbox"/>
Quality Control Status	<input checked="" type="checkbox"/>
Checklist Maintenance	<input type="checkbox"/>
QC Phase Values	<input checked="" type="checkbox"/>
Definable Feature of Work Values	<input checked="" type="checkbox"/>

- The program is now available on the standard PM JSP Treeview for launching. Any **custom** Treeview will require changing to include this program.



- Launch the Checklist Maintenance program to allow setting up of various checklist Types. TYPE1 is a standard checklist representing the 'Weekly Check List' program located under Site Management node.



4. Click the **[Add Type]** button to add more checklist types.

The screenshot shows the 'Checklist Maintenance' window. On the left is a treeview menu. The main area has a table with columns: Code, Grounds, Type Code, Type Name, and Action. A 'Add Checklist Type' dialog box is open, with a red arrow pointing to the 'Add Type' button in its top right corner.

This screenshot shows the 'Checklist Maintenance' window after adding types. The table lists: GROUNDS, MAINTENANC, SAFETY, and TYPE1. The 'Name' column contains: Grounds Up-keep, Maintenance, Safety Procedures, and TYPE1 Check List. A red arrow points to the 'Name' column header with the text: 'click the Name to complete the definition screen for Headers and Details of each Type'.

The screenshot shows the 'Grounds Up-keep Maintenance' window. It displays a table with columns: Line No., Prompt, Header, Active, and Action. The table contains several rows for defining the checklist steps and headers.

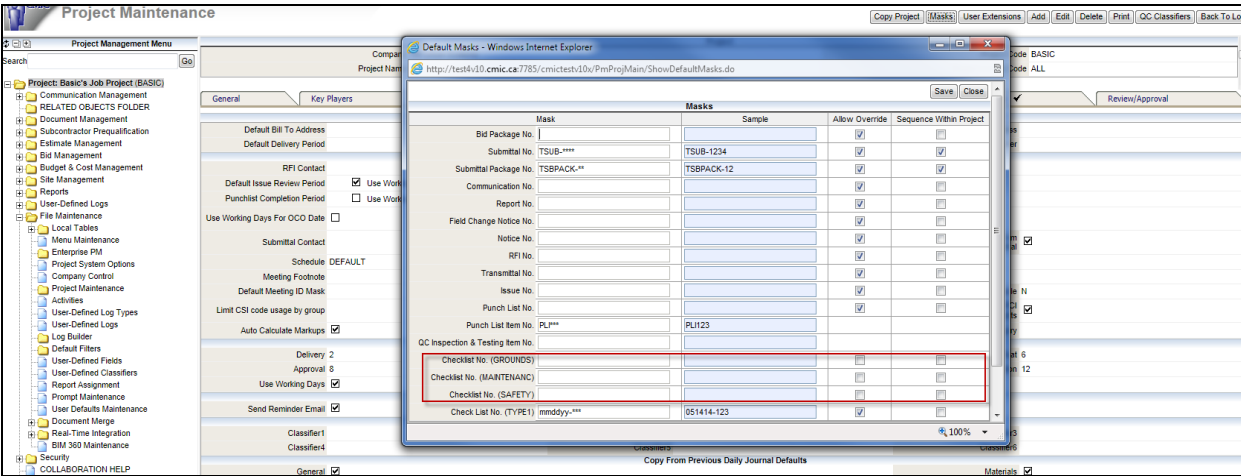
5. Once Checklist Types are created, a number of related records are created in the system:

a) Company Control – Code Masks

The screenshot shows the 'Company Control' window with the 'Code Masks' tab selected. It displays a table with columns: Mask, Sample, Allow Override, and Sequence Within Project. The table lists various code masks for different project components like Bid Package, Submittal, Report, etc. A red box highlights the 'Checklist No.' rows for GROUNDS, MAINTENANC, SAFETY, and TYPE1.

Standard Treeview path: *xProjects > File Maintenance > Company Control – Code Masks tab*

b) Project Maintenance – Masks



Example of pop-up window launched from [Masks] button on Project Maintenance screen

c) Security: Assign Programs, Assign Menu Items, Add/Remove Privileges (Add, Edit, Delete):

Field Work Directive	COLLAB	<input checked="" type="checkbox"/>
Funding Source Maintenance	COLLAB	<input checked="" type="checkbox"/>
Grounds Up-keep	COLLAB	<input type="checkbox"/>
ITB Broadcast History	COLLAB	<input checked="" type="checkbox"/>
Invitation To Bid	COLLAB	<input checked="" type="checkbox"/>
Issue	COLLAB	<input checked="" type="checkbox"/>
Job Status Queries	COLLAB	<input checked="" type="checkbox"/>
Link to Issue	COLLAB	<input checked="" type="checkbox"/>
Maintenance	COLLAB	<input type="checkbox"/>
Meeting Minute Item Status	COLLAB	<input checked="" type="checkbox"/>
Meeting Minutes	COLLAB	<input checked="" type="checkbox"/>
My Actions	COLLAB	<input checked="" type="checkbox"/>
Notice	COLLAB	<input checked="" type="checkbox"/>
Notice Status Maintenance	COLLAB	<input checked="" type="checkbox"/>
Owner Change Order	COLLAB	<input checked="" type="checkbox"/>
Owner Change Transmittal	COLLAB	<input checked="" type="checkbox"/>
PCI Markup Rules	COLLAB	<input checked="" type="checkbox"/>
PCI Projection	COLLAB	<input checked="" type="checkbox"/>
PM Document Package	COLLAB	<input checked="" type="checkbox"/>
PM History	COLLAB	<input checked="" type="checkbox"/>
PM Menu – Project Selection	COLLAB	<input checked="" type="checkbox"/>
Payment Requisition	COLLAB	<input checked="" type="checkbox"/>
Planwell Folder	COLLAB	<input checked="" type="checkbox"/>
Potential Change Item	COLLAB	<input checked="" type="checkbox"/>
Project Contact Popup	COLLAB	<input checked="" type="checkbox"/>
Project Control	COLLAB	<input checked="" type="checkbox"/>
Project Menu Maintenance	COLLAB	<input checked="" type="checkbox"/>
Project Partner Maintenance	COLLAB	<input checked="" type="checkbox"/>
Project Roles	COLLAB	<input checked="" type="checkbox"/>
Project System Options	COLLAB	<input checked="" type="checkbox"/>
Punch List	COLLAB	<input checked="" type="checkbox"/>
Punch List Status	COLLAB	<input checked="" type="checkbox"/>
RFI	COLLAB	<input checked="" type="checkbox"/>
RTI Error Log	COLLAB	<input checked="" type="checkbox"/>
RTI Log	COLLAB	<input checked="" type="checkbox"/>
RTI Maintenance	COLLAB	<input checked="" type="checkbox"/>
RTI Mapping	COLLAB	<input checked="" type="checkbox"/>
Safety Procedures	COLLAB	<input type="checkbox"/>

Assign
Programs

Example of Assigning Programs

Site Management	<input checked="" type="checkbox"/>
Daily Report	<input checked="" type="checkbox"/>
Punchlists	<input checked="" type="checkbox"/>
Field Change Notices	<input checked="" type="checkbox"/>
Notices	<input checked="" type="checkbox"/>
Weekly Check List	<input checked="" type="checkbox"/>
QC Inspection and Testing Plan	<input checked="" type="checkbox"/>
Checklists	<input type="checkbox"/>
Grounds Up-keep	<input type="checkbox"/>
Safety Procedures	<input type="checkbox"/>
Maintenance	<input type="checkbox"/>
Reports	<input checked="" type="checkbox"/>

Assign
Menu
Items

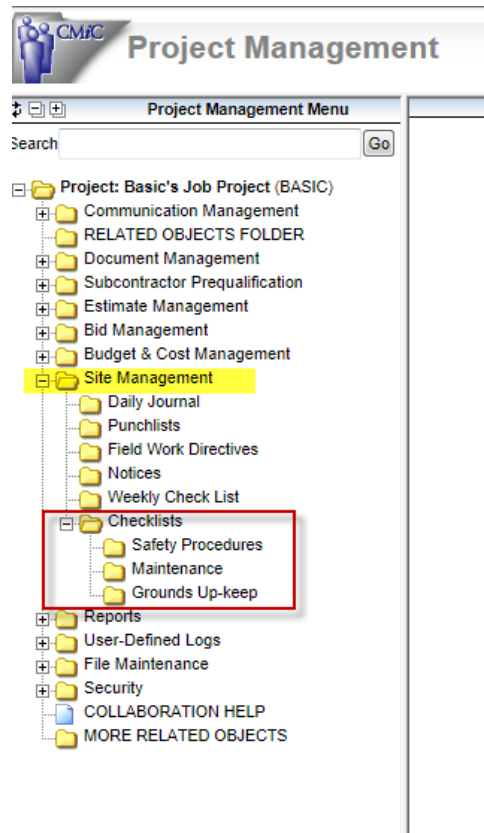
Example of Assigning Menu Items

FWD - Create	<input checked="" type="checkbox"/>
Grounds Up-keep - Create	<input type="checkbox"/>
Grounds Up-keep - Delete	<input type="checkbox"/>
Grounds Up-keep - Edit	<input type="checkbox"/>
Issue - Create	<input checked="" type="checkbox"/>
Logs (Contacts) - Show Outlook Export/Import Buttons	<input checked="" type="checkbox"/>
Logs - Set Defaults For Query Configurations	<input checked="" type="checkbox"/>
Logs - Set Defaults For Query Filters	<input checked="" type="checkbox"/>
Maintenance - Create	<input type="checkbox"/>
Maintenance - Delete	<input type="checkbox"/>
Maintenance - Edit	<input type="checkbox"/>
Markup Rules - Edit	<input checked="" type="checkbox"/>
Meeting Minutes - Create	<input checked="" type="checkbox"/>
Meeting Minutes - Edit Own Records	<input checked="" type="checkbox"/>
Menu Maintenance - Assign Security to Custom Items	<input checked="" type="checkbox"/>
Menu Maintenance - Set System Default	<input checked="" type="checkbox"/>
Messages - Update text messages for different users	<input checked="" type="checkbox"/>
Notes - Delete Own Notes	<input type="checkbox"/>
Notes - Edit Own Notes	<input checked="" type="checkbox"/>
Notice - Create	<input checked="" type="checkbox"/>
Owner Change Order - Create	<input checked="" type="checkbox"/>
PCIs - Create from and Link to other objects	<input checked="" type="checkbox"/>
Projects - Close	<input checked="" type="checkbox"/>
Projects - Create	<input checked="" type="checkbox"/>
Projects - Delete	<input checked="" type="checkbox"/>
Projects - Edit	<input checked="" type="checkbox"/>
Punchlists - Create	<input checked="" type="checkbox"/>
RFI - Create	<input checked="" type="checkbox"/>
Request For Payment - Create	<input checked="" type="checkbox"/>
Safety Procedures - Create	<input type="checkbox"/>
Safety Procedures - Delete	<input type="checkbox"/>
Safety Procedures - Edit	<input type="checkbox"/>
Subcontract - Add	<input checked="" type="checkbox"/>
Subcontract - Edit	<input checked="" type="checkbox"/>

Add/Remove
Privileges

Example of Adding and Removing Privileges

6. After assigning security access to these programs, menu items and privileges, the user can now start using the checklists. They are located under the **Site Management > Checklists** node of the standard Treeview, but would possibly need to be added to custom Treeviews.



Example of Checklists in Treeview Menu

7. When the user clicks on the [Add] button after selecting a checklist program, the screen display will be based on the setup definition in step 4, for example, for 'Grounds Up-keep', the following screenshot would be shown.

Field security can also be applied to the [Add Type] button and Delete icon on the Checklist Maintenance screen (standard Treeview path: *xProjects > Security > Role Maintenance – Programs/Checklist Maintenance*).

ALL

[Update](#) [Back](#)

*Note: Not all programs have fields available with field privileges

Programs Checklist Maintenance

Item Name	Column/Field Security	Security Level
Add Checklist Button		Unrestricted
Delete Checklist Button		Unrestricted
Assign Checklist to Project Checkbox		Unrestricted

BEFORE:

Checklist Maintenance [Add Type](#) [?](#) [Home](#)

Code	Name	Assign To Project	Action
GROUND	Grounds Upkeep	<input checked="" type="checkbox"/>	X
PTFTSTING	Testing PTF	<input type="checkbox"/>	X
SAFETY	Safety Procedures	<input type="checkbox"/>	X
TYPE1	TYPE1 Check List	<input type="checkbox"/>	

AFTER:

ALL

[Update](#) [Back](#)

*Note: Not all programs have fields available with field privileges

Programs Checklist Maintenance

Item Name	Column/Field Security	Security Level
Add Checklist Button		Hidden
Delete Checklist Button		Hidden
Assign Checklist to Project Checkbox		Unrestricted

Checklist Maintenance [?](#) [Home](#)

Code	Name	Assign To Project	
GROUND	Grounds Upkeep	<input checked="" type="checkbox"/>	
PTFTSTING	Testing PTF	<input type="checkbox"/>	
SAFETY	Safety Procedures	<input type="checkbox"/>	
TYPE1	TYPE1 Check List	<input type="checkbox"/>	

- Set up the user-defined fields using the Free Form Fields screen (program: PMFFSET), which can be found in the System module (standard path: *System > User Extensions > Free Form Fields*):

Activity Maintenance & Import

Schedule activities related to the current project can either be created or imported in the Activities Maintenance screen. The pre-requisite to adding or importing activities is to assign a default schedule in the Defaults tab of the current project. Schedules are defined in the Resource Schedule module.

When activity start dates get modified during DM activity import, all the open submittals linked with the activity will be updated with the new start date, and the schedule dates will be recalculated accordingly.

Adding an Activity

To add an activity to the current project, simply click on the **[Add]** button that is at the top of the Activity Log.

An input line is opened above the log.

Enter the activity code, description, start and end dates.

[Save] the activity record.

Importing Schedule Activities

When importing schedule activities, ensure the import file is in the required format and layout:

Import file (.txt or .csv) format:

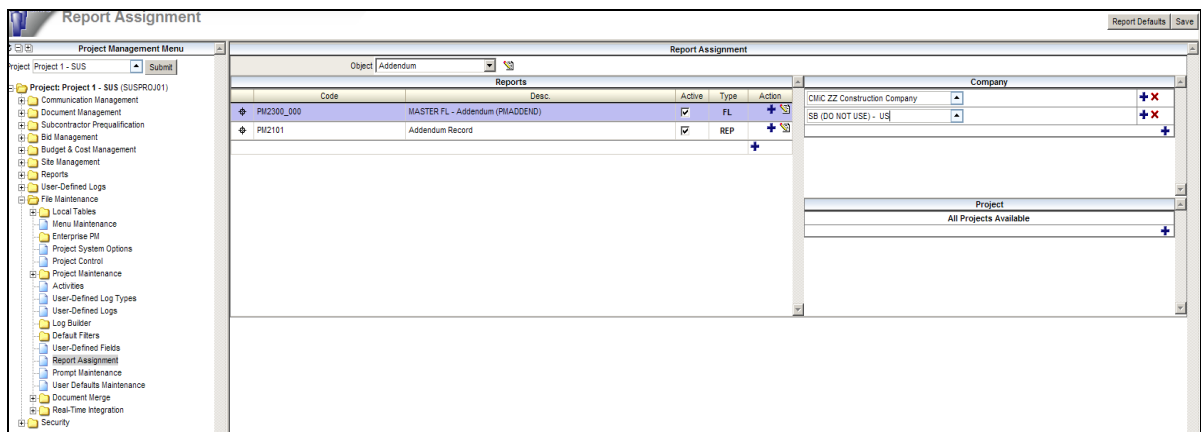
- DMFAI_PROJ_CODE - current project code
- DMFAI_COMP_CODE - current company code
- DMFAI_ACT_CODE - activity code
- DMFAI_ACT_DESC - activity description
- DMFAI_START_DATE - start date (dd-mmm-yyyy)
- DMFAI_END_DATE - end date (dd-mmm-yyyy)

Click the [**Import**] button to access the activities import functionality.

After selecting the upload file and clicking on [**Upload**], a log of any errors is next displayed. On this screen, make any necessary corrections, re-validations and complete the import by clicking on the [**Accept**] button.

When activity start dates get modified during DM activity import, all the open submittals linked with the activity will be updated with the new start date, and the schedule dates will be re-calculated accordingly.

Reports & Form Letter Assignment



Standard Treeview path: *xProjects > File Maintenance > Report Assignment*

Certain Form Letters and Reports can be restricted to certain companies and projects through the Reports and Form Letters Assignment feature of PM JSP.

First, select the PM object from the object list.

Reports – Section

All related form letters and reports for that object will then be loaded in the ‘Reports’ area.

Each record has the following fields:

Code and Description

The Report Code and Description fields allow users to specify the report filename and description for their custom reports separately.

Active – Checkbox

The ‘Active’ checkbox indicates whether the report is active or inactive. It is used for enabling/disabling any report.

Type

The ‘Type’ field will show documents that are Form Letters (FL), standard reports (REP) or documents created using the Document Merge feature (DOCX), and these will be displayed in pink text.

Action

This field is used to add custom reports.

Select the form letter or report that is to be assigned by clicking the mouse-pointer on it. Once selected, the record will have a blue background.

Company – Section

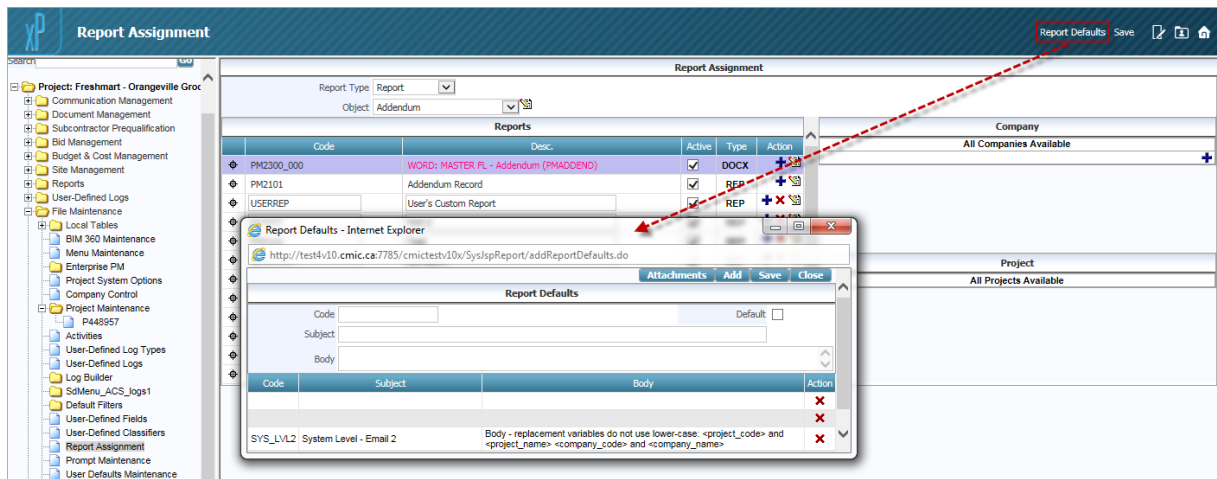
The company/companies that will be given access to this report is next assigned by adding it/them from the LOV in the ‘Company’ section.

Project – Section

Finally, select the projects from the LOV which the report will be accessible and click [**Save**].

Refresh the session to see the effects of the changes made to the object that was chosen. Reports that are restricted to a particular company/project will only be available for printing to users that are in that company/project security group. Users without this report/form letter assignment will not see it listed in their set of available reports/form letters for that object, while in PM JSP.

[Report Defaults] – Button



Example of pop-up window launched from [Report Defaults] button on Report Assignment screen

Clicking on the [Report Defaults] button opens a pop-up window where you can define default parameters for reports. Click on the [Add] button to add a new report default.

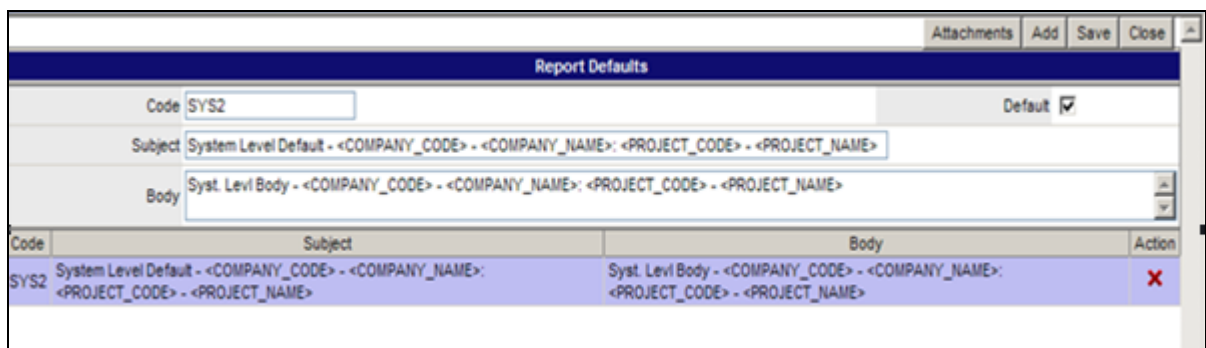
Email Replacement Parameters

The user can attach parameters to the Subject or Body of Report Defaults for Email, in Report Assignment.

The following replacement variables are allowed: <PROJECT_CODE>, <PROJECT_NAME>, <COMPANY_CODE>, <COMPANY_NAME>...not necessarily in that order, **but they must be in uppercase.**

EXAMPLE:

In Report Assignment for Communications, you can define a default email subject/body:



Example of default email subject/body for communications report

When printing the Communication record to email, the following will be shown:

The screenshot shows an email composition window with the following fields:

- From:** stephanie@cmic.ca
- To:** allan.martin@cmic.ca
- CC:** (empty)
- BCC:** (empty)
- Subject:** System Level Default - SB - SB Company (TEST2006): SBPROJ990 - Tryall Develo
- Message:** Syst. Levi Body - SB - SB Company (TEST2006): SBPROJ990 - Tryall Development - PHASE II
- Report File Name:** PM3020.pdf
- Attachments:** (empty table with columns Document Name and File Name)

Excel MIP Documents for Report Assignment

The screenshot shows the 'Report Assignment' window in xProjects. The left pane displays a treeview with the following structure:

- Project: Freshmart Office Building - Chi
 - Communication Management
 - Document Management
 - Subcontractor Prequalification
 - Bid Management
 - Budget & Cost Management
 - Site Management
 - Reports
 - User-Defined Logs
 - File Maintenance
 - Local Tables
 - BM 360 Maintenance
 - Menu Maintenance
 - Enterprise PM
 - Project System Options
 - Company Control
 - Project Maintenance
 - Activities
 - User-Defined Log Types
 - User-Defined Log Types
 - Log Builder
 - SdMenu_ACS_logs1
 - Default Filters
 - User-Defined Fields
 - User-Defined Classifiers
 - Report Assignment
 - Prompt Maintenance
 - User Defaults Maintenance
 - Document Merge

The right pane shows the 'Report Assignment' table with the following columns:

- Report Type: MIP Document
- Object: Action Items
- MIP Documents (Table):

Template Name	Template Description
All Companies Available	
- Company: All Companies Available
- Project: All Projects Available

Standard Treeview path: xProjects > File Maintenance > Report Assignment – MIP Report

An additional Report Type **MIP Document** gives the ability to select Excel MIP documents for Report Assignment for the objects listed under that selection:

The screenshot shows the 'Report Assignment' window. On the left is a 'CMIC Field Menu' tree. The 'Project: Freshmart Office Building - Chi' is selected. The main area shows a list of 'Action Items' for the selected object. The 'Action Items' list includes: Addendum, Administration Action, Annual Review, Applicant, Applicant Information, Application Action, Applications Log, Auto Cold Storage Definitions, Bid Package (Owners), Bid Packages, Bidder Response Log, Budget Status Query, Budget Status Query (Category), Buyout Items, Change Orders, Change Transmittals, Checklist for MF, and Class Enrollment. The 'Company' dropdown is set to 'All Companies Available' and the 'Project' dropdown is set to 'All Projects Available'.

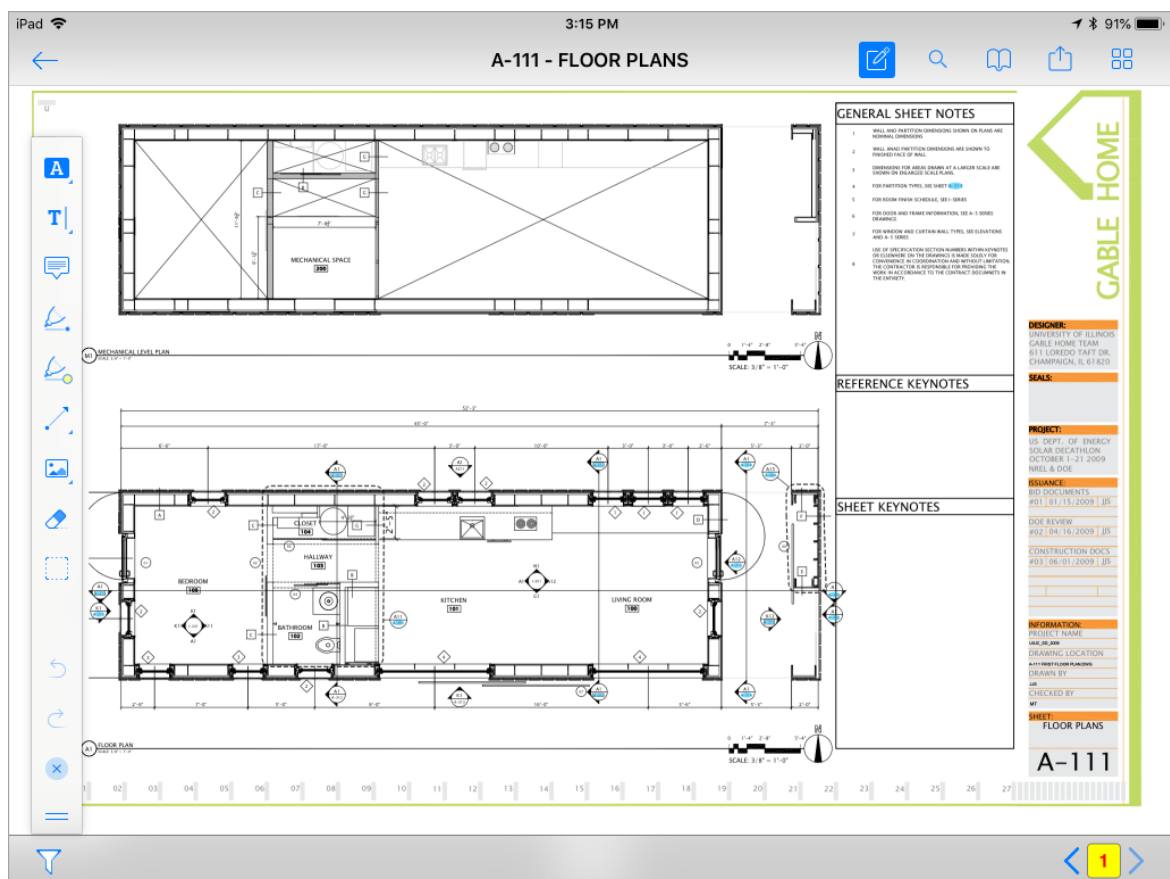
Any defined **Excel** templates for a particular object can be assigned to particular companies or company/projects.

Form Letters & Key Players

Some Form Letters use Key Player Role codes as replacement fields. For details, please refer to the [Key Players \(Assignment\) – Tab](#) subsection under the *Project Maintenance* section for details.

Mobile Drawing Management – Setup

Overview – Mobile Drawing Management



Sample of Drawing Set Sheet in Mobile Field.

Effective communication between project key players, stake holders and subcontractors is vital for the timely identification and resolution of issues, and to minimize costly misunderstandings so that projects stay on schedule and on budget. To better understand and illustrate communications, specifically for those

out in the field where construction is actually done, project members need to remotely view, mark up, and include drawing plans in communications.

Mobile Drawing Management has been designed by CMiC, in conjunction with our clients, to greatly increase the effectiveness of mobile communications involving PCIs, RFIs, Issues and Bid Packages by:

- Automatically splitting large, multipage PDF drawing plans from architects/engineers to create a drawing set of one PDF per sheet so that only relevant sheets need to be including in mobile communications.
 - For each sheet in created drawing set, its sheet label, sheet title and drawing type (e.g., Architectural, Electrical, Mechanical...) is automatically extracted using Optical Character Recognition (OCR) functionality to allow linking between the sheets.
 - All sheet labels in call-outs and text are converted to hyperlinks to greatly facilitating navigation between sheets in drawing set.
- Providing smart upload/download logic by storing mark-ups on separate layers from drawings so that:
 - Drawing sets only need to be downloaded to mobile devices in full once.
 - Only mark-up changes need to be sent and received, greatly speeding up mobile communications.
- Removing operational overhead required to manage and use drawing plans in one system and other document types in a different system.

Requirements

ECM Explorer

- Requires FS-06 Build 32c or higher
- Installer can be downloaded here: <http://ecmexplorerbeta.cmicglobal.com/>

NOTE: Uninstall any older builds of ECM Explorer before installing the latest one.

Mobile Field

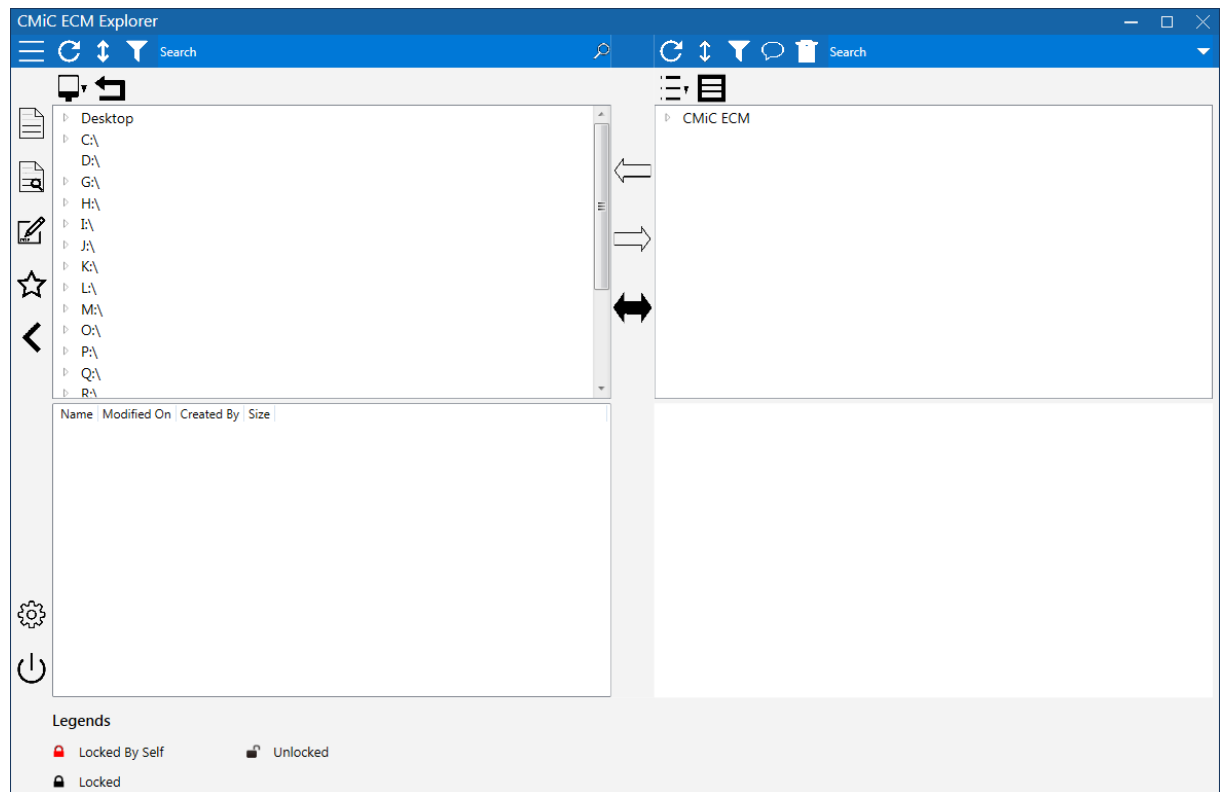
- Requires Mobile Hotfix B34b or higher; note, installing Mobile Hotfix B35 is highly recommended for full functionality of Mobile Field; build is available in the Apple App Store

PSPDF Web (JSP)

- Requires Patch 210-2 or higher
- PSPDF License Key must be installed in your environment

ECM Drawing Set Extraction

Overview – ECM Drawing Set Extraction



The ECM Explorer desktop application is used to extract drawing sets from large PDF files from architects and engineers, and it can handle both raster and vector images. The extracted drawing sets, which contain one PDF for every page in the large PDF from the architect or engineer, are uploaded into your xProjects Document Management system, where they can be used on a page-by-page basis to greatly enhance mobile communications through Mobile Field.

Drawing Set Extraction Overview

The extraction process involves the following:

I) PDF Splitting & Optical Character Recognition (OCR)

- Large, multipage PDF file from architect/engineer is split into one Drawing Set Sheet per page.
- For each extracted Drawing Set Sheet, OCR is used to extract its Sheet Label, Sheet Title and drawing type (e.g., Architectural, Electrical, Mechanical...).

II) Hyperlink Creation

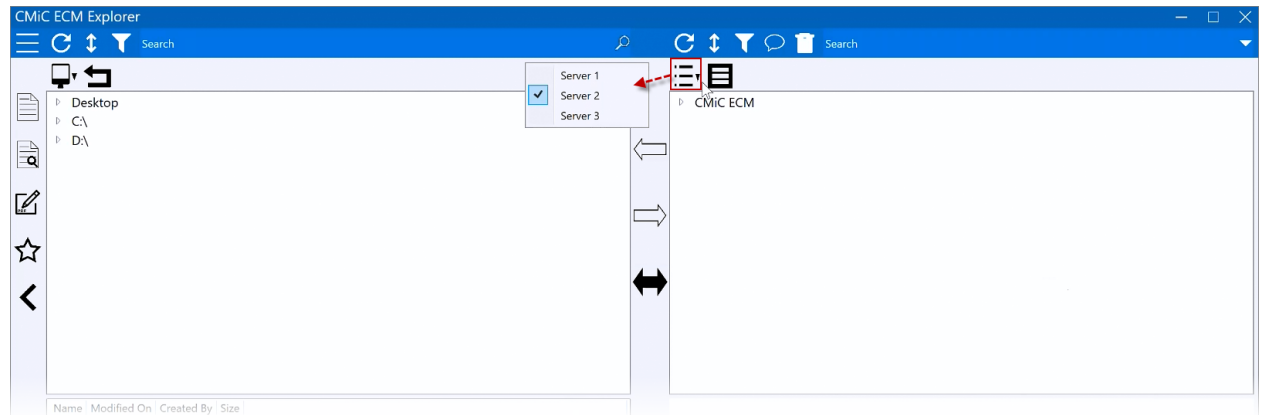
- For each extracted Drawing Set Sheet, all Sheet Labels in sheet's call-outs and text are converted to hyperlinks to facilitate navigation between the sheets.

III) Upload Drawing Set into xProjects' Document Management System

Extracted Drawing Set Sheets are uploaded into xProjects' Document Management system.

Part 1: Select Project & Original PDF

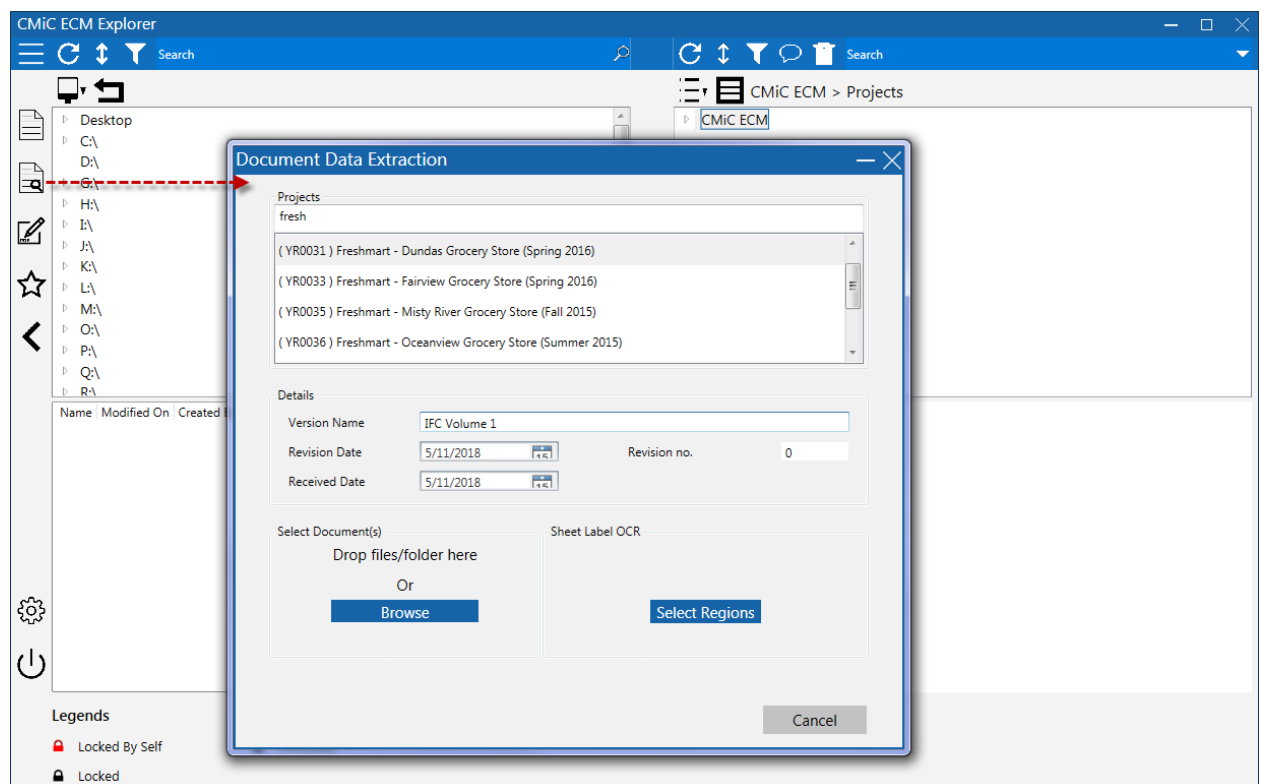
Step 1: Server Selection



First, click the Server Selection button, shown above, to select the server containing the Project to which the extracted drawing set will be added.

The servers are set up on the **Servers** tab of the ECM Settings screen.

Step 2: Select Project & Original PDF & Enter Drawing Set Details



Click the Data Extraction icon to open the Document Data Extraction popup, which is used to:

1. Select Project to which extracted drawing set will be added.
2. Select original PDF(s) from which the drawing set will be extracted.
3. Provide details for the drawing set being extracted.

The following are details about the Document Data Extraction popup:

The screenshot shows a window titled "Document Data Extraction" with a blue header bar. Inside, there are three main sections. The top section, labeled "Projects", contains a list box with the text "fresh" and a scrollable list of project entries: "(YR0031) Freshmart - Dundas Grocery Store (Spring 2016)", "(YR0033) Freshmart - Fairview Grocery Store (Spring 2016)", "(YR0035) Freshmart - Misty River Grocery Store (Fall 2015)", "(YR0036) Freshmart - Oceanview Grocery Store (Summer 2015)", and "(YR0032) Freshmart - Orangethills Grocery Store (Fall 2015)". The middle section, labeled "Details", contains three input fields: "Version Name" with the value "IFC Volume 1", "Revision Date" with the value "5/11/2018" and a calendar icon, and "Received Date" with the value "5/11/2018" and a calendar icon. To the right of these is a "Revision no." field with the value "0". The bottom section is divided into two parts: "Select Document(s)" on the left, which includes a "Drop files/folder here" area, an "Or" label, and a "Browse" button; and "Sheet Label OCR" on the right, which includes a "Select Regions" button. A "Cancel" button is located at the bottom right of the window.

Sample of Document Data Extraction popup launched by Data Extraction icon.

Projects

Select the Project to which the extracted drawing set will be added.

Details

Drawing Management

Sheet Number: A-111 | Sheet Name: A-111 - FLOOR PLANS

Status: Approved | Trade: Architectural | Original Page Number: A-110 | Received: 2018-05-10

Number	SB - Designer Ref.	Revision Date	Received Date	Status	User	Description	Notes	Attachment	download	Change_#	ESignings	Esign Status	Action
0	A-111	15/May/2018	14/May/2018		Mike Fernandes	Original Version		http://collab.cmic360.com/cmclaunch/launch.html		Create Change Link			Update Packages
1	A-111 R1	16/May/2018	16/May/2018		Mike Fernandes	IFC Volume 1		A-111 - FLOOR PLANS.pdf		Create Change Link			Update Packages

Field	Details
Version Name	Populates Description field for each Drawing Set Sheet being uploaded to PM JSP, as framed in below screenshot. Like keywords and tags, the Version Name gets associated to each sheet being uploaded so that searches can later be done against it PM JSP and Mobile Field.
Revision Date	Defaults to your computer's system date, and populates Revision Date field for each Drawing Set Sheet being uploaded to PM JSP, as framed in below screenshot. This default Revision Date can be overridden on a sheet-by-sheet basis during the second step of the second part of the extraction process: <i>Step 2: Validate Extracted Sheet Info & Enter Overrides</i> .
Received Date	Populates Received Date for each Drawing Set Sheet being uploaded to PM JSP, as framed in below screenshot. This default Received Date can be overridden on a sheet-by-sheet basis during the second step of the second part of the extraction process: <i>Step 2: Validate Extracted Sheet Info & Enter Overrides</i> .
Revision no.	Populates the Number field (Revision Number) for each Drawing Set Sheet being uploaded to PM JSP, as framed in below screenshot. This default Revision Number can be overridden on a sheet-by-sheet basis during the second step of the second part of the extraction process: <i>Step 2: Validate Extracted Sheet Info & Enter Overrides</i> .

Select Document(s)

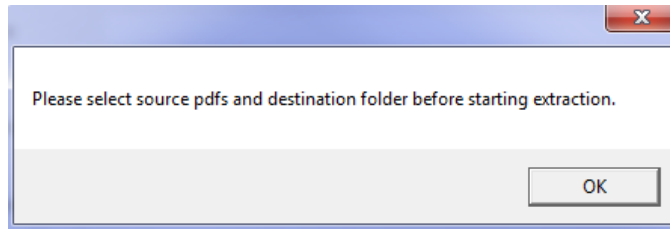
Use these controls to select the document(s) to upload for extraction. Note, more than one document can be selected for extraction.

Document Extraction Output Folder:

Right after you select the documents, if you have not set the destination folder for the extracted PDFs yet, a prompt appears letting you know that you have to set it.

The extracted PDFs are stored in your xProjects system, as a Drawing Set Sheets, but copies of the extracted PDFs are stored in the specified destination folder.

Click **[OK]** and use the launched popup to select the destination folder for the extracted PDFs.



Once the destination folder for the extracted PDFs is set, you will not have to set it again, but you can change it using the **Document Extraction Output Folder** field on the **General** tab on the Settings screen.

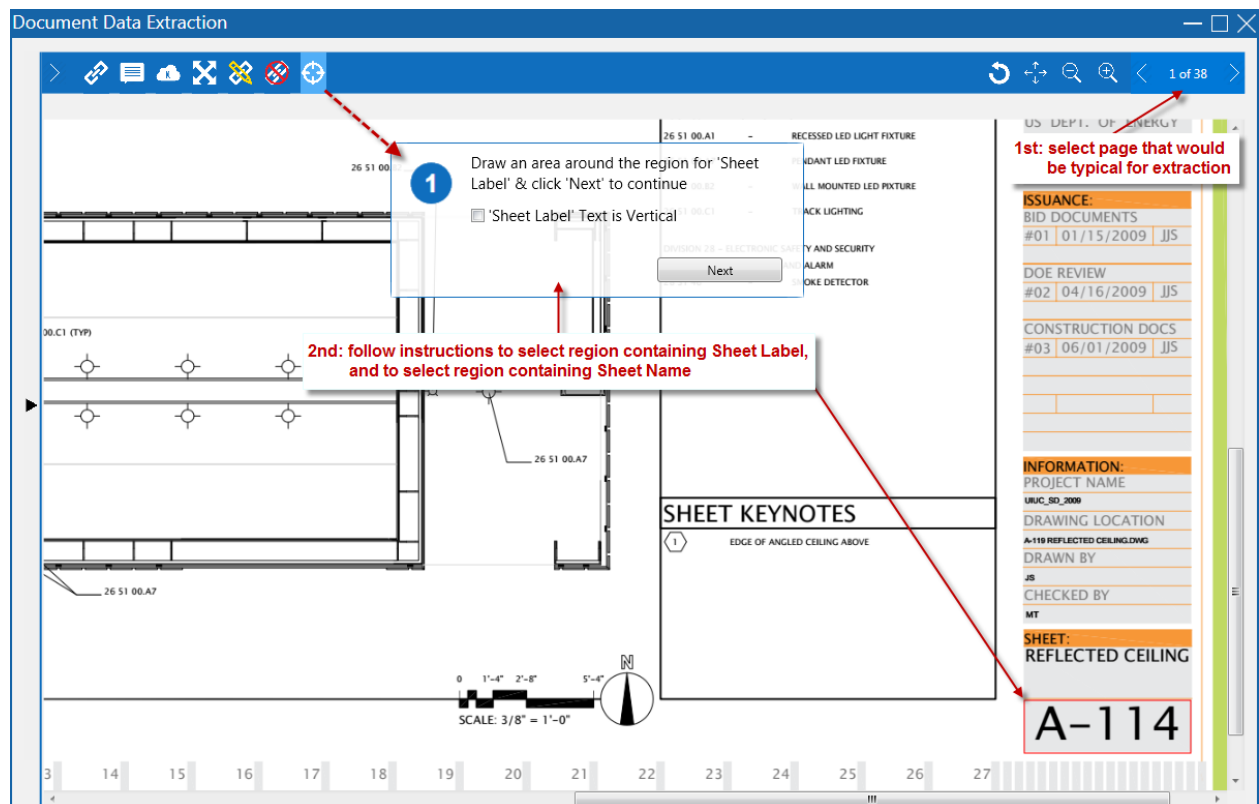
Sheet Label OCR

For details, please refer to the following section about the second part of the extraction process.

Part 2: Extracting Sheet Labels & Sheet Titles

Step 1: Select Regions Containing Sheet Label & Sheet Name

Once the documents have been selected in the Document Data Extraction popup, click [Select Regions] to open the following screen to select the regions on each page from which the Sheet Label (PDF ID) and Sheet Title (PDF Title) can be extracted by the Optical Character Recognition (OCR) functionality.



As shown above, use the launched screen to navigate to a page that is typical, in regards to where the Sheet Label and Sheet Title are located.

Zoom into the area with the Sheet Label, and following the displayed instructions, use the red rectangle to select the area where the Sheet Label is typically found. If the text for the Sheet Label is vertical, check the **'Sheet Label' Text is Vertical** box in the popup displaying the instructions. Click the popup's [Next] button to continue.

Next, follow the displayed instructions to select the area where the Sheet Title is typically found, using the blue rectangle. If the text for the Sheet Title is vertical, check the **'Sheet Name' Text is Vertical** box in the popup displaying the instructions. Click the popup's [Proceed] button to begin the extraction process.

NOTE: When selecting these areas, be sure to select the whole area where longer instances of the relevant text could be found, and do not overlap the areas. Also, be sure not to include areas where irrelevant characters could be found.


Step 2: Validate Extracted Sheet Info & Enter Overrides

	Label	Sheet Name	Trade	Sub-Trade	Version	Revision Date	Revision	Sheet Label	Sheet Title
1	A-111	FLOOR PLANS	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-111	FLOOR PLANS
2	A-113	ROOF CAP PLAN	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-113	ROOF CAP PLAN
3	A-114	REFLECTED CEILING	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-114	REFLECTED CEILING
4	A-115	PHOTOVOLTAIC ROOF PLAN	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-115	PHOTOVOLTAIC ROOF PLAN
5	A-116	CONDITIONED SPACE AREA	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-116	CONDITIONED SPACE AREA
6	A-117	SOLAR FOOTPRINT AREA	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-117	SOLAR FOOTPRINT AREA
7	A-201	NORTH & SOUTH SITE ELEVATIONS	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-201	NORTH & SOUTH ELEVATIONS
8	A-202	EAST & WEST SITE ELEVATIONS	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-202	EAST & WEST ELEVATIONS
9	A-211	NORTH & SOUTH ELEVATIONS	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-211	NORTH & SOUTH ELEVATIONS
10	A-212	EAST & WEST ELEVATIONS	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-212	EAST & WEST ELEVATIONS
11	A-311	BUILDING SECTION	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-311	BUILDING SECTION
12	A-312	BUILDING SECTION	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-312	BUILDING SECTION
13	A-313	BUILDING SECTION	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-313	BUILDING SECTION
14	A-314	BUILDING SECTION	Architectural		IFC Volume 1 of 1	15/05/2018	0	A-314	BUILDING SECTION

☐ Allow Multi Select

Validate Cancel

After the extraction process finishes, the above screen is shown to display the extracted data for each sheet in the drawing set. This screen is used to verify the extracted data, and to make any necessary corrections/overrides.

As shown above, you can click the Hide/Show Pane icon  to view a selected sheet in the left-most pane.



The following are details about the extracted data for each sheet in the extracted drawing set:

Field	Details
Label	Extracted Sheet Label; extracted text can be overwritten if incorrect.
Sheet Name	Extracted Sheet Name; extracted text can be overwritten if incorrect.
Trade	Extracted drawing type, based on prefix from Sheet Label (e.g., Architectural, Electrical, Mechanical...)
Sub-Trade	Extracted sub-trade.
Version	This text comes from the Version Name field on ECM's Document Data Extraction popup.
Revision Date	This date comes from the Revision Date field on ECM's Document Data Extraction popup.
Revision	Revision number for Sheet. If a previous version of sheet is found, this number is auto-incremented.
Sheet Label	Image used to extract Sheet Label.
Sheet Title	Image used to extract Sheet Title.

If there are sheets with incorrect Sheet Labels or Sheet Names due to differences in the regions containing them for those sheets, you can check the **Allow Multi Select** box in order to re-select the regions and re-run the extraction process for the atypical sheets, as per the following subsection. The **Allow Multi Select**

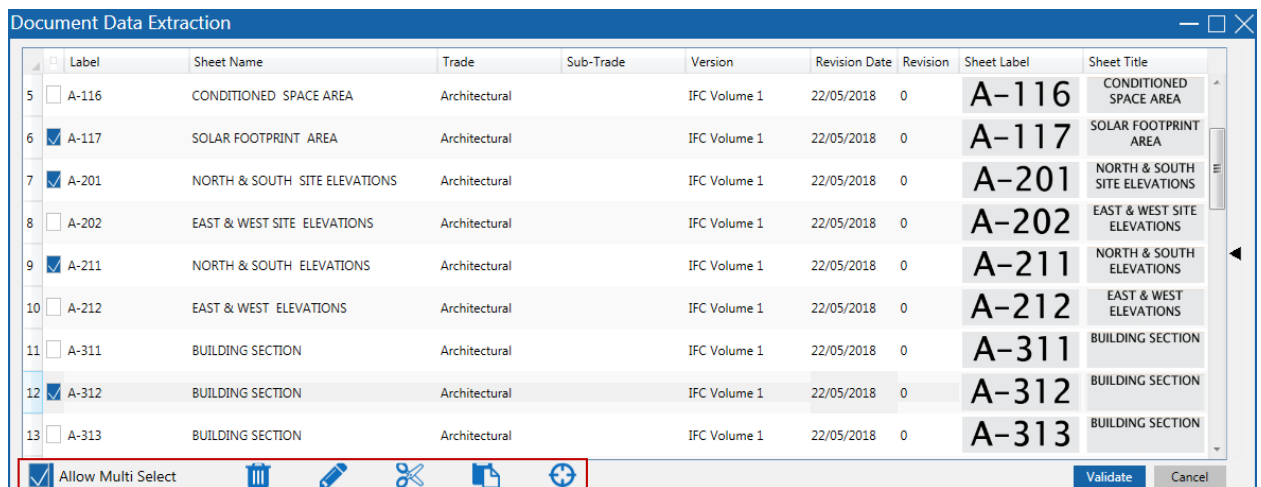
checkbox's functionality, detailed in the following subsection, can also be used to select multiple sheets to perform various en masse actions.

Once you have verified the extracted data and made any necessary corrections/overrides, click the **[Validate]** button to have ECM check the extracted sheets for missing labels and names, and to check them against the sheets existing in xProjects. The following are details about the validation indicators, which can be hovered over for additional details:

- Extraction Error : a red circle appears next to each sheet with extraction errors.
- Sheet Already Exists : a blue circle appears next to each sheet that already exists in xProjects, and their Revision Number is automatically incremented.

Once the sheets pass validation, clicking the **[Validate]** button results in the **[Link Files]** button appearing in order to progress to the next part of the extraction process: [Part 3: Converting Sheet Label Call-Outs to Hyperlinks](#).

Allow Multi Select: Override Values En Masse & Re-Extract Sheet Labels & Names for Selected Sheets



The **Allow Multi Select** checkbox's functionality is used to select multiple Drawing Set Sheets to perform the following en masse actions:

Delete Selected Sheets

Deletes selected sheets from drawing set.

Edit Field for Selected Sheets

Update Column

In Column: Revision

New Value: 1

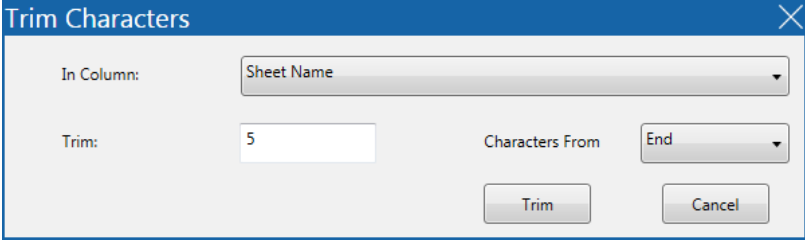
Maximum Value For Revision could be 792281625142643375935439503:

Update

Cancel

For selected sheets, launched popup is used to change value of column selected via **In Column** LOV to value entered in **New Value** field.

Trim Column Text for Selected Sheets

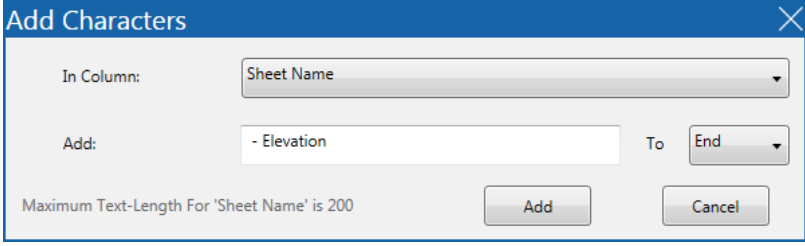


The 'Trim Characters' dialog box has a blue title bar with a close button. It contains two main sections. The first section, labeled 'In Column:', has a dropdown menu currently showing 'Sheet Name'. The second section, labeled 'Trim:', has a text input field containing the number '5'. To the right of this is a label 'Characters From' followed by a dropdown menu currently showing 'End'. At the bottom right are two buttons: 'Trim' and 'Cancel'.

For selected sheets, launched popup is used to trim off a specified number of characters from the start or end of a specified column's text.

The **In Column** LOV is used to select the column containing the text to be trimmed, the **Trim** field is used to specify how many characters are to be trimmed off the text, and the **Characters From** LOV is used to select whether the trimming is to happen at the start or end of the text.

Append Text to Column Text for Selected Sheets



The 'Add Characters' dialog box has a blue title bar with a close button. It contains two main sections. The first section, labeled 'In Column:', has a dropdown menu currently showing 'Sheet Name'. The second section, labeled 'Add:', has a text input field containing '- Elevation'. To the right of this is a label 'To' followed by a dropdown menu currently showing 'End'. At the bottom left, there is a status message: 'Maximum Text-Length For 'Sheet Name' is 200'. At the bottom right are two buttons: 'Add' and 'Cancel'.

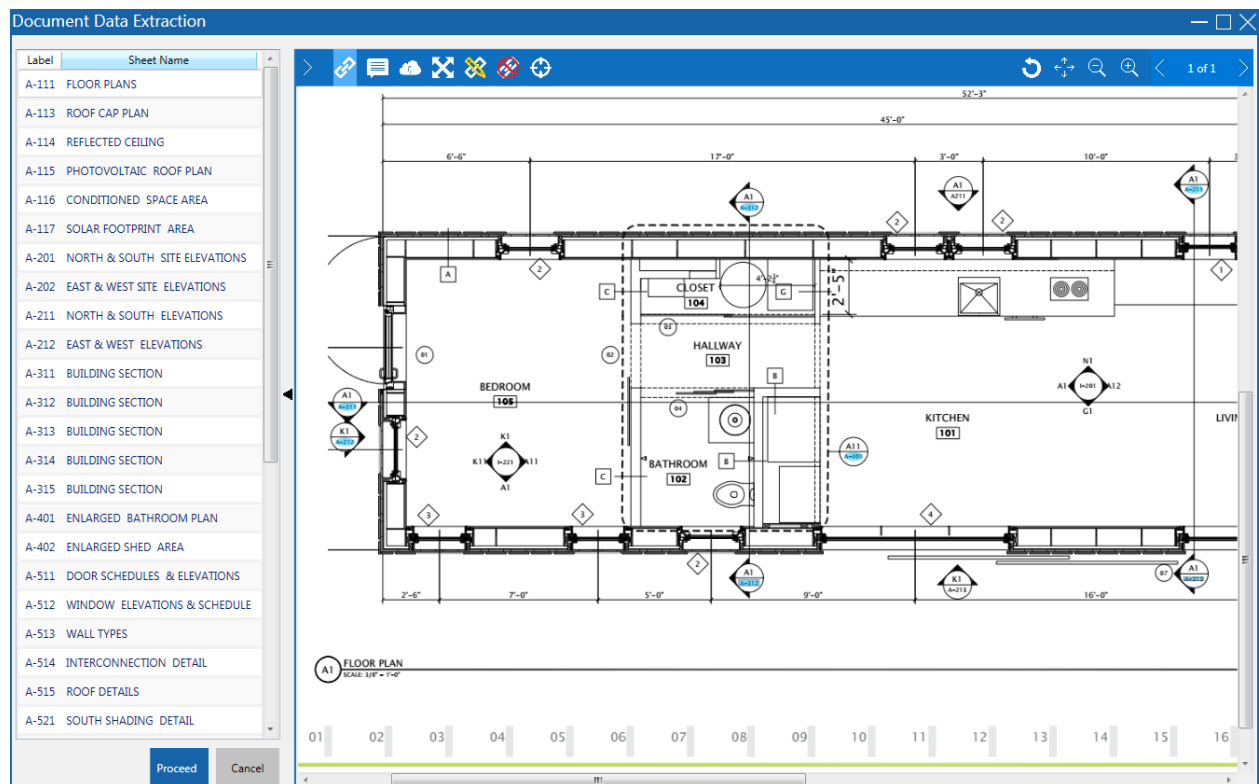
For selected sheets, launched popup is used to append text to start or end of selected column's text.

The **In Column** LOV is used to select the column containing the text, the **Add** field is used to specify the text to be appended to the existing text, and the **To** LOV is used to select whether the text is to be added to the start or end of the text.

Specify Sheet Label & Name Extraction Regions

If there are sheets with incorrect Sheet Labels or Sheet Names due to them being atypical in regards to the regions containing the Sheet Labels and Sheet Names, you can use this option to re-select the regions and re-run the extraction process for the atypical sheets.

Part 3: Converting Sheet Label Call-Outs to Hyperlinks



After the **[Link Files]** button is used in the previous step, ECM's OCR functionality examines each sheet to search for text that matches any of the Sheet Labels extracted during the previous step. Every found instance of text, anywhere on the sheet, that matches an extracted Sheet Label is converted to a hyperlink to the corresponding sheet. As shown in the above screenshot, instances of text matching Sheet Labels were automatically converted to blue hyperlinks.

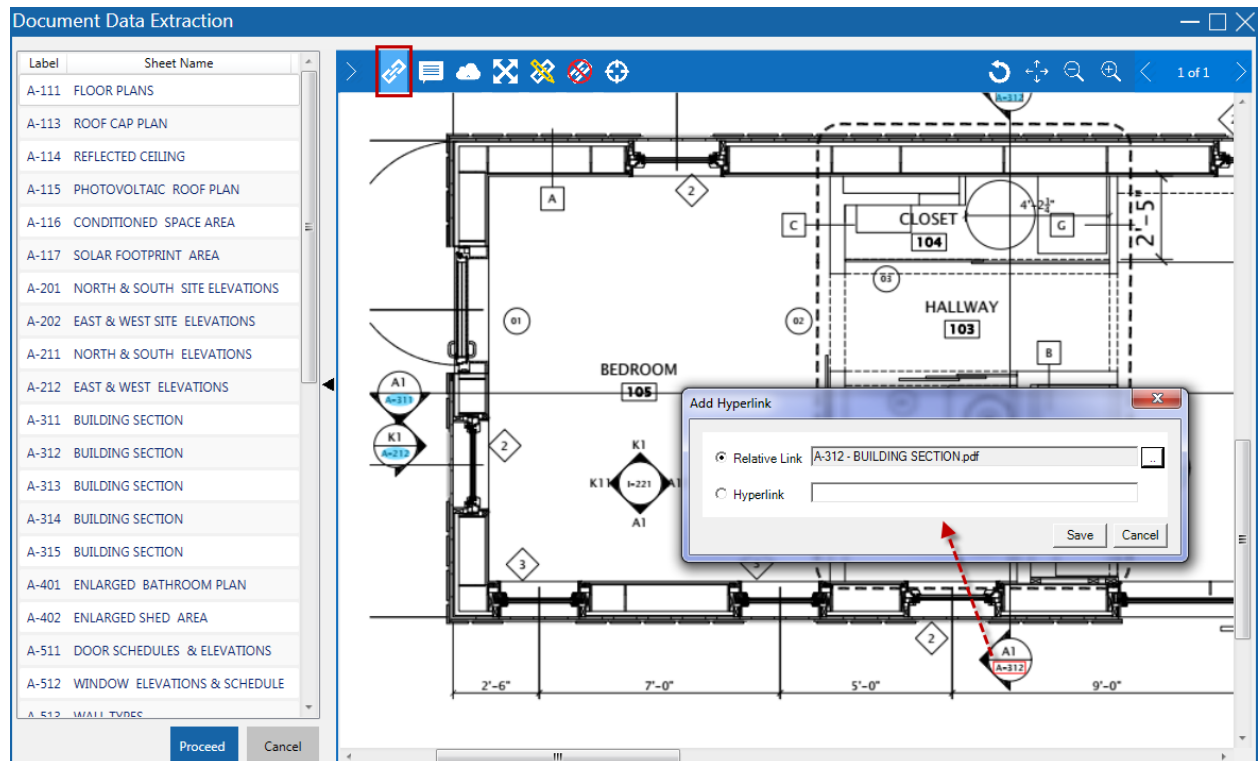
Due to various reasons, such as missing dashed, not all instances of text representing Sheet Labels get converted to hyperlinks. Hence, after the process of automatically creating the links is finished, we need to verify that all necessary links were created. If any text representing a Sheet Label was not converted to a hyperlink, we can manually create the link by clicking the Hyperlink icon, as detailed by the following subsection.

After verifying that all required links have been created, click **[Proceed]** to begin the process of uploading the extracted sheets into your xProjects system, for the Project you selected in the first part of the extraction process.


During the upload process, if it is detected that a sheet with the same Sheet Label already exists for the Project, a message will be displayed to let you know that the sheet being uploaded will be marked as a revision of the existing sheet in xProjects.

Once the upload process is completed, the extracted drawing set is available in xProjects, as detailed by the following section: [xProjects & Drawing Management](#).

Hyperlink



To convert text to a hyperlink, click the Hyperlink icon and select the relevant text using the red rectangle.

After selecting the text, the Add Hyperlink popup appears, as shown above. In the popup, select the **Relative Link** radio button and click its corresponding  button to open a popup for you to select the sheet to link to the selected text.

Move Markups

To move a markup to a new location on the sheet, click the Move Markups icon, then click-and-hold on the markup and move it to its new location.

Edit Markups

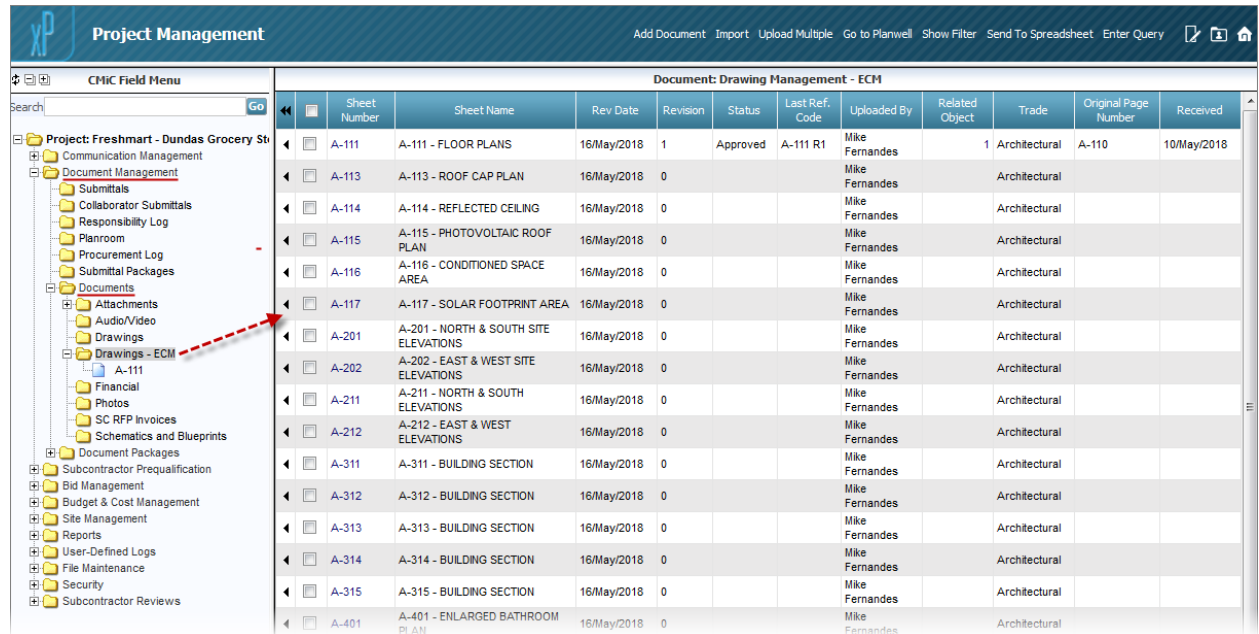
To edit a markup, such as a hyperlink, click the Edit Markups icon, then click on the markup to bring up the editor popup.

Delete Hyperlink

To delete a hyperlink, click the Delete Hyperlink icon, then click the markup to be deleted.

xProjects & Mobile Drawing Management

ECM Drawings – Screen

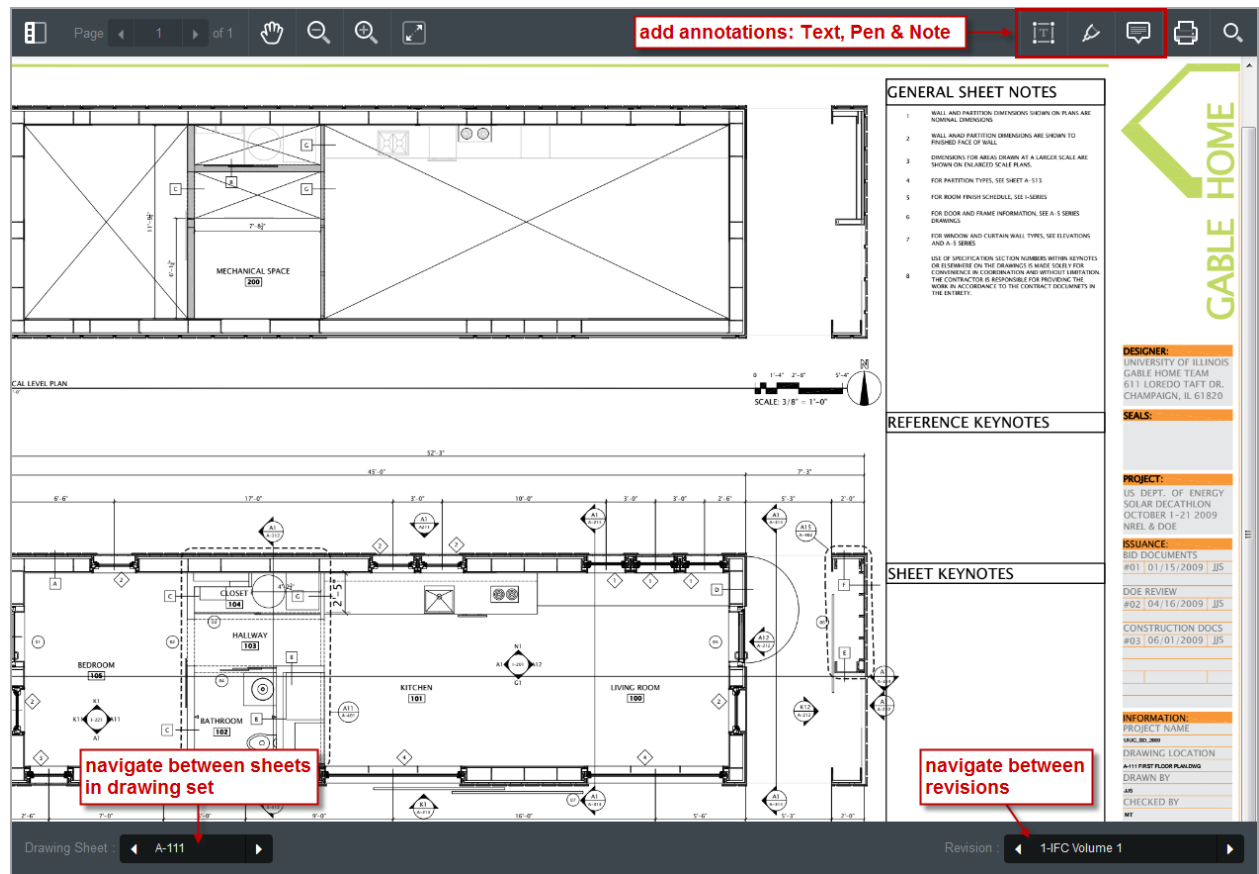


Project Management											Add Document Import Upload Multiple Go to Planwell Show Filter Send To Spreadsheet Enter Query	
CMIC Field Menu		Document: Drawing Management - ECM										
Search	Go	Sheet Number	Sheet Name	Rev Date	Revision	Status	Last Ref. Code	Uploaded By	Related Object	Trade	Original Page Number	Received
		A-111	A-111 - FLOOR PLANS	16/May/2018	1	Approved	A-111 R1	Mike Fernandes	1	Architectural	A-110	10/May/2018
		A-113	A-113 - ROOF CAP PLAN	16/May/2018	0			Mike Fernandes		Architectural		
		A-114	A-114 - REFLECTED CEILING	16/May/2018	0			Mike Fernandes		Architectural		
		A-115	A-115 - PHOTOVOLTAIC ROOF PLAN	16/May/2018	0			Mike Fernandes		Architectural		
		A-116	A-116 - CONDITIONED SPACE AREA	16/May/2018	0			Mike Fernandes		Architectural		
		A-117	A-117 - SOLAR FOOTPRINT AREA	16/May/2018	0			Mike Fernandes		Architectural		
		A-201	A-201 - NORTH & SOUTH SITE ELEVATIONS	16/May/2018	0			Mike Fernandes		Architectural		
		A-202	A-202 - EAST & WEST SITE ELEVATIONS	16/May/2018	0			Mike Fernandes		Architectural		
		A-211	A-211 - NORTH & SOUTH ELEVATIONS	16/May/2018	0			Mike Fernandes		Architectural		
		A-212	A-212 - EAST & WEST ELEVATIONS	16/May/2018	0			Mike Fernandes		Architectural		
		A-311	A-311 - BUILDING SECTION	16/May/2018	0			Mike Fernandes		Architectural		
		A-312	A-312 - BUILDING SECTION	16/May/2018	0			Mike Fernandes		Architectural		
		A-313	A-313 - BUILDING SECTION	16/May/2018	0			Mike Fernandes		Architectural		
		A-314	A-314 - BUILDING SECTION	16/May/2018	0			Mike Fernandes		Architectural		
		A-315	A-315 - BUILDING SECTION	16/May/2018	0			Mike Fernandes		Architectural		
		A-401	A-401 - ENLARGED BATHROOM PLAN	16/May/2018	0			Mike Fernandes		Architectural		

Sample of ECM Drawings screen in Log Mode, listing all sheets in drawing set.

After the extracted drawing set is uploaded into xProjects for a Project, it can be accessed using the ECM Drawings screen (standard path: *xProjects > Document Management > Documents > Drawings – ECM*), as per the following section: [Mobile Drawing Management](#).

CMiC/PSPDF Web Viewer – xProjects

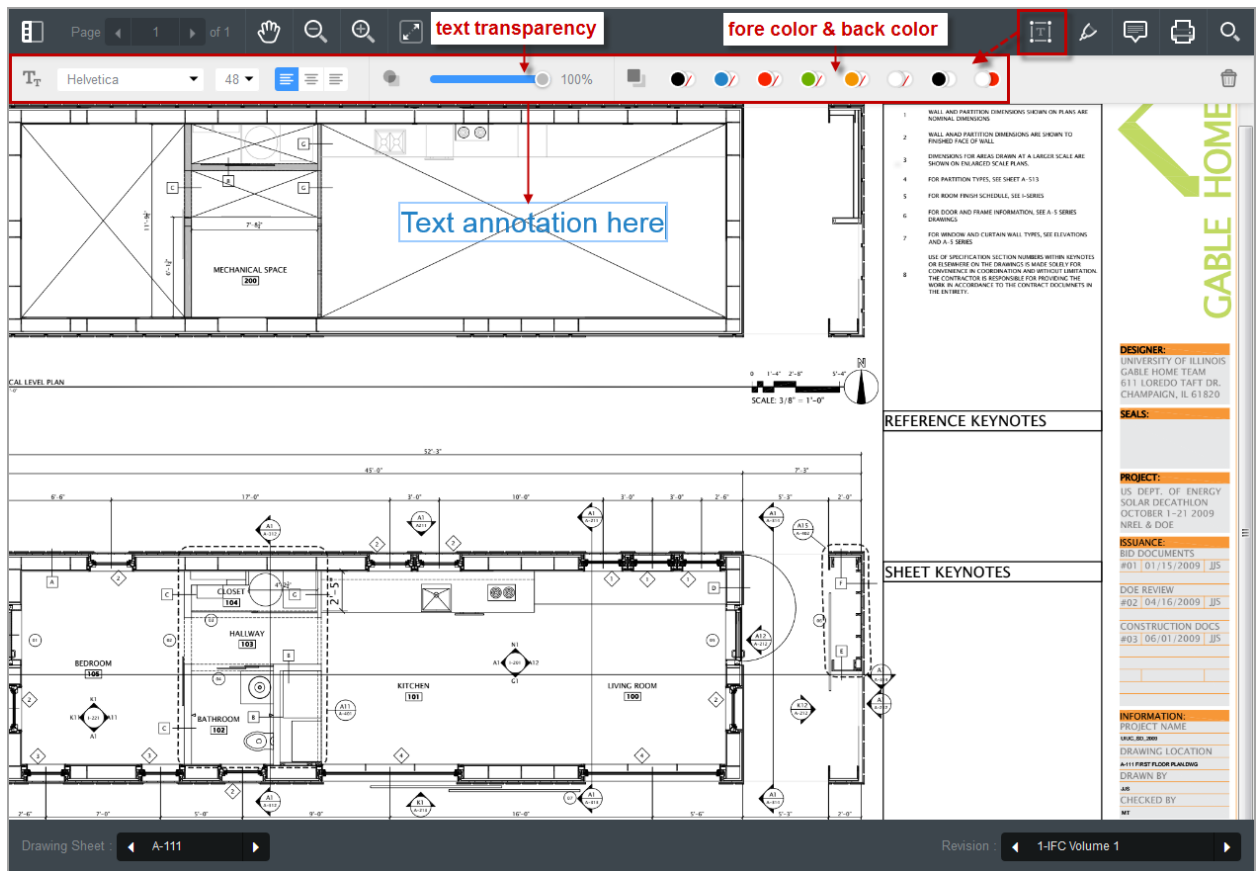


The CMiC/PSPDF Web Viewer can be used in xProjects to view Drawing Set Sheets and their annotations, and to add new annotations.

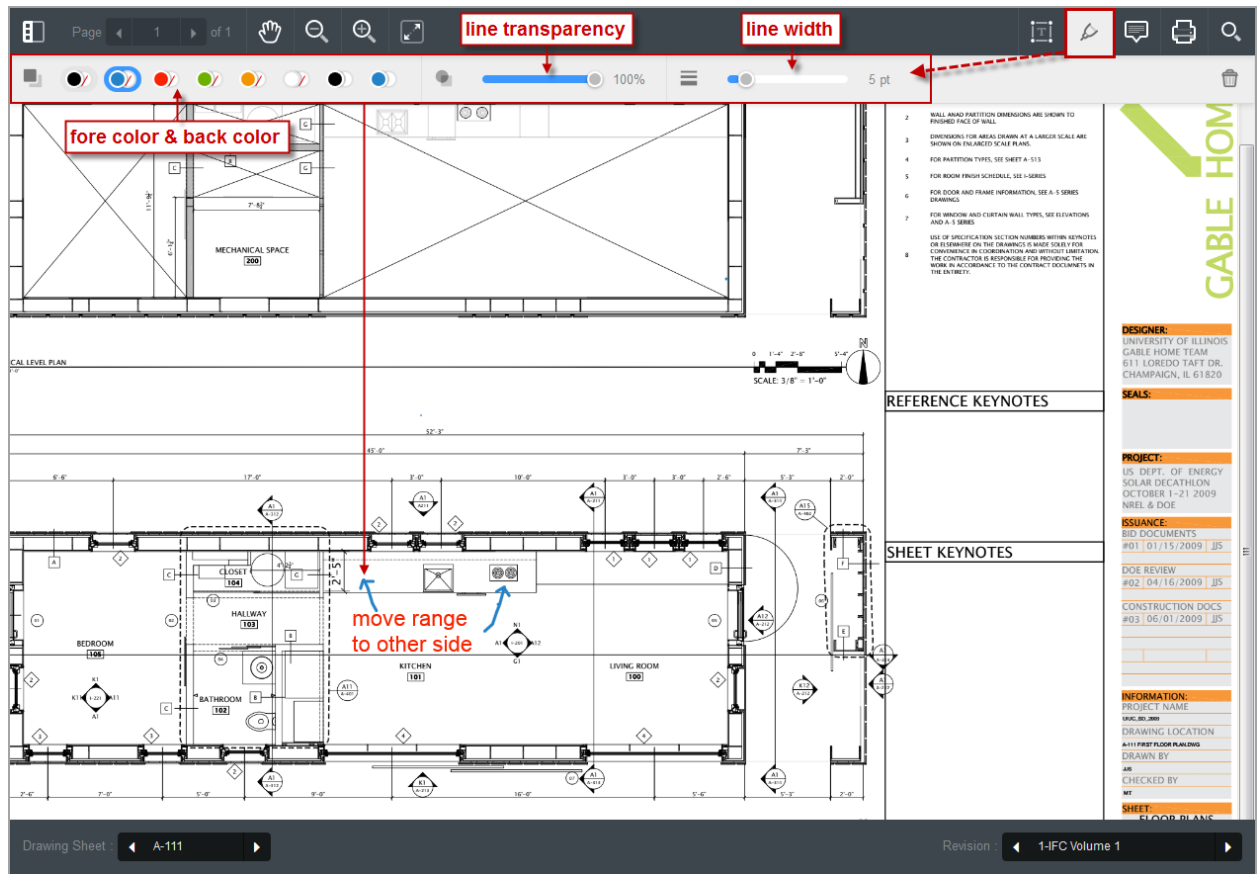
To set the CMiC/PSPDF Web Viewer as the default viewer for PDFs, please refer to the following section: [Set PDF Viewer for Drawing Set in xProjects.](#)

The following subsections provide details about adding the different types of annotations.

Text Annotations

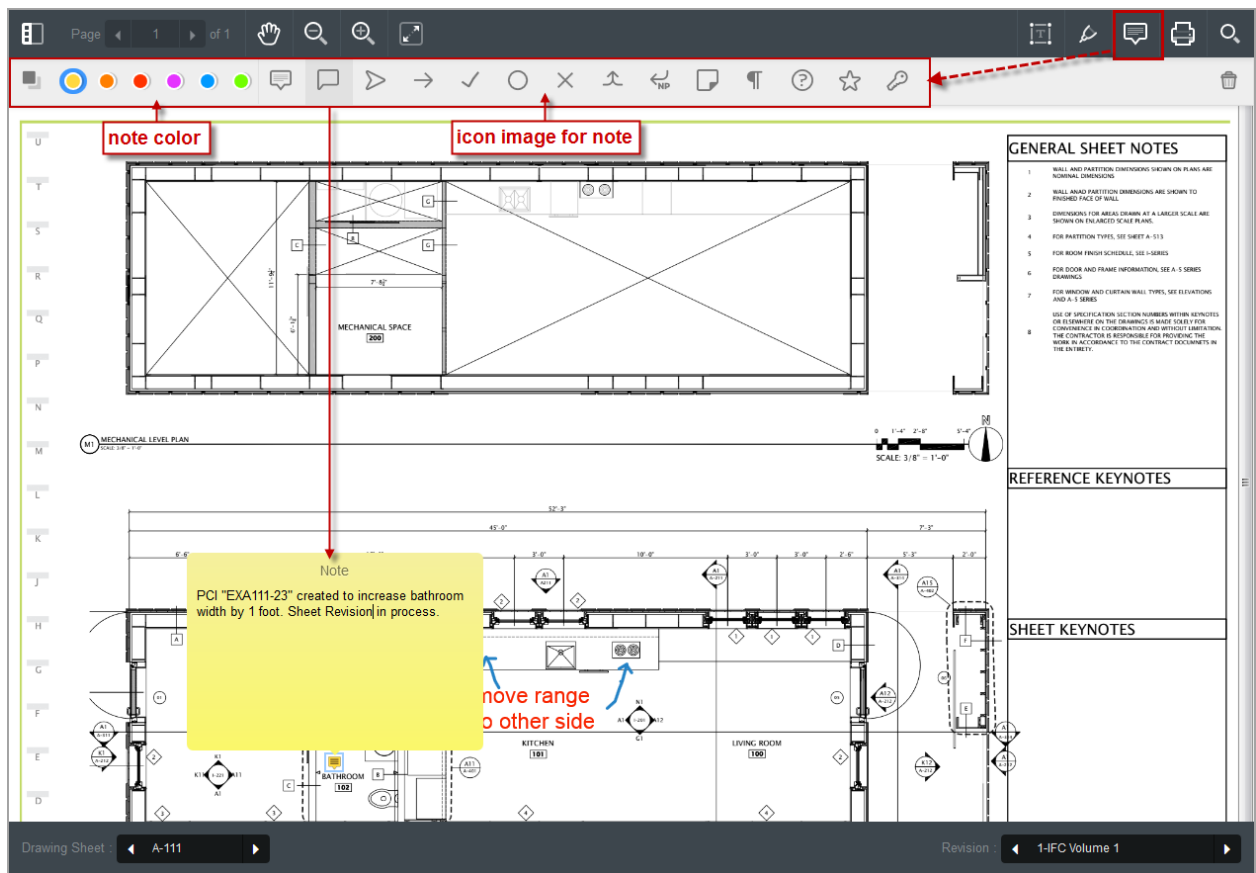


To add a text annotation, click the Text Annotation button, select the font, font size, text alignment, fore color and back color, then click the spot where you want the first letter to start and type away.



To draw an annotation on the sheet, click the Pen Annotation button, select the fore color and back color, line transparency and line width, then draw the annotation on the sheet.

Note Annotations



To add a note annotation, click the Note Annotation button, select the note's color and icon, then click the spot to add the note.


Selecting, Deleting, Editing & Moving Annotations

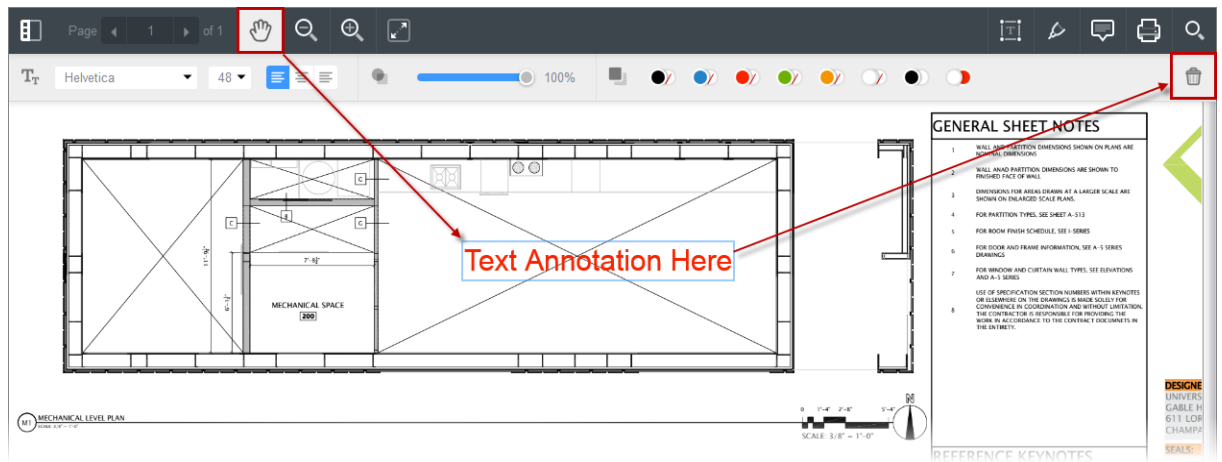
Below are details about the common actions that can be performed on annotations.

Selecting Annotations

To select an annotation, select the Hand tool , then click the annotation to be selected.

Deleting Annotations

To delete an annotation, select it using the Hand tool, then click the Trash icon , as shown below:



Editing Annotations

To edit an annotation, select it using the Hand tool, then make the required changes.

Moving Annotation

To move an annotation, select the Hand tool, then click-and-hold the annotation and drag it to its new spot.

Mobile Field & Mobile Drawing Management

iPad Wi-Fi 4:20 PM Battery Not Charging

CMiC Mobile Field

Freshmart - Dundas Grocery Store (Spring 2016) (YR0031)

Drawings

Label	Name	Trade	Revision	Version Name
A-111	A-111 - FLOOR PLANS	Architectural	1	IFC Volume 1
A-113	A-113 - ROOF CAP PLAN	Architectural	0	IFC Volume 1
A-114	A-114 - REFLECTED CEILING	Architectural	0	IFC Volume 1
A-115	A-115 - PHOTOVOLTAIC ROOF PLAN	Architectural	0	IFC Volume 1
A-116	A-116 - CONDITIONED SPACE AREA	Architectural	0	IFC Volume 1
A-117	A-117 - SOLAR FOOTPRINT AREA	Architectural	0	IFC Volume 1
A-201	A-201 - NORTH & SOUTH SITE ELEVATIONS	Architectural	0	IFC Volume 1
A-202	A-202 - EAST & WEST SITE ELEVATIONS	Architectural	0	IFC Volume 1
A-211	A-211 - NORTH & SOUTH ELEVATIONS	Architectural	0	IFC Volume 1
A-212	A-212 - EAST & WEST ELEVATIONS	Architectural	0	IFC Volume 1
A-311	A-311 - BUILDING SECTION	Architectural	0	IFC Volume 1
A-312	A-312 - BUILDING SECTION	Architectural	0	IFC Volume 1
A-313	A-313 - BUILDING SECTION	Architectural	0	IFC Volume 1
A-314	A-314 - BUILDING SECTION	Architectural	0	IFC Volume 1
A-315	A-315 - BUILDING SECTION	Architectural	0	IFC Volume 1
A-401	A-401 - ENLARGED BATHROOM PLAN	Architectural	0	IFC Volume 1

PCI

Journal

Punch List

Checklist

Photo Log

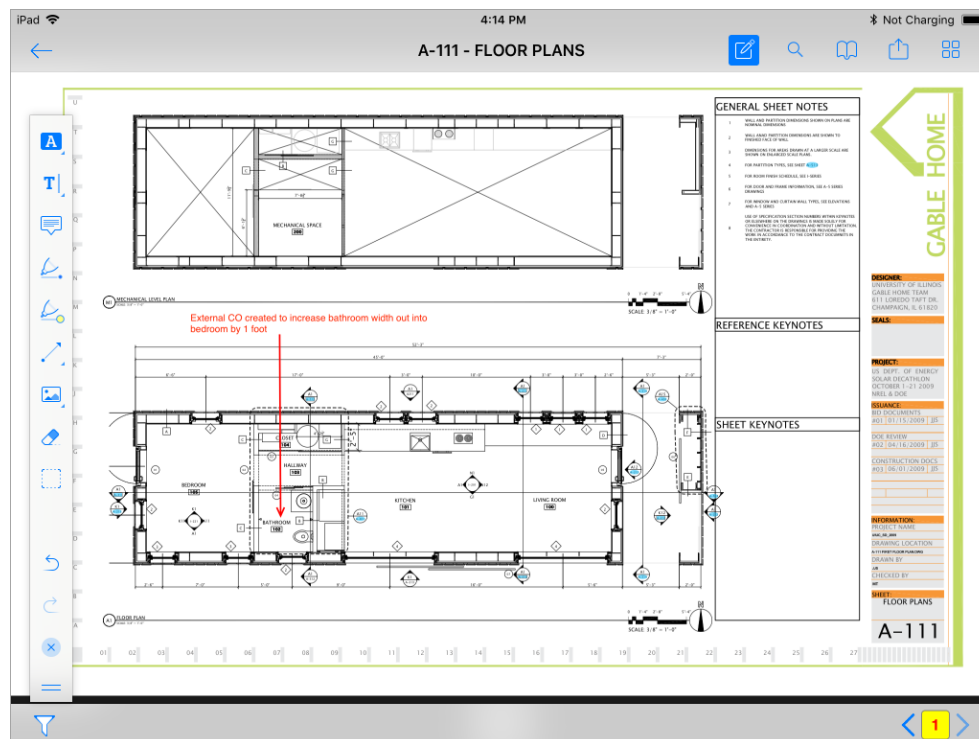
Documents

Drawings

Sample of Drawings screen in Mobile Field, listing Drawing Set Sheets for Project.

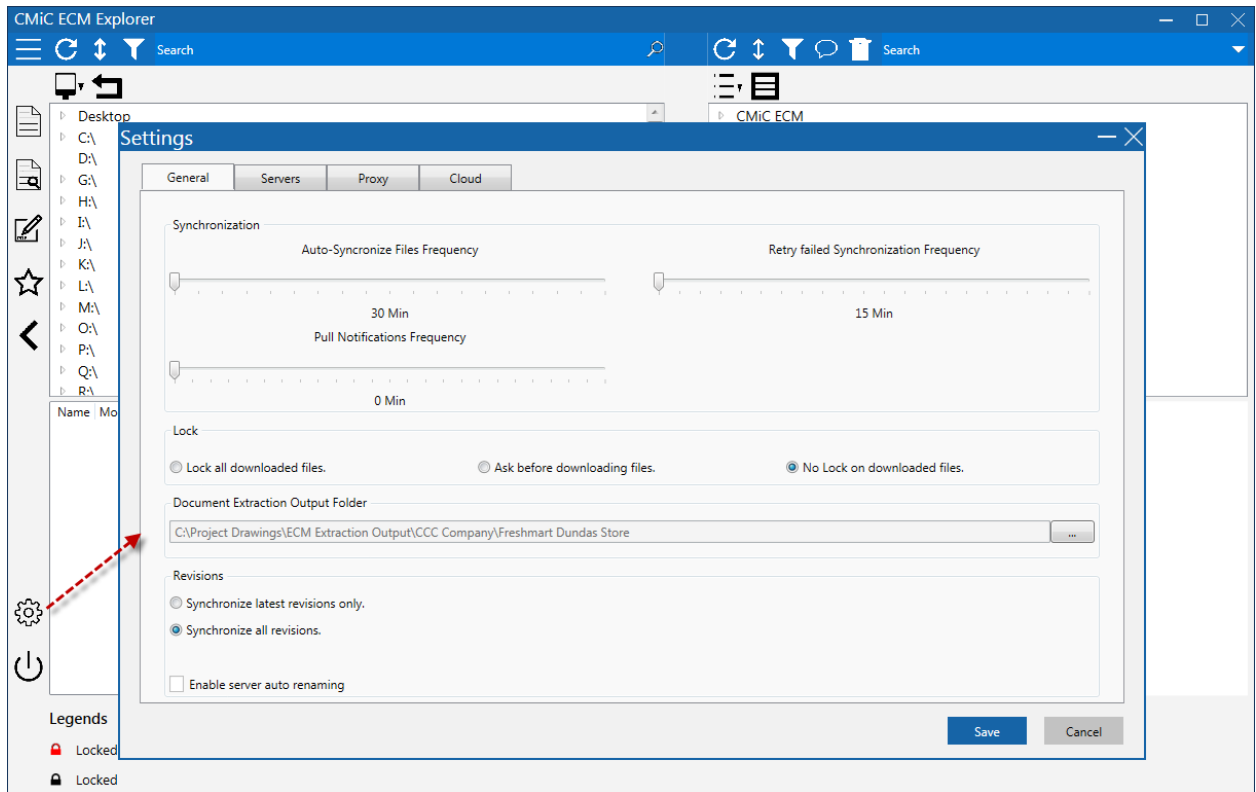
Once the Drawing Set for a Project has been uploaded into xProjects' Document Management system, the Drawing Set can be accessed via the Drawings screen in Mobile Field, as shown above.

Selecting a Sheet opens it using the CMiC/PSPDF Mobile Viewer, as shown below, which can be used to view, add, edit and delete annotations, and to link the Sheet to an RFI or Issue.



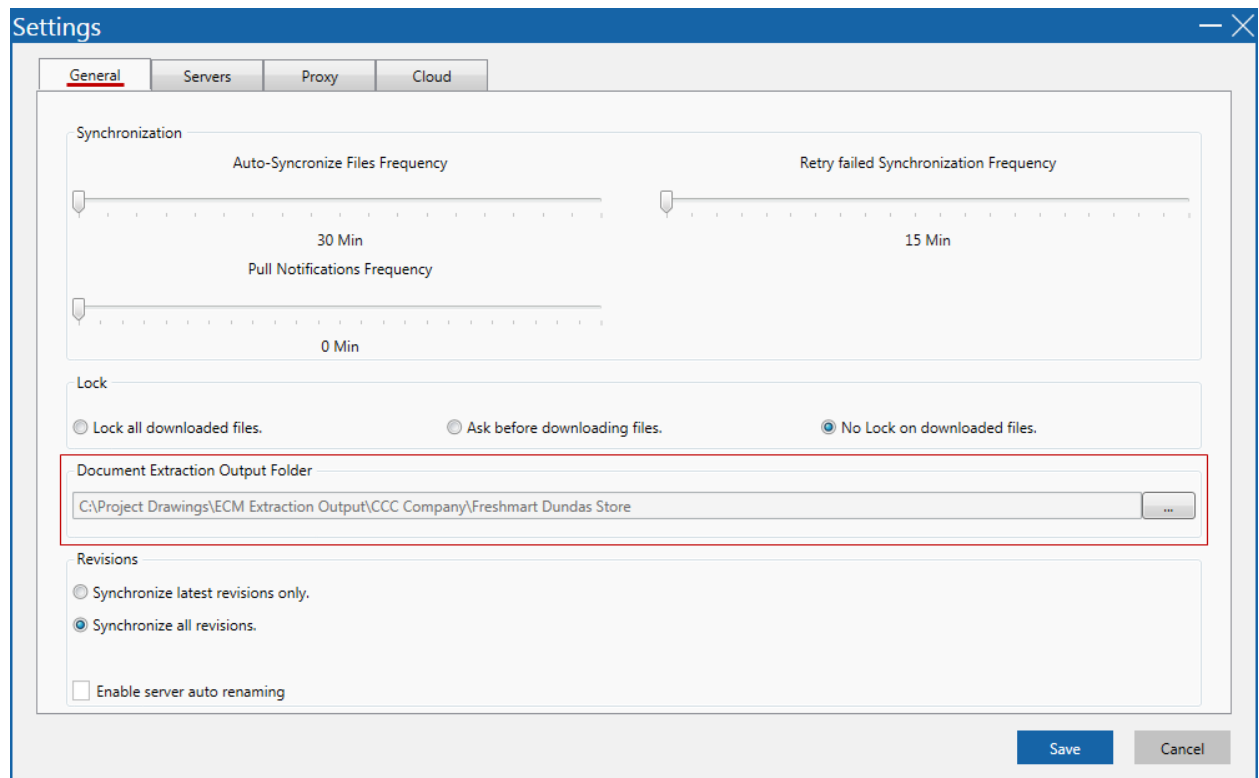
Set Up

ECM Explorer



ECM Explorer is set up using its Settings popup, which is launched by clicking the Settings icon on the main screen, as shown above.

General – Tab



Sample of General tab of Settings screen.

Document Extraction Output Folder

This field is used to specify the folder to store copies of the extracted PDFs. The extracted PDFs will be stored in your xProjects Document Management system, however, copies of the extracted PDFs will be stored in this location.

Servers – Tab

The screenshot shows the 'Settings' window with the 'Servers' tab selected. The window has a blue title bar and a tabbed interface with 'General', 'Servers', 'Proxy', and 'Cloud' tabs. The 'Servers' tab contains three server configuration sections: Server1, Server2, and Server3. Each section has fields for Tenant ID, Username, Password, and Server URL, along with a checkbox for 'Use older TLS version'. Red boxes highlight the 'Username' fields for each server, which are labeled 'CMiC User ID 1', 'CMiC User ID 2', and 'CMiC User ID 3' respectively. The 'Server URL' fields contain specific URLs for each server. At the bottom right, there are 'Save' and 'Cancel' buttons.

Server	Tenant ID	Username	Password	Server URL	Use older TLS version
Server1	Enter CMiC Tenant ID	CMiC User ID 1	*****	http://dev5v10.cmic.ca:7785/cmidev10x/MSPluginWebService/MSPlugin/MSPluginWS/	<input type="checkbox"/>
Server2	Enter CMiC Tenant ID	CMiC User ID 2	*****	https://v10xsandboxwfs.cmicglobal.com/cmiproduct/MSPluginWebService/MSPlugin/MSPluginWS/	<input type="checkbox"/>
Server3	SOLUTIONS	CMiC User ID 3	*****	https://hikuu.cmicglobal.com/cmictest/MSPluginWebService/MSPlugin/MSPluginWS/	<input type="checkbox"/>

Sample of Servers tab of Settings screen.

This section explains how to set up ECM Explorer for use with Mobile Drawing Management.

The **Server URL** field needs to be set to the same server that would be set for the ECM Outlook plugin.

xProjects – PM Role Setup

Role	PlanGrid Admin	PlanGrid Power Collab	Project Manager	Project MNGR 1	Project Accountant	Project Coordinator	Project Executive	Quantity Surveyor	Regional Manager
PGADMIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PGPWRCO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PM1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PROJACCT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PROJCOORD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PX	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update Role PROJCOORD
☒ View/Create/Update/Delete All Objects ☒ View/Create/Update/Delete All Document Types ☐ Mobile Springboard Objects ☐ Default Email Notification Settings
☒ Restricted View All for RFIs
Send/Receive
☒ Receive Owner Change Order ☒ Receive Partner RFI
☒ Send Partner RFI ☒ Forward RFI
☒ Redirect RFI ☒ VO Email
☒ Send Partner Transmittal ☒ Send Partner Communication
☒ Send Partner Issue ☒ Send Partner Notice
☐ Send Partner Punch List
Collaborate
☐ Gateway - Publish/Revoke a Project ☐ Gateway - Send Contact Invitation
☐ Gateway - Revoke Invitation ☐ Data Exchange - Project Registration
☐ Data Exchange - Administrator maintenance
Drawing Management
☐ Publish Annotation ☐ View All Annotations (Public and Private)
☐ Hide Annotation ☐ Edit Annotation

Sample of PM Roles screen in xProjects.

In the **Project Roles** section of the PM Roles screen, select the PM Role that is to be granted Mobile Drawing Management privileges.

Annotation Privileges for Drawing Sets

In the lower section, scroll down to the **Drawing Management** section and grant the PM Role the required privileges.

The following are details about the Drawing Management privileges that can be granted to the selected PM Role. These privileges are relevant to the Drawing Management functionality in Mobile Field.

Publish Annotation

Privilege to publish draft annotations created by others.

Hide Annotation

Privilege to hide annotations created by others.

View All Annotations (Public and Private)

Privilege to view all annotations, public and private.

Edit Annotation

Privilege to edit annotations created by others.

View/Create/Edit/Delete Privileges for Drawing Sets

PM Roles Add PM Role Save Cancel

Project Roles

Role Code	Role Name	View	Create	Edit	Delete	Link	Unlink
PGADMIN	PlanGrid Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PGPWRCO	Plangrid Power Collab	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PM	Project Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PM1	Project MNGR 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PROJACCT	Project Accountant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PROJCOORD	Project Coordinator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PX	Project Executive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QS	Quantity Surveyor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RM	Regional Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update Role PROJCOORD

☒ View/Create/Update/Delete All Objects ☒ View/Create/Update/Delete All Document Types ☐ Mobile Springboard Objects ☐ Default Email Notification Settings.

☒ Restricted View All for RFIs

Send/Receive

☒ Receive Owner Change Order

☒ Send Partner RFI

☒ Redirect RFI

☒ Send Partner Transmittal

☒ Send Partner Issue

☒ Send Partner Punch List

Posting - Voiding

☒ Post PCI - External

☒ Post PCI - Transfer

☒ Edit Posted PCI

☒ Post Subcontract

☒ Void Subcontract

☒ Add SOV On Posted Subcontract

Workflow

☒ Workflow Button - OCO

☒ Workflow Button - Subcontract

☒ Workflow Button - Bid Items

☒ Workflow Button - RFI

☒ Workflow Button - Meeting Minutes

Maintenance

☒ Create Partner On The Fly

Update Role PROJCOORD

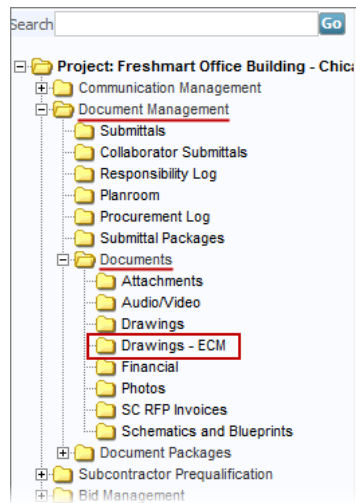
Description	Show In Menu	View	Create	Edit	Delete	Link	Unlink
ARCHITECTURAL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Addendums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applicant Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attachment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Awards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Base Building Standards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bidding Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bidding Folder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bonds and LOC's	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Development	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Client Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drawings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Drawings - ECM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Executed Subcontracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In xProjects, the Document Type for the extracted sheets in a drawing set is **Drawings - ECM**.

To grant a PM Role privileges for drawing sets, select the PM Role in the **Project Roles** section of the PM Roles screen, then click the **View/Create/Update/Delete All Document Types** link (framed above) in the lower section to bring up the popup shown above.

In the popup, use the **Drawings - ECM** checkboxes to grant the PM Role the required privileges for drawing sets. The following are details about the privileges.

Show In Menu



If checked, the **Drawings - ECM** Treeview link, shown above, becomes available to members of the PM Role granted this privilege.

View, Create, Edit, Delete

Used to grant rights to view, create, edit and delete Drawing Set Sheets.

Link, Unlink

Used to grant rights to add and remove Drawing Set Sheets to and from PM Objects, such as PCIs, RFIs and Issues.

Access to Drawing Sets in Mobile Field

PM Roles Add PM Role Save Cancel

Project Roles					
PROJCOORD	Project Coordinator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	
PX	Project Executive	<input type="checkbox"/>	<input type="checkbox"/>		
QS	Quantity Surveyor	<input type="checkbox"/>	<input type="checkbox"/>	6	
RM	Regional Manager	<input type="checkbox"/>	<input type="checkbox"/>		
SAFETY	Safety Officer	<input type="checkbox"/>	<input type="checkbox"/>	3	
SALESDIR	Sales Director	<input type="checkbox"/>	<input type="checkbox"/>		
SC	Subconsultant	<input type="checkbox"/>	<input type="checkbox"/>	5	
SCHEDULER	Resource Planning Scheduler	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10	
SERVICE	Service Staff	<input type="checkbox"/>	<input type="checkbox"/>	20	

Update Role PROJCOORD

☒ View/Create/Update/Delete All Objects ☒ View/Create/Update/Delete All Document Types ☐ Mobile Springboard Objects ☐ Default Email Notification Settings.

☒ Restricted View All for RFIs

Send/Receive

☒ Receive Owner Change Order
☒ Send Partner RFI
☒ Redirect RFI
☒ Send Partner Transmittal
☒ Send Partner Issue
☒ Send Partner Punch List

Posting - Voiding

☒ Post PCI - External
☒ Post PCI - Transfer
☒ Edit Posted PCI
☒ Post Subcontract
☒ Void Subcontract
☒ Add SOV On Posted Subcontract

Workflow

☒ Workflow Button - OCO ☒ Workflow Button - PCI

View All Mobile Objects - Mozilla Firefox

v10xsandboxwls.cmic360.com/cmicprod/PmProjRoleMaint/showMo

Update Role PROJCOORD

Description	View All
Change Item	<input type="checkbox"/>
Check List	<input type="checkbox"/>
Contacts	<input type="checkbox"/>
Cost Status Query	<input type="checkbox"/>
Daily Report	<input type="checkbox"/>
Document	<input type="checkbox"/>
Drawing Management	<input type="checkbox"/>
Home	<input type="checkbox"/>

Save Close

To grant members of a PM Role access to drawing sets in Mobile Field, click the **Mobile Springboard Objects** link in the lower section, and check the **Drawing Management** box in the launched popup.

Set PDF Viewer for Drawing Set in xProjects

VIEWER BY TYPE
Save Exit ? ? ? ? ? ?

Enter Application Code Or "*" For All Applications

SELECTION CRITERIA

Application Code Mask * *All Applications
Program Code Mask * *All Programs
Portal User Mask * *All Users
File Type Mask * *All File Types

VIEWER BY TYPE

View Filter Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export

* Application	* Program	* Portal User	* File Type	* Viewer Name
IMG	IMGMR	*	*	CMIC/PSPDF Web Viewer
COL	*	*	.PDF	CMIC/PSPDF Web Viewer

Application Name Collaboration
Program Name *All Programs
Portal User *All Users
File Type Adobe Acrobat Portable Document Format or Netware Printer L

Pgm: IMGVWTYP – Viewer By Type; standard path: System > Security > Viewer by Type

To set what application is used to open a specific file type, such as PDFs, use the Viewer By Type screen in the System module (standard path: **System** > **Security** > **Viewer by Type**).

In the **Viewer by Type** section of the screen, click the **[Insert]** Block Toolbar button, then use the new row to set up an application for a specific type of file. The following are details about the new row's fields:

Application

Module for which setting is being set. The “COL” code is for xProjects, and an asterisk indicates all modules.

Program

Program (screen) in module for which setting is being set. An asterisk indicates all modules.

Portal User

User for which setting is being set. An asterisk indicates all users.

File Type

File type for which viewer application is to open. An asterisk indicates all file types.

Viewer Name

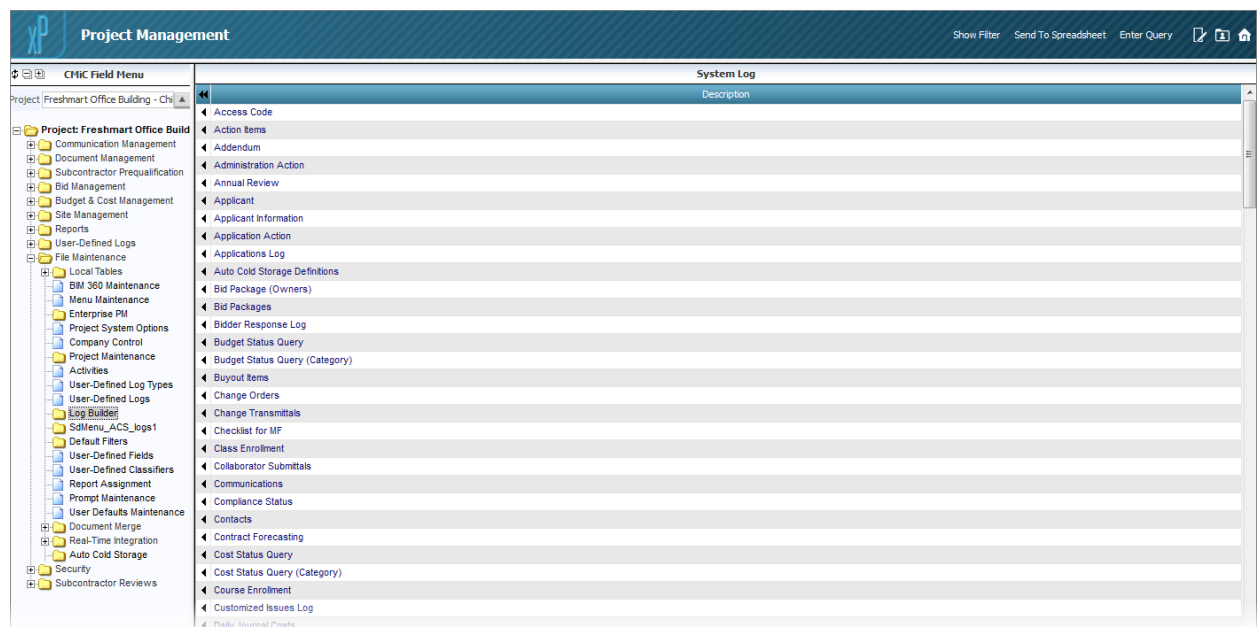
Viewer application to open files of the type specified by the **File Type** field.

Customizing Your Workspace

Overview – Customizations

The CMiC Project xProjects Suite has been specifically designed and implemented so that it can be run directly 'out of the box'. All configurations are optional. The areas that are configurable by user include the Logs and Query Filters. User Extensions may also be applied.

Customizing the Logs



Standard Treeview path: xProjects > File Maintenance > Log Builder

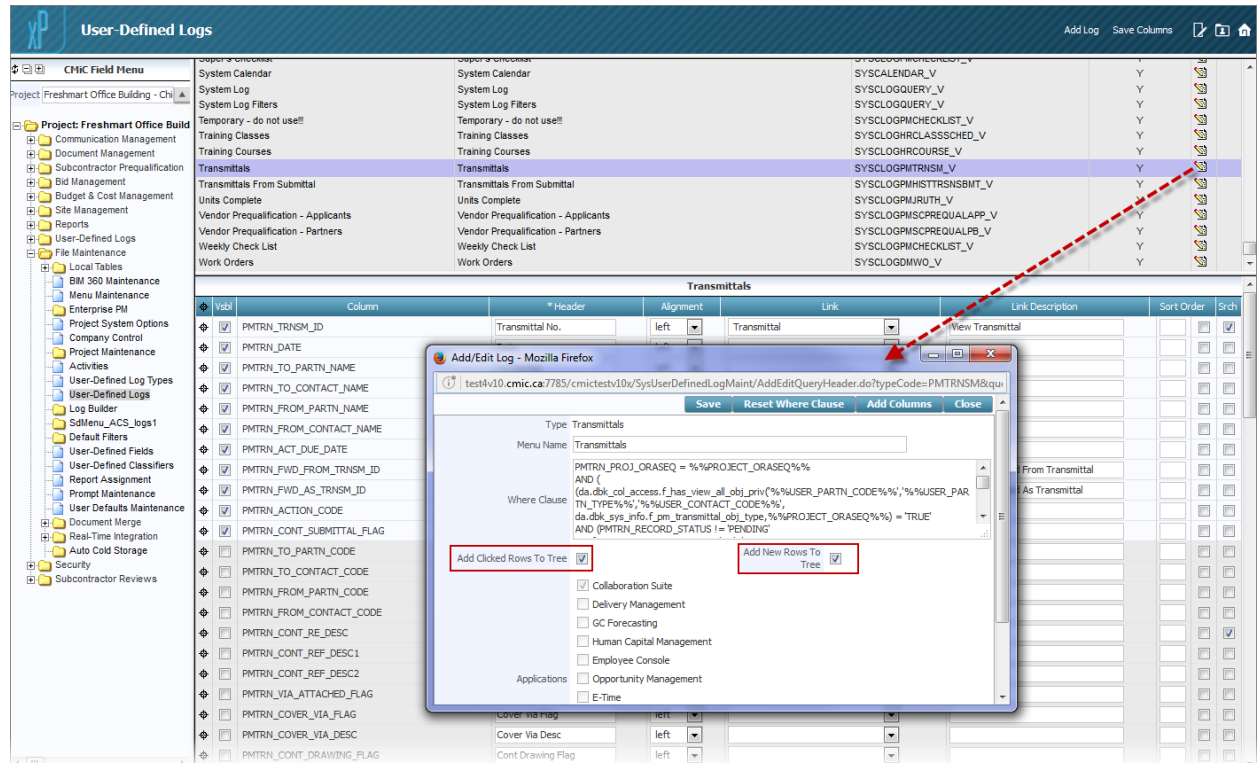
Each Log on the system can be customized, if required. From the Treeview, open the 'XProjects Manager' Node and select the Log Builder option. Select the log requiring customization.

The system displays all fields that are available to be used on the log in question. The fields that are already on the log are displayed with a white background and are at the beginning of the list.

When defining/customizing logs, it is important to realize that you are not limited to the space on the screen, if more fields are selected than fit, the system will automatically add a scroll bar to the log page.

NOTE: Use of the Quick Search will include all fields displayed in xProjects, but only those marked as searchable in all other JSP Applications.

User Control for Items Added to Treeview Log



Example of pop-up window launched from 'Edit' icon on User-Defined Logs screen

In the User Defined Logs definition screen, there are two checkboxes: 'Add Clicked Rows to Tree' and 'Add New Rows to Tree'. The default value of both checkboxes is 'checked'.

Add Clicked Rows to Tree – Checkbox

This checkbox is available for all objects, whereas the 'Add New Rows to Tree' checkbox only applies to objects where a count of the new and modified records are shown on the tree, for example, Communications, Issues, Transmittals etc.

When 'Add Clicked Rows To Tree' is checked, the record link is added to the tree when the record is clicked from the log of the associated launched program. Otherwise, the record link will not be displayed in the Treeview.

Add New Rows To Tree – Checkbox

When 'Add New Rows To Tree' is checked, all new and modified records for the associated program will be displayed in the Treeview when the user clicks on the program link for the log when it loads. Otherwise, the program link will only show the count of new and modified records beside the program link on the tree.

Adding/Removing Fields

The only fields available are those that are shown on the log screen. By adding or removing fields, you are changing the look of the log. To add a field to the log, check the 'Visible' checkbox, and to remove a field, uncheck the checkbox.

Changing the Order

To move a field anywhere on the log, click on the field's action icon (⚙) and drag and drop the field to the desired location. For example, in the following screenshot

Modifying the Header & Alignment of Data

The system allows the title (or header) of the field to be changed plus the alignment of the data within the field. To modify the title, change the 'Header' information (this field cannot be left blank). There are three settings for alignment: Left, Right and Center. This alignment refers to the data being displayed, not the column title.


























Adding/Modifying Links & Link Descriptions (Hints)

Link columns are pre-defined by the system but can be applied to any field within the log. A **Link** is a drill down to more detail. For example, from the RFI log, a standard **Link** would be to drill down into the detail where the user can view the answer and the question and add notes if required. The **Link Description** is the field help that will display when the cursor moves over the linked field.

Sort Order

Use the **Sort Order** field to define the log's sort order. You can specify to sort by a specific field, in ascending order, or check the 'Sort Descending' checkbox to sort by descending order. In the example below, the sort order has been defined to sort by 'Date' first (in descending order, e.g. oldest to most current date) and then by Transmittal No.

User-Defined Fields

User-Defined Fields	
Type	Action
Action Item	
Addendum	
Communication	
Employee Profile	
Forecast UDF	
HR Job Classification	
HR Positions	
Issue	
Notice	
OM Sales Budget	
Opportunity	
Opportunity UDF Tab	
Organization	
Owner Change Order	
Prequalification UDF Tab	
Project	
RFI	
Subcontract	
Subcontract Change Order	
Submittal	
System Contact	
Transmittal	
Weekly Check List	
Work Item	
Work Order	

Standard Treeview path: xProjects > File Maintenance > User-Defined Fields

User Defined Fields may be applied to xProjects in the same manner as CRM and Enterprise applications. Once the User-Defined Fields (also called User Extensions in Forms version) have been created, they may be applied to items such as Subcontract through the Maintenance option for User-Defined Fields.

User-Defined Classifiers

This is the JSP version of the definition of User-Defined Fields with Lookup Table set as 'Use Valid Data as LOV'. The fields are first defined in the System module:

UE FIELD MAINTENANCE											
UE FIELD MAINTENANCE											
View Freeze Search Insert Multiple Workflows Export User Extensions											
* System Defined	* Field	Field Description	* Rendering Type	* Data Type	Length	* Lookup Table	Lookup Validated	Required	Updateable	Update Null	
<input type="checkbox"/>	DESDESC	Design/Discipline	DEFAULT	Text	16	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DESIGNGRP	Design Group	DEFAULT	Text	16	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOCDRADISC	Discipline	DEFAULT	Text	100	Use Valid Data as LOV	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOCDRADOC	Document #	DEFAULT	Text	50	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOCDRAPRST	Project Stage	DEFAULT	Text	100	Use Valid Data as LOV	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOCFORM	Document Format	DEFAULT	Text	16	Use Valid Data as LOV	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOCISSUEDT	Issue Date	DEFAULT	Date	13	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOCPROCNUM	Number	DEFAULT	Text	11	No LOV used	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOCPROCTYP	Type	DEFAULT	Text	16	Use Valid Data as LOV	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOCPROCVEN	Vendors by Company	DEFAULT	Text	16	Vendors by Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOCREVDECS	Revision Description	DEFAULT	Text	100	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOCWKAREA1	Work Area 1	DEFAULT	Text	50	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOC_TYPE	Document Type	DEFAULT	Text	15	Use Valid Data as LOV	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOPINT	DOP Integer	DEFAULT	Integer	16	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOPNUM	DOP Number	DEFAULT	Numeric	16	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DOPTEXT	DOP Text	DEFAULT	Text	16	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DRAWDATE	Drawing Date	DEFAULT	Text	16	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	DWGS	Drawings	DEFAULT	Text	16	No LOV used	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Pgm: UEFIELD – UE Field Maintenance; standard Treeview path: System > User Extensions > Field Maintenance

They are displayed in JSP through this program, so changes can be made directly in JSP. (These changes are also reflected in the FORMS version.)

XP

User-Defined Classifiers

</

Standard Treeview path: xProjects > File Maintenance > User-Defined Classifiers

Clicking on the **Name** of any record, opens another screen which allows the user to specify User-Defined Prompts and Valid Data to be used in the LOV for that field.

Language	Classifier Description	Row Prompt	Action
ENG	Construction Type	Construction Type	+ X
FRE	Test this	Test Prompt	+ X
SPA	bbbb	mmm - added from FORMS	+ X

Display Order	Value	Description	Action
0001	010	New	+ X
0003	030	Both	+ X
0009	901	Demolition	+ X
0010	020	Renovation	+ X

Example of specifying User-Defined Prompts and Valid Data for a User-Defined Classifier

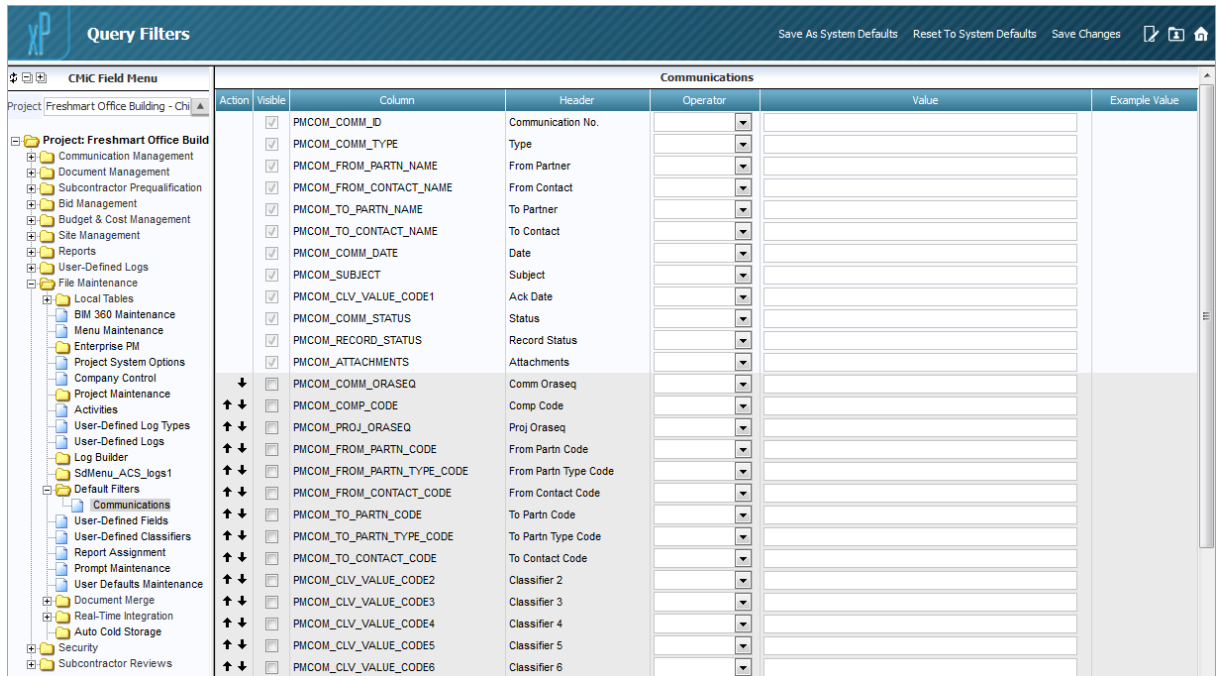
The values are available for selection in the LOV of the field on any screen that the field is used as a classifier.

Defining Default Query Filters

Query filters can be applied to each 'Log' available on the system. As a default, the Logs are not restricted so they show all data available to the user. But as a project continues, it may be advantageous to limit the defaults to show only recent data, or open data, so that less data is displayed and it is easier and quicker to go directly to the required information. Even if a filter is put in place, it can be changed at any time.

From the Treeview, open the 'XProjects Manager' Node and select the Query Filter option (standard Treeview path: *xProjects > File Maintenance > Default Filters*). This will open a Log Screen that displays all of the system logs available for the xProjects Suite. Select the log requiring a default filter.

The screen will display every field available for the log. Select which fields are to be visible to the query filter screen and what, if any, Query Conditions should be the defaults.





Standard Treeview path: *xProjects > File Maintenance > Default Filters – Communications log*

Adding/Removing Fields

The only fields available are those that are shown on query filter screen. By adding or removing fields, you are changing the look of the query filter. To add a field to the filter, check the 'Visible' checkbox. To remove a field, uncheck the checkbox.

Changing the Order

To change the order of the fields not automatically shown in the query filter, use the action icons of  (Move Up) or  (Move Down) to change the position of a specific field.

Defining the Condition

The Operator column allows you to select one of the following standard operators:

Operator	Meaning
=	Equals
!=	Not Equal
>	Greater Than
=>	Greater Than or Equal to
<	Less Than
<=	Less Than or Equal to
IN	Within a stated set of values
NOT IN	Not in a stated set of values
LIKE	Value like a stated value using wild characters

Operator	Meaning
NOT LIKE	Not like a stated value using wild characters
BETWEEN	The value in between two stated values
NOT BETWEEN	The value is not between two stated values
IS NULL	The value is blank
IS NOT NULL	The value is not blank

Once the Operator is selected, the matching condition needs to be entered in the Value Column. There is one system defined variable that could be very useful to you, this is 'SYSDATE' – this returns the current date, so if you use a posting date greater than or equal to SYSDATE –120 you will be asking for all records that have been posted in the last 120 days.

This type of filter keeps the log more or less current, but you can still change the filter to view all records.

Other types of common filters are:

- Where Status != 'Closed'
- Where Received = 'Yes'
- Where Contact = 'Me'

Each filter can have multiple conditions applied, each is just another 'AND' statement.

Depending on your security privilege, the [**Save As System Defaults**] button will be active or not. If the button is active and used, the system will save the defaults entered for ALL users. If the [**Save**] button is used, it will only save the defaults for the current users.

The [**Reset To System Defaults**] button will reset the defaults to either nothing or to the 'Defaults' defined by the Administrator.

Be aware that it is possible to mark items as visible to the query filter but apply no filter – this means that you want the field to be available but are not restricting it for the default query. Also, if any query filters are applied to items that are not visible, they will always be utilized in the query even though they cannot be updated.

Substitution variables may also be utilized in filters. These include:

- &today
- &username
- &userid
- &partner
- &partnertype
- &contact

NOTE: Do not put single quotes around the filter value when using parameters like **&today**.

xProjects Security

Creating xProjects User

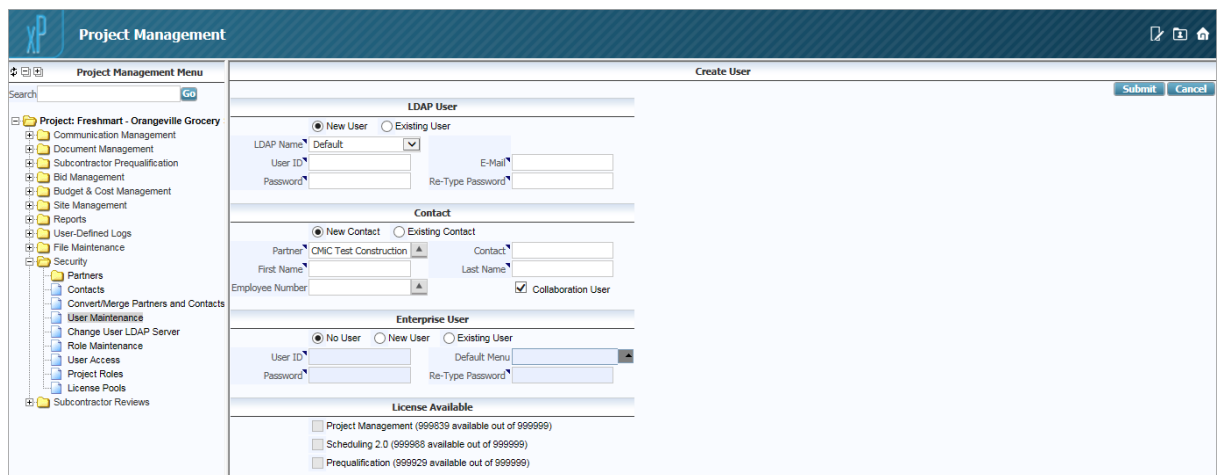
There are different types of users that may be using the PM xProjects Suite:

- External Project Partners
- Project Employees
- Project Employees who are also CMiC Enterprise users

All three user types may be created using the User Maintenance screen (standard Treeview path: *xProjects > Security > User Maintenance*).

This program first opens in a log format, showing all the users currently defined. From here you can use the **[Create User]** button to add a new user to the system.

Create New User



Standard Treeview path: *xProjects > Security > User Maintenance* – **[Create User]**

This functionality is accessed via the Create User program. When this screen is first opens, it will display a list of all current users. Press the **[Create User]** button at the top of the screen. Field security can be applied to this button (standard Treeview path: *xProjects > User Maintenance* – *Programs/User Maintenance*).

The screen is split into 4 areas, LDAP User, Contact, Enterprise User, and License Available. To create a New User:

- Make sure the **New User** radio button is active, and enter the **User ID**, **Password** and **E-mail**.
- Select the **Partner** Code – this will either be a Business Partner or one of your own company codes, depending on the type of user being created.
- The **Contact** Code will default with the User ID entered but can be changed as required. The contact code is used throughout the system as a quick way for selecting the person.
- Enter the **First** and **Last Name** of the contact. If the user being created is an employee, this does not have to be the same as the employee name. Match the user to the employee number, and make sure the Collaboration User checkbox is checked.
- If the User is someone who will need to access either the CMiC Enterprise System either via Forms or Discoverer, then **Enterprise User** information will be required.
- The **License Available** section lists the licenses that are available for Project Management, Scheduling 2.0 and Vendor (subcontractor) Prequalification. The checkboxes are not enabled until an Enterprise User ID is filled in. The options are expanded with additional fields for entry.

License Available	
<input checked="" type="checkbox"/> Project Management (999839 available out of 999999)	
Company	Security Group
Default Project	
<input checked="" type="checkbox"/> Scheduling 2.0 (999988 available out of 999999)	
Company	Security Group
Default Project	
<input checked="" type="checkbox"/> Prequalification (999929 available out of 999999)	
Company	Security Group
Default Project	

Example of options expanded in License Available section of Create User screen

This section is used to indicate if a user is included for licensing for any of the applications listed. The purchase of the actual license is still required before the user can start using the applications. Additionally, the security for the individual programs in the application must be applied per user role/user as required, in order for the user to use them.

When complete, press the [**Submit**] button.

From a Technical point of view, the create user function does the following:

- Always creates an LDAP user
- Always creates a Contact Record in the CMiC Enterprise Database for the user
- Creates a Database Login if Database Login Required is flagged
- Creates a User in the CMiC Enterprise System (only if user is an employee and Database Login Required is flagged)

This screen also allows you to map existing LDAP users to either new or existing contacts and to existing database users. Normally, this type of setup is only required when you are upgrading from a pre-2004 version of CMiC software or an employee has changed roles, and now needs access to xProjects or Enterprise.

Completing Setup Process

If the user is for xProjects:

- Assign Project Access

NOTE: Project Treeview nodes are disabled for user when 'No Project Assigned' (i.e. when user is not assigned to a Project).

If the user created will be using the CMiC Enterprise Application:

- Assign Roles to the User
- Assign Companies Access
- Assign Job and Payroll security, as required

Deleting xProjects User

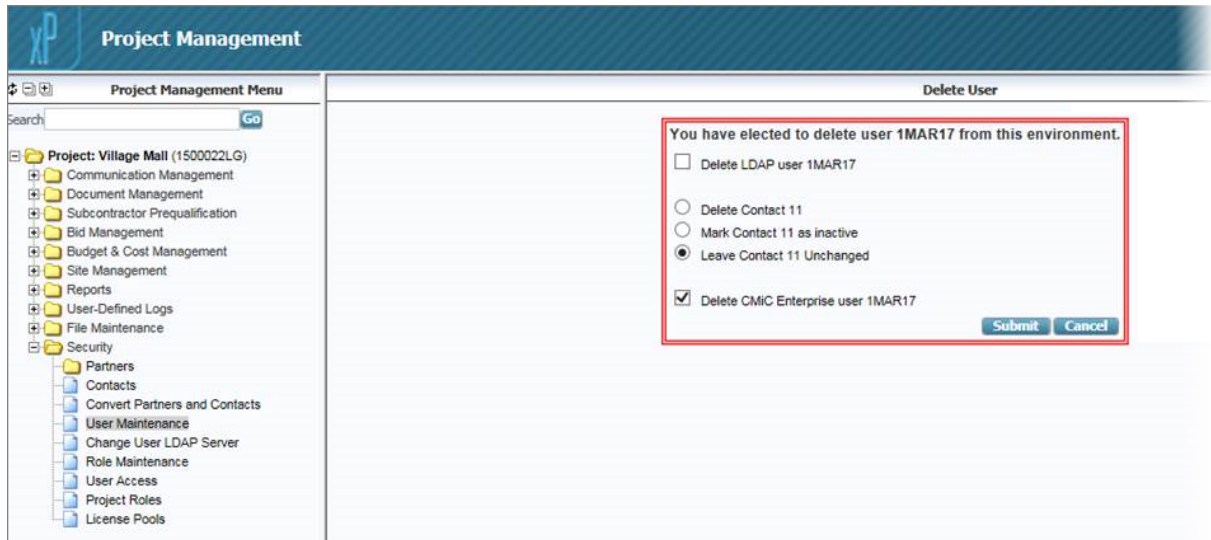


The screenshot shows the 'Project Management' interface with a 'User Maintenance' tab. A table lists users with columns: User ID, First Name, Last Name, Contact Code, Enterprise User, LDAP Name, Collab User, and Action. The 'Action' column contains icons for edit, delete, and other functions. A red arrow points to the delete icon (a trash can) for the user '1MAR17', with a callout box labeled 'Delete Action'.

User ID	First Name	Last Name	Contact Code	Enterprise User	LDAP Name	Collab User	Action
1MAR17	1MAR	17	11	1MAR17	Default	N	[Delete]
9FEB17	Test User	9 Feb 2017	T9	9FEB17	Default	N	[Delete]
ADDCODE	003 Salaryk	PYMJ	AC	ADDCODE	Default	N	[Delete]
ADRIANA	Adriana	Balana	AB	ADRIANA	Default	N	[Delete]
AKUSER	Shobhit	Jain	AK		Default	Y	[Delete]
ALLEN1	Allen	Iverson	AI		Default	Y	[Delete]
ALPRODV10X	Andy	Loney	AL	ALPRODV10X	Default	N	[Delete]
AMANDA	Amanda	Pinto	AP	AMANDA	Default	N	[Delete]
AMBER	Amber	Aaron	AA		Default	N	[Delete]
ANDYDEV	Abby	Ruchard	AD	ANDYDEV	Default	N	[Delete]
ANDYPROD	Andy	Prod	AP	ANDYPROD	Default	N	[Delete]
ANDYPROD/V10	Andyprod	V10	AV	ANDYPROD/V10	Default	N	[Delete]
ANGIE			AP		Default	N	[Delete]
ANMOLK	ANMOL	KAUR	AKA	ANMOLK	Default	N	[Delete]
ANTHONYF	Anthony	Filicetti	AF	ANTHONYF	Default	N	[Delete]
APRI-K	Apri	K	APRI-K		Default	N	[Delete]
ARCH	Architect	Role	AR		Default	Y	[Delete]
ARCHITECT	Archibald	Smith	ARCH		Default	Y	[Delete]
ARTHUR	Arthur	Rodney	AR		Default	Y	[Delete]
AZU	Andrejs	Zuravets	AZU	AZU	Default	Y	[Delete]
BALRAJS	bal	rajs	BR	BALRAJS	Default	N	[Delete]
BHALL	Bill	Hall	BHALL		Default	Y	[Delete]
BILBO	BILBO	Baggins	BBA	BILBO	Default	N	[Delete]
BILL	Bill	Gustaw	BG	BILL	Default	N	[Delete]

Standard Treeview path: xProjects > Security > User Maintenance

Use the User Maintenance screen to delete a User ID, by clicking the User ID's corresponding Delete action (shown above).



Standard Treeview path: *xProjects > Security > User Maintenance – Delete User screen*

In the **Delete User** screen:

1. Check the **Delete LDAP user ...** checkbox if the User ID is to also be deleted from the LDAP directory, resulting in the User ID being unusable to log into any CMiC product.
2. Select whether the User ID's corresponding Contact record is to be deleted, made inactive, or left unchanged.

It is recommended that the Contact record is made inactive, for historical purposes, as it may have been associated to other records.

For ADF screens, inactivated Contacts are only available in LOVs if the **Hide Inactive Contacts** checkbox on the **Global** tab of the System Options screen is unchecked (standard Treeview path: *System > Setup > System Options – Global tab*). However, if the **Hide Inactive Contacts** checkbox is checked, inactive Contacts would be available to users with the **SHWINACCNT** System Privilege.

For JSP screens, Contact LOVs do not show inactive Contacts, but users can type in Contact Codes for inactive Contacts to access them.

3. Ensure the **Delete CMiC Enterprise user ...** checkbox is checked to delete the User ID.
4. Click [Submit].

Adding Contacts to Project

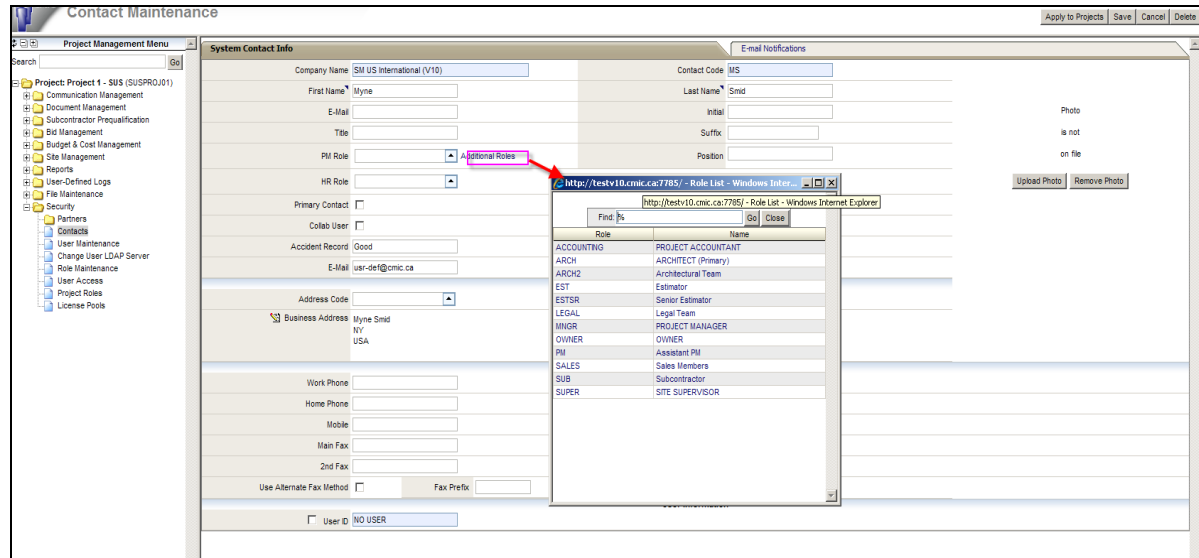
As a project continues over time, contacts may need to be added or removed from a project. This is done via the Contacts screen from the Security Menu. This function gives the user the ability to assign existing contacts to a project. This program also allows the user to create a new contact/user for xProjects only.

The program opens in a log format showing all contacts, regardless of the current project, unlike the Project Directory where you can only see the current project contacts and add new contacts.

This screen is really designed to allow for the quick assigning of contacts to a new project. The screen lists all contacts, and then all you need to do is check the select box next to each required contact. When done, use the [Assign to Project] button. This will add all the selected contacts to the current project.

System contacts not assigned to a project can perform Project-level activities as long as they have the privilege for the Project role that is assigned to them. In addition, multiple Project Roles can be assigned to a system contact by using the **'Additional Roles'** link that is displayed next to the project role.

NOTE: The **'Additional Roles'** link does not display until the Contact record has been saved.



Standard Treeview path: *xProjects > Security > Contacts – System Contact Info tab*

When the system contact is brought into a project, it will bring all associated project roles.

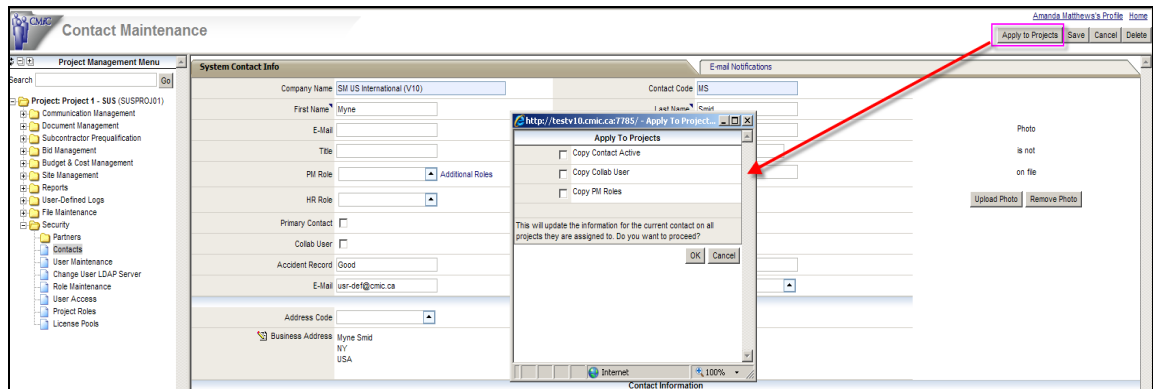
Project Roles will be utilized as follows: if the user is a project contact, then the system will use the project contact project roles to determine access. If the contact does not exist on the project, the system will use the system contact level project roles to determine access.

NOTE: All of this functionality is only applicable to the JSP version.

Field security can be applied to the Change Password icon and the Security Role icon in the System Contact Maintenance screen. The possible settings are 'Unrestricted' or 'Hidden'.

The **"HR Role"** may be assigned to a user and determines the privileges and functions the user will have in **Employee Self Service**. Field Security can be applied to this field. HR Roles are defined in the HR Role Maintenance screen of the Human Capital Management (HCM) module. The HR Role is associated with the user's Contact Code in order to facilitate approval of change requests in HCM.

[Apply to Projects] – Button



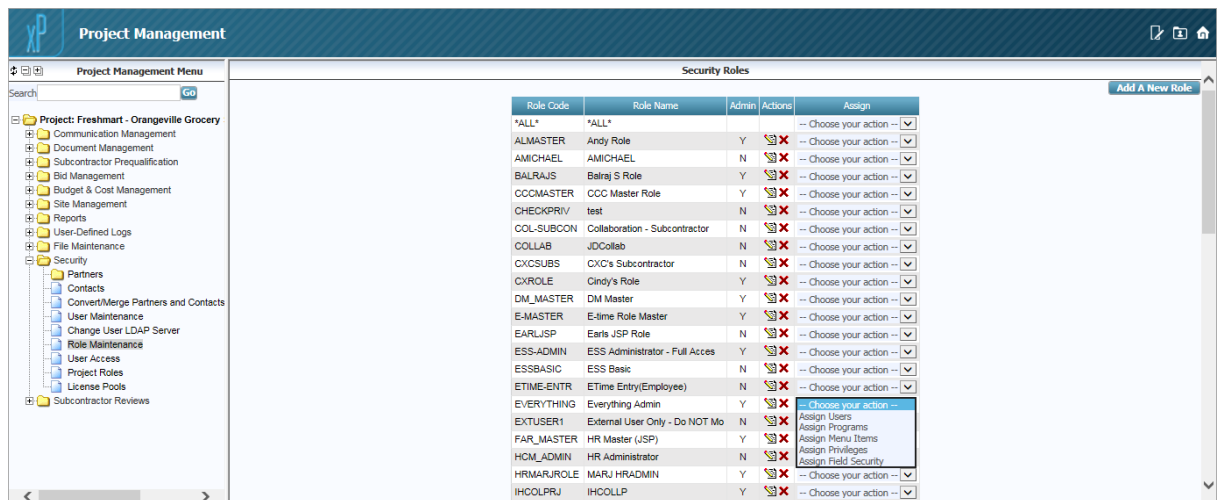
Example of pop-up window launched from [Apply to Projects] button on Contact screen

The [Apply to Projects] button allows the user to update changes to the contact's address and contact data across projects, in addition to the option of updating the 'Contact Active' flag, 'Collab User' flag and PM Role at the project level with its current values at the system level.

NOTE: The [Apply to Projects] button does not display until the Contact record has been saved. After the record has been saved, click on the [Edit] button and the [Apply to Projects] the button will appear.

xProjects Roles

Overview

















Standard Treeview path: xProjects > Security > Role Maintenance

JSP Security Roles are used to grant privileges for JSP based screens. For the xProjects module, which is JSP based, JSP Security Roles are used to set which programs and Treeview menu options are available to xProjects users, and to tailor access to the options and operations available in the granted programs.

To set up JSP Security Roles for the xProjects module, the JSP Security Roles maintenance screen in the xProjects module must be used, as only it has settings for the xProjects module.

In the JSP Security Roles screen of the xProjects module, the **Assign Menu Items** action, framed below, is used to set which Treeview Menu Items are available to xProjects users:

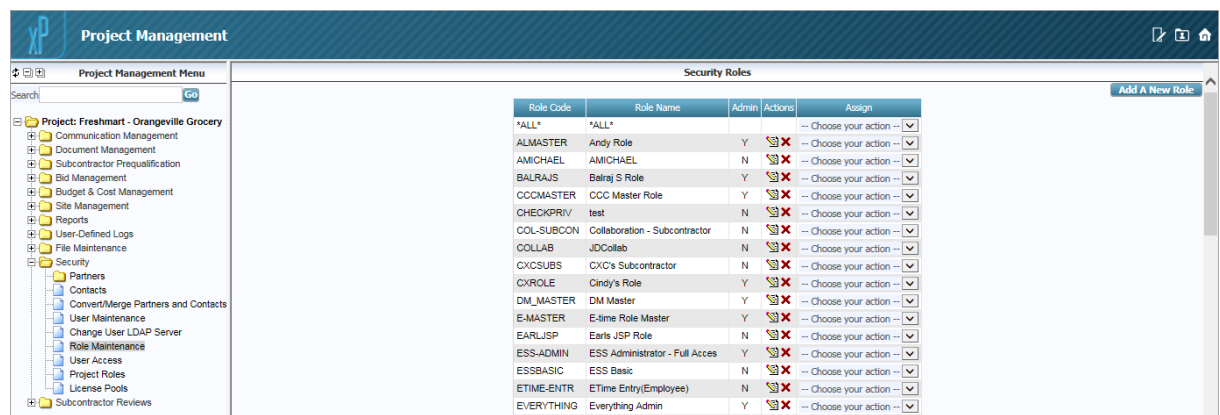
LUDMILA	Ludmila's Role	Y			-- Choose your action --
MIKEPMJSP	MIKE PMJSP Role	Y			-- Choose your action --
MISTY-JSP	Misty's JSP Security Role	Y			-- Choose your action --
MRROLE	Madhuri Role	Y			-- Choose your action --
MRTTESTPMRO	MR TEST PM ROLE	N			-- Choose your action --
NAVCOLLAB	navcollabrator	N			-- Choose your action --
NAVMASTER	navmaster	Y			-- Choose your action --
NEWROLE	new role	N			-- Choose your action --

















Once the Menu Items are selected, security access is assigned to the Programs.

NOTE: Security access can be assigned to Programs without assigning access to the Treeview Menu Item. For example, a Program could be launched as a Simple Menu Development Tool from the launch screen.

After security access is assigned to the Programs, Privileges and Field Security are assigned to fine-tune operations and fields within the programs.

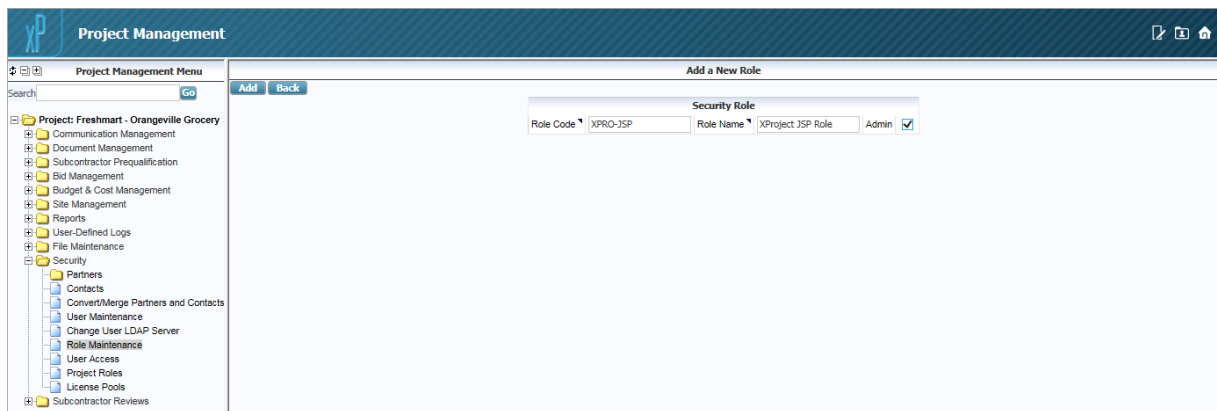
Creating a New Role



Role Code	Role Name	Admin	Actions	Assign
ALL	*ALL*			-- Choose your action --
ALMASTER	Andy Role	Y		-- Choose your action --
AMICHAEL	AMICHAEL	N		-- Choose your action --
BALRAJS	Balraj S Role	Y		-- Choose your action --
CCCMASTER	CCC Master Role	Y		-- Choose your action --
CHECKPRIV	test	N		-- Choose your action --
COL-SUBCON	Collaboration - Subcontractor	N		-- Choose your action --
COLLAB	JDCollab	N		-- Choose your action --
CXCSUBS	CXC's Subcontractor	N		-- Choose your action --
CXROLE	Cindy's Role	Y		-- Choose your action --
DM_MASTER	DM Master	Y		-- Choose your action --
E-MASTER	E-time Role Master	Y		-- Choose your action --
EARLISP	Earls JSP Role	N		-- Choose your action --
ESS-ADMIN	ESS Administrator - Full Access	Y		-- Choose your action --
ESSBASIC	ESS Basic	N		-- Choose your action --
ETIME-ENTR	ETime Entry(Employee)	N		-- Choose your action --
EVERYTHING	Everything Admin	Y		-- Choose your action --

Standard Treeview path: *xProjects > Security > Role Maintenance*

xProjects Roles define a group of programs, menu options and user privileges. The Role is then assigned to a user. To access the Roles function, select 'Role Maintenance' from the Security Node of the Treeview.

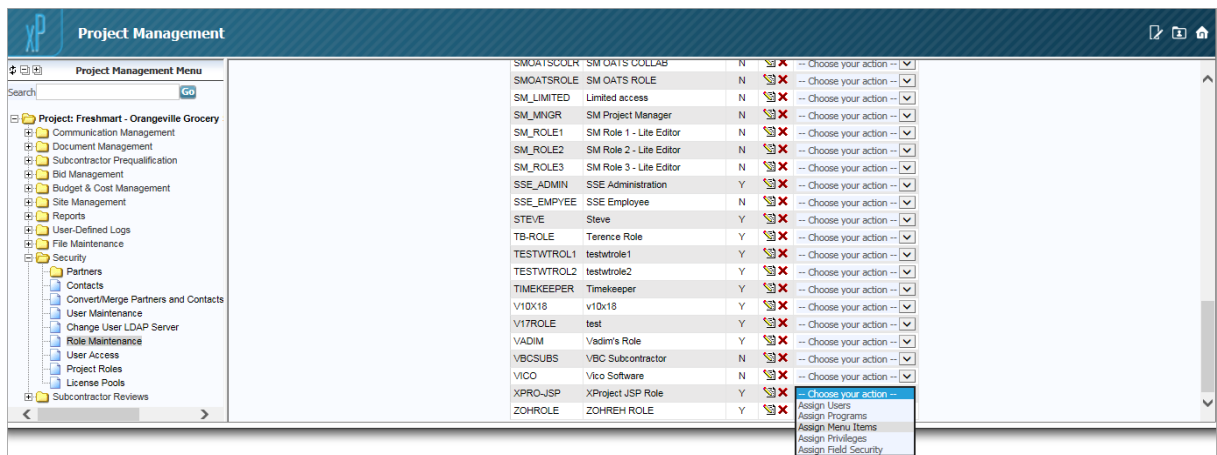


Standard Treeview path: xProjects > Security > Role Maintenance – Add A New Role screen (launched from [Add A New Role] button)

Use the [Add A New Role] button to open the Add A New Role window. In this window, enter a Role Code and Description. The ‘Admin’ flag against a role will allow the user with this role to override field security and assign roles to users that they are not assigned to themselves. When complete, press the [Add] button to save the record and return to the main screen.

Once the role is created, you must now apply the required menu options, programs, privileges and users.

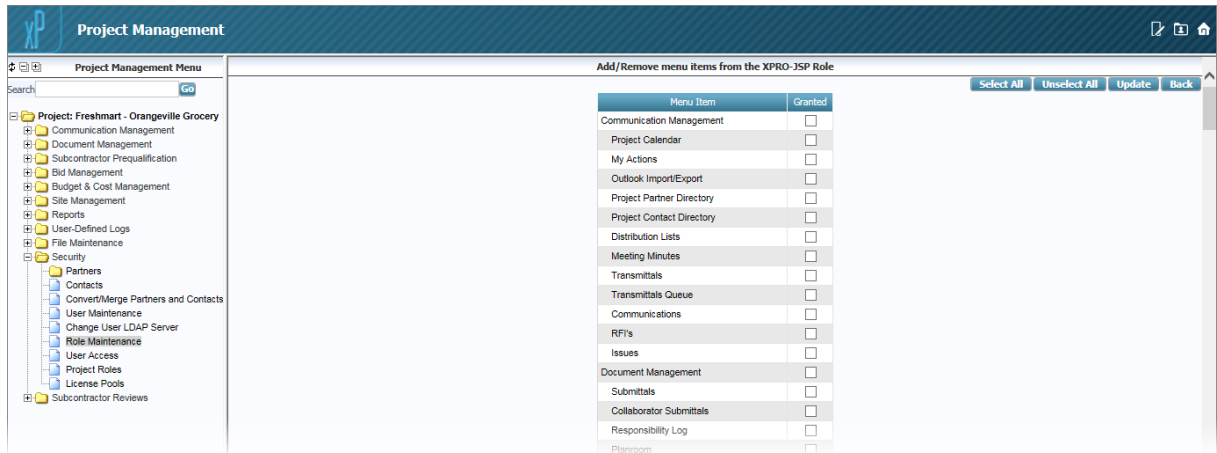
Assigning Menu Items



Standard Treeview path: xProjects > Security > Role Maintenance – Assigning Menu Items to Role

Assigning menu options is defining what the Treeview will look like for all users who will be assigned this role. By assigning menu items, you are giving users with this role the ability to view the Logs associated with the menu item.

Select the option 'Assign Menu Items' from the drop-down list on the row for the required Role.



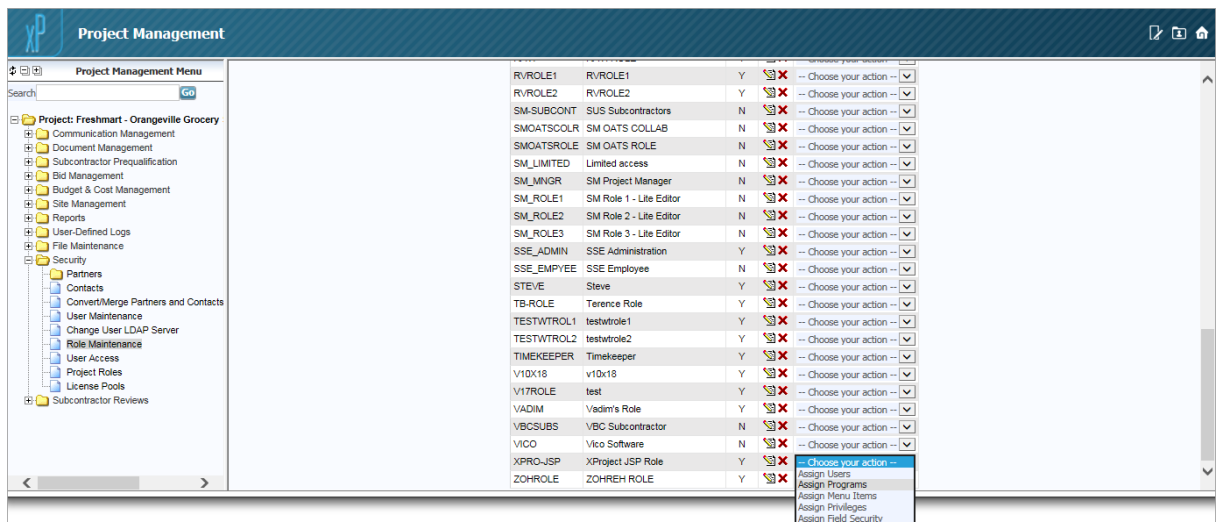
Example of Assigning Menu Items to a Role

This screen lists all the available menu items. The data is displayed in the Tree Hierarchy. To apply a menu item, check the 'Granted' box next to the item. If any item on a node is required, then the controlling Menu Item must also be selected. For example, if the role can only access Punch Lists in Site Management, both Site Management and Punch Lists must be granted.

When Complete, use the **[Update]** button to save the changes and return to the main screen. The **[Back]** button will return without saving any changes.

Use the **[Select All]** and **[Unselect All]** buttons to select all or unselect all Menu Items at once.

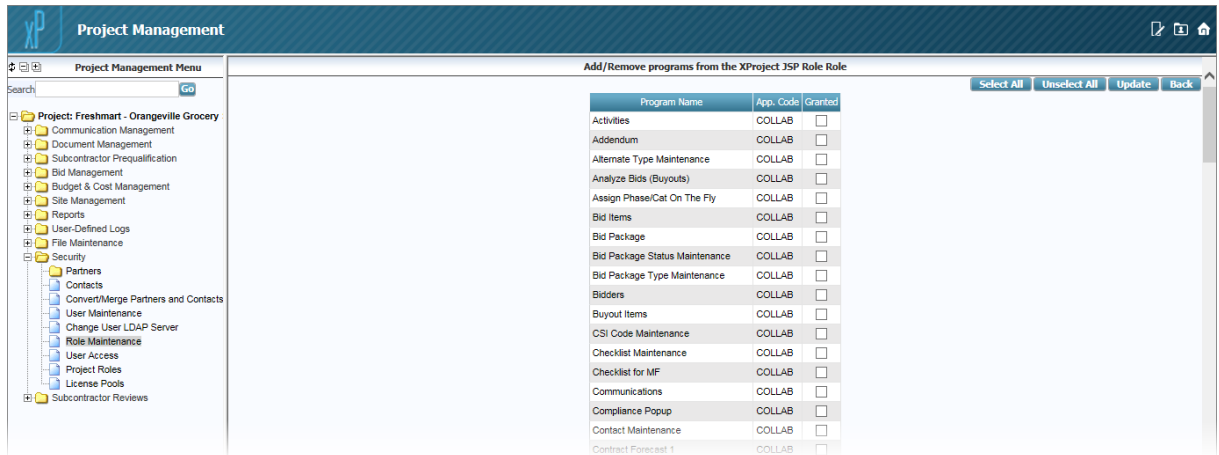
Assigning Program Access



Standard Treeview path: xProjects > Security > Role Maintenance – Assigning Programs to Role

Now that the Menu structure has been defined, you should grant access to the programs available within the menu. This defines if the user will be able to either add new records or drill down into the details of existing records.

Select the option 'Assign Programs' from the drop-down list on the row for the required Role.

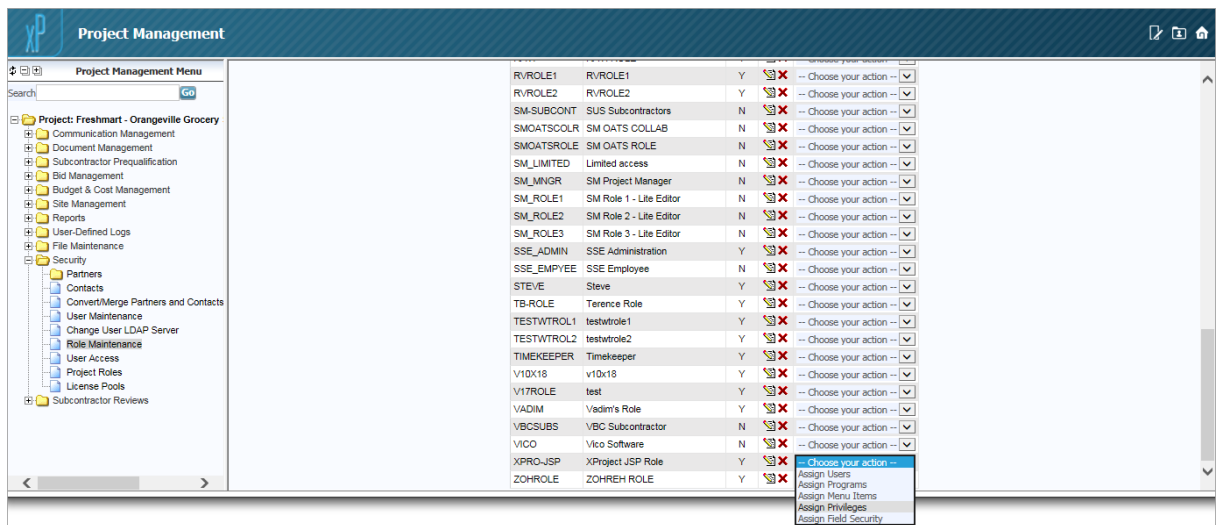


Example of Assigning Programs to a Role

If a program is not checked, but the user has it as a menu option, they will get a message indicating they are not authorized to use the program.

Once the required programs have been checked, press the **[Update]** button to return to the main screen.

Assigning Privileges



Standard Treeview path: *xProjects > Security > Role Maintenance – Assigning Privileges to Role*

Privileges are accessed by selecting the 'Assign Privileges' option.



Example of Assigning Privileges to a Role

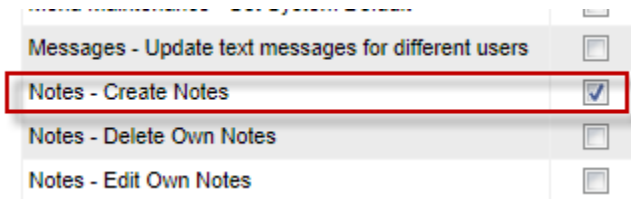
Select the required privileges and press **[Update]** to save and return to the main screen.

Create Notes Privilege

The xProjects security privilege “**Notes – Create Notes**” restricts who can add notes to PM correspondence, especially external users or others that are ‘CC’d’.

When this privilege is assigned to a user, that user will be able to add notes to PM correspondence when the user is not the Author, or the ‘To’ contact, or the Responsible contact (in the case of Submittals).

When a user is the Author, ‘To’ contact or the Responsible contact (on a submittal), that user will always be able to add notes to PM correspondence, without necessarily having this privilege.

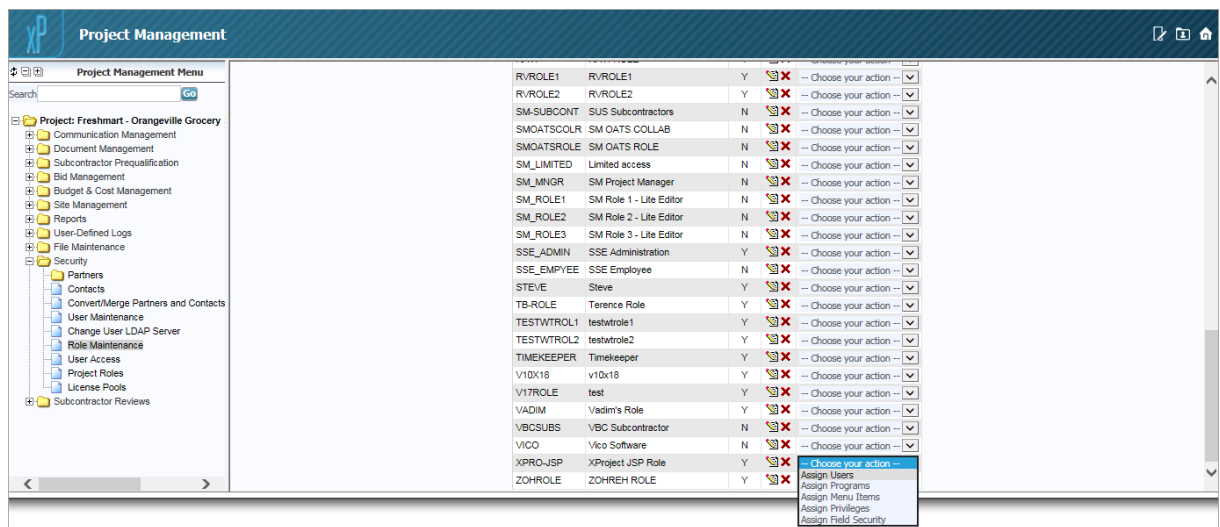


The default value of the privilege is ‘checked’ for existing roles, to preserve previous functionality where creation of notes was available to all users.

This privilege is also unaffected by the ‘Admin’ flag on the user role, or any PM role privileges.

At the end of a Submittal review cycle when the Responsibility is null, only users with the privilege will be able to create notes against the submittal.

Assigning Users

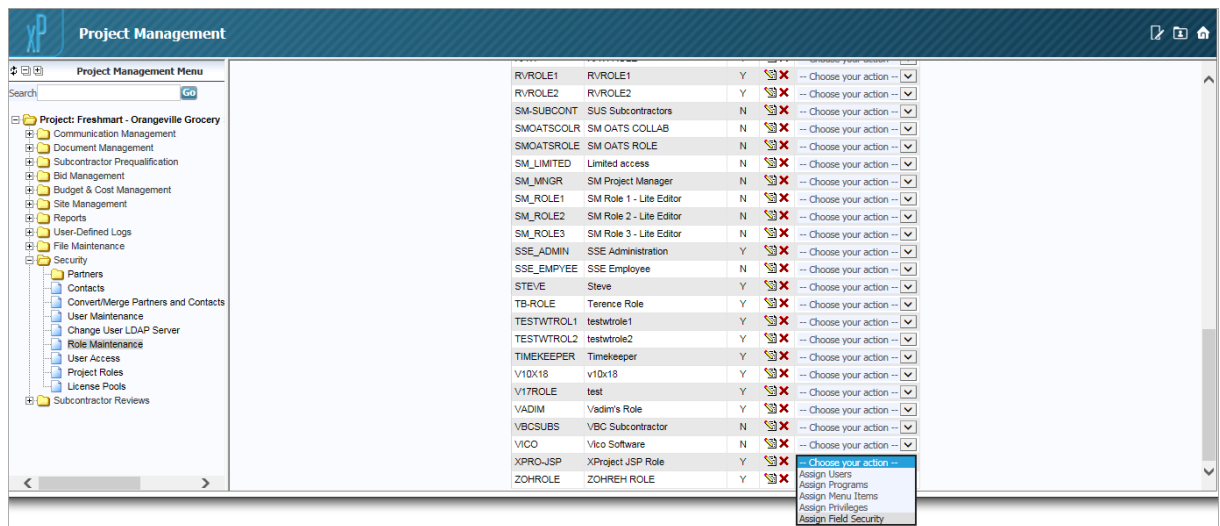


Standard Treeview path: *xProjects > Security > Role Maintenance – Assigning Users to Role*

Once the Roles are set up, it is now time to apply users to the roles. The User will inherit all the rights of the role. To apply users, select the option 'Assign Users'. The program will list all users. Select the user/users that you want to apply to the role. When done, press the [Update] button to save the changes.

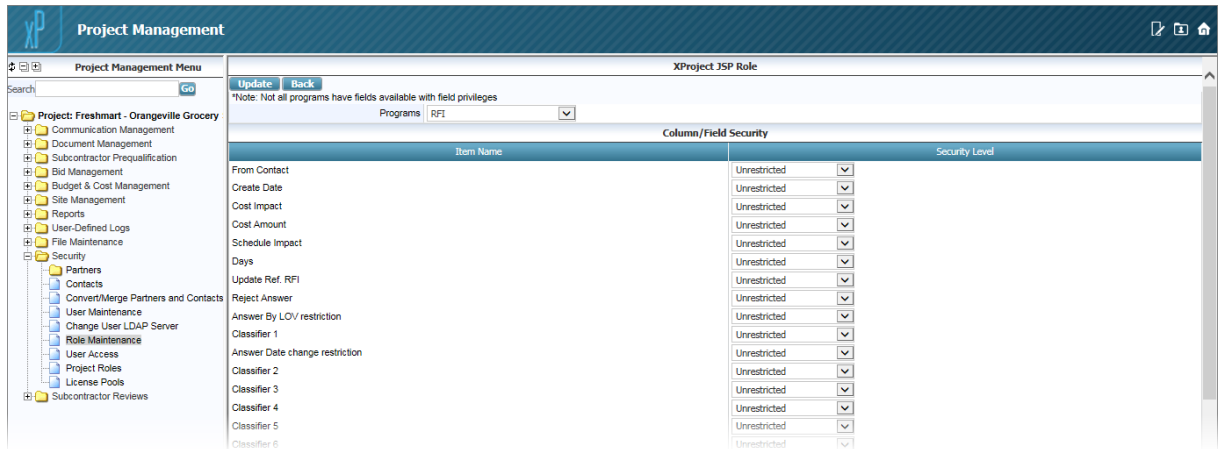
Users can belong to more than one role. If they have more than one role, the system will display both roles combined when the Treeview opens. If the same program is granted twice by two roles, the 'Active' grant will be utilized.

Assigning Field Security



Standard Treeview path: *xProjects > Security > Role Maintenance – Assigning Field Security to Role*

Field security is available on a number of fields for varying PM Objects. Field Security is only applied at the xProjects role level, not at the individual user level.



Example of Assigning Field Security to a Role

This functionality is the same as in Forms. Setting a security level in the **ALL** role will not update all other roles. The **ALL** role is a role in itself, which every user automatically has.

The algorithm for deciding what level of field security to use on a field is as follows:

1. If you have one role, it looks at that role and applies any field security.
2. If you have more than one role, it takes the lowest security level of all the roles (i.e.: if you have Secured and Read-Only it would use the Read-only since it is the lower security level).

NOTE: Unrestricted security level is equivalent to having no security level.

3. If there are no roles with field security applied, it looks at the *'*ALL*'* security level and applies it to the field
 - Unrestricted = data entry allowed
 - Read Only = Not updateable
 - Secure = Data entered will display as *'*'*
 - Hidden = Field will not display on the screen

Customizing a Specific User

If after creating roles and applying users, there is still a need to customize at the User level, this can be done via the **User Access** option under the Security menu (standard Treeview path: *xProjects > Security > User Access*). If a user is specifically granted access to a program, menu item, or privilege, it augments the role. You cannot remove a role level grant from specific users.

Project Role Definition

Role	Description	Admin Req.	Key Player	Order Seq.	Est. Weight
ACCOUNTING	ACCOUNTING (Alerts)	<input type="checkbox"/>	<input type="checkbox"/>	7	
ACCT	Accountant	<input type="checkbox"/>	<input type="checkbox"/>		
ADAMROLE	Adm Role	<input type="checkbox"/>	<input type="checkbox"/>		
ADFROLE	ADF PM Role	<input type="checkbox"/>	<input type="checkbox"/>	4	
ALT/APPR	Alternate Approver	<input type="checkbox"/>	<input type="checkbox"/>		
APAAPP1	Project Manager1 (A)	<input type="checkbox"/>	<input type="checkbox"/>		
APAPP1	Project Manager1 (B)	<input type="checkbox"/>	<input type="checkbox"/>		
APAPP3	Project Manager (C)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Update Role ACCOUNTING	
<input type="checkbox"/> View/Create/Update/Delete All Objects	<input checked="" type="checkbox"/> View/Create/Update/Delete All Document Types
<input checked="" type="checkbox"/> Restricted View All for RFIs	
Send/Receive	
<input checked="" type="checkbox"/> Receive Owner Change Order	<input checked="" type="checkbox"/> Receive Partner RFI
<input checked="" type="checkbox"/> Send Partner RFI	<input checked="" type="checkbox"/> Forward RFI
<input checked="" type="checkbox"/> Redirect RFI	<input checked="" type="checkbox"/> Send I/O Email
<input checked="" type="checkbox"/> Send Partner Transmittal	<input checked="" type="checkbox"/> Send Partner Communication
<input checked="" type="checkbox"/> Send Partner Issue	<input checked="" type="checkbox"/> Send Partner Notice
<input checked="" type="checkbox"/> Send Partner Punch List	
Posting - Voiding	
<input checked="" type="checkbox"/> Post PCI - External	<input checked="" type="checkbox"/> Post PCI - Internal
<input checked="" type="checkbox"/> Post PCI - Transfer	<input checked="" type="checkbox"/> Post PCI - Original Budget
<input checked="" type="checkbox"/> Edit Posted PCI	<input checked="" type="checkbox"/> Post OCO
<input checked="" type="checkbox"/> Allow for adding posted PCI's to unposted OCO's	<input checked="" type="checkbox"/> Post Subcontract
<input checked="" type="checkbox"/> Post Subcontract Change Order	<input checked="" type="checkbox"/> Void Subcontract
<input checked="" type="checkbox"/> Void Subcontract Change Order	<input type="checkbox"/> Add SOV On Posted Subcontract
<input type="checkbox"/> Add SOV On Posted Subcontract Change Order	
Workflow	
<input checked="" type="checkbox"/> Workflow Button - OCO	<input checked="" type="checkbox"/> Workflow Button - PCI
<input type="checkbox"/> Workflow Button - Subcontract	<input checked="" type="checkbox"/> Workflow Button - SC CO
<input checked="" type="checkbox"/> Workflow Button - Bid Items	<input type="checkbox"/> Workflow Button - RFP
<input checked="" type="checkbox"/> Workflow Button - RFI	<input checked="" type="checkbox"/> Workflow Button - Project

Standard Treeview path: *xProjects > Security > Project Roles*

Project Roles are different than xProjects Roles. Project Roles do not define which programs or privileges the user has within the application, rather they define what type of action the user can take on existing data, and what data they can see within the system.

Admin Req. – Checkbox

This functionality is usually used in conjunction with the assignment of multiple Project Roles to a contact (see [Adding Contacts to Project](#)).

If the **Admin Req.** flag is checked for a Project Role, users must have the **Admin** flag checked on their xProjects security role (standard Treeview path: *xProjects > Security > Role Maintenance*) in order to assign this role to other users or contacts. Users without the **Admin** flag checked on their xProjects security role will not even be able to see Project Roles with the **Admin Req.** flag checked in any Project Role LOV (found on a Contact screen and **Key Players** tab of Project Maintenance screen).

Also, a user's xProjects security role must have the **Admin** flag checked in order for the user to edit the **Admin Req.** flag on any Project Role.

PM Roles Add PM Role Save Cancel

Project Management Menu

Search: Go

- Project: Freshmart - Orangeville Grocery
 - Communication Management
 - Document Management
 - Subcontractor Prequalification
 - Bid Management
 - Budget & Cost Management
 - Site Management
 - Reports
 - User-Defined Logs
 - File Maintenance
 - Security
 - Partners
 - Contacts
 - Convert/Merge Partners and Contacts
 - User Maintenance
 - Change User LDAP Server
 - Role Maintenance
 - User Access
 - Project Roles**
 - License Pools
 - Subcontractor Reviews

Project Roles

Role	Description	Admin Req.	Key Player	Order Seq.	Eval Weight
ACCOUNTING	ACCOUNTING (Alerts)	<input type="checkbox"/>	<input type="checkbox"/>	7	
ACCT	Accountant	<input type="checkbox"/>	<input type="checkbox"/>		
ADAMROLE	Adsm Role	<input type="checkbox"/>	<input type="checkbox"/>		
ADPROLE	ADF PM Role	<input type="checkbox"/>	<input type="checkbox"/>	4	
ALTVAAPR	Alternate Approver	<input type="checkbox"/>	<input type="checkbox"/>		
APAAP1	Project Manager1 (A)	<input type="checkbox"/>	<input type="checkbox"/>		
APAPP1	Project Manager1 (B)	<input type="checkbox"/>	<input type="checkbox"/>		
APAPP3	Project Manager (C)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Update Role ACCOUNTING

☐ View/Create/Update/Delete All Objects ☒ View/Create/Update/Delete All Document Types ☒ Mobile Springboard Objects

☒ Restricted View All for RFIs

Send/Receive

☒ Receive Owner Change Order ☒ Receive Partner RFI ☒ Receive RFIs

Send/Receive RFIs

If checked, indicates that the user must have the 'Admin' checkbox checked on their xProjects security role to assign this role to other users or contacts

Key Player – Checkbox

Check the **Key Player** checkbox to indicate if this role is a Key Player role.

Key Players are assigned on the Project Maintenance screen (standard Treeview path: *xProjects > File Maintenance > Local Tables > Project Maintenance*). This is the main project screen where all the default information for a project is stored. It is broken into separate tabs to help organize the information. One of the tabs is for Key Players.

Key Players are a way of automatically including specific parties on documentation such as transmittals.

Order Seq.

This field is to indicate the order sequence (sort order) for the Key Player role.

Project Roles & Privileges

PM Roles

Project Management Menu

Search: [Go]

Project: Freshmart - Orangeville Grocery

- Communication Management
- Document Management
- Subcontractor Prequalification
- Bid Management
- Budget & Cost Management
- Site Management
- Reports
- User-Defined Logs
- File Maintenance
- Security
 - Partners
 - Contacts
 - Convert/Merge Partners and Contacts
 - User Maintenance
 - Change User LDAP Server
 - Role Maintenance
 - User Access
 - Project Roles**
 - License Pools
 - Subcontractor Reviews

Role	Description	Admin Req.	Key Player	Order Seq.	Eval Weight
ACCOUNTING	ACCOUNTING (Alerts)	<input type="checkbox"/>	<input type="checkbox"/>	7	
ACCT	Accountant	<input type="checkbox"/>	<input type="checkbox"/>		
ADAMROLE	Adam Role	<input type="checkbox"/>	<input type="checkbox"/>		
ADFROLE	ADF PM Role	<input type="checkbox"/>	<input type="checkbox"/>	4	
ALTVAPPR	Alternate Approver	<input type="checkbox"/>	<input type="checkbox"/>		
APAAPP1	Project Manager1 (A)	<input type="checkbox"/>	<input type="checkbox"/>		
APAPP1	Project Manager1 (B)	<input type="checkbox"/>	<input type="checkbox"/>		
APAPP3	Project Manager (C)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Update Role ACCOUNTING

☐ View/Create/Update/Delete All Objects ☒ View/Create/Update/Delete All Document Types ☒ Mobile Springboard Objects

☒ Restricted View All for RFIs

Send/Receive

☒ Receive Owner Change Order ☒ Receive Partner RFI

☒ Send Partner RFI ☒ Forward RFI

☒ Redirect RFI ☒ Send I/O Email

☒ Send Partner Transmittal ☒ Send Partner Communication

☒ Send Partner Issue ☒ Send Partner Notice

☒ Send Partner Punch List

Posting - Voiding

☒ Post PCI - External ☒ Post PCI - Internal

☒ Post PCI - Transfer ☒ Post PCI - Original Budget

☒ Edit Posted PCI ☒ Post OCO

☒ Allow for adding posted PCI's to unposted OCO's ☒ Post Subcontract

☒ Post Subcontract Change Order ☒ Void Subcontract

☒ Void Subcontract Change Order ☐ Add SOV On Posted Subcontract

☐ Add SOV On Posted Subcontract Change Order

Workflow

☒ Workflow Button - OCO ☒ Workflow Button - PCI

☐ Workflow Button - Subcontract ☒ Workflow Button - SC CO

☒ Workflow Button - Bid Items ☐ Workflow Button - RFP

☒ Workflow Button - RFI ☒ Workflow Button - Project

☒ Workflow Button - Meeting Minutes

Maintenance

☒ Create Partner On The Fly ☒ Maintain Working Days

☒ Edit Meeting Topics ☒ Create Prohibited Area On The Fly

Standard Treeview path: xProjects > Security > Project Roles

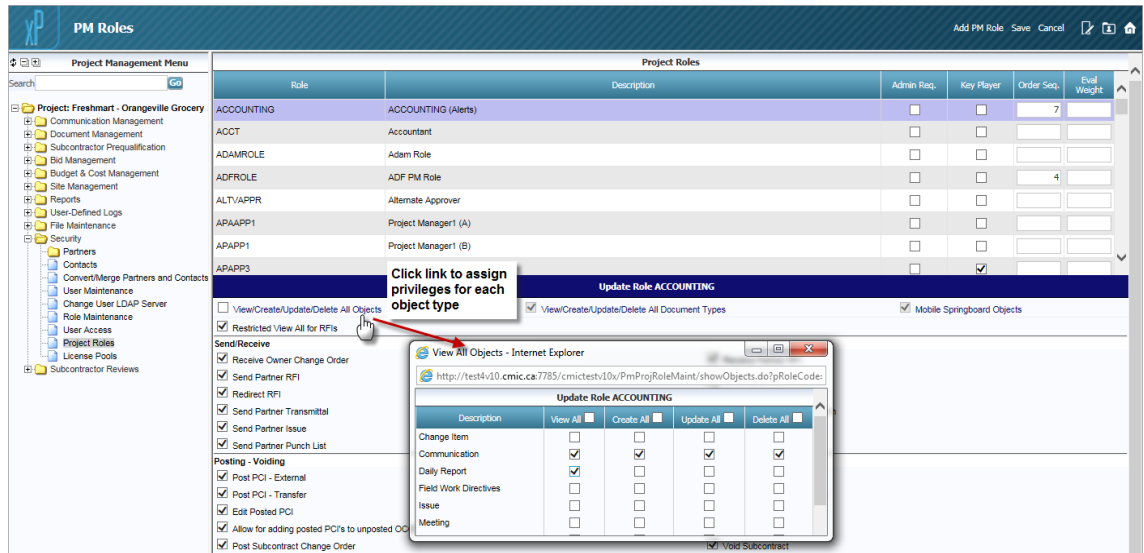
The Project Roles are defined within the CMiC Enterprise system, and are the same roles already used within the Enterprise PM system. Within xProjects, there are attributes to the roles that can be set.

Each role can have one or more attributes. If applied, all contacts that have this PM Role will be able, for example, to: Receive Owner Change Orders, View/Create/Update/Delete All Objects, View/Create/Update/Delete All Document Types, Send CC e-mails to non-project contacts, Send I/O e-mails, Create Partner 'on the fly', etc.

These roles allow you to customize how the system works for the different categories of internal and external users.

View/Create/Update/Delete All Objects – Checkbox

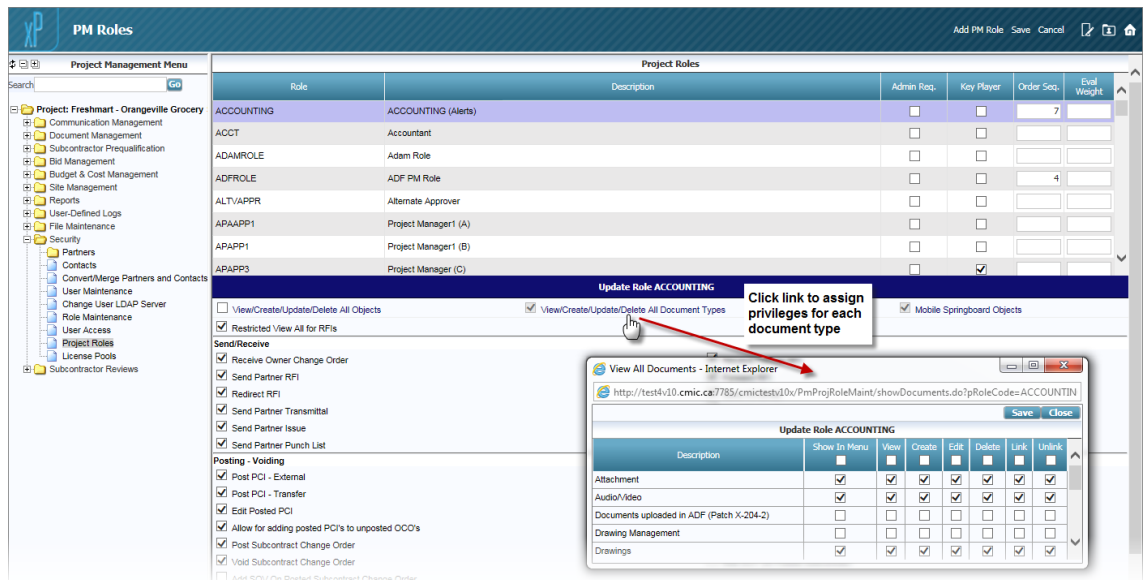
The **View/Create/Update/Delete All Objects** attribute can be assigned to 'ALL' objects or it can be uniquely applied to specific objects.



Example of options for assigning privileges to Object Types

View/Create/Update/Delete All Document Types – Checkbox


The **Show in Menu/View/Create/Edit/Delete/Link/Unlink All Document Types** attribute can be assigned to 'ALL' objects or it can be uniquely applied to specific document types.




Example of options for assigning privileges to Document Types

This pop-up window will display all Document Types that have been created in Project Management, and allow the user to specify for the Role selected which Document Types the user may View, Create, Edit or Delete.

If un-checked, the users with that role will not be able to use that function for all documents of that particular type within the xProjects suite.

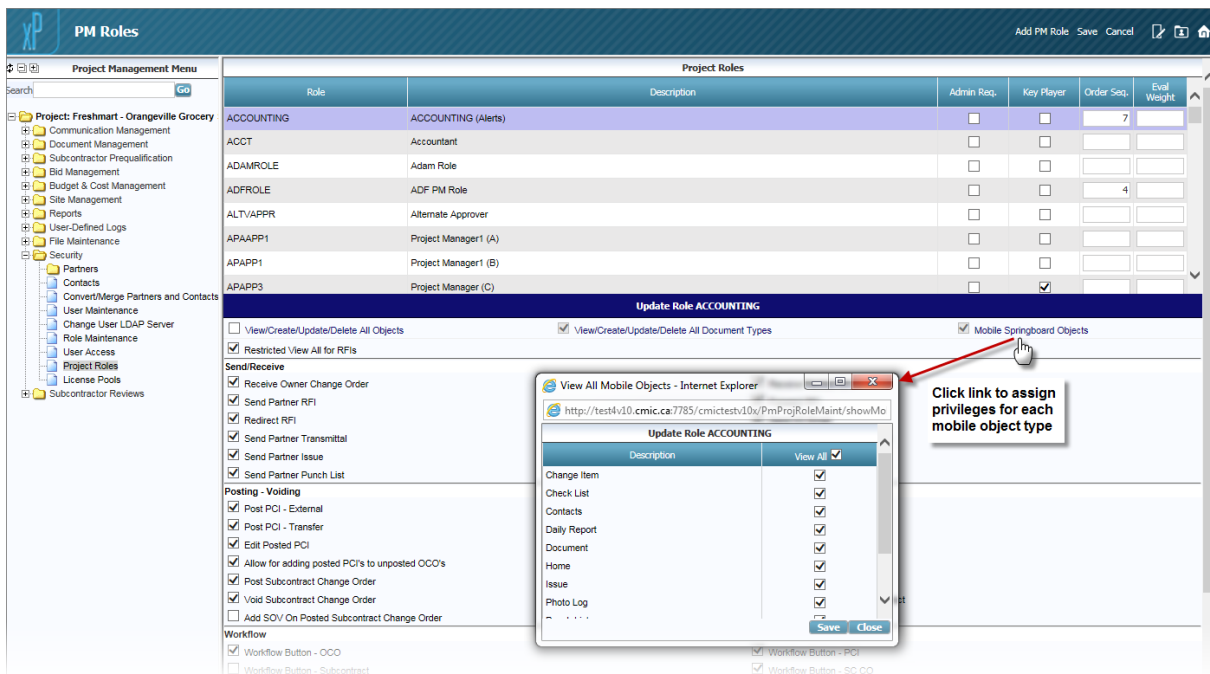
The **“Link/Unlink”** checkboxes allow users to link or un-link (i.e. ‘Remove’ using the  icon) an attachment to/from any JSP object such as RFIs, Meeting Minutes, etc.

RFI Detail		Attachments	Related Objects	History		
Type	Number	Rev. Number	Attachment	Action		
Attachment	ATTCH00004 - test	0 - 20-AUG-10 - Original	TestDoc.doc			

When the 'Unlink' flag is checked, the minus sign becomes available within the Attachment tab of an object, and attachments may be un-linked.

'Show in Menu' allows the user to indicate whether a particular Document Type must be shown in the JSP Treeview for users with a particular project role.

Mobile Springboard Objects – Checkbox



The screenshot shows the 'PM Roles' configuration page. On the left is a tree view of the project management menu. The main area contains a table of roles and their associated permissions. A modal window titled 'Update Role ACCOUNTING' is open, showing a list of mobile objects with checkboxes for assigning privileges. A red arrow points to the 'Mobile Springboard Objects' checkbox in the modal, with a callout box that says 'Click link to assign privileges for each mobile object type'.

Role	Description	Admin Req.	Key Player	Order Seq.	Eval Weight
ACCOUNTING	ACCOUNTING (Alerts)	<input type="checkbox"/>	<input type="checkbox"/>	7	
ACGT	Accountant	<input type="checkbox"/>	<input type="checkbox"/>		
ADAMROLE	Adam Role	<input type="checkbox"/>	<input type="checkbox"/>		
ADFROLE	ADF PM Role	<input type="checkbox"/>	<input type="checkbox"/>	4	
ALT/APPR	Alternate Approver	<input type="checkbox"/>	<input type="checkbox"/>		
APAAPP1	Project Manager1 (A)	<input type="checkbox"/>	<input type="checkbox"/>		
APAPP1	Project Manager1 (B)	<input type="checkbox"/>	<input type="checkbox"/>		
APAPP3	Project Manager (C)	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Update Role ACCOUNTING

☐ View/Create/Update/Delete All Objects ☒ View/Create/Update/Delete All Document Types ☒ Mobile Springboard Objects

☒ Restricted View All for RFIs

Send/Receive

☒ Receive Owner Change Order

☒ Send Partner RFI

☒ Redirect RFI

☒ Send Partner Transmittal

☒ Send Partner Issue

☒ Send Partner Punch List

Posting - Voiding

☒ Post PCI - External

☒ Post PCI - Transfer

☒ Edit Posted PCI

☒ Allow for adding posted PCI's to unposted OCO's

☒ Post Subcontract Change Order

☒ Void Subcontract Change Order

☐ Add SOV On Posted Subcontract Change Order

Workflow

☒ Workflow Button - OCO

☐ Workflow Button - Subcontract

☒ Workflow Button - PCI

☒ Workflow Button - SO CO

Example of options for assigning privileges to Mobile Springboard Objects

The 'Mobile Springboard Objects' attribute can be assigned to 'ALL' objects or it can be uniquely applied to specific objects.

Convert Partners and Contacts: Convert/Merge from Project to System Level

Project Management Menu

Search [Go]

Project: Project 1 - SUS (SUSPROJ01)

- Communication Management
- Document Management
- Subcontractor Prequalification
- Estimate Management
- Bid Management
- Budget & Cost Management
- Site Management
- Reports
- User-Defined Logs
- File Maintenance
- Security
 - Partners
 - Contacts
 - Convert Partners and Contacts**
 - User Maintenance
 - Change User LDAP Server
 - Role Maintenance
 - User Access
 - Project Roles
 - License Pools

Convert Partners and Contacts

Company: SB (DO NOT USE) - US

Project: Project 1 - SUS

☒ Show Corporate Partners and Contacts

Project Data			Corporate Data		
Code	Abbreviation	Name	Code	Abbreviation	Name
<input type="checkbox"/> KOVAX	KOVAX	Kovax Enterprises			
<input type="checkbox"/> A1DOORS	A1DOORS	A1DOORS - 'Company RRR'	<input type="checkbox"/> A1DOORS	A1DOORS	A1DOORS - 'Company RRR'
<input type="checkbox"/> ACTION	ACTION	Action Design	<input type="checkbox"/> ACTION	ACTION	Action Design
<input type="checkbox"/> AETNA	AETNA	Aetna Insurance	<input type="checkbox"/> AETNA	AETNA	Aetna Insurance
<input type="checkbox"/> ALFATECH	ALFATECH	Alfa Tech	<input type="checkbox"/> ALFATECH	ALFATECH	Alfa Tech
<input type="checkbox"/> ALTFENCE	ALTFENCE	ALT Fencing	<input type="checkbox"/> ALTFENCE	ALTFENCE	ALT Fencing
<input type="checkbox"/> AMGAS	AMGAS	American Gas Supply Co.	<input type="checkbox"/> AMGAS	AMGAS	American Gas Supply Co.
<input type="checkbox"/> ATCO	ATCO	ATCO Properties and Management Inc	<input type="checkbox"/> ATCO	ATCO	ATCO Properties and Management Inc
<input type="checkbox"/> AXIS	AXIS	AXIS Technologies	<input type="checkbox"/> AXIS	AXIS	AXIS Technologies
<input type="checkbox"/> BOWER	BOWER	Bower Design	<input type="checkbox"/> BOWER	BOWER	Bower Design

Project Data			Corporate Data		
Code	Abbreviation	Name	Code	Abbreviation	Name
<input type="checkbox"/> EW	EW	Eric Wilson	<input type="checkbox"/> EW	EW	Eric Wilson
<input type="checkbox"/> SMSUB1	SMSUB1	Simon Parrish	<input type="checkbox"/> SMSUB1	SMSUB1	Simon Parrish

Standard Treeview path: xProjects > Security > Convert Partners and Contacts

This utility is used for the following purposes:

- Convert project-only partners/contacts to System partners/contacts
- Merge duplicate project-only partners/contacts to System partners/contacts

Convert Project-Only Record to System Record

Convert Partners and Contacts

Company: CMC Construction Inc.

Project: SJOB1 Project

☒ Show Corporate Partners and Contacts

Project Data			Corporate Data		
Code	Abbreviation	Name	Code	Abbreviation	Name
<input checked="" type="checkbox"/> CG	CG	Ciare			
<input type="checkbox"/> ABSCONT	ABSCONT	ABS Contractors Ltd	<input type="checkbox"/> ABSCONT	ABSCONT	ABS Contractors Ltd
<input type="checkbox"/> ACTION	ACTION	Action Design	<input type="checkbox"/> ACTION	ACTION	Action Design
<input type="checkbox"/> AETNA	AETNA	Aetna Insurance	<input type="checkbox"/> AETNA	AETNA	Aetna Insurance
<input type="checkbox"/> AFL	AFL	American Federation of Labour	<input type="checkbox"/> AFL	AFL	American Federation of Labour
<input type="checkbox"/> AT1	AT1	AT1	<input type="checkbox"/> AT1	AT1	AT1
<input type="checkbox"/> AXIS	AXIS	AXIS Technologies	<input type="checkbox"/> AXIS	AXIS	AXIS Technologies
<input type="checkbox"/> OTTO3	OTTO3	Ot Test company	<input type="checkbox"/> OTTO3	OTTO3	Ot Test company

Project Data			Corporate Data		
Code	Abbreviation	Name	Code	Abbreviation	Name
<input type="checkbox"/> EW	EW	Eric Wilson	<input type="checkbox"/> EW	EW	Eric Wilson
<input type="checkbox"/> SMSUB1	SMSUB1	Simon Parrish	<input type="checkbox"/> SMSUB1	SMSUB1	Simon Parrish

Convert control

To convert project-only partners/contacts to System partners/contacts, check the checkboxes of the project-only partners/contacts (as shown above), then click the Convert control.

Merge Project-Only Record with Corresponding System Record

Convert Partners and Contacts

Company: CMIC Test Company Incorporated

Project: Rover project now in V10

☐ Show Corporate Partners and Contacts

Project Data			Partners			Corporate Data		
Code	Abbreviation	Name	Code	Abbreviation	Name	Code	Abbreviation	Name
<input type="checkbox"/> 201	201							
<input checked="" type="checkbox"/> 2087	2087					00000001	00000001	First Enterprise
<input type="checkbox"/> 2088	2088							
<input type="checkbox"/> 301	301							
<input type="checkbox"/> 999001	999001							
<input type="checkbox"/> AGCOMP09	AGCOMP09							
<input type="checkbox"/> AGCOMP10	AGCOMP10							
<input type="checkbox"/> AGCOMP11	AGCOMP11							

Contacts

Code	Abbreviation	Name
<input type="checkbox"/> FL	Ethan Hawke	
<input type="checkbox"/> IC	Ian Clark	

Confirm - Mozilla Firefox

dev4v10.cmic.ca:7785/cmicdevv10x/cmic/confir

This will merge the selected project partners with corporate partners. Do you wish to continue?

Yes No

Project Partner

Merge Control

System (Corporate) Partner picked from LOV

To merge duplicate project-only partners/contacts with System partners/contacts, check the checkboxes of the project-only partners/contacts (as shown above), select the duplicate System partners/contacts from the corresponding LOVs under the **Corporate Data** table (as shown above), then click the Merge control (shown above). After the merge, the duplicate project-only partners/contacts will not exist, as they were merged with the System level versions.

Addendum

Copy Function

The Copy function, which copies the current record, has been added to many xProjects screens where it had not previously been installed.

Clicking this button will open a new record and may include all information from the record that was being displayed when the user clicked 'Copy'.

Vendor Compliance Warning

Task Code	Task Name	Contracted Quantity	UOM	Rate	Amt	Previously Certified Quantity	Previously Certified Amount	Completed Quantity	Current Quantity	Current Amount	Completed Amount	Retainage %	Previous Retainage Amount	Retainage Amount	Total Retainage Amount	Previous Release Amount	Outstanding Release Amount	Release Amount
bditem7	bid item 7	140	EA	17,857	2,499.99		0.00					0	0	0	0	0	0	0

In the Daily Journal, Request for Payment and PCI Entry pages, a search can be made on vendor compliances. If the vendor is not compliant, it will be displayed with a yellow background. If the user then hovers the mouse over the yellow vendor code, a list of non-compliances will display.

Tabular Display Form Totals & Counters

http://testv10.mic.ca:7785/ - PCI Transactions - Windows Internet Explorer

Close

Phase

Company SUSJob SUS-JOB-2Phase 01Phase Name General Conditions

PCI Transactions

Type	PCI Code	Status	Reference Date	Post Date	Budgeted Quantity	WM	Budgeted Amount	Billing Amount	Vendor	Contract	SC Change	Task Id
SUSE	00-BC3	APPRV	21/Jul/2011			NA	4,500.00	0.00				
SUSE	00-BCTEST	APPRV	21/Jul/2011			NA	2,400.00	0.00				
SUSE	00-MARYAM	APPRV	15/Jun/2011			HR	2,000.00	0.00	EAGLE	SUSEAG005		
SUSE	BILLCDE	APPRV	20/Jun/2011			NA		1,200.00				
EAP	EAP01	APPRV	03/Mar/2011		22	NA	264.00	264.00				
SUSE	EXT0000008	APPRV	08/Mar/2011			NA	1,100.00	1,100.00	EAGLE	SUSEAG003		
SUSE	EXT0000024	APPRV	31/May/2011			NA	1,200.00	0.00				
SUSE	EXT0000027	APPRV	10/Mar/2011			NA	560.00	560.00	RIGOR	SUSRIG003	003	EXT-TBD4
SUSE	EXT0000029	APPRV	23/Jun/2011			NA	2,200.00	2,200.00				
SUSE	EXT0013	APPRV	20/Jul/2011			NA	1,100.00	1,100.00				
SUSE	EXT0014	APPRV	20/Jul/2011			NA	3,000.00	0.00				
SUSE	EXT0015	APPRV	20/Jul/2011			NA	2,200.00	2,200.00				
SUSE	SCOPE-AMTS	APPRV	12/Apr/2011			NA	25,000.00	25,000.00				
Total (13 rows)							45,524.00	33,624.00				

All 'log' type display forms in all JSP applications now show 'totals' counters to the bottom. The Total 'Rows' counter will appear on the left, and **Amounts** totals will be right aligned in the appropriate column fields.

Spell Checking

The Spell Check option has been added to the majority of xProjects screens where it had not previously been installed.

User Extensions

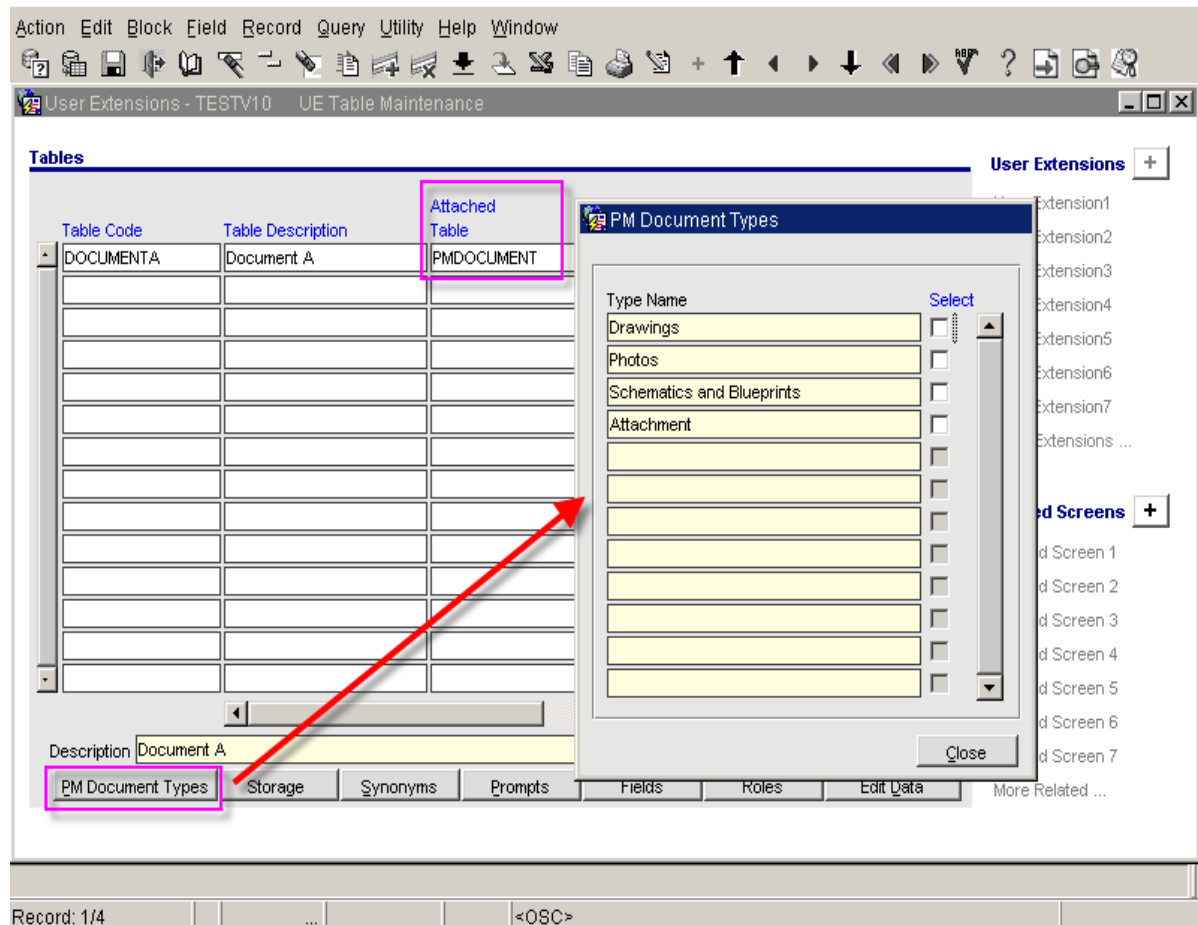
The [User Extensions] button is available on Documents, Subcontracts, Project Maintenance and Daily Journal Objects in PM JSP.

The user extensions have to be defined in System Data before they can be used in this context (standard Treeview path: *System > User Extensions*). Please refer to the System Data guide on how to define User Extensions.

Attachments (images) can be added to a user extension using the picture icon that is shown in the pop-up screen.

Attachments for a defined Document Type can also be uploaded using the 'Upload New' link. The documents created here are stored in the appropriate Document Management folders.

Limiting User Extensions (UE) on PM Documents in JSP



The UE Table Maintenance screen in Forms version has the button **[Document Types]** which will only be available when the "Attached Table" is the **PMDOCUMENT** Table. This button will open up a window that displays all document types that have been defined in the system and the user will then select which document types this UE should apply to. If there are no document types selected, then the UE will not be available for any document type in JSP PM, it will only display in document types to which it has been assigned.

Phase Segmentation

Standard Treeview path: *xProjects > File Maintenance > Company Control – Defaults tab – Phase Segmentation*

Phase Segmentation provides a mechanism to automatically build a hierarchy of phases within the Phase Master. This feature is only available in the JSP version of Project Management, and when used, is applicable to both the Bid Items and the Potential Change Item (detail section) screens via the 'create on the fly phase' pop-up feature in both screens.

The configuration fields related to Phase Segmentation are found in the **PM Control – Defaults** tab, as shown in the screenshot above. These fields are used in combination to indicate to the system how to break up the phase codes into segments and the maximum length of the total phase code.

The sum of all the numbers in the **Phase Segmentation** field must equal the **Phase Code Maximum Length**, and the segmentations are defined by a comma.

Segment Security Required – Checkbox

Segment security can be applied so that any segment other than the Last segment can be made non-updateable.

The following rules apply to phase segment security:

- If segment security is checked, when the user is in the 'Add Phase on the Fly' program, any segment other than the Last segment will not allow direct entry into the field by keyboard; the user must select the segment value from the list of values. If segment security is not active, the segment values can be selected from the LOV, as well as typed in from the keyboard.
- If segment security is checked, the Bid Item program will only allow the user to select from the list of values when entering all segments except the Last segment. In the latter case, the user can type in or select a value from the LOV. This will apply on the Add Bid Item pop-up window and the Bid Item screen itself. If segment security is not active, the segment values can be selected from the list of values, as well as typed in from the keyboard.
- If segment security is checked, the controlling phase on the 'Add Phase on the Fly' program will automatically populate and not be accessible to the user. Otherwise, the phase can be selected or typed in for the applicable segments.

Example:

1. The following phases were first defined in the JC Phase Master of CMiC Enterprise:

Phase	Name	Ctrl.Phase	Phase Type Code	Alternate	WC	VM	Active
500000	Structural Concrete	ALL		500000		NA	<input checked="" type="checkbox"/>
501100	Forming Materials & Accessories	500000		501100		NA	<input checked="" type="checkbox"/>
501110	Lumber	501100		501110		NA	<input checked="" type="checkbox"/>
501110.01	Lumber-line	501110		501110.01		NA	<input checked="" type="checkbox"/>
501110.02	Plywood	501110		501110.02		NA	<input checked="" type="checkbox"/>

When in edit mode in the JSP screen, notice that the phase field is now split into segments as defined on the control file.

To build a phase structure with the pay item 37 prefixing the phases, enter 37 in the First segment on the Bid Item Entry screen for the line item concerned.

Then select the phase from the LOV from each of the remaining segments:

Subsec	Job	Phase						Category	Phase Quantity	Phase
	SBJOB00007	37	50	11	10	.02	02			
	SBJOB00007									

Job Costing - Phase Master Maintenance

Select Company

Company

Phase Detail

Phase	Name	Ctrl.Phase	Phase Type Code	Alternate	WC	WM	Active
500000	Structural Concrete	ALL		500000		NA	<input checked="" type="checkbox"/>
501100	Forming Materials & Accessories	500000		501100		NA	<input checked="" type="checkbox"/>
501110	Lumber	501100		501110		NA	<input checked="" type="checkbox"/>
501110.01	Lumber-line	501110		501110.01		NA	<input checked="" type="checkbox"/>
501110.02	Plywood	501110		501110.02		NA	<input checked="" type="checkbox"/>

WBS Defaults

That is:

Segment 1 = 37

Segment 2 LOV - the first two characters of the lowest level phases '50'

Segment 3 LOV - the next two characters of the lowest level phases '11'

Segment 4 LOV - the 3rd set of two characters of the lowest level phases '10'

Segment 5 LOV - The last 3 characters of the lowest level phases '.01, .02,.03'

On clicking [Save], the hierarchy is created:

Job Costing - Phase Master Maintenance

Select Company

Company

Phase Detail

Phase	Name	Ctrl.Phase	Phase Type Code	Alternate	WC	WM	Active
37	Segment 37	ALL		37		NA	<input checked="" type="checkbox"/>
37500000	Structural Concrete	37		37500000		NA	<input checked="" type="checkbox"/>
37501100	Forming Materials & Accessories	37500000		37501100		NA	<input checked="" type="checkbox"/>
37501110	Lumber	37501100		37501110		NA	<input checked="" type="checkbox"/>
37501110.02	Plywood	37501110		37501110.02		NA	<input checked="" type="checkbox"/>

WBS Defaults

Category Detail

Phase	Category	Name	Ctrl.	Active
37				<input checked="" type="checkbox"/>

3. Updating the JC Budget with the New Phases

To create the phases at the Job Level, use the [Update Budget] button in the Bid Items screen.

4. PCI Entry – Adding Phases ‘on the fly’ popup

The functionality works the same as in the Bid Item screen. The new phase hierarchy is created in the same way as described above.

The screenshot shows the 'Potential Change Item' form with a 'Phase' popup. The popup has fields for 'Phase' (Name: Phase Code currently not valid), 'Controlling Phase' (NOT_VALID), 'Quantity', and 'Category' (Name: Phase Code currently not valid). The 'Phase' field is highlighted in blue. The 'Category' field is also highlighted in blue. The 'Phase' field is currently empty, and the 'Category' field is currently empty. The 'Phase' field is currently empty, and the 'Category' field is currently empty.

In the PCI Detail, the Phase LOV [Add New] button displays the ‘Add Phase on the Fly’ popup, showing the Phase in the segments defined in the PM Control. Enter the Pay Item in the first segment, and select the remaining segments from the LOVs.

When segmentation is in use the Phase LOV is separated into two sections: ‘Phases Assigned to Project (Via Job)’, and ‘Master Phases’.

Complete the popup and [Save]. The save action builds the hierarchy, which can be verified in the JC Enter Cost Code screen:

* Cost Code	* Name	Ctrl. Cost Code	Cost Code Type Code	Alternate	WC	* WM	Active	Add/Remove Categories	Category Detail	Altern
03-200	Architectural Concrete	03		03-200		NA	Y	Add/Remove Categories	Category Detail	Alter
04 0000	MASONRY	ALL		04 0000		NA	Y	Add/Remove Categories	Category Detail	Alter
04 0500	Masonry	04 0000		04 0500		NA	Y	Add/Remove Categories	Category Detail	Alter
04 0510	Masonry - Mortar & Grout	04 0000		04 0510		NA	Y	Add/Remove Categories	Category Detail	Alter
04 4000	Masonry - Stone	04 0000		04 4000		NA	Y	Add/Remove Categories	Category Detail	Alter
04 8888	Masonry - Overhead	04 0000	RECOVERABLE	04 8000		NA	Y	Add/Remove Categories	Category Detail	Alter
07	Wood Working	ALL		07		NA	Y	Add/Remove Categories	Category Detail	Alter
07-100	Rough Carpentry	07		07-100		NA	Y	Add/Remove Categories	Category Detail	Alter
08	Adjustment Phase	ALL		08		NA	Y	Add/Remove Categories	Category Detail	Alter
08-100	Adjustment - Groups	08		08-100		NA	Y	Add/Remove Categories	Category Detail	Alter
08-200	Adjustment - Contract	08		08-200		NA	Y	Add/Remove Categories	Category Detail	Alter

Pgm: JCPHSMST; standard path: JC > Setup > Local Tables > Enter Cost Code

Program Security - Assign Phase/Category ‘on the fly’

Security can be applied to a User Role to 'Assign Phase/Cat on the Fly'. By default, this is un-checked. When checked, it allows the user to access the Quick Phase/Category pop-up via the [Add New] button

when creating phases/categories 'on the fly'. This is an added security feature to the JSP functionality only. Therefore, having the Forms privilege JCPHSINS is not sufficient to allow a user to create phase/category 'on the fly' in JSP... he/she must have access to the **program** on the outset.

NOTE: When the list of values for a phase code first appears in the PCI Detail, the list is limited to the list of phase codes currently available on the job. If the user selects the [Add New] button, then the full phase master list appears.

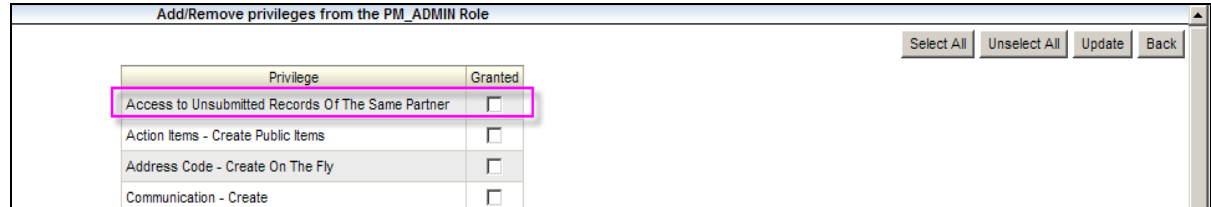
NOTE: The CMiC Enterprise Systems Option (Projects tab) has a flag “**Do Not Add ‘Created On The Fly Phases’ To Phase Master**” which when checked, will not add phases that are created 'on the fly' to the Phase Master. This applies to those created in PM JSP as well as Forms.

Classifiers in JSP Logs

Classifier values and/or classifier descriptions have been added to a number of JSP logs: Issue, Addendum, Bid Packages, PCI, Communications, Project Contact Directory, Project Partner Directory, Daily Journal, Field Work Directives, Notices, Project Maintenance, Submittals, Submittal Packages and RFIs.

NOTE: It is possible that system performance will deteriorate with heavy usage of this functionality.

Privilege to see Pending (Un-submitted) PM Objects



Privilege	Granted
Access to Unsubmitted Records Of The Same Partner	<input type="checkbox"/>
Action Items - Create Public Items	<input type="checkbox"/>
Address Code - Create On The Fly	<input type="checkbox"/>
Communication - Create	<input type="checkbox"/>

The security role or user access privilege “**Access to Un-submitted Records Of The Same Partner**” will allow the user to see the pending objects of another user from the same company they work for.

A user with a security role that has the 'Admin' flag checked will be able to see any pending objects.

An internal pending Issue that belongs to another partner will NOT be accessible even if the user has the 'Admin' flag checked on his/her role.

When the user accesses a PENDING record of another user, he/she should be able to edit, delete, submit, etc., the record provided the user has the PM Role privileges to execute these actions.

The PM objects affected by this change are Meeting Minutes (PM and Delivery Management), Transmittals, Communications (PM and Delivery Management), Issues, RFIs, Daily Journals, Punch Lists, Field Work Directives, Notices and OC Transmittals.

WARNING: In order for these modifications to take effect, it must be ensured that the supplied "system" WHERE clause for each and every log is being used and has not been overridden (customized). Should it have already been overridden, the user will need to reset their WHERE clause to the SYSTEM one and re-apply their own customizations on top of that.

Field Security for [Printable] Button

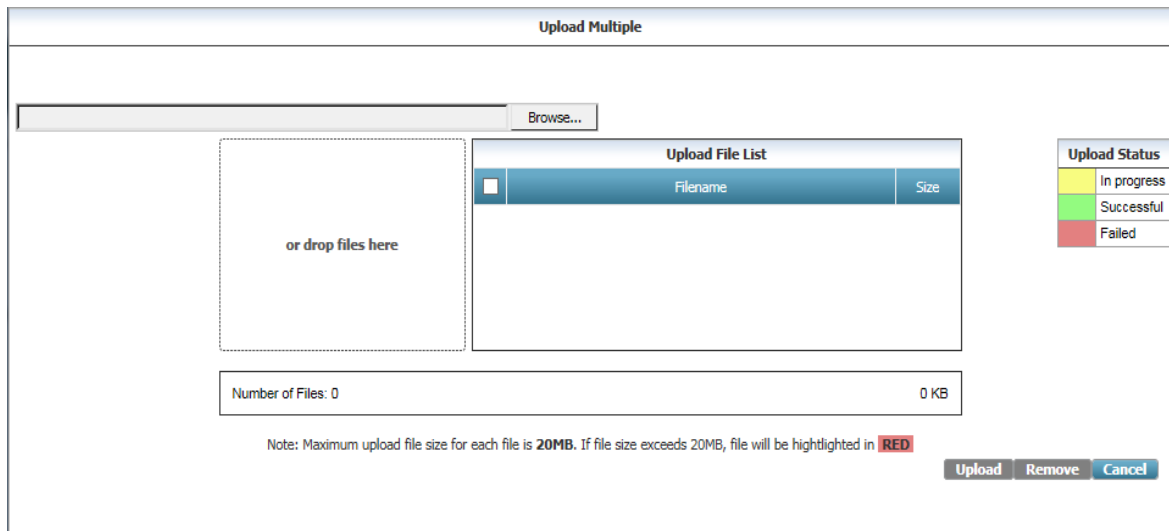
Field security can be applied to the **[Printable]** button which is available in the Communications, Meeting Minutes and Punch List programs. The possible settings are 'Unrestricted' or 'Hidden'.

Multiple Document Upload

PM JSP has been enhanced to allow for uploading multiple documents at one go, in the PM objects that have Attachments tab, or the Upload button (Transmittals). In addition, changes have been made to not have the **[Upload New]** button as part of the 'Add Attachment' pop-up. Now, there are three buttons for adding attachments: **[Upload Multiple]**, **[Upload New]** and **[Add Attachment]**. The latter two are for single document uploads – the underlying functionality for which has not changed.

[Upload Multiple] – Button

Clicking on the **[Upload Multiple]** button displays a pop-up window which is used to select the documents to be uploaded.



Upload Status	
In progress	
Successful	
Failed	

In addition to selecting files to upload using the **[Browse]** button, the user can drag and drop files from an open file folder into the area shown.

The Upload Status is a legend to show the status of the files while they are loading and at the end of the initial load.

Upload Multiple

or drop files here

Browse...

Upload File List		
<input type="checkbox"/>	Filename	Size
<input type="checkbox"/>	10-08-2015 3-23-54 PM.pdf	79 KB
<input type="checkbox"/>	10-08-2015 4-35-00 PM.pdf	164 KB
<input type="checkbox"/>	11-08-2015 2-11-17 PM.pdf	79 KB
<input type="checkbox"/>	11-08-2015 4-09-07 PM.pdf	59 KB

Number of Files: 4
381 KB

Note: Maximum upload file size for each file is **20MB**. If file size exceeds 20MB, file will be highlighted in **RED**

Upload
Remove
Cancel

Upload Status	
	In progress
	Successful
	Failed

To remove a file, select it by checking the checkbox beside the filename and then click [**Remove**].

Click the [**Upload**] button to bring the files into the next display window where you can modify the document type as well as the values of the document records to be created. You can also delete a record here.

http://testv10.cmic.ca:7785/?docObjectType=PMFWD&docObjectOraseq=2485766&uid=f2d288a2-3f3d-4955 - Windows Internet Explorer

Enter Additional Fields
Proceed
Close

Select Document Types				
No.	Name	Type	Has Mandatory Fields	Action
1.	00- Ticket Adjustment testing - .doc	-- Please Select a Document Type --	<input type="checkbox"/>	X
2.	00-action item.jpg	-- Please Select a Document Type --	<input type="checkbox"/>	X
3.	00-Attach-edit.msg	-- Please Select a Document Type --	<input type="checkbox"/>	X

Done

If any document record has mandatory fields, the [**Proceed**] button will be inactive, and the flag will be checked. Use the [**Enter Additional Fields**] button to edit the upload and make the adjustments before proceeding.

Use the 'X' to remove any record that you do not want in the current upload, when you proceed. It **does not** remove the file that was initially uploaded – use the [**Remove**] button on the 'Upload Multiple' pop-up screen to do this.

The [**Proceed**] button will complete the upload process.

[**Enter Additional Fields**] – Button

Use the [**Enter Additional Fields**] button to display the interface for modifying the fields:

http://testv10.cmic.ca:7785/ - Upload Multiple Documents - Windows Internet Explorer

Enter any additional fields required and press Save to continue Save Close

Add Multiple

1. "00- Ticket Adjustment testing - .doc" - Attachment

Number Title

From Contact To Contact

Copies Status

Tester Name

Revision Info

Designer Ref.	Revision Date	Received Date	Status	Description	Attachment
<input type="text"/>	150811	150811	Open	Original Version	00- Ticket Adjustment testing - .doc

2. "00-action item.jpg" - Drawings

Number Title

Copies Status

Bulletin Category Design

Designer Section Section

Received

Example of pop-up window launched from [Enter Additional Fields] button

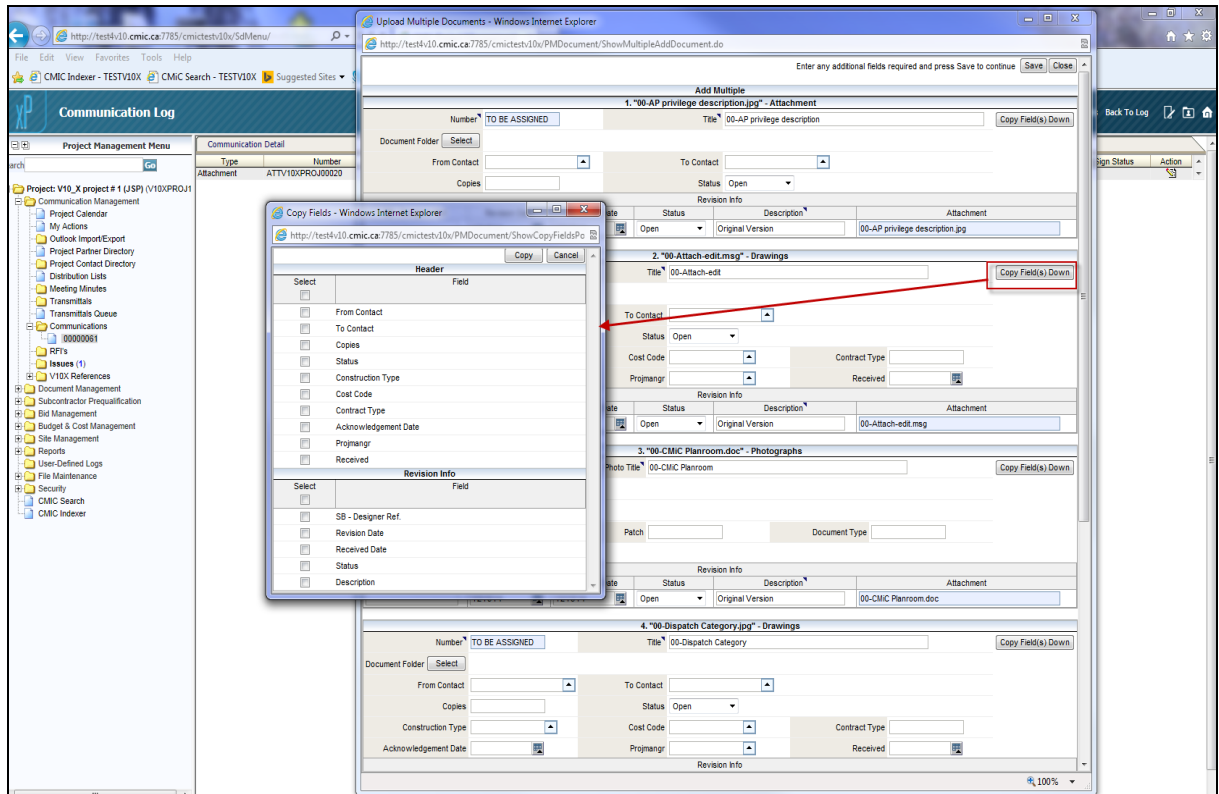
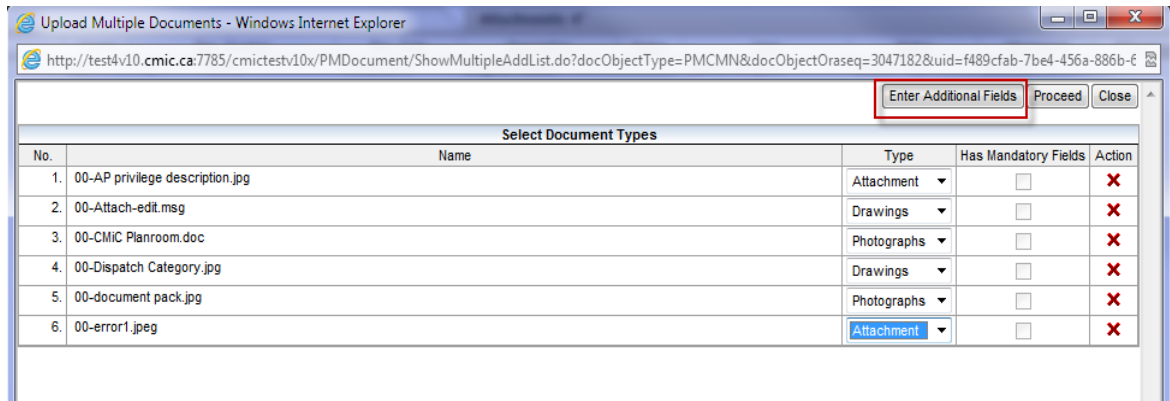
Make any necessary corrections and then click [**Save**]. The saving procedure completes the upload.

NOTE: Documents brought in with [**Upload**] are not cleared from the ‘Select Document Types’ pop-up box unless the documents are posted to the PM object with either [**Proceed**] or [**Save**], or by any of the single upload options, or until the Attachments tab is refreshed.

CAUTION: Running any Forms browser sessions while using the [**Upload Multiple**] feature in PM JSP may terminate all browser sessions.

[Copy Fields Down] – Button

For Documents, CMiC has added the ability to **copy down** from one record to one or more records of the same document type, in the Multiple Upload - Enter Additional Fields screen:



Example of pop-up window launched from [Copy Field(s) Down] button

When the [Copy Fields Down] button is clicked, a pop-up window is displayed with checkboxes against every field in the header and detail section for the document type where the user is. The user selects the fields to be copied and clicks the [Copy] button. The system will then perform the copy down function for all selected fields for the same document type records **below** the current record.

During the copy process, any fields that are being copied over will be overridden if the field already some value in it.

All fields except for the file name and the document number (for any selected document type) will be able to be selected and to be copied.

The descriptions that show for the fields on the copy screen are the names as defined by the user (if the standard labels are changed via Prompt Maintenance). For example, if the user renames “Designer Ref” to “SB Designer Ref” then the latter is the name that will show in the Copy window.

Multiple Reports Printing

The reports printing functionality has been enhanced to give the user the flexibility of printing a single report (form letter), or **multiple reports** (form letters) and attachments, the latter option producing a single PDF file with all the reports and attachments as pages of that file. The file types that are currently applicable are 'BMP', 'PDF', 'IMG', 'JPG', 'JPEG', 'PNG', 'TIFF'.

Printing Multiple Reports at one go is controlled by the PM Systems Options flag '**Multiple Reports Printing**' (standard Treeview path: *xProjects > File Maintenance > Project System Options – General tab*).

When the [**Print Report**] button in any PM JSP screen is clicked, the pop-up window displays the 'Print Multiple Reports' link:

The [**Print**] button allows the conventional single report printing.

The '**Print Multiple Form-Letter**' link will take the user to a selection screen where all the report types are listed with an 'Include Attachments' checkbox, if the user wishes to print the attachments as well:

	Type	Code	Name
<input type="checkbox"/>	Conversation Record		
<input type="checkbox"/>	Speed Memo		
<input type="checkbox"/>	Enter Communication Log		

☐ Embed Attachments

Click on each link to expand the list for each report type and make your selection:

	Type	Code	Name
<input checked="" type="checkbox"/>	Conversation Record		
<input checked="" type="checkbox"/>		PM1000_STD	Conversation Record - Standard
<input checked="" type="checkbox"/>		NEW	New Conversation Record
<input checked="" type="checkbox"/>	Speed Memo		
<input checked="" type="checkbox"/>		PM1010_STD	Speed Memo (Standard)
<input checked="" type="checkbox"/>	Enter Communication Log		
<input checked="" type="checkbox"/>		PM1100_000	MASTER FL - Communication Log (PMCOMMLG)
<input checked="" type="checkbox"/>		PM1100_001	Conversation Record (PM1100_001)

☒ Embed Attachments

Click **[Accept]**. The next pop-up window shows the reports selected and the attachments (if the 'Include Attachments' flag is also checked):

Order Multiple Form-Letters					Cancel	Save	Accept
	<input type="checkbox"/>	Type	Code	Name			
⌕	<input checked="" type="checkbox"/>	Conversation Record	PM1000_STD	Conversation Record - Standard			
⌕	<input checked="" type="checkbox"/>	Speed Memo	PM1010_STD	Speed Memo (Standard)			
⌕	<input checked="" type="checkbox"/>	Conversation Record	NEW	New Conversation Record			
⌕	<input checked="" type="checkbox"/>	Enter Communication Log	PM1100_000	MASTER FL - Communication Log (PMCOMMLG)			
⌕	<input type="checkbox"/>	Enter Communication Log	PM1100_001	Conversation Record (PM1100_001)			

Select/Deselect the reports and attachments to be printed (or excluded).

The **[Save]** button saves your settings in case you decide to **[Cancel]** and go back to the previous window, or if you change your mind about printing, but you want to keep the settings that you make.

The ⌕ icon is used to re-position a report or attachment to a desired location before printing. The order of printing is from top to bottom.

NOTE: If you restart the printing session, only the **report selections** that were previously saved will remain intact....you will need to **re-select the attachments** to include.

Click the **[Accept]** button to proceed with printing your selection:

Report Config

Print Server

test

Destination

Preview with attachments

Name

Format

PDF

Print Blank Letter

☐

Run Report

Close

You can always Preview your print before finally sending it to the printer or other output media (email, fax etc.).

Report Security

Report Security set in the Reports Assignment screen also applies to the printing of multiple reports.

Merging Attachments after Generating the Report

Select Multiple Form-Letters

Accept

Close

<input type="checkbox"/>	Type	Code	Name
	Subcontract Document		
	Modifications to Subcontract		

☐ Include Attachments
 ☐ Merge Attachments after Report

There is an additional flag in the Print Multiple Form Letter screen to '**Merge Attachments after Report**'. This option involves a new process to add the valid attachments (PDF, JPG, PNG, BMP, JPEG, TIFF) to the report generated. All 'converted' attachment types will have their original state and should retain the markups as well.

NOTE: When this new flag is un-checked, the Print Multiple Form Letter functionality will function in the original way outlined above.

The screenshot shows a web application window titled 'Form Letter - Internet Explorer'. The address bar displays 'http://qa4v10.cmic.ca:7785/cmcp'. The main content area contains a form with the following fields and controls:

- Print Server:** A text input field.
- Destination:** A text input field with a context menu open over it. The menu options are: Preview, Preview with Cold Storage, Printer, File, E-Mail, Fax, Cold Storage, Preferred Contact Method, and **Preview with attachments** (highlighted).
- Name:** A text input field.
- Format:** A dropdown menu currently set to 'PDF'.
- Print Blank Letter:** An unchecked checkbox.
- Merge Report & Attachments:** A checked checkbox.

At the bottom of the form, there are two buttons: 'Run Report' and 'Close'.

When the 'Merge Attachments after Report' flag is checked, valid destinations are 'Preview with Attachments' and 'Email' only. Also note that with the 'Email' option you will need to select the attachments in the 'Email Information' pop-up display (see below), and this will add an additional report (report+attachments.pdf) to the Email, which is the merge: report + attachments:

Document Name	File Name	
00-CMiC	00-CMiC	<input type="checkbox"/>
00-Dispatch Category	00-Dispatch Category.jpg	<input checked="" type="checkbox"/>
00-error1	00-error1.jpeg	<input checked="" type="checkbox"/>
2uo4212	2uo4212.png	<input checked="" type="checkbox"/>
A1-2 Site Plan	A1-2 Site Plan.pdf	<input checked="" type="checkbox"/>
R2LOGO	R2LOGO.jpg	<input checked="" type="checkbox"/>

Screen Editor

This feature allows the user to set up field security and prompt maintenance for JSP programs (such as Communications, Submittal, Issues, Daily Journal, etc.) in one screen without going to the Prompt Maintenance or Field Security programs directly. That is, the user can perform these actions and affect the updates without leaving the active program. The changes take effect right away.

NOTE: Not all programs have fields available with field privileges.

The prompts that appear in the Screen Editor are all the prompts for fields and messages that are used by the program.

Screen Editor performs two kinds of Update as well:

- Initialize (previously labelled as 'Update to Database')
- Update

Screen Editor

Initialize Update Refresh

Roles: SMMASTER

*Note: Not all programs have fields available with field privileges

System Name	Security Level	Item Prompt
From Contact	Unrestricted	
Add To Change	Unrestricted	
Printable Button	Unrestricted	
Link to Issue	Unrestricted	
Add Attachment	Unrestricted	Add Attachment
Add New	Unrestricted	Add New

Example of pop-up window launched from Screen Editor Icon

[Initialize] – Button

Allows the User to update all the prompts in Screen Editor whether they have been edited or not.

[Update] – Button

Allows the User to update only those prompts in Screen Editor which he/she has edited.

In both cases, the prompts are added/updated in Prompt Maintenance. They are added in the case where they have no existence for the program name in Prompt Maintenance records, and are updated in the case where they have existence for the program name in Prompt Maintenance records.

Prompt Maintenance Integration

To add or remove fields, this has to be done by selecting or clearing the appropriate program from the field record in Prompt Maintenance:

Project Management

Message Maintenance

Required fields are indicated with a blue triangle (*)

Message Key* Reference_Key* Message* User* Project* Program* Submittal* Locale* en [Add] [Cancel] Query Mode

Message Key	Reference_Key	Message	User	Project	Program	Locale	Action
Current_Responsibility		Current Responsibility			PMSBI	en	[Edit] [Delete]
Submittal_Id		CMC Submittal Identification			PMSBI	en	[Edit] [Delete]
submittal_id		Submittal ID			PMSBI	en	[Edit] [Delete]

Standard Treeview path: xProjects > File Maintenance > Prompt Maintenance

Index

A

Add Attendees	36
Adding a Item to the Calendar	21
Adding a New Document	75
Adding a Note to a Revision.....	77
Adding a Potential Change Item	126
Adding a Revision	76
Adding Contacts on the Fly	17
Adding Contacts to a Project	350
Adding Information to the Journal	194
Adding Log Records to the Treeview.....	10
Adding/Modifying Links and Hints	341
Adding/Removing Fields.....	341
Answering an RFI.....	52
Attachments.....	12

C

Changing the Order.....	341
Collaboration Manager.....	3
Collaboration Security	347
Collaboration Suite	1
Communication Logs	48
Communication Management.....	21
Completing the Setup Process	348
Create a New User.....	347
Creating a Collaboration User	347
Creating a Communication Record	48
Creating a FWD.....	215
Creating a New List	31
Creating a New Meeting.....	33
Creating a Notice	216
Creating a Punch List.....	208
Creating a Subcontract	150
Creating a Subcontract Change Order	162, 163
Creating a Submittal.....	61
Creating an RFI	51
Creating the Contract Header.....	150
Customizing Your Workspace.....	339

D

Daily Journal	191
Deleting a Communication Record	49
Deleting a Daily Journal.....	203
Deleting a PCI	139
Deleting a Transmittal.....	46
Deleting an RFI	52
Deleting an RFP.....	181
Distribution Lists	30
Documents	75

E

Editing a Saved Communication Record	49
Editing a Saved RFI.....	52
Editing a Saved Transmittal.....	46
Editing an Existing List.....	31
Editing an RFP	181
Enter Meeting Notes	37
Entering a New Requisition.....	170
Entering a Transmittal.....	43
Entering Issues.....	58
Entering Meeting Minutes	36
Entering Payment Requisitions	170

F

Field Work Directives	214
-----------------------------	-----

I

Importing the Schedule of Values	157
--	-----

L

Linking/Creating a PCI from a Communication Record.....	49
Linking/Creating a PCI to Objects	20

M

Managing Budgets and Costs	123
Managing Documents	60
Managing Meeting Minutes.....	32
Manually entering Schedule of Values.....	155
Modifying the Title and Alignment.....	341

N

Notes.....	11
------------	----

O

Online Bid Entry.....	85
Overview - Collaboration Manager.....	3
Overview - Collaboration Suite	1
Overview - Customizations	233, 339
Overview - Document Management.....	60
Overview - Online Bid Entry.....	85
Overview of Communication Management	21
Owner Change Orders.....	123

P

Printable Pages	227
Printing a Punch List.....	211
Printing a Report.....	228
Printing a Transmittal Record.....	46
Printing PCI Reports	142
Printing Reports.....	227
Printing the Journal	203
Project Calendar	21
Project Directory.....	27
Project Role Definition.....	360
Punch List Log	205

R

Responding to a Communication	49
Reviewing Addendum's.....	113
Reviewing Bid Packages	106

S

Security	1
Selecting Multiple Contacts.....	16
Selecting/Using Contacts.....	16
Setting Your Project.....	4
Site Management	191
Sorting Log Information.....	9
Standard Icons	2
Subcontractor SOV	156
Submittal Log	60

U

Updating a Punch List.....	209
Updating Existing Items.....	37
Updating Other Contract Info	159
Updating Your User Profile.....	6
User Extensions	342
Using a Distribution List	31
Using Logs	8
Using Notes and Attachments.....	11
Using Query Filters on Logs.....	10

V

Viewing an RFP.....181

W

Working with RFI's.....50
Working with Transmittals.....43
