

ORACLE[®]

PRIMAVERA

**Contract Management User's Guide
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Oracle Primavera Contract Management User's Guide

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Preface

In This Section

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Contract Management Module Documentation

For the most up-to-date versions of all manuals and technical documents related to installing, administering, and using Contract Management, go to:

http://download.oracle.com/docs/cd/E23619_01/index.htm

Contract Management Installation and Configuration Guide for Oracle

This document explains how to install the module for Oracle, and how to convert data from previous versions. The network or database administrator responsible for the initial installation of the module, ongoing maintenance of the system and database, and general troubleshooting should read this manual.

Contract Management Installation and Configuration Guide for Microsoft SQL Server

This document explains how to install the module for Microsoft SQL, and how to convert data from previous versions. The network or database administrator responsible for the initial installation of the module, ongoing maintenance of the system and database, and general troubleshooting should read this manual.

Contract Management User's Guide

This document explains how to manage and monitor documents from initial contracts through the last change order. All individuals who use the module should read this guide, even if they are already familiar with previous versions of the software.

Contract Management Help

This is an integrated comprehensive help system that supplements the printed documentation. Help is available while you are working in the module for quick access to information about dialog boxes and fields. Help also includes step-by-step procedures for performing the module functions and answers to common questions. The Table of Contents provides a starting point for many major topics. You can also use Help's Search and Index features to find topics related to any text you enter. Click How To for a list of all procedures contained in Help.

See the online help for the latest Contract Management information. Use it as your primary source of information.

Contract Management Web Services Administrator's Guide

This document provides information on the services and operations supported by Contract Management Web Services.

Contract Management Web Services Programmer's Guide

This document provides information on how to use Contract Management Web Services.

Other Documentation

The Contract Management physical media or download location contains additional information in the folder, \documentation.

Tested Configurations

Lists the configurations that have been tested and verified to work with Primavera Contract Management 14.0, Business Intelligence Publisher Edition. The network administrator/database administrator and Contract Management administrator should read this document.

Note: Several areas of Contract Management are customizable, such as the Project View, document names, log column headings, and document field labels. The examples throughout this manual and in the online help use the default settings shipped with the software.

Where to Get Training

To access comprehensive training for all Primavera products, go to:

<http://education.oracle.com>

Oracle Learning Library

The Oracle Learning Library (OLL) provides online learning content covering Primavera products. Content includes whitepapers, videos, tutorials, articles, demos, step-by-step instructions to accomplish specific tasks, and self-paced interactive learning modules.

To access the learning library's Primavera content, go to:

<http://www.oracle.com/oll/primavera>

Where to Get Support

If you have a question about using Oracle products that you or your network administrator cannot resolve with information in the documentation or help, click <http://support.oracle.com/>. This page provides the latest information on contacting Oracle Global Customer Support, knowledge articles, and the support renewals process.

Contract Management integrates with different Oracle applications; when you create a Service Request, be sure to open the request with the proper Support team. To ensure you reach the proper Support team, enter the correct product information when you create the Service Request. Each product has its own support line.

- ▶ Use the **Primavera Contract Management** support line when you are having installation, configuration, connection, or application issues related to Contract Management.
- ▶ Use one of the following support lines when you are having installation or configuration issues that do not relate to Contract Management.
 - ▶ Oracle WebLogic Server
 - ▶ Oracle Server
 - ▶ BI Publisher
 - Repository Creation Utility
 - ▶ Oracle Universal Content Management
 - ▶ Oracle Access Manager
 - ▶ Primavera P6 Enterprise Project Portfolio Management
 - ▶ Oracle AutoVue

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/us/support/contact-068555.html> or visit <http://www.oracle.com/us/corporate/accessibility/support/index.html> if you are hearing impaired.

Finding the Contract Management Master Note with Oracle Technology Network

Master Notes link to the most commonly accessed Knowledge Base Solutions for each product. They are a great place to start if you have a question which is not answered in this document.

To view Master Notes for Contract Management:

- 1) Log into **My Oracle Support** (<https://support.oracle.com>).
- 2) On the **My Oracle Support** navigation bar, click the **Advanced** link.
- 3) In the **Advanced Search** dialog box:
 - a. In the **The exact phrase** field, enter **Master Note**.
 - b. In the **Related to the Product** field, enter **Primavera** then select Contract Management from the list.
 - c. Click **Search**.

About this Manual

Anyone who will be using Contract Management to track projects should use this manual. This includes owners, construction managers, general contractors, subcontractors, architects, designers, engineers, administrators responsible for setting up the module, and persons who will enter data. Whether you are an experienced user or are new to the program, the User's Guide contains the information you need to use the module to organize all your projects successfully.

| Part | Contents |
|---|---|
| <i>Getting Started</i> | <i>Provides an introduction to Contract Management, including workflow, the module workspace, sample projects, and the initial steps required to plan and add a project. Instructions are included for setting access rights, entering contacts, creating distribution lists, entering initial contract information, creating submittals, and linking with a P6 Enterprise Project Portfolio Management schedule.</i> |
| <i>Working with a Contract Management Project</i> | <i>Explains how to work with, and customize, the module log and document windows, set up dictionaries and preferences, and print logs, forms, and reports.</i> |
| <i>Communicating Project Information</i> | <i>Describes how to send Contract Management module documents to other users, prepare transmittals, track different types of communications, record meeting minutes, and manage safety-related documents.</i> |
| <i>Working with Contracts, Project Costs, and Changes</i> | <i>Describes how to set up the Cost Worksheet, manage contracts and purchase orders, use trends, prepare requisitions for payment, record invoices, use the Change Management module to customize the workflow for your company's needs, use procurement to track bidding, and create and track issues.</i> |
| <i>Logging and Tracking Information</i> | <i>Illustrates how the module logs and tracks important project information such as drawings, submittals, materials, daily reports, insurance certificates, and punch lists.</i> |
| <i>Exchanging Contract Management Data</i> | <i>Describes how to link schedule data to the module, exchange module data with a P6 Enterprise Project Portfolio Management schedule, and export/import data to and from other applications.</i> |

Getting Started

In This Section

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About Contract Management

Contract Management is a document management tool designed to help you manage your projects more easily. From submittals to change orders, all the facts about your project are at your fingertips.

This manual shows you ways to plan and create a project in Contract Management, and how to manage that project by logging and tracking project information, using meeting minutes, transmittals, contracts, purchase orders, requisitions, change orders, and so on. You will learn how to exchange data between the module and other programs, and identify the best methodology for tailoring the control process to your workflow.

Contract Management enables you to transfer documents electronically between users to speed and simplify exchanges between project participants.

Starting Contract Management

Users access Contract Management from a client browser, there is no client software to install. The Contract Management administrator provides a web address to users for accessing Contract Management. To connect, open Microsoft Internet Explorer or Mozilla Firefox, and type the web address of the Contract Management Web Server provided to you.

The Contract Management administrator usually provides user names and passwords.

To log in to Contract Management:

- ▶ Enter your user name and password, and click **Login**.

To change user names and passwords, click the topic below that applies to you:

- ▶ **Administrators Created Prior to Installing Contract Management 14.0, Business Intelligence Publisher Edition** (on page 18)
- ▶ **Administrators with New Installations of Contract Management** (on page 18)
- ▶ **Users Created Prior to Installing Contract Management 14.0, Business Intelligence Publisher Edition** (on page 18)
- ▶ **Users Created in Contract Management 14.0, Business Intelligence Publisher Edition or Later** (on page 19)

Administrators Created Prior to Installing Contract Management 14.0, Business Intelligence Publisher Edition

If you are signing into the Contract Management 14.0, Business Intelligence Publisher Edition Administration Application with an administrator user name and password from a previous version, you must enter your user name and password in all uppercase letters the first time you log in.

Once successfully logged into the Administration Application, you can change your password.

- 1) Click **Administrator IDs**.
- 2) On the Administrator IDs page, click the **Edit** icon for the ID you want to update.
- 3) On the Administrator IDs & Passwords page, select the **Change Password** option and enter a new password in the **Password** field. The new password can be uppercase, lowercase, or a combination of the two. Click **Save**.

Administrators with New Installations of Contract Management

If Contract Management is a new installation, sign into the Contract Management Administration Application with the default administrator user name and password. (The default is *expadmin* for both the user name and password.)

Once successfully logged into the Contract Management Administration Application, you can change your password.

- 1) Click **Administrator IDs**.
- 2) On the Administrator IDs page, click the **Edit** icon for the ID you want to update.
- 3) On the Administrator IDs & Passwords page, select the **Change Password** option and enter a new password in the **Password** field. The new password can be uppercase, lowercase, or a combination of the two. Click **Save**.

Users Created Prior to Installing Contract Management 14.0, Business Intelligence Publisher Edition

If your user was created in a version of Contract Management prior to the installation of Contract Management 14.0, Business Intelligence Publisher Edition, you must enter your user name and password in all uppercase letters the first time you log into Contract Management version 14.

After you successfully login, you will be prompted to change your password. When changing the password, enter your old password in all capital letters. The new password can be uppercase, lowercase, or a combination of the two.

You can contact your administrator to change your user name. If you do not change your user name, you will need to enter your user name in all capital letters every time you log in.

Users Created in Contract Management 14.0, Business Intelligence Publisher Edition or Later

If your user was created in Contract Management 14.0, Business Intelligence Publisher Edition or later, you must enter your user name and password exactly as assigned the first time you log into Contract Management version 14. After you successfully login, you will be prompted to change your password. The new password can be uppercase, lowercase, or a combination of the two.

Contract Management Overview

Contract Management is a multi-user, multi-project application that provides a centralized way to store, organize, and track project information that enables users to keep contracts on time and within budget.

Record Contracts and Purchase Orders:

Contract Management enables you to record key information about contracts and purchase orders (POs) in the following documents.

Contracts and Purchase Orders: Use these documents to record the basic information.

Cost Worksheet: Use this document to track contract costs and categorize contract or purchase order amounts using cost codes for a detailed breakdown of the component costs for your project. You can distribute the value of any contract, purchase order, or change to any number of cost codes.

Invoices/Requisitions: These documents are generated from contracts/purchase orders (POs), and then sent for payment approval. The amounts are posted to the Cost Worksheet to track actual costs.

Materials Delivery: Use these documents to record the date and quantity of materials received and noted against each contract or purchase order. Then incorporate these and approved changes into requisitions for up-to-date payment amounts.

Companies: These documents contain physical and electronic addresses and communications numbers for all individuals with whom you interact. The module uses this information when you send any contract, purchase order, or other information to those individuals.

Trends: These documents are an expectation of future costs (estimated revisions). Use trends in conjunction with the Cost Worksheet (where you can modify column headings to accommodate the way you handle costs) to track possible cost increases for the project.

Track Contract Changes:

After participants accept a contract or purchase order and work begins, any changes resulting from changed specifications or changed conditions will affect the initial contract. You can use the following to help track the changes.

Change Management: Use these documents to manage project modifications due to changes. You specify which change documents are created, when they are created, and where they are calculated on the Cost Worksheet. By recording all necessary contract, contractor, and cost data early in the change process, you can evaluate the effect of the change on all contracts involved and see the current status of the change at a glance.

Markup: This functionality provides a way to manage overhead and profit by adding markup values to change documents. The module can calculate overhead and profit automatically, and add additional costs to change orders and proposals. You can set default values for overhead, profit, and any other markup categories you create. Typically you will collect all proposals from committed parties, and then roll the costs and codes of each document to create a quote to the customer or owner of a project. With markup, you can add your overhead and profit prior to submitting the quote.

Daily Reports: These documents provide a record of daily activities and conditions. Use these reports to record conditions observed in the field, such as soil, rock, or underground utilities that were not moved correctly, as well as to track and communicate the potential effect of these recorded conditions in a timely manner. You can also include underway activities from Contract Management module schedules that are linked to the project to see where the work is taking place on that report day.

Telephone Records, Meeting Minutes, Correspondence, Requests for Information (RFIs), and Notices: Use these documents to record information that may affect both the submittal and change processes. For example, a change in condition may result in meetings, phone calls, notes, letters, and correspondence that lead to a formal contract change.

Change Orders: These documents result from changes in the scope of work, site conditions, or schedule delays. You can post costs associated with changes to the Cost Worksheet so you have a total financial picture of past events and projected future costs. With this view, you can measure the impact of each change order on any contract or purchase order.

Track Submittals:

Submittals: These documents include contract drawings, sample materials, and permits that need approval. Submittals help you ensure contract compliance by tracking who received what and when they received it.

Daily Reports, Telephone Records, Meeting Minutes, Correspondence, RFIs, and Notices: These documents also support the submittal process. For example, during a submittal cycle a reviewer may reject a submittal; as a result, the project team may have meetings and exchange phone calls, letters, and correspondence to clarify the requirements for resubmittal.

Drawings and Drawing Sets: These documents maintain a list of project drawings, facilitate the dissemination of these drawings to other parties, and provide information about the status of revisions. When you add distributions to drawing sets or create revisions, an entry is made in the Transmittal Creation Queue for each contact on the distribution list.

Transmittals: These documents accompany documents, such as submittals and drawings to create a permanent record of the actions taken. Submittal items and drawing revisions are automatically placed in the Transmittal Queue; you can add any transmittals in this queue to the database and print them for recipients on your distribution list. The module can quickly generate transmittals, or you can customize your own.

Dunning Letters: These documents remind participants of overdue items such as submittals and drawings. Contract Management can quickly generate dunning letters, or you can customize your own.

Reports and Forms: These documents provide quick and accurate project information in various formats. The flexible reporting feature produces reports that summarize when items such as submittals are due, who received what and when, what has been approved and what is pending, and how many days an item is overdue.

Use the Cross-Document Tools:

The *Issues* feature cross-references and links documents from any Contract Management module log to issues you define. You can link documents to issues directly as you add records to the documents, or you can link documents to issues automatically based on keywords such as *underground*, *electrical*, or some other item that may be related to a problem or other situation. The module then assembles the documents for review in a fully organized, indexed list so you can easily trace the sequence of actions taken, saving hours of work.

The inbox stores items sent to you electronically by other participants. You can also use this feature to communicate quickly with other project team members by sending documents related to submittals and changes.

Sample Projects:

Contract Management includes several sample projects, each set up from the perspective of a different team member in a construction project: general contractor, owner, subcontractor, and designer. DEMO is the sample general contractor project; HOSP and OFFC are from the owner and subcontractor perspectives, respectively. Another sample project, DESIGN, is provided to demonstrate how a designer tracks drawings during design review. These projects are included as templates on which you can base your own projects.

The sample projects relate to construction work that must be completed for Philadelphia County. Design Group is the architect/engineer; ACME General Contractors is the general contractor; A-1 Construction Management is the construction manager; and Stresson Industrials is the subcontractor to ACME for concrete work.

The information included in the sample projects is just an example of what is possible. Most projects contain more requisitions, change documents, transmittals, and submittal cycles than the examples shown.

Allentown (New Hotel Construction): Contains project data from the owner's perspective for the construction of a new hotel. The value of the contracts is \$2.675 million.

DEMO (School Addition – Automotive Center): Contains project data from the general contractor's perspective, manages shop drawings and submittal items, tracks project issues, documents the change process, and records daily progress in the construction of a school addition. This addition is a masonry structure with brick siding that houses an automobile and light truck service center. The value of the contract between the owner and ACME General Contractors is \$10 million.

ENG (Office Building): Contains project data from the designer's perspective. The designer manages shop drawings and submittal items, tracks project issues, documents the change process, and records daily progress in the construction of an office building.

HOSP (South General Hospital Addition): Contains project data from the owner's perspective regarding the construction of a new hospital wing for Philadelphia County. A-1 Construction Management is the construction management company awarded this job. The value of this contract is 9 million British pounds.

OFFC (Phila Office Building Addition): Contains project data from the subcontractor's perspective for concrete work required for renovations to City Hall. The subcontract is between ACME General Contractors and Stresson Industrials. The value of the subcontract with Stresson is \$1.4 million.

9R27L (Runway 9R Reconstruction): Contains project data from the engineer's perspective for concrete work required to reconstruct a runway for the Atlanta airport. The contract is between APAC-MSSM Inc. and the city of Atlanta. The value of the contract is \$52,174,655.36.

About Contract Management Roles

The roles of the construction manager, general contractor, owner, and the engineer/architect/designer are described in this section to help you understand how Contract Management is implemented by various team members in a business workflow.

Owner

As the project owner, you will use Contract Management to organize project data so you can stay on top of progress, coordinate activities with your operations people, and make sure that all of the project details are handled by the appropriate people. You will find the comprehensive records of documents, correspondence, and changes invaluable for claims avoidance.

The following list includes tasks that are usually the responsibility of the owner in the contract process. Included with each task is the corresponding chapter/part in this manual where you can find more information about those tasks.

- ▶ Analyzing the projected cost and identifying areas with significant cost variances – See **Setting Up and Using the Cost Worksheet** (on page 116)
- ▶ Approving requisitions – See **Preparing Requisitions for Payment** (on page 132)
- ▶ Identifying unfinished tasks for which final payment should be withheld – See **Working with the Control Center** (on page 113)
- ▶ Identifying issues that require resolution and issuing change orders – See **Creating and Tracking Issues** (on page 177) and **Working with the Control Center** (on page 113)
- ▶ Managing submittals – See **Managing Submittals** (on page 194)
- ▶ Comparing daily progress to the schedule – See **Using Daily Reports** (on page 211)
- ▶ Generating supporting reports – See **Printing Logs, Forms, and Reports** (on page 75)

Engineer/Architect/Designer

As the project designer, you will use Contract Management to track specifications and drawings, control the submittal review process, monitor progress by the design team, communicate with other team members, and coordinate the activities of outside consultants.

The following list includes tasks that are usually the responsibility of the designer in the contract process. Included with each task is the corresponding chapter/part in this manual where you can find more information about those tasks.

- ▶ Managing design and contract drawings – See **Tracking Drawings** (on page 182)
- ▶ Recording the design budget and expenses – See **Setting Up and Using the Cost Worksheet** (on page 116)
- ▶ Tracking changes in scope and their effect on the cost at completion – See **Working with the Control Center** (on page 113)
- ▶ Quickly finding all the documents you need to resolve open issues – See **Creating and Tracking Issues** (on page 177)
- ▶ Monitoring progress through written and verbal communications – See **Communicating Project Information** (on page 79)
- ▶ Generating supporting reports – See **Printing Logs, Forms, and Reports** (on page 75)

General contractor

As the general contractor, you will use Contract Management to manage shop drawings and submittal items, track project issues, document the change process, and record daily progress. When you want to compare progress to the schedule, you can retrieve your schedule.

The following list includes tasks that are usually the responsibility of the general contractor in the contract process. Included with each task is the corresponding chapter/part in this manual where you can find more information about those tasks.

- ▶ Using the Drawing and Submittals logs to track shop drawings and submittal items – See **Tracking Drawings** (on page 182) and **Managing Submittals** (on page 194)
- ▶ Coordinating submittal activities with the project schedule – See **Managing Submittals** (on page 194) and **Exchanging Contract Management Data with a P6 EPPM Schedule** (on page 232)
- ▶ Identifying issues that require resolution and creating change documents – See **Creating and Tracking Issues** (on page 177) and **Working with the Control Center** (on page 113)
- ▶ Identifying areas with significant cost variance and analyzing the effects of pending changes on profit – See **Setting Up and Using the Cost Worksheet** (on page 116) and **Working with the Control Center** (on page 113)
- ▶ Tracking items that must be completed before final payment is made – See **Working with the Control Center** (on page 113)
- ▶ Reporting daily progress – See **Using Daily Reports** (on page 211)
- ▶ Generating supporting reports – See **Printing Logs, Forms, and Reports** (on page 75)

Subcontractor






As the subcontractor, you will use Contract Management to update status, request information, log daily reports, and communicate with other team members.









The following list includes tasks that are usually the responsibility of the subcontractor in the contract process. Included with each task is the corresponding chapter/part in this manual where you can find more information about those tasks.









- ▶ Create drawings – See **Add a Drawing** (on page 187) or **Add a Drawing Set** (on page 191)
- ▶ Create daily reports that capture important information. The daily reports can specify weather conditions, record equipment usage, or record personnel information. You can create new reports or base reports on existing ones – See **Prepare a Daily Report** (on page 211) and **Generate a Daily Report Based on an Existing Report** (on page 218)
- ▶ Create submittals – See **Adding a Submittal** (on page 197) and **Add a Submittal Package** (on page 194)
- ▶ Create RFIs – See **Add a Request for Information (RFI)** (on page 91)
- ▶ Add attachments to a document – See **Attach Files to Documents** (on page 45) and **Attach URLs to Documents** (on page 45)

Buttons and Icons Used in Contract Management

The following table lists and describes the most commonly used icons in Contract Management:

| <i>Table 1: Contract Management Buttons and Icons</i> | |
|---|--|
| Icon | Description |
|  | <p>Add Contact</p> <p>Appears on the Company document window. Use to add a contact for the company.</p> |
|  | <p>Add Document</p> <p>Appears on all log windows. Use to add a new document to the module.</p> |
|  | <p>Add Project</p> <p>Appears on the Control Center workspace.</p> |
|  | <p>Check In</p> <p>Appears on the Letters document window when a letter is opened in view mode. Use to check in a letter that you previously checked out.</p> |
|  | <p>Check Out</p> <p>Appears on the Letters document window when a letter is opened in view mode. Use to check out a letter to edit it.</p> |

| | |
|---|---|
|  | <p>Customize</p> <p>Appears at the top of the Control Center workspace. Use to add items to the workspace, and control the layout. Appears at the top of each object on the workspace, and is used to control the appearance of the portlet.</p> |
|  | <p>Define Distribution Lists</p> <p>Appears on the Company Directory log window. Use to add distribution list.</p> |
|  | <p>Download Letter</p> <p>Appears on the Letters document window in the left-hand pane. Used to download a copy of a letter from the Oracle BI Publisher server to your local system. If the letter is checked out, only the person who checked it out, or an administrator, can download it.</p> |
|  | <p>Download Letter</p> <p>Appears on the Letters log window next to the Edit icon for each letter file name. This is a smaller version of the Download Letter button. Used to download a copy of a letter from the BI Publisher server to your local system. If the letter is checked out, only the person who checked it out, or an administrator, can download it.</p> |
|  | <p>Edit Document</p> <p>Appears on a document window when each document was opened in read-only mode from a log window.</p> |
|  | <p>Edit Document - high priority</p> <p>Appears on a log window for each document that has a high priority status. Click to open the document in edit mode.</p> |
|  | <p>Edit Document - low priority</p> <p>Appears on a log window for each document that has a low priority status. Click to open the document in edit mode.</p> |
|  | <p>Edit</p> <p>Click the icon beside a document name to open a Contract document window in Edit mode.</p> <p>Appears on a log window for each document that has a normal priority status. Click to open the document in edit mode.</p> |

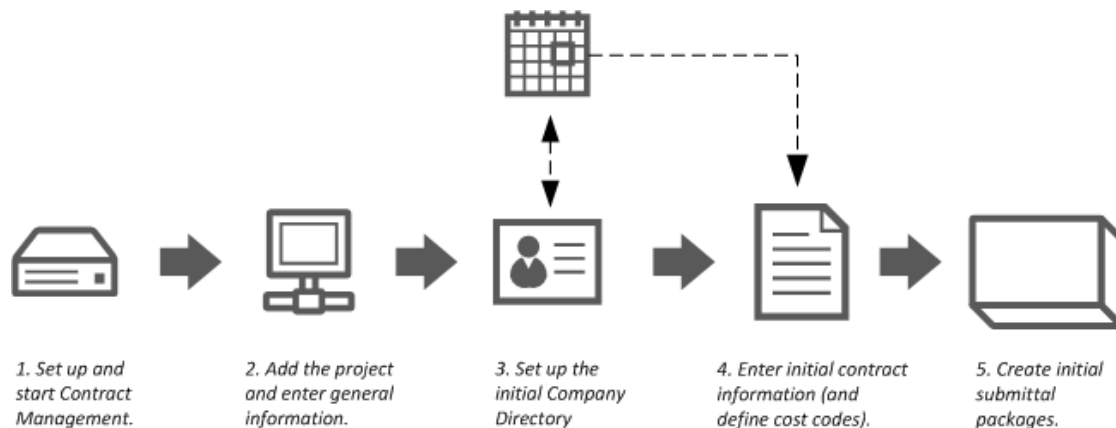
| | |
|---|--|
|  | <p>Go to Document</p> <p>Appears on the log window next to the document name. Click to open the document in view mode.</p> |
|  | <p>Print Preview</p> <p>Click to display the page that will be printed.</p> <p>Appears on all log and document windows. Use to see what the printed document or log report will look like.</p> |
|  | <p>Print Form or Print Report</p> <p>On all document windows, this is the Print Form button. Use it to print the default form. On all log windows, this is the Print Report button. Use it to print the default report.</p> |
|  | <p>Refresh List</p> <p>Click this icon to populate the Inbox log window with documents that have come into the Inbox, but that are not currently displayed in the list.</p> |
|  | <p>Save Distribution List as</p> <p>Appears in the Distribution List - Project Companies dialog when a distribution list has been defined. Used to save a copy of the existing list by another name.</p> |
|  | <p>Spelling</p> <p>This button appears when the document is in Edit mode. Click to spell check the document. If a mistake is found, the Spelling dialog box opens.</p> |
|  | <p>Undo Checkout</p> <p>Appears on the Letters document window when you checked out a letter. Use to cancel the letter check out.</p> |
|  | <p>View</p> <p>Appears on a log window for each document that has a status of closed. Click to open the document in read-only mode.</p> |

Planning and Adding a Contract Management Project

Setting Up the Contract Management Module

Contract Management offers a wide range of features and functions. Depending on how you currently manage contracts (or how you want to manage them) you can use all the features or select only the ones you need to support your work process.

The following figure is a general plan for setting up and implementing Oracle Primavera Contract Management. The remainder of this chapter describes steps 2 through 5. For more information, see the installation guide for Oracle or MSSQL.



Contract Management flexibility enables you to realize its benefits even if you do not have all the details about your project at the beginning. As the project progresses, you can add and/or modify the information entered during the initial setup, such as new negotiated contracts, new or changed companies, and more clearly defined submittals and submittal packages.

These are the basic steps to get started in Contract Management; adapt them to your own work processes.

Add a New Project Overview

To add a new project, right-click on the top level folder (**All Projects** is the default). There are two ways to create a new project:


- ▶ Choose **New Project** to open the Add Project Dialog Box, which guides you step-by-step in Add a New Project. This method is best when you have most of the information prepared for the project, or are unfamiliar with creating a new project.
- ▶ Choose **Publish Project** to open the Publish Project Dialog Box to create a project name and assign it to an administrator who will then enter the project information. The module notifies the administrator that a project has been added and needs information.

Note: The **New Project** menu option is not available if you do not have rights to create a new project.

Set Access Rights in a New Project

When you add a new project, you become its administrator and other users initially have no access to it (except for administrator level users).

To set access rights:

- 1) In the Project View, right-click on a project and select **Project Access**.
- 2) In the Project Access dialog box, click **edit**  next to the user for which you want to set access rights.
- 3) In the User Project Access dialog box, select or clear options to determine what the user can or cannot do.
- 4) Click **Save & Close** when finished.

Delete a Project

To delete a project:

In the Project View, right-click on the project you want to delete and select **Delete Project**.


Caution:

- When you delete a project, you permanently remove that project and all its associated documents.
- You can only delete a project if you are the project administrator or a Contract Management administrator.

Defining Key Contacts

The contact you specify in the Your Company field (in the Key Parties section of the Add Project Wizard) is the key contact for the project. When you create documents, Contract Management automatically enters the key contact in the To or From field, based on the type of document being created. For example, if the document being created is a contract or PO, Contract Management automatically selects that company in the From field.

To define a key contact:

- 1) In the Project View, right-click the project and choose **Project Settings**.
- 2) On the **Key Parties** tab, click **browse**  next to **Your Company** and select your company from the dialog box.

Creating Project Templates

If you will be adding projects that use the same key parties, currency, and schedule information, you can create a project template that contains this information. Use this template as the basis for each new project you create.

Add a New Project Template

To add a new project template:

- 1) In the Project View, right-click a project and select **Save As Template**.
- 2) In the Save As Template dialog box, enter the **Template Name** and **Title** for the project.
- 3) Click **OK**.

Use the Template as a Basis for a New Project

To use the template as a basis for a new project:

- 1) In the Project View, right-click the top level folder and choose **New Project**.
- 2) In the Add Project dialog box, enter a project Name and Title.
- 3) Click **Template** in the left pane.
- 4) Select the **Use Template** option and select the template you want to use from the **Template** drop-down list.

Note: When you select a template, Contract Management creates the new project based on the information contained in the template. You can edit this information in the new project.

About Access Rights (Project Access)

Contract Management has three user levels: Contract Management administrator, project administrator, and restricted user.

Contract Management administrators and project administrators can set access rights to a project for Contract Management users. Access rights determine which modules and documents a user can view, add, edit, export, or delete. If you have the required privileges, you can set a user's access rights for each Contract Management module.

Contract Management administrator

Contract Management administrators have full access to all new and existing projects. They can:

- ▶ Change module and process-level security for all projects and users.
- ▶ Change the owner of any project and delete any project.
- ▶ Copy project access rights from any project or user.

Note: Two users with administrator level rights are shipped with Contract Management (admin and sjohnson). To use one of these user accounts, enter one of the following default logons when you start Contract Management: admin/admin or sjohnson/sjohnson.

Project administrator

A project administrator is the user who created a particular project. Project administrators initially have full access to all projects they create, and can:

- ▶ Change module and process-level security in projects they create, and change their own access rights.
- ▶ Change ownership of projects they create and delete projects they create.
- ▶ Copy project access rights from any project to projects they administer.

Note: Project administrator rules apply only if the user who created the project retains ownership. If ownership changes, the new owner gains full access to the project, and the original owner becomes a restricted user.

Restricted user

By default, restricted users have no access to projects (including all modules and process-level security). A project administrator can change a user's default access for their project only. A Contract Management administrator can change a user's default access rights for any project and can also give the user access to new projects.

To change a user's project access rights, right-click a project and choose Project Access. Click the edit icon in the User section to open the User Project Access dialog box.

To change a user's general access rights, open the Contract Management Administration Application and click User Accounts. Click the document icon in the User section.

Set a user's access rights

Right-click the project in the Project View, and choose Project Access. Click the document icon next to the user for whom you want to set access rights. Set the user's rights by module.

- ▶ Select **View** to enable a user to only view data in a module.
- ▶ Select **Add** to enable the user to add data in a module.
- ▶ Select **Edit** to enable the user to edit data in a module.

Note: In order for users to add items to documents, users must have Add and Edit rights to the module. If users have Add rights, but not Edit rights, they will not be able to add items to a document.

- ▶ Select **Export** to enable the user to export data from the module.
- ▶ Select **Delete** to enable the user to delete data from a module.

To prevent a user from opening a module, clear the options for all access types. If a user has no access rights to a particular module, that module will not appear in the Project View.

Access by Company can be used to further restrict a user's access to project documents. In the Access by Company field, click Select and choose a company to associate with the current user. When a user is associated with a company, the user has access to documents that contain that company in the To or From fields of the document as well as to Submittals in which that company is listed as the BIC.

Users can also view documents linked with a contract in which the user's associated company is listed as the To, From, or BIC. A request for information, notice, noncompliance notice, payment requisition, Change Management record, change document record, material record, or insurance record may be viewed through this method. Users can also view a material request that is linked to a requisition which is then linked to a contract in which the user's associated company is listed in the To or From field.


Note: Access by Company, also known as contact-level security, is not enforced in the Companies and Cost Worksheets modules. For example, contact-level security is not enforced in the Companies module. If you do not want users to see company documents, switch off their access rights in the Companies module as explained in the Module section.

You cannot change Access rights for administrators. They always have full access to all projects.

Setting Access Rights for a Group of Users across Projects

To save time, the project administrator can copy the access rights for users in one project to another project.

To copy a user's access rights from one project to another:

- 1) In the Project View, right-click the project to which you want to copy access rights and choose **Copy User Access**.
- 2) In the Copy User Access dialog box, click **browse**  (after **Copy from**) and choose the project from which to copy users' access rights.
- 3) Select users from the first list and click **Add** to add these user access rights to your project.

Note: To remove user access rights, select a user from the second list and click **Remove**.

Setting Up the Company Directory

The Company Directory enables you to store information about everyone involved in your project. You can include names, phone numbers, and addresses of subcontractors, managers, suppliers, your own staff, and any other companies or individuals involved in the project.

Nearly all Contract Management documents use the information included in the Company Directory. Entering this information at the beginning of the project ensures that your unique abbreviations are consistent, avoiding confusion and mistakes. Even if you have only part of the company's information, enter at least the company abbreviation, name, office address, and a key contact; you can add missing details later.

Add a Company and Contact

To add companies and contacts to a project:

- 1) Expand the **Project Information** folder in the Project View and click **Companies**.

- 2) In the Company Directory log window, click **Add Company** .

- 3) On the **General** tab:

- a. Enter an abbreviation for the company.
- b. Enter a company name.
- c. Select a specification section code.

Note: Specification section codes are a part of a standard coding system developed by the Construction Specification Institute (CSI). You can select an existing code, or you can create your own codes by right-clicking on the top-level folder, and choosing **Dictionaries, Specification Sections**.

- d. Select the company's role.

- 4) On the **Status** tab, select a Ball In Court for the company. This is the person responsible for the company's Action List items.

Note: You can select an existing role, or you can create a new role by right-clicking on the top-level folder, and choosing **Dictionaries, Company Roles**.

- 5) On the **Contacts** tab, click **Add** to create a contact for the company.

Note: The first contact you add becomes the key contact. The key contact is the person to whom most documents will be addressed. The Key Contact field on the General tab is populated with this contact's name.


- 6) On the **Remarks** tab, enter any important details for the company in the field.
- 7) On the **Details** tab, select an option to indicate if the company is a Disadvantaged (DBE), Minority (MBE), or Woman-owned (WBE) business enterprise.

Note: Contract Management requires that you enter the key contact's initials.

Add Contacts for the Company

Note: Contract Management does not apply changes you make in the Contact window to any documents where the original address already appears (such as contracts). This practice protects the validity of the original document information.

To add contacts for the company:

- 1) Expand the **Project Information** folder in the Project View and click **Companies**.
- 2) In the Company log window, open the company to which you want to add contacts.
- 3) In the Company document window, click **Add Contact**  or click the **Contacts** tab then click **Add**. You can add as many contacts as needed for each company.
- 4) In the Contacts dialog box, enter information for the contact such as a name, address, or paper size for drawings. You can also link issues and attachments to the contact.



Note: To define custom paper sizes, right-click the top-level folder in the Project View and choose **Dictionaries, Drawings, Paper Sizes**.

- 5) Click **Save and Close** when you are finished editing the contact.

Link a User Account with a Contact

To use a contact in the document approval and document owner processes of Contract Management, you must link a valid user account with the contact. One user account can have multiple contacts linked to it. Contacts without valid user accounts linked with them will not be available for selection during document approval and document owner processes.


To associate a user account with a contact:

- 1) From a Company document window, click **Add Contact**  or click the **Contacts** tab then click **Add** to open the Contacts dialog box.
- 2) In the Contacts dialog box, click **browse**  next to the **User Account** field and select a user account. Click **Save**.
- 3) In the Contacts dialog box, fill out any other information. Click **Save and Close** when finished.

Copy the Company Directory

To set up a new project more quickly, you can copy the Company Directory from a similar project in the same database or from the group Company Directory.

To copy the company directory:

- 1) In the Project View, right-click the project with the directory you want to copy and choose **Copy Companies**.
- 2) In the Copy Companies dialog box, click **Select Copy From**  to choose a project (or group) from which to copy companies.
- 3) Select the companies to copy to the project and click **Add**.

To copy only specific contacts in a company to the project, expand a company tree, select the contact you want to add, and click **Add**.

Inactivate a Company or Contact

You can label a company that you are no longer dealing with as inactive. Inactivating a company or contact disables the company or contact without deleting it. When a company is made inactive, all of its contacts also become inactive; the company and contacts do not appear in dialog boxes or vendor picker windows that contain lists of companies and/or contacts. The company and its contacts remain in the database but do not appear in the lists.

To inactivate a company:

- 1) Open in Edit mode the Company document window in which you want to inactivate a company or contact.
- 2) To inactivate a company:
 - a. Click the **Status** tab.
 - b. Select the **Inactive** option. Any time you want to mark this company as active, clear this option.
 - c. Click Save.
- 3) To inactivate a contact:
 - a. Click the **Contacts** tab.
 - b. Click the name of the contact to edit the contact information.
 - c. In the Contacts dialog box, select the **Inactive** option. Any time you want to mark this contact as active, clear this option.
 - d. Click **Save and Close**.

Delete a Contact

To delete a contact:

- 1) Open the Company document containing the contact which you want to delete.
- 2) Click the **Contacts** tab.
- 3) Click **delete** for the contact which you want to remove.
- 4) When prompted to confirm whether you want to delete the item, click **Yes**.

Saving Companies and Contacts in the Project/Group List

Each project contains its own directory of project companies. Contract Management also maintains a directory of database companies that all projects in the same database can share.

When you add a new project, Contract Management uses the Project Company Directory by default. To use the same companies for all of your projects, switch to the Group (database) Company Directory.

To save companies and contacts to the Project/Group Company Directory:

- 1) In the Project View, right-click a project and choose **Project Settings**.
- 2) In the Project Settings dialog box, click the **Companies** tab.
- 3) Click **Switch**. The **Group or Project Companies** field will switch from "Project" to "Group" or "Group" to "Project" depending on what displayed originally. Whatever displays indicates which directory is in use.

Tips

- ▶ If you select the **Add Company to Group After Adding to Project** option, you can save new companies in the Group Company Directory while using the Project Company Directory. Right-click a project, select **Project Settings**, click the **Companies** tab, and select the **Add Company to Group After Adding to Project** option.
- ▶ If you select the **Update Group When Project Company Edited** option, Contract Management will update the Group Company Directory if you change an existing company in a project, even if the active directory is Project. Right-click a project, select **Project Settings**, click the **Companies** tab, and select the **Update Group When Project Company Edited** option.

Adding Companies and Contacts from Other Documents

When you add a document, you may need to enter information for a company that is not in the Company Directory. Rather than interrupt your current task, you can add companies and contacts from most documents without going back to the Companies dialog box.

To add companies and contacts from other documents:

- 1) When you click **Select** for a company or contact field, the Select Company or Select Contact dialog box opens.
- 2) Choose whether to organize by company or contact, and click **Add Contact** or **Add Company**.
- 3) Type the company name and abbreviation (if adding a new company), the contact's full name and initials, and other information, and click **Save**. Contract Management adds the company and contact information to the Company Directory. You can edit the information later if necessary.

Customizing the Control Center

The Control Center is a customizable window that enables you to quickly view and access your information.

- ▶ You can use the Control Center as a starting point for all the tasks you need to perform.
- ▶ You can view information across all projects, multiple projects, or one project at a time.
- ▶ You can add items to the Control Center that enable you to view issues, requests for information (RFIs), actions, alerts, and reports. Other items enable you to integrate with a P6 EPPM schedule, view your Inbox, and prepare documents.
- ▶ You can click a section of a graph to display the details.
- ▶ You can include up to 12 items in the Control Center.
- ▶ Items can be included more than once in the Control Center. For example, if you want issues to appear as a graph, a bar chart, and a pie chart, move three Issue items to the Layout area, and edit each item's appearance by clicking the **Edit** link above it in the Control Center.

To customize the Control Center:

- 1) In the Workspace, click **Customize this Page** to select which items appear in the Control Center and where they are placed.

- 2) In the Customize Control Center, select items in the **Available Items** list and click **Add** to add the items to the **Layout** list. These items will be added to the Control Center.
- 3) Click **Move Up** or **Move Down** to adjust the items position in the Layout list. This changes the location of the items in the Control Center.
- 4) Click **OK** when finished.

About Distribution Lists

After you set up your company directory, you can create distribution lists for project participants involved in the transmittal, submittal, or drawing processes. Contract Management displays the defined distribution group names in the distribution selection lists in these documents. You can use the same lists in any project in the same database, add or delete names, and combine them as necessary.

Setting up distribution lists saves time by enabling you to quickly select a group of participants to whom you want to send a document instead of selecting each one individually.

You can establish different distribution lists depending on the document and the people to whom you want it sent. For example, if you are the general contractor, you may want to set up a distribution list that contains your subcontractors so you can send them the transmittals resulting from their submittals. All of the contacts in the list will receive a copy of the document.


At the beginning of a project, you may need to communicate with different team players to determine who requires a copy. As contract work progresses, you can refine the lists and copy them to other projects. If you assign contacts to a group (switch to Group on the Companies tab of Project Settings), they apply to all projects in that group.

Creating Distribution Lists

Create distribution lists to quickly select a group of participants to receive a document.

Note: Any changes you make to your company directory are also reflected for the corresponding company in distribution lists.

To create distribution lists:

- 1) Expand the **Project Information** folder for a project in the Project View and click **Companies**.
- 2) In the Company log window, click **Define Distribution Lists**  or select **Distribution Lists** from the **Select an action** drop-down list.
- 3) In the Distribution Lists dialog box, click **Add** to create a new distribution list.

- 4) In the Add Distribution List dialog box:
 - a. Enter an **Abbreviation** for the list.
 - b. Enter a **Title** for the list.
 - c. Click **Select** and select contacts to add to the distribution list.



Note: To easily find the contacts you need, you can organize by contact, company, or distribution list. All companies in the current project will be displayed if the Project Setting is set to *Project*. All group companies will be displayed if the Project Setting is set to *Group*. Companies assigned to the Group level apply to all projects in that group.

- 5) Click **Save and Return to Menu** when you are finished defining the list.

Copy a Distribution List



To save time, you can create a new distribution list based on an existing one.

To copy a distribution list:

- 1) Expand the **Project Information** folder for a project in the Project View and click **Companies**.
- 2) In the Company Directory log window, click **Define Distribution Lists** .
- 3) In the Distribution Lists dialog box, click **Save As**  next to the list you want to copy.
- 4) In the Save Distribution List As dialog box:
 - a. Enter an Abbreviation and Title for the new list.
 - b. Add or remove contacts in the list as necessary by clicking **Select** or **Unselect**.
- 5) Click **Save and Return to Menu** when you are finished editing the distribution list.

Edit a Distribution List


To edit a distribution list:

- 1) Expand the **Project Information** folder for a project in the Project View and click **Companies**.
- 2) In the Company Directory log window, click **Define Distribution Lists** .
- 3) In the Distribution Lists dialog box, click **Edit**  next to the list you want to edit.
- 4) In the Edit Distribution List dialog box make the necessary changes.
- 5) Click **Save and Return to Menu** when you are finished. Changes to the list are only visible in future uses of the list.
- 6) Click **Close** in the Distribution Lists dialog box when you finish defining distribution lists.

Assigning Default Contacts

To specify which contacts will automatically display in the To and From fields of a particular document, assign default contacts.

To assign default contacts:

- 1) In the Project View, right-click the project to which you want to assign default contacts and choose **Default Field Values**. The Set Default Field Values dialog box displays the default contact assignments for the currently open project.
- 2) In the Set Default Field Values dialog box, click **Select**  next to the To or From fields to which you want to assign default contacts.
- 3) In the Select Company dialog box, click **Select** next to the company you want to assign as the default, and click **OK**.

Note: You can edit or delete default contacts at any time. Changing the default contact affects new documents only. Contact names for existing documents remain unchanged.

Workflow-Based Approval Process Overview



In Contract Management versions 12.0 and later, there is an approval process for the following types of documents: contracts, change orders, purchase orders, requests for information, and payment requisitions.

For each of these types of documents, a document owner must be specified. This can be done at the project level by right-clicking the project name and choosing Project Settings. In the Project Settings dialog box you can specify a default owner for each approval module. When set at the project level, each time one of these types of documents is created, the name of the document owner will automatically be entered in the Document Owner field. The document owner can also be selected when the document is created. Once the document owner is selected, only the Contract Management administrator, the project owner, or the document owner can select a different document owner.

Contract Management documents can be added by anyone who has the security privilege to add documents and access to the project. Documents can be approved by the Contract Management administrator, the project owner, or the document owner who is acting for any contact on the document review list.

Prerequisites for using the workflow-based approval process:

- 1) There must be companies for this project. See Add Companies and Contacts for more information.
- 2) There must be contacts for the companies and they must be linked to a user account. See Add Contacts for more information.
- 3) The contacts must have view, add, and edit rights for the project.
 - ▶ This is done in the Contract Management Administration Application when the user account is created. Log onto the Contract Management Administration Application, and click **User Accounts** to add a user account.

-
- ▶ Once the user account has been created, in Contract Management you can change access rights by right-clicking on the project name and selecting **Project Access**. In the **Project Access** dialog box, click the **Edit**  icon next to the user you want to configure. If the user is not listed for this project, click **Add Users to this Project** and select users to add to the project.
- 4) The contacts must have approval rights for the project.
 - ▶ Assign an access template to the user account. This is done in the Contract Management Administration Application on the User Accounts page.
 - ▶ Once the template has been assigned to a user account, you can change the approval rights by right-clicking on the project name and selecting **Project Access**. On the Project Access dialog box, click the **Edit**  icon next to the user name to display the User Project Access dialog box, and set the approval rights. If the user is not listed for this project, click **Add Users to this Project** on the Project Access dialog box, and select the users to add to the project.
 - 5) Contacts must have an approval limit that is greater than or equal to the amount of the document being created. If you select a contact for the reviewer list, and that contact does not have a limit greater than or equal to the amount of the document, an error message displays when you initiate the approval process. In that case, you must remove that contact name, and re-initiate the approval process.

Note: If any of the preceding prerequisites are not met, the reviewer that you want to choose for the approval process will not show up on the list of reviewers from which you can select.

Create a Reviewer List

Reviewer lists are part of the workflow-based approval process instituted in Contract Management 12.0. Reviewer lists contain the names of contacts that are responsible for reviewing contract documents and deciding whether to approve the document. Each contact in the reviewer list must be linked to a user account, or the contact name will not be listed in the selection pop-up list that displays for you to select reviewers. For information about creating contacts and linking them to a user account, see [Add Contacts](#).

Note: Before you can create a reviewer list, ensure that you have created a company, created contacts, and that you have linked the contacts to a user account.

To create a reviewer list:

- 1) Expand the **Project Information** folder and click **Companies**.
- 2) From the **Select an action** drop-down list, select **Reviewer Lists**. The displays the **Reviewer Lists – Project Companies** dialog box will open.
- 3) Click **Add**. The Reviewer Lists dialog box will open.

- 4) On the **Reviewer Lists – Project Companies** dialog box, do the following:
 - a. In the **Abbreviation** field, enter a unique abbreviation for the reviewer list, using up to 12 characters.
 - b. In the **Title** field, enter a title for the reviewer list, using up to 23 characters.
 - c. Click **Select** in the **Contacts (from project)** section. The **Select Contacts** dialog box will open.
- 5) On the **Select Contacts** dialog box, select the **Contact, Company, or Reviewer List** option to display a list of contacts from which to select the reviewers.

The following table explains the options on this dialog box:

| If you chose: | Your options are: |
|---------------|---|
| Reviewer List | <p>If you select a reviewer list, all of the contacts on the list will be added as reviewers. You cannot add individuals from a reviewer list.</p> <p>You can select more than one list.</p> <p>Select the list or lists to add to the reviewer list, and click Save.</p> |
| Company | <p>If you select a company, only the key contact for that company is added to the reviewer list.</p> <p>You can expand the company, and select individuals from the company contact list. You can select contacts from more than one company.</p> <p>If a company you need is not on the list of companies, click Add Company to add the company. If a contact you need is not on the list for a company, click add contact next to the company name to add the contact to the list.</p> <p>Select the company (or companies) or individual contacts to add to the reviewer list and click Save.</p> |
| Contact | <p>This lists all contacts (that are linked to user accounts) from all companies.</p> <p>Each contact's company name is listed with the contact.</p> <p>Select the contacts to add to the reviewer list and click Save.</p> <p>This returns you to the Add Reviewer List dialog box.</p> |

- 6) Repeat steps 4 and 5 to create another approver list.
- 7) When you are finished creating reviewer lists, click **Save and Return to Menu** on the **Add Reviewer List** dialog box. This displays the **Reviewer Lists – Project Companies** dialog box.
- 8) On the **Reviewer Lists – Project Companies** dialog box, click **Close**.

Delete a Reviewer List

The document reviewer list is created at the company level, and can be deleted at any time.

To delete a reviewer list:



- 1) Expand the **Project Information** folder and click **Companies**.
- 2) From the **Select and action** drop-down list, select **Reviewer Lists**. This displays the **Reviewer Lists - Project Companies** dialog box.
- 3) Click **Delete** to the right of the approval list that you want to delete.
- 4) Click **Yes** when prompted *Do you want to delete Reviewer List <reviewer list name>?*. This displays the **Reviewer Lists - Project Companies** dialog box.
- 5) On the **Reviewer Lists - Project Companies** dialog box, click **Close**.

Set Up the Approval Process

Set up the approval process when you create one of the following types of documents: contracts, change orders, purchase orders, requests for information, or payment requisitions.

Note: Before you set up the approval process, ensure that the prerequisites listed in the **Workflow-Based Approval Process Overview** (on page 38) topic have been met.

Once you have set up the approval process, the Status column will display one of the following for each reviewer:



- ▶ Who the BIC is.
- ▶ A green check mark () if the reviewer approved the document.
- ▶ A red X () if the reviewer rejected the document.

To set up the approval process:

- 1) Open in Edit mode the document for which you want to set up the approval process.
- 2) Click the **Review Status** tab.
- 3) Select the **Use Approval Process** option to use the workflow-based approval process.
 - ▶ This will display the fields for the new approval process, and will hide the fields that would be available for versions of Contract Management prior to version 12.0.
 - ▶ Once you enter all the information for the approval process and click **Save**, the **Use Approval Process** option will no longer be visible.



- ▶ After you save the document using the workflow-based approval process, you will not be able to go back and use the approval fields that were available in Contract Management 11.1 and older.

Note: If you have reports that were built against approval data using the approval fields available in Contract Management versions 11.1 and older, use the approval fields that were available in Contract Management 11.1 and older to set up the approval structure. If you use this new approval process, the reports that you built against the approval data may not work.

- 4) Click **Select Document Owner**  next to the **Document Owner** field to open the **Select Contact** dialog box and choose the contact responsible for this document. This contact should already have been linked to a user account.
- 5) Click **Select Ball in Court**  next to the **Ball in Court** field to open the **Select Contact** dialog box and choose a BIC.
- 6) Select a priority level for the document. Priority can be *High*, *Normal*, or *Low*.
- 7) Select a status for the document. This field will change, depending on what action a reviewer designates for a document.
- 8) Select a method of approval. This can be one of the following:
 - ▶ **Approve in Sequence:** Use this when the document must be approved in the order in which the reviewers are listed in the **Review** section.
 - ▶ **All must Approve:** Use this when every contact listed in the **Review** section must approve the document before approval is final.
 - ▶ **Any can Approve:** Use this when any contact listed in the **Review** section can approve the document and make the approval final.
- 9) Click **Add Reviewers** to create the list of reviewers. The Select Contact dialog box will open. Use this to choose the reviewers.

Notes:

- You must already have added the contacts and linked them to a user account. You add contacts when you add companies.
 - You can also select reviewers from an approver list that you previously created.
-

- 10) Click the calendar  icon for the **Required Start** field and select the date on which the approval process must start.
- 11) Click the calendar  icon for the **Required Finish** field and select the date on which the approval process must end.

12) After setting up all the information and creating the list of reviewers, click **Initiate** to start the approval process. Only one of the following users can initiate a document review: the project owner, the document owner, or the Contract Management administrator.

Caution: If you click **Initiate** before all fields are complete and the reviewers listed, you will not be able to make any changes in this cycle. Only after a new approval cycle is started can you make any additions or changes. The field to the right of the **Initiate** field lists the cycles. You can use the drop-down list to pick a different cycle to review. This field will be blank until after the first cycle is initiated.

Once the document review cycle is initiated, Contract Management sends email notification to all relevant contacts designated as reviewers whose email addresses were entered on the Contact dialog box when they were added to a company.

Approving Documents

If you are the Ball in Court (BIC) reviewer, do the following to approve the document after reviewing it.

To approve a document:

- 1) Open the document.
- 2) Click the icon next to your name.

- 3) On the Review comments dialog box, enter any comments related to the document, and then click **Approve**.

Note: Once the BIC reviewer approves the document, the BIC status changes depending on how the document must be approved.

| If the approval is set to: | The BIC is: |
|-----------------------------------|--|
| All Approve | Assigned to each reviewer. If a reviewer approves the document, the BIC status is replaced by a green check mark. If a reviewer rejects the document, the BIC status is replaced by a red box with an X in it for that reviewer, and is removed from all other reviewers in the list. The BIC then becomes the document owner. |
| Any Approve | Assigned to each reviewer. If a reviewer approves the document, the BIC status is replaced by a green check mark and the document is removed from all other reviewers' lists. If a reviewer rejects the document, the BIC status is replaced by a red box with an X in it for that reviewer, and is removed from all other reviewers in the list. The BIC then becomes the document owner. |
| Approve in Sequence | Assigned to the first reviewer in the list. If a reviewer approves the document, the BIC status is replaced by the green check mark, and the BIC passes to the next reviewer on the list. If a reviewer rejects the document, the BIC status is replaced a red box with an X in it for that reviewer. The BIC then becomes the document owner. |

Rejecting a Document

Rejecting a document returns the document to the state it was in before the approval cycle was initiated. To begin a new cycle for a rejected document, click New Cycle. New Cycle only displays when a document has been rejected. You must begin a new cycle in order to delete a document or start a new review cycle.

To reject a document:

- 1) Open the document.
- 2) Click the icon next to your name.

- 3) On the Review comments dialog box, enter any comments related to the document, and then click **Reject**.

Attach Files to Documents

You can attach files, such as word processor documents, graphics, spreadsheets, scanned drawings or pictures to Contract Management documents.

Note: Attachments cannot be larger than 750 MB. The application displays an error message if an attachment is larger than the limit.

- 1) Open a document from a log window and click the **Attachments** tab.
- 2) Click **Attach File** to open the Attach File Dialog Box.

Note: If you attach a file from your local machine, you must copy the file to the network in order to make it available to other users.

- 3) In the **Attachment** field, click **Browse**. Locate the file you want to attach and click **Open**.
- 4) In the **Subject** field, enter a subject for the attachment.
- 5) To attach another file, click **Save and Add Another**, and repeat steps 3 and 4. When you are finished adding files, click **Save & Close**.

Attach URLs to Documents

You can attach URLs to Contract Management documents.

- 1) Open a document from a log window and click the **Attachments** tab.
- 2) Click **Attach URL** to open the Attach URL Dialog Box.
- 3) In the **URL** field, enter the internet or intranet address.
- 4) In the **Subject** field, enter a subject for the hyperlink.
- 5) To attach another URL, click **Save and Add Another**, and then repeat steps 3 and 4. When you are finished adding URLs, click **Save & Close**.

Stop the Approval Process

After the approval process has been initiated, and before it has been approved, the project owner, the document owner, or a Contract Management administrator can stop the approval process by doing the following:

- 1) Open the document that is in review.
- 2) Click **Stop**.

This returns the document to the state it was in before the approval cycle was initiated. The cycle must be initiated again to restart the approval process.

Revoke a Document Approval

After a document has been approved, the project owner, the document owner, or a Contract Management administrator can revoke the approval.

To revoke an approval:

- 1) Open in View mode the document for which you want to revoke approval.
- 2) Click **Revoke**.

This returns the document to the state it was in before the approval cycle was initiated. The cycle must be initiated again to restart the approval process.

Delete an Approved Document

You can delete a document for the following types of documents: change orders, contracts, purchase orders, requests for information, or payment requisitions.

To delete a document:

- 1) Open the approved document that you wish to delete.
- 2) Click **Revoke**. You cannot delete a document until you revoke the approval.
- 3) Click **Yes** when prompted *Revoke the current cycle?*
- 4) From the **Select an action** drop-down list, choose **Delete Document**.
- 5) Click **Yes** when prompted *Delete this document?*

Delete a Rejected Document

You can delete a rejected document for the following types of documents: change orders, contracts, purchase orders, requests for information, or payment requisitions.

To delete a document:

- 1) Open the rejected document that you wish to delete.
- 2) Click **New Cycle**. You cannot delete a rejected document without initiating a new cycle.
- 3) Click **Yes** when prompted *Start a new cycle?*
- 4) From the **Select an action** drop-down list, choose **Delete Document**.
- 5) Click **Yes** in response to the **Delete this document?** prompt.

About Submittals and Submittal Packages

You can easily track submittal review cycles with the module. No matter how many revisions a submittal goes through, you will always know:

- ▶ Who received the submittal and when they received it.
- ▶ Which submittals were approved and which are pending.
- ▶ Which submittals are overdue and by what amount of time.
- ▶ Who is currently responsible.

The module also provides distribution copies, transmittals, and dunning letters.

You can group related submittals into packages to help organize them. For example, you can assemble a submittal package for all items pertaining to a specific supplier, floor of a building, or area of work. Set up packages at the beginning of the project so you already have an organized structure when you are ready to enter individual items.

Linking with a P6 EPPM Schedule

You can link projects scheduled in P6 EPPM to Contract Management module projects. Once this link is established, you can use activities in P6 EPPM projects to build and update Contract Management project data. You can create a connection from the Contract Management module to any P6 EPPM project. You can then specify the path and project name in Contract Management module using the Schedule tab in Project Settings.

The link enables you to review dates from a P6 EPPM schedule from within Contract Management to see how schedule delays or other factors affect a project. Once you specify the project schedule to link to Contract Management project, you can use early and actual activity dates from the schedule to update start and finish dates in Contract Management.

Working with the Workspace

When you open Contract Management, the Workspace appears; this is where all Contract Management tasks begin.

The Workspace is divided into two main areas: the Project View on the left and the Control Center (Workspace) on the right. The Control Center is discussed in ***Working with the Control Center*** (on page 113).

Project View

The Project View shows your project hierarchy, which includes the top-level folder called All Projects, followed by the folder for each project, the folders in each project, and the modules (logs and documents) inside these folders. It also contains a Templates folder which consists of any project templates you have created, including the default templates, DESIGN and SCHOOL.

Most Contract Management modules consist of a log and a document window. The document windows contain many tabs with logically related information. You can enter, edit, or view data on the tabs in the document windows.

You can right-click the top-level folder or any project in the Project View to display a list of commands. If you right-click the top-level project folder (All Projects), the available commands apply to all projects within that folder. If you right-click a project, the available commands apply to that specific project.

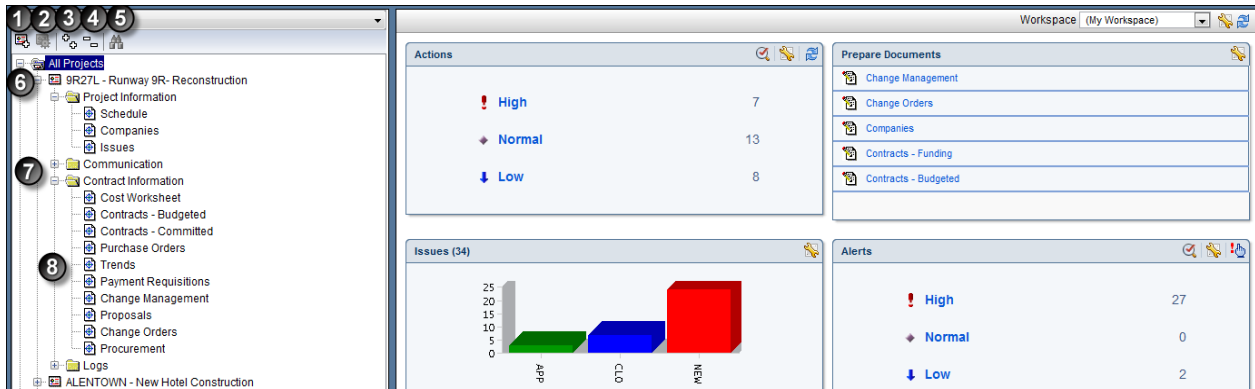


Table of Screen Elements

| Item | Description |
|------|---|
| 1 | Add Project: Use this icon to add a new project. |
| 2 | Project Settings: Use this icon to set project settings. |
| 3 | Expand All: Use this icon to expand all projects. |
| 4 | Collapse All: Use this icon to collapse all projects. |
| 5 | Find: Use this icon to search for a project. |
| 6 | Projects: The 9R27L - Runway 9R - Reconstruction and ALENTOWN - New Hotel Construction are shown as projects in this example. |
| 7 | Folders: When a folder is collapsed, click its icon to display the names of the items in that folder. To collapse the folder, click the folder icon again. |
| 8 | Modules: Usually consist of a log and document window. To open a log or document in an expanded project folder, click the name of the log. |

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Printing Logs, Forms, and Reports 75

Working with the Log Window

Most functions within Contract Management consist of a log and a document window. The log window lists the existing documents for that function. The document window, accessed from the log window, contains detailed information about an item grouped into different tabs related to the item and also features an Edit mode in which you can add, edit, and delete items.

Open a document from a log window

You can open a document from a log window in either View mode or in Edit mode.

- ▶ To open a document in View mode, click document title listed in the Document For column of the log window.
- ▶ To open a document in Edit mode, click the edit icon to the left of the document title.

The following example is a typical log window from which you can view a summary of existing documents, or add a new document.

| Document For | Number | To | To Contact | From | From Contact |
|---|--------------|--------------------------|-----------------|--------------------------|---------------|
| Summary | DIRECT COSTS | ACME General Contractors | Steve Johnson | ACME General Contractors | Steve Johnson |
| Instructions to Bidders | 2 | BMTC | Venkata Oracle | ACME General Contractors | Steve Johnson |
| Rough Carpentry | AA450-00300 | Brink Contractors | Lou Jackson | ACME General Contractors | Steve Johnson |
| Temporary Facilities and Controls | 1 | Bentley Trailers | Joan Jannis | ACME General Contractors | Steve Johnson |
| Basic Finish Materials and Methods | AA450-00400 | Button Paint & Paper | Jan Shady | ACME General Contractors | Steve Johnson |
| Price and Payment Procedures | AA450-00500 | CPM Consultants | Don Newman | ACME General Contractors | Steve Johnson |
| Ceilings | AA450-01300 | Finish Ceilings, Inc. | George Lafferty | ACME General Contractors | Steve Johnson |
| Basic Masonry Materials and Methods | AA450-00602 | ACE Mason Contractors | Dave Barron | ACME General Contractors | Steve Johnson |
| Basic Mechanical Materials and Methods | AA450-00700 | Mechanical Contractors | Terry Mills | ACME General Contractors | Steve Johnson |
| Site Preparation | AA450-9802 | Moore Paving | John Kelly | ACME General Contractors | Steve Johnson |
| Basic Thermal and Moisture Protection Materials | AA450-00800 | Smith Insulation | Dave Smith | ACME General | Steve Johnson |

Table of Screen Elements

| Item | Description |
|------|---|
| 1 | Add Document: Use this icon to add a new document. |
| 2 | Print Report: Use this icon to print the default report. |
| 3 | Print Preview: Use this icon to view the document as it will appear when printed. |
| 4 | Select Layout: Select a layout. Layouts combine filters, sorts, and groups into one item that you can apply to logs. |


| Item | Description |
|------|--|
| 6 | Select Action: Select an action to print, import, export, add a new document, and so on. |
| 6 | Edit Document: Use this icon to open the document in edit mode. |
| 7 | View Mode: Click the text to open the document in view mode. |
| 8 | Vertical Bar: Click the bar near the left side of the screen (to the left of number 6 in the example) to split the window so the rows on one side of the bar remain fixed as you horizontally scroll through the rows on the other side of the bar. Remove the split screen by again clicking the bar near the left side of the screen. |

Add, Edit, and Delete Documents

You can add, edit, or delete documents from log and document windows using a variety of techniques. Choose the method you are most comfortable with or the method that is easiest for the function you are performing.


Add Documents

To add a document, do one of the following:

- ▶ Click **Add Document**  while working in any log window.
- ▶ Click **Select an action**, and choose **Add Document** while working in any log window.
- ▶ Click **Select an action**, and choose **Generate Document** to copy all or part of a document.

Edit Documents

To edit a document, do one of the following:

- ▶ Click **Edit document**  for the document you want to edit while working in any log window.
- ▶ Click the title of the document you want to edit while working in any log window. Then click **Select an action** and choose **Edit Document**.

Delete Documents

To delete a document:

- 1) Open the document window in View mode by clicking the document name in a log window. Do not open the document in Edit mode.

2) Choose **Delete Document** from the **Select an action** drop-down list.

Notes:

- When you delete a document from a log window, the module removes its associated document window and any links to issues and attachments.
 - Some document windows contain lists of items, such as the line items in a daily report. You can delete these items by scrolling to the last column and clicking **Remove** or **Delete**.
-

Working with the Spelling Checker

P6 Compression Server provides a spelling checker so you can detect misspelled words in documents.

The spelling checker looks for misspelled words using the main dictionary provided and the customizable dictionaries you create. The main dictionary is comprehensive, but it does not contain proper names or many specialized words; you can add these words to your user dictionary so that the module can recognize them.

In addition to misspellings, the spelling checker looks for repeated words, such as “that that.” The spelling checker does not check single-character words (such as ‘a’) or text that does not contain letters (such as 75% or 23). The spelling checker also does not enable you to change information in fields that cannot be edited.

Use the spelling checker

Open the document for which you want to check spelling in Edit mode. Click the **Spelling** button. If the module does not find any mistakes, the spelling checker displays the following message: *The Spell check is complete*. If it finds a word it does not recognize, it will provide several options.

For each word the module does not recognize, select one of the following options:

- ▶ To keep the spelling, click **Ignore**. Click **Ignore All** to ignore all instances of the highlighted word.
- ▶ To keep the spelling and add the word to your user dictionary so that the module recognizes the word the next time, click **Add**.
- ▶ To change the spelling, type a different spelling or choose a suggestion and then click **Change** (click **Change All** to replace all occurrences of the misspelled word in the current document).
- ▶ To undo a change you made within one field, click **Undo**.

To customize spelling options, click **Options** in the Spelling dialog box to display the Options dialog box.

About Layouts

You can define a filter, sort, and group as a layout and apply the layout to a log window.

For example, if you use a certain combination of a sort, filter, and/or group repeatedly, you could create a layout in the New Layout dialog box that combines them and apply the layout to a log window.

A layout will appear in the same log window for all projects within a database. If you create a layout called Layout1 for the Contracts log in project DEMO, Layout1 will appear in the Contracts log in every project in that database.

Add a Layout

To create a layout:

- 1) From the log window to which you want to add a layout, select **Customize Layouts** from the **Layout** drop-down list.
- 2) In the Customize Layouts dialog box, click **Add**.
- 3) In the New Layout dialog box:
 - a. Edit layout number if necessary.
 - b. Enter a Title for the layout.
 - c. If wanted, select or add a new filter, sort, or grouping for the layout.
 - d. Select the columns that you want to include in the layout.
 - e. Click **Save and Return to Menu**.
- 4) When you are done working with layouts, click **Close** in the Customize Layouts dialog box.

Assigning Layouts


To assign a layout:

- 1) Open the log window to which you want to assign a layout.
- 2) From the **Layout** drop-down list, select the layout which you want to assign to the log window. Any filter, sort, or group settings specified for the selected layout will apply to the log window.

Configuring Layouts

You can define filter, sort, and group specifications to customize a layout and apply it to a log window. For example, if you use a certain combination of a sort, filter, and/or group repeatedly, you could create a layout using them and apply that layout to a log window.

To configure a layout:

- 1) From a log window, select **Customize Layouts** from the **Layout** drop-down list.
- 2) In the Customize Layouts dialog box, click **edit**  next to the layout you want to edit.
- 3) In the Edit Layout dialog box:
 - a. Select or add a filter, sort, or grouping to the layout.
 - b. Add or remove columns for the layout as necessary.

- c. Click **set column properties** to adjust log window column width, which columns display totals, and the position of the **Select an action** drop-down list.
 - d. Click **Save and Return to Menu** when finished.
- 4) In the Customize Layouts dialog box, click **Close** when finished configuring layouts.

Customizing Favorite Layouts

You can have Contract Management list your favorite two layouts at the top of the Layout drop-down list.

To set your favorite layouts:

- 1) In a log window, select **Customize Layouts** from the **Layouts** drop-down list.
- 2) In the Customize Layouts dialog box, click **Set Favorite Layouts**.
- 3) In the Set Favorite Layouts dialog box, select your favorite layouts in the **First Layout** and **Second Layout** drop-down lists. The selected layouts will appear above all existing layouts in the **Layout** list.

Creating Layout Filters

You can select and rearrange the displayed sequence of a list of documents in a log using Contract Management filter features for a layout.

A filter shows some documents in a log while hiding others, depending on the options selected. For example, you can assign a filtered layout for the Contracts log so you see only contracts for which ACMEGC is the From Company.

The following are the filter conditions available when customizing the layout for log files:

| Condition | Definition |
|-----------------------------|-------------------------------------|
| Equal to = | Is equal to |
| Not equal to <> | Does not equal |
| Greater than > | Is greater than |
| Greater than or equal to >= | Is greater than or equal to |
| Less than < | Is less than |
| Less than or equal to <= | Is less than or equal to |
| Is null | Date field does not contain a value |
| Is not null | Date field contains a value |

Filtering Tips


A filter applies only to the log to which you add it. For example, if you create a filter in a contracts log, that filter does not apply to transmittals.

If Contract Management is linked to a schedule, and you want to filter activities in the Schedule log (click Schedule in the Project Information folder), remember that P6 EPPM data is stored in a different format than Contract Management data, and the syntax of activity criteria based on dates differs slightly. Examine the syntax for the sample filters in the Criteria field before you create a new filter for the Schedule log based on dates.

If Contract Management does not list certain documents, remove the filter from the customized layout, if applicable, and re-examine the log.

Assigning Filters

To apply an existing filter to a layout:

- 1) From the log window you want to filter, select **Customize Layouts** from the **Layout** drop-down list.
- 2) From the Customize Layouts dialog box, click **edit**  next to the layout you want to edit or click **Add** to define a new layout.
- 3) In the Edit Layout or New Layout dialog box, select the filter you want to use from the **Filter** drop-down list.
- 4) Click **Save and Return to Menu**.
- 5) In the Customize Layouts dialog box, click **Close**. The module displays documents in the list based on the selected filter.

Add a Standard Filter

To add a standard filter:

- 1) From the log window you want to filter, select **Customize Layouts** from the **Layout** drop-down list.
- 2) In the Customize Layouts dialog box, click **filter**.
- 3) In the Filter dialog box, click **Add**.
- 4) In the New Filter dialog box:
 - a. Enter a Title for the new filter.
 - b. Click **Add** to add a filter statement.
 - c. Click **Verify** to check whether the filter is valid.
 - d. Click **Organize Rows** to rearrange the filter statements.
 - e. Click **Save and Return to Filter List** when you are finished adding the filter.
- 5) In the Customize Layouts dialog box, click **Return to Menu**.

Note: Click **Advanced Filter** to build more sophisticated filters. Once you edit a filter in Advanced mode, the filter cannot be changed back to the standard format.

Add an Advanced Filter

If you require more powerful filters, you can create advanced SQL statements by using the Advanced Filter feature.

Caution: You should only use this feature if you are familiar with SQL statements.

To add an advanced filter:

- 1) From the log window you want to filter, select **Customize Layouts** from the **Layout** drop-down list.
- 2) In the Customize Layouts dialog box, click **filter**.
- 3) In the Filter dialog box, click **Add**.
- 4) In the New Filter dialog box:
 - a. Enter a Title for the new filter.
 - b. Click **Advanced Filter**.
 - c. Click **Yes** to confirm that you want this filter to be advanced.
 - d. Select a field from the drop-down list and click **Insert**. Do this for each field you want to add to the **Criteria** field.
 - e. Enter a SQL statement directly in the **Criteria** field.
 - f. Click **Verify** to check the filter.
 - g. Click **Save and Return to Filter List**.
- 5) In the Customize Layouts dialog box, click **Return to Menu**.

Add a Sort Specifications

A sort specification changes the order in which documents are displayed. For example, you can sort the Contracts log so the module lists contracts in order of accepted date, starting with the latest date at the top.

To create sort specifications:

- 1) From the log window you want to sort, select **Customize Layouts** from the **Layout** drop-down list.
- 2) In the Customize Layouts dialog box, click **sort**.
- 3) In the Sort dialog box, click **Add**.
- 4) In the New Sort dialog box:
 - a. Enter a Title for the sort specification.
 - b. Select a field you want to sort and the order in which you want to sort it.
 - c. Click **Add** to add additional fields to be sorted.
 - d. Click **Save and Return to Sort List** when finished.
- 5) In the Customize Layouts dialog box, click **Return to Menu**.


Tips

A sort applies only to the log to which you add it. For example, if you create a sort in a contracts log, that sort does not apply to transmittals.

Assigning Sort Specifications

Contract Management includes several predefined sort specifications.

To assign a sort specification:

- 1) From the log window you want to sort, select **Customize Layouts** from the **Layout** drop-down list.
- 2) In the Customize Layouts dialog box, click **edit**  next to the layout you want to edit or click **Add** to define a new layout.
- 3) In the Edit Layout or New Layout dialog box, select the sort specification you want to use from the **Sort** drop-down list.
- 4) Click **Save and Return to Menu**, and click **Close**. The module rearranges documents in the list based on the selected sort specification.

Add a Group

Grouping enables you to group and display log documents by criteria that you specify. For example, you can group and display documents by ball-in-court, activity ID, package number, or any other available field. You can also apply different background and text colors to header rows to differentiate sections, and you can create multiple groups.

To create a new group:


- 1) Open the log for which you want to group its documents. Select **Customize Layouts** from the **Layout** drop-down list.
- 2) In the Customize Layouts dialog box, click grouping.
- 3) In the Grouping dialog box, click Add.
- 4) In the New Grouping dialog box:
 - a. Enter a Title for the grouping.
 - b. Select the field by which you want to group documents, along with Background Color, Sort order, and whether to total the group.
 - c. Click **Add** to add additional fields by which to group documents.
 - d. To save the groupings, click **Save and Return to Grouping List**.
- 5) In the Customized Layouts dialog box, click **Return to Menu**.

Tips

- ▶ A group applies only to the log to which you add it. For example, if you create a group from the Contracts log, that group does not apply to transmittals.
- ▶ You can create multiple groups in a log; each group takes precedence over any group below. Click **Organize Rows** to determine group order.

Assigning Groups

To assign a group to a layout:

- 1) Open the log window to which you want to assign a group, select **Customize Layouts** from the **Layout** drop-down list.
- 2) In the Customize Layouts dialog box, click **edit**  next to the layout you want to edit or click **Add** to define a new layout.
- 3) In the Edit Layout or New Layout dialog box, select the grouping specification you want to use from the **Grouping** drop-down list.
- 4) Click **Save and Return to Menu**.
- 5) In the Customize Layouts dialog box, click **Close**. The module rearranges documents in the list based on the group you select.

Attaching Files and URLs to Contract Management Documents

You can attach files such as word processor documents, graphics, or spreadsheets to any module document. You can then start the application in which the attached document was created directly from the module to view or modify the attachment.

Note: Attachments cannot be larger than 750 MB. The application displays an error message if the attachment is larger than the limit.

You can attach URLs (Internet addresses) to a module document. You (or a user to whom you sent the document and attachment) can then click the URL to open the web page in your Internet browser.

You can attach documents from an Oracle UCM or Microsoft SharePoint repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management.


If you are creating a new transmittal from an existing one, you can also copy the attachments from the existing transmittal to the new one.

To attach a file or URL to a Contract Management document:

- 1) Open the document window for the document to which you want to attach a file or URL.
- 2) Click the **Attachments** tab.
- 3) Click **Attach File** to attach a file to the document, or click **Attach URL** to attach a web address.

You can also launch an attached document or URL in its native application or delete an attachment.

To view an attachment:

- 1) Click the **Attachments** tab on a document window.
- 2) Click the attachment's underlined title to view the document, or click **edit**  next to the document name to edit the attachment properties.

To delete an attachment:

- 1) Click the **Attachments** tab of the document window.
- 2) Click the **remove** link to the right of the attachment you want to delete. When the *Detach this document?* message displays, click **Yes**.

Attaching Documents from a Content Repository

In addition to attaching documents created in Contract Management, you can browse the Oracle UCM or Microsoft SharePoint repository (depending on which content repository your organization uses) for documents to copy or link to Contract Management documents.

The content repository location is configured in the Contract Management Administration Application and the Primavera Administrator utility. For more information on the Primavera Administrator utility, see the installation guide for Oracle or MSSQL.

The documents you can access are based on the security assigned to them for the repository. You can copy or link to a document.

- ▶ For the Oracle UCM repository, a tree structure is built of all the files to which you have access.
- ▶ For the SharePoint repository, you must specify the root node in the Primavera Administrator utility.

If your project is set to use the content repository, you can attach a document from that repository.

To attach a document from a repository:

- 1) Open the document window for the document to which you want to attach a document.
- 2) Click the **Attachments** tab.
- 3) Click **Attach from Repository**.

Note: This link does not display unless the administrator sets the Contract Management content repository properties in the Contract Management Administration Application.

- 4) In the Attach Document dialog box:
 - a. Search for a document or expand the folder list and choose the document you want to attach.
 - b. Click **OK** when finished. The document will be listed on the **Attachments** tab.

Customizing Log and Document Windows

Customizing the Project View

To accommodate your work environment, you can change the names that Contract Management uses to identify folders and documents, and the order of the folders in the Project View. For example, you can change the name of the Contract Information folder to Accounts Payable and include only Purchase Orders, Trends, and Payment Requisitions. You can then move the Cost Worksheet, Contracts, and the other modules to the Communication, Logs, or Project Information folder.

Project View changes are not project-specific; any name changes affect the entire database and all projects in it. You can edit folder names and the document order within each folder, change the order of the entire Project View, and move documents between folders. You cannot add new items to a folder or remove a folder or log from a project.

To change the Project View folder names and sort orders:

- 1) In the Project View, right-click the top-level folder and choose **Folders** when no project is open.
- 2) In the Folders dialog box, make the updates needed and click OK when finished.
 - ▶ To add a new folder, select the All Projects folder, click **New Folder**, and enter a name for the new folder.

Note: To add a module to the new folder, select the module you want to add and click Move Up or Move down until it is in the new folder.

- ▶ To change a folder or module name, select the item, click **Rename**, and enter a new name.
- ▶ To delete a folder, select the folder and click **Delete Folder**. Click **Yes** to confirm the delete.

Note: You can only delete an empty folder.

- ▶ To change a folder or module position, select the item and click **Move Up** or **Move Down**.

Customizing Text

You can change the names of logs, and customize the text for headings in log windows and field labels in document windows to match your company's terminology. For example, in the Cost Worksheet, you may want the column name Original Budget to display as Revenue.


To customize text:

- 1) Right-click the top-level folder in the Project View and choose **Customize Text** to edit the text for headings and field labels.
- 2) Type text in the **Search** field or click a letter to jump to the fields you would like to edit. Any change made to headings and labels affects all projects in all groups within this Contract Management environment. If more than one user changes the same heading, the module uses the last change made.
- 3) Click **Restore Defaults** to return to the default text supplied with the module.

Choosing Acronyms and Descriptions

You can change the names and acronyms of documents to match your company's terminology.

To choose acronyms and descriptions:

- 1) Right-click the All Projects top-level folder and choose **Document Setup** when no project is open.
- 2) In the Document Setup dialog box, click **edit**  for the document type you want to update.
- 3) In the Type Document dialog box, edit the acronym or description as necessary.

Tips

- ▶ If you change the description, the new description will appear in document type drop-down lists.
- ▶ If you want to restore the defaults later, refer to the **Default Acronym** and **Default Description** columns.

Creating User-Defined Document Types

To add your own document types and reference types:

- 1) Right-click the **All Projects** top-level folder and choose **Document Setup**, when no project is open.
- 2) In the Document Setup dialog box:
 - ▶ Click **Add Document Type** to create new types of change orders, notices, noncompliance notices, proposals, or requests.
 - ▶ Click **Add Reference Type** to create documents you can reference in correspondence sent and correspondence received.

For example, if you want to include a fax as part of a correspondence document, define a reference type called FAX, and reference it in the Type field in the Source Document section of the correspondence document window.

You can edit the default report and form libraries and print files associated with the document when you create a document type.

About Custom Fields

A custom field is a field that you can add to the Contract Management database to include and track additional nonstandard information about a project. You can create a custom field to track certain information, such as information particular to your company or at a client's request that is not part of a standard Contract Management log or document window.


For example, you may be managing a project that consists of three phases. To print reports and sort information by phase, you can create a custom field called PHASE, add it to the Contract Management module where you need to track the phase, and then assign a dictionary to the custom field that distinguishes each phase, such as First, Second, or Third. The Custom Fields dialog box displays all custom fields by module.

Add Custom Fields

When you add a custom field, you are adding a new field to your Contract Management database. Custom fields are a database level feature, and are available to every project in a database. You can include custom fields in reports. For example, you can create or modify a report so that it shows only the contracts associated with Phase 1 of a project. The custom fields are added to the appropriate table of the module you are using to create/modify the report.

To add a custom field:

- 1) Verify that no one else is working in Contract Management by right-clicking on the top-level (All Projects) folder and clicking **Current Users**. You can only add custom fields when all other users are logged out. Close the dialog box.
- 2) If no one else is working in Contract Management, right-click on the top-level (All Projects) folder and click **Custom Fields** to open the Custom Fields Dialog Box.
- 3) Expand the module to which you want to add a custom field, and click **Add** to open the Custom Field Dialog Box.

Caution: Do not exit this dialog box by clicking the  (X) in the upper right corner of the dialog box. This will prevent anyone from using Contract Management until the service is restarted by an administrator. Click either **Save and Close** when finished with the rest of this procedure, or **Cancel**.

- 4) Enter the **Column Name** to which you are applying the custom field.
- 5) Enter a name for the custom field in the **Display As** field.
- 6) From the **Location** field drop-down list, select the module to which the custom field should be applied.

- 7) From the **Type** drop-down list, select the type of custom field you are adding to the database. This can be:

| Type: | Used to: |
|--------------|--|
| Character | Define dictionary item |
| Currency | Define numeric currency item |
| Date | Define date format |
| Description | Define a 4000 character box for entering data. |
| Quantity | Define numeric item |
| Uppercase | Define dictionary item |
| True/False | Define an option (for example, for document approval). |

- 8) In the **Length** field, enter the number of characters that users can enter in the custom field.
- 9) For custom fields of type Quantity and Currency, in the **Decimal** field enter the number of decimal places to store.
- 10) If the entry made in the field must always be unique, select the **Unique** option. This prevents the user from entering data that has already been entered.
- 11) If an entry is required in the field before the user can continue, select the **Required** option.

To create dictionary definitions for the custom field:

- 1) Set the **Type** field to *Character*, and then select the **Dictionary** option.
- 2) If appropriate, select the **Allow users to enter items not in the list** option to enable to enter new items.
- 3) Click **Add** to display the Dictionary Item Dialog Box.
- 4) Enter a **Name** for the custom field.
- 5) Enter a **Description** for the custom field.
- 6) Click **Save and Close** if finished, or click **Save and Add Another** to add another dictionary definition.

To save the custom field:


Click **Save and Close** to apply the changes. The custom fields appear in log windows in the farthest right columns, and in document windows at the bottom.

You can enter a value for the custom field (depending on its type) by going to the custom field in the document window. The value will also appear in the log window.

Create a Dictionary of Terms for a Custom Field

You can create a dictionary of terms, also referred to as a List of Values, for custom fields and select the module to which the custom field applies. When you add dictionary definitions to custom fields, the entries appear when you click Select next to the custom field in the document window. You can then choose these definitions to apply to the corresponding document.

To add dictionary terms:

- 1) In the Project View, right-click on the top-level folder (All Projects) and choose **Custom Fields**.
- 2) In the Custom Fields dialog box, expand the appropriate document type.
- 3) Either click **Add** to create a new custom field, or click **Edit**  next to an existing custom field to edit it.
- 4) In the Custom Field dialog box, select the **Dictionary** option.

Note: The **Dictionary** option on the Custom Field dialog box will only be available when the **Type** field is set to either *Character* or *Upper Case*. In all other cases, the option is inactive.

- 5) In the Dictionary Items section, click **Add**.
- 6) In the Dictionary Item dialog box, select the **Allow Users to Enter Items Not in the List** option to enable users to type definitions directly in the custom fields. Definitions entered directly are not added to the Custom Field Dictionary.

Note: You can include custom fields in reports. For example, using the custom field above, you can create or modify a report so that it shows only the contracts associated with the First Phase of the project.

Assigning a Custom Field to a Document

To assign a custom field to a document:

- 1) From a log window, open the document to which you want to add custom fields.
- 2) In the document window, click the **Custom Fields** tab to display the custom fields available for the document.
- 3) Enter or select a value for the custom fields you want to associate with the open document.
- 4) Click **Save** when finished.

Setting Up Dictionaries and Preferences


Working with Dictionaries

You can edit or add codes and categories to existing dictionaries in Contract Management. The defined categories and codes of the dictionaries appear throughout the projects in drop-down lists. Right-click the top-level folder and choose **Dictionaries**, to choose from a list of database-specific dictionaries that enable you to change or add the following:

- ▶ Reason codes that identify the source of a particular change
- ▶ Company roles
- ▶ Equipment types, length of suitable conditions, precipitation, sky, temperature, wind, and weather impact associated with daily reports
- ▶ Bid packages associated with drawings
- ▶ Drawing disciplines used to categorize drawings
- ▶ Phase codes specific to drawing revisions
- ▶ File numbers associated with drawings
- ▶ CSI divisions and purchase types for procurement
- ▶ NAICS codes, accident causes, and dispositions related to safety
- ▶ Specifications codes used to classify work
- ▶ Status codes
- ▶ Submittal categories and types
- ▶ Work impact
- ▶ Various other codes

Add or Edit Reason Codes for Change Management


To add or edit reason codes for Change Management:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Reason Codes**.
During a project, different participants and factors inevitably introduce changes that affect project contracts. In Change Management, these codes enable you to identify the reason for a change. Codes defined here appear in all projects in the database.
- 2) In the Reason Code dialog box:
 - ▶ To create a reason code, click **Add**, enter a reason code and title, and click **Save and Close**.
 - ▶ To edit a reason code, click **edit** , update the information as necessary, and click **Save and Close**.
- 3) Click **Close** when you are finished.

Change the Name of Company Roles and Define New Roles


To edit and create company roles:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Company Roles**.

- 2) In the Company Roles dialog box:
 - ▶ To define new roles, click **Add**, enter information for the role, and click **Save and Close**.
 - ▶ To edit a role, click **edit** , make the necessary changes, and click **Save and Close**.
- 3) Click **Close** when you are finished.

Add or Edit Weather Conditions and Types of Equipment used for Daily Reports


To add or edit weather conditions and equipment:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Daily Reports**, and a type of weather condition or equipment type.
- 2) In the Daily Report dialog box, click **Add** or **edit** .
- 3) In the Daily Report Detail dialog box, enter information for the item and click **Save and Close**.
- 4) Click **Close** when you are finished.

Define the Bid Packages for Drawings

Once the design cycle is finished for architectural drawings on a project, drawings are sent to different contractors to bid on work. You can keep track of drawings and their revisions by defining a bid package for each contractor, and logging the drawings by bid package in the Drawings log. You can modify this list if you send additional contractors drawings for bid. You can also filter drawings by bid package.

To define bid packages for drawings:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Drawings, Bid Packages**.
- 2) In the Bid Package dialog box:
 - ▶ Click **Add** to define a new bid package.
 - ▶ Click **edit**  to update an existing bid package as necessary.

Note: The bid package abbreviation can be up to 15 characters in length.


- 3) Click **Close** when you are finished.

Define Disciplines for Drawings

You can categorize drawings in the Drawings and Drawing Sets logs by discipline, such as ELECT, MECH, ARCH, and CIVIL. When you define disciplines, keep in mind how your company tracks drawings throughout a project. These categories can be used to sort, filter, and report drawing information.

To define disciplines for drawings:


- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Drawings, Disciplines**.

- 2) In the Disciplines dialog box:
 - ▶ Click **Add** to define a new discipline.
 - ▶ Click **edit**  to update an existing discipline.
- 3) Click **Close** when you are finished.

Define Phase Codes for Drawing Revisions

Drawings are sent out for different purposes during different phases of the distribution cycle. For example, Issued for Bid (IFB) or Issued for Construction (IFC) identify the purpose of a drawing sent to project participants. In the Design cycle, drawings in the Design Development (DESIGN) phase require revision cycles similar to submittal review cycles. Predefined codes are included for drawing phases, but you can add additional codes to meet your requirements.

To define phase codes:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Drawings, Drawing Phases**.
- 2) In the Drawing Phases dialog box:
- 3) Click **Add** to define a new phase code.
- 4) Click **edit**  to update an existing phase code.


Note: The code can be up to eight characters in length.

- 5) Click **Close** when you are finished.

Define Drawing File Numbers

If you set up a filing system specifically for drawings, you can add your file numbers to this dictionary, and select the appropriate number when you log drawings.

To define drawing file numbers:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Drawings, File Numbers**.
- 2) In the File Numbers dialog box:
 - ▶ Click **Add** to define a new drawing file number.
 - ▶ Click **edit**  to update a drawing file number.


Note: The file number description can be up to 23 characters in length.

- 3) Click **Close** when you are finished.

Define Paper Sizes for Drawings

Specify a size code and corresponding measurements for the individual paper sizes you use for drawings.

To define paper sizes for drawings:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Drawings, Paper Sizes**.
- 2) In the Paper Sizes dialog box:
 - ▶ Click **Add** to define a new drawing paper size.
 - ▶ Click **edit**  to update a drawing paper size.


Note: You can click **Organize Rows** to set the order in which codes appear in drop-down lists.

- 3) Click **Close** when you are finished.

Define Codes Used for Procurement

If you use procurement, you can create new CSI division codes and purchase types.


To define codes used for procurement:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Procurement**, and click the appropriate item for which to create codes.
- 2) In the dialog box:
 - ▶ Click **Add** to define a new code.
 - ▶ Click **edit**  to update a code.
- 3) Click **Close** when you are finished.

Define Codes Used to Specify Concerns and Violations

Recording safety violations, concerns, and injuries on the job site is critical for conforming to OSHA regulations and keeping records. The Safety module enables you to track safety violations and accidents. You can define categories and codes for accident sources, safety dispositions, violations, and NAICS codes.

To define codes used to specify concerns and violations:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Safety**, then click the appropriate safety code to define.
- 2) In the dialog box:
 - ▶ Click **Add** to define a new code.
 - ▶ Click **edit**  to update a code.


Note: Disposition and violation codes can be up to four characters in length. NAICS codes can have up to eight characters.

- 3) Click **Close** when you are finished.

Add or Edit the Specification Codes Used to Classify Work

The codes in the Specification Sections Dictionary classify construction work using the MasterFormat coding system developed by the Construction Specification Institute (CSI). A Specification Section field is available in most document windows. These codes are used in reports and forms, and are available for sorting and filtering data.

To add or edit the specification codes:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Specification Sections**.
- 2) In the Specification Sections dialog box:
 - ▶ Click **Add** to define a new section.
 - ▶ Click **edit**  to update a section.
 - ▶ Click **Organize Rows** to set the order in which the codes appear in drop-down lists.
 - ▶ Click **Delete** to remove a specification code.
- 3) Click **Close** when you are finished.


Add or Edit Status Codes

The module displays status description values in the Status field in various windows. You can change these codes and descriptions to match your company standards, and you can add new codes to the list. Use status codes in documents (such as submittals and change documents) to identify their status in various stages of the project.

The module uses these standard types to categorize the code names you create.

Note: You can delete status codes from this list, but you must keep at least one Approved, Open, Closed, Rejected, and New Item type. Only the Description, Color, and Move Below fields are editable for the New Item status.

To add or edit status codes:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Status**.
- 2) In the Status dialog box:
 - ▶ Click **Add** to define a new status code.
 - ▶ Click **edit**  to update a status code.


Note: The file number description can be up to 23 characters in length.

- 3) Click **Close** when you are finished.

Add or Edit Submittal Categories and Types

To organize submittals, you can define different categories and types. The submittal categories and types you define are available in the Category and Type drop-down lists in the Submittal document window on the General tab

To add or edit submittal categories and types:

- 1) Right-click the top-level folder in the Project View and choose **Dictionaries, Submittal**, and select **Categories** or **Types**.
- 2) In the Submittal Category or Submittal Type dialog box:
 - ▶ Click **Add** to define a new submittal type or category.
 - ▶ Click **edit**  to update a submittal type or category.
- 3) Click **Close** when you are finished.

Working with Project Dictionaries

When a project is open, you can add or change drawing areas, punch list elevations, and punch list rooms. The items defined in the Drawing Areas and Punch Lists dictionaries appear only in the opened project.

Right-click a project and select **Dictionaries** to access the project's dictionaries.

Assign Areas Associated with Drawings

Drawings typically correspond to specific areas of construction work, such as the reception area in an office building. Areas are useful for a general association of which particular drawing or set of drawings is referenced in construction or design work. These areas help to further categorize drawings so you can more easily determine outstanding requirements in revisions.

To assign areas associated with drawings:

- 1) Right-click a project in the Project View and choose **Dictionaries, Drawing Areas**.
- 2) In the Drawing Areas dialog box, click **Add**.
- 3) In the Drawing Areas Detail dialog box, enter an area, a description, and select from the **Move Below** list where you want to position the area in the list of areas.
- 4) Click **Save and Close** when finished.

Define Elevation and Rooms for Punch Lists

You can define elevations and rooms for an individual punch list item in the Location section of the Punch List Item dialog box (accessed from a punch list document by clicking a punch list item, the Punch List Items tab, and a punch list Item Number). Elevations and rooms are project-specific.

To define elevation and rooms for punch lists:

- 1) Right-click a project in the Project View and click **Dictionaries, Punch Lists**, and select **Punch List Elevations** or **Punch List Rooms**.
- 2) Click **Add** to define additional elevations or rooms.

- 3) In the detail dialog box:
 - a. Enter an elevation or room name.
 - b. Enter a description.
 - c. Select from the **Move Below** list where you want to position the elevation or room in the list of elevations or rooms.
- 4) Click **Save and Close**.
- 5) Click **Close** when finished.

Specifying Project Settings

The settings you specify for a project form the basis for how these functions work as you use them throughout Contract Management. You can set project settings for the current project only. You can change the default project settings to suit your preferences for the project.

Note: If you have a project open, you can specify preferences for the following: Key participants, Contacts, Default document owners, Transmittals, E-Mail Integration, Contracts/Purchase Orders, Schedules, Requisitions, Change Management, Procurement, Cost options, Currency, and Markup.

To specify project settings:

- 1) Right-click a project name in the Project View and choose **Project Settings**.
- 2) In the Project Settings dialog box, select the tab for the area you want to configure. For more information on each tab, see Project Settings Dialog Box.

Configuring User Settings

You can set personal settings for how you want certain functions performed.

To configure user settings:

- 1) Right-click the top-level folder or a project in the Project View and choose **User Settings**. Settings selected here are user-specific per Contract Management server. The module saves the changes for your user ID and uses them for any workstation which you use to log into Contract Management.
- 2) In the User Settings dialog box:
 - a. Select the **Add Mail to Sent Log** option to automatically log your mail.
 - b. Select the **Create Correspondence Sent record for each email recipient** option to create a Correspondence Sent record for every email recipient.
 - c. Select the **Include email attachments in Correspondence Sent record** option to copy email attachments to the Correspondence Sent log.
 - d. Select the **I am currently connected to the file server** option under if you have a direct connection (access) to the location on the server where attachments are stored, and you intend to manually upload attachments to the file server. Check with your Contract Management module administrator before changing this setting. Depending on how attachment function is configured within your User Account, you may not see this setting.

- e. Select the **Reset Reminder Messages** option if you want Contract Management to display reminder messages again. For example, if a message appeared that said "Do not display this reminder anymore" and you chose to stop displaying it, selecting this option will cancel that action and display the messages again.
 - f. Select the **Ask Me to Copy Commitments to Budget When Starting a New Budgeted Phase in Change Management** option to remind you to copy commitments to the budget when you start a new budgeted phase in Change Management.
 - g. Select a language from the **Language** drop-down list to change what language the application is displayed in.
 - h. To change the password you use to log into the module, click **Change** in the Password section and enter a new password in the resulting dialog box.
- 3) When you are finished configuring your user settings, click **Save**.

Setting Layout Options

Use the Layout Options window to choose how layout titles appear in the Layout drop-down list in log windows: number and title, title and number, or title only.

To set layout options:

- 1) Right-click the top-level folder in the Project View and select **Layout Options** to set layout options.
- 2) In the Layout Options dialog box, select one of the options to determine how the **Layout** list will display.
- 3) Click **OK**.

Maintaining a Contract Management Database

Working with Contract Management Databases

A Contract Management database is a file that contains one or more projects. Contract Management includes two project databases.

Note: A database is sometimes referred to as a “Group” (as in the Change Group dialog box).

Projects in a database share the following information:

- ▶ *Companies and contacts.* Details about all of the contacts involved in your projects.
- ▶ *Custom fields.* Fields you can add to the Contract Management database for tracking information that is unique to your company and projects.
- ▶ *Cost code definitions.* Descriptions of your cost code structure, for reporting purposes, if you are using the Cost Worksheet.
- ▶ *Specification sections, company roles, status, document settings, group-level distribution lists, reason codes, bid packages, disciplines, file numbers, paper sizes, phases, equipment types, length of suitable conditions, sky, precipitation, temperature, wind, weather impact, CSI divisions, purchase types, accident sources, NAICS codes, dispositions, safety violations, submittal categories, submittal types, work impact, alerts, reporting currency, Project View names, and reference types.*

For detailed, step-by-step information for adding, updating, and migrating databases, see the installation guide for Oracle or MSSQL.

Printing Logs, Forms, and Reports

About Printing

In Contract Management, you can print a copy of any log, print the contents of a document using a predefined form, or print a predefined report or dunning letter. Several multiproject reports are also available to print data from all projects in your database for the document type. Some examples of multiproject reports that pertain to multiple document types are Multi-Project Items Overdue, Multi-Project Items Required Today, and Multi-Project Items Required within 7 Days.

Depending on your printer designation, you can also print multiple copies of logs, forms, reports, or dunning letters. This is helpful if you need to send a copy to several people.

Print and Preview Logs As-Is

The logs contain all documents for that module, and columns showing general information about each document. Open the log window you want to print, and then click Print Report to print the default report for the log.

Print and preview logs as-is (which includes printing selected layouts) by sending the log to a spreadsheet program (for example Microsoft Excel). This will allow you to keep the formatting of the current log layout. Any layouts (grouping, filtering, or sorting) will preview and print as-is.


To print and preview logs as-is:

- 1) Open a log window and choose **Download Current Layout** from the **Select and action** drop-down list.
- 2) In the Opening dialog box, select to open the document and click **OK**.
- 3) When the log opens in the program you chose, you can use that program's functionality to print the log.

Print Forms

Forms are used to print detailed information from a single document, such as a transmittal. You can choose a standard form, or you can use BI Publisher to customize or create your own.

Use one of the following methods to print a form:

- ▶ From a document window, click **Print Form**  to print the default form. Click **Print** in the resulting dialog box.
- ▶ From a document window, choose **Advanced Print** from the **Select an action** list. In the **Print** dialog box, select the **Form** radio button and then select the form you want to print. Click **Print**.
- ▶ From a document window, choose **Print Form** from the **Select an action** list. Click **Print** in the resulting dialog box.
- ▶ From a log window, click **Select an action**, corresponding to the document for which you want to print the form and select **Print Form**.

Printing Reports

Reports usually include information that the module collects from multiple documents, such as a list of submittals. You can choose a standard report from those included with the module, or you can use BI Publisher to customize an existing report.

To print a report:

- 1) From any log or document window, choose **Advanced Print** from the **Select an action** drop-down list.
- 2) Choose **Reports**, select the report to print, and then click **Print**.
- 3) Click **Print** again after the report displays in Adobe PDF format.

To print the default report:

- ▶ From any log or document window, click **Print Report**.
- ▶ From a log or document window, choose **Select an action**, to open the Print dialog box. Choose **Reports** and select the report. Click **Print Preview** or **Print**.

Printing Multi-Project Reports

You can print certain reports that contain data from all projects in a folder for a particular document type. For example, you can list items required within seven days for all projects, print the Contract log grouped by project with totals, or print submittals by ball-in-court (BIC) for all projects. Multi-project reporting provides a convenient way for you to gather all the data you need to assess status, requirements, and outstanding issues for all projects. Multi-project reports are denoted by an m_ prefix; single project reports are identified with an r_ prefix.

To print a multi-project report:

- 1) In the Project View, click the top-level folder so that no project is selected.
- 2) Click **Print** located on the right side of the header.
- 3) From the drop-down list, select a log to list the predefined reports for that document type, and click **Show**.
- 4) Select the report from the list on the right side, and then click **Print** or **Preview**.
- 5) Click **Print** again after the report displays in Adobe PDF format to print the report.

Print Dunning Letters

A dunning letter is a specific kind of report used to remind project participants to deliver certain items or perform certain tasks. You can use the sample dunning letters, or create your own using BI Publisher.

To print a dunning letter:

- 1) From a log or document window, choose **Advanced Print** from the **Select an action** list. The Print dialog box will open.
- 2) Choose the **Dunning Letters** option.

- 3) Select the dunning letter you want to print and click **Print** or **Preview**.

Notes:

- Not all logs contain dunning letters.
 - Preview displays a screen representation of the printed document. You cannot edit the document in Print Preview; you must make your changes directly in the document.
-

Previewing Logs or Documents

You can preview a document as it will appear when printed. The document displays in Adobe PDF format.

Previewing the Default Document from a Log Window

To view the default document for the log displays, click **Print Preview** from a log window without selecting a document.

Previewing a Document with the Advanced Print Function

To preview a document with the advanced print function:

- 1) From a document window, choose **Advanced Print** from the **Select an action** drop-down list.
- 2) Select the option for the type of document to preview (Forms, Reports, or Dunning Letters).
- 3) Select a document and click **Preview**.

Communicating Project Information

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Sending Contract Management Documents to Other Users

About the Inbox

The Contract Management Inbox and related Send to Inbox feature provide a convenient method for transferring documents electronically between users. Use the Inbox to retrieve documents other users have sent you.

You can open documents from other projects while in the Inbox without closing the project you are currently in; while previewing the document, you can forward it to another user.

The Inbox stores documents sent to you by other users. The module automatically records documents here that are sent by choosing Send to Inbox from the Select an action drop-down. The Inbox displays the linked name of the document, the date and time sent, the name of the contact that sent the document, the document's project, and a comment icon, if applicable.

Notes:

- To open a document, click the document icon (Edit mode) or the document's title (View mode).
 - To forward a document, select the document's option and click Forward.
 - To mark a document as read or unread, select the document's option and click Mark Read or Mark Unread.
 - To delete a document, select the document's option and click Delete.
 - You cannot manually add a document to the Inbox from the Inbox.
 - You cannot send a document to another user's Inbox if the user does not have access to the document.
 - When the item is deleted from the Inbox, the Inbox record and its comments are deleted from the database. The actual document (such as a submittal) is not deleted.
-

Sending Documents to Users

When you send a document to a user, it is equivalent to handing someone a document and asking them to review it. For example, you may want Steve Johnson, the project manager, to review the daily report you just entered for the day. To do this, send the document to Steve's Inbox. The difference between sending it this way and sending it to users through email is that you are not creating an attachment. You are providing a link to the actual document in the contact's Inbox. When the contact opens the document from their Inbox, they are opening the actual document.

To send documents to users:

- 1) Open the document window for the document you want to send.


Note: You can also send documents from the log window.

- 2) Choose **Send to Inbox** from the **Select an action** drop-down list. The Send to Inbox dialog box opens.
- 3) Select the recipient of the document in the **Send to** field.
- 4) Enter any comments you want attached to the document in the **Comment** field. Any comments you send appear as a sticky note icon in the user's inbox.
- 5) Click **Send**.

Configuring the Inbox

The Inbox object indicates the number of documents for each priority level sent to you by other users.

To configure the inbox:


- 1) From the Inbox object in the Workspace, click **Customize** . The Customize Inbox dialog box will open.
- 2) Choose whether to view all documents from all projects or documents only from projects within the selected folder.
- 3) Choose how to organize documents in the Inbox from the **Organize documents by** drop-down list. You can select a secondary way to organize documents from the **Then by** drop-down list.
- 4) Click **OK**.

Adding Email Addresses for Contacts

You must enter email addresses to use the request notification feature. This feature automatically sends an email to the RFI's Ball in Court when you first enter the RFI. It sends a notification to the Ball in Court when the answer is provided. Your contacts can provide you with their correct email addresses. This feature can also send one response to other contacts via the Answer Distribution section.

Note: Any email address entered here can also be used with the Publish Project and Send PDF feature.

To add an email address for a contact:

- 1) In the Project View, expand the **Project Information** folder and click **Companies**.
- 2) Click a company name, or its document icon, to open the document window.
- 3) Click **edit**  next to the contact you want to edit to open the Contact dialog box.
- 4) In the **E-mail Information** section, enter the contact's email address in the **Address** field.
- 5) Click **Save & Close**.

Preparing Transmittals

Prepare a New Transmittal

Use the Transmittals Log Window to add new transmittals and view all current transmittals.


To prepare a new transmittal:

- 1) In the Project View, expand the project to which you want to add a submittal.
- 2) Expand the **Communication** folder and click **Transmittals**.


3) Click **Add Document** .

4) Use the information below to edit the transmittal.

On the General tab:

- 1) Click **Select To**  to choose the transmittal's recipient.
- 2) Contract Management supplies the system date, the next available sequential number, and the From contact in the other fields on the General tab. The **From** field is populated based on the project owner. You can edit these fields.

On the Status tab:

- 1) Click **Select Ball in Court**  to assign a BIC to the transmittal.
- 2) Select a priority level.

On the Items tab:

Use the Items tab to add transmittal items. See Add Transmittal Items.

Note: To delete a transmittal item, simply click **Delete** for the item and confirm.

On the We are Sending tab:

- 1) Mark the checkboxes to indicate what you are sending.
- 2) Enter the number of copies for print, approval, and distribution as appropriate.
- 3) Use the **Other** field to add your own description of an item that you will also send.
- 4) Enter the number of copies for corrected print, approval, or distribution.

On the Submitted For tab:

Mark the checkboxes corresponding to the reasons for the transmittal.


On the Sent Via tab:

- 1) If the transmittal is attached, select the **Attached** option.
- 2) If the transmittal will be sent by another method, select the **Separate Cover VIA** option, and enter a description in the field.

- 3) To track the delivery of something sent with the transmittal, select a shipping company.
- 4) If you are tracking shipping, enter a number in the **Tracking Number** field.
- 5) Click **Track It** to open the selected shipping company's website in another browser. The tracking number is automatically inserted and tracked.

Note: If you enter a shipping company and tracking number in a transmittal that was created from drawings or drawing sets, the shipping company and tracking number will appear on the **Revision Distributed to** subordinate tab on the **Revisions** tab of the Drawing Document Window and the Drawing Distribution Dialog Box.

On the Actions Taken tab:

- 1) Mark the checkboxes to indicate what actions you are taking, or what actions the recipient must take, regarding the attached contents.
- 2) Click **Select Date**  to select a due date.



On the Remarks tab:

Use the Remarks tab to enter additional information regarding the transmittal.

On the Distributions tab:

Click **Add** to select contacts to add to the distribution list.

On the Details tab:

- 1) In the **Reference** field, enter information about the document associated with the transmittal.
- 2) In the **Additional References** fields, enter information about any additional documents associated with the transmittal.
- 3) In the **Contract** field, click **Select Contract**  to link a contract to the transmittal. Click **Clear**  to clear the **Contract** field so you can choose another.
- 4) In the **Copies to** field, enter the names of contacts receiving copies of the transmittal.
- 5) In the **Attention** field, Contract Management automatically enters the key contact for the company that you selected for the **To** field on the General tab. You can enter a different contact name.
- 6) In the **Signed** field, Contract Management automatically enters the key contact for the company that you selected for the **From** field on the General tab. You can enter a different contact name.

On the Issues tab:

Click **Link** to add issues to the transmittal.

On the Attachments tab:

On the **Attachments** tab, you can do the following:

- ▶ Click **Attach File** to attach a file to the document.

- ▶ Click **Attach from Repository** to attach a document from the content repository. These documents are external to Contract Management. This will not display unless the administrator configured Contract Management to use the repository. See Configure the Content Management Version Document and Attachment Feature.
- ▶ Click **Attach URL** to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

On the Custom Fields tab:

The Custom Fields tab only displays when one or more custom fields have been defined for the module. To define any additional information about a project, create a custom field. See Add Custom Fields.

On the Versions tab:

Use the Versions tab to view different versions of the document. If you make changes to the document and you want a version of it, select **Version Document** from the **Select an action** drop-down list. For more information about versions, see the Version Document Overview.

To create a new version of the current document, choose **Version Document** from the **Select an action** drop-down list. When you add a new document, this tab only displays when you save your document.

You can configure Contract Management to automatically create a version document each time you save the document.

Save the transmittal:

When you are finished editing the transmittal, click **Save**.

Delete a Transmittal

To delete a transmittal:

- 1) Open the transmittal that you want to delete in View or Edit mode.
- 2) From the **Select an action** drop-down list, choose **Delete Document**.
- 3) Click **Yes** when prompted to delete the item.

Using Distribution Lists in Transmittals

Use distribution lists to record the distribution of a transmittal to the appropriate people.

- 1) On the Transmittals document window, click the **Distributions** tab and click **Add**.
- 2) From the Select Contacts window, select the **Distribution List** option.

- 3) Click **Select** beside the distribution list names to add distribution lists to the transmittal. Click **Unselect** in the **Selected Contacts** section below to remove an individual name from the distribution list used for this transmittal.
- 4) Click **Save** to add the distribution list to the transmittal.

Tips

When you print transmittals, you can print a copy for all contacts listed on the Distribution list. Choose **Advanced Print** from the **Select an action** drop-down list to set printing options.

Generate a Transmittal from an Existing Transmittal

You can create a transmittal that is similar to an existing one. For example, you may want to send information from an existing transmittal to a different company; in this case, only the recipient's address is different. To reduce data entry time, generate a copy of the transmittal, and then modify the copy.

To generate a transmittal:

- 1) Open the transmittal that you want to copy in View or Edit mode.
- 2) From the **Select an action** drop-down list for that transmittal, choose **Generate Transmittal**. The Generate Transmittal dialog box will open.
- 3) Specify whether to link the transmittal to the same issues and attachments as the original transmittal.
- 4) Click **Finish** to add the new transmittal to the log. The dialog box will close and the document window for the new transmittal will open. The transmittal will be identical to the original except for its number and date.

Produce Transmittals from Other Documents

You can produce transmittals from most Contract Management modules. Transmittals for submittals and drawings are created automatically.

To produce a transmittal from another document:

- 1) Open the document from which you want to produce a transmittal in View or Edit mode.
- 2) From the **Select an action** drop-down list, choose **Generate Transmittal**. The new transmittal document window will open.

For most documents, the transmittal is created automatically with the To and From contacts. For documents that do not have explicit To and From contacts, the Generate Transmittal Wizard opens. Click **Select** to select contacts for the **To** and **From** fields. Click **Finish**.

- 3) If you need to edit the transmittal, click **Edit Document** . See *Prepare a New Transmittal* (on page 82) for more information.

Note: Contract Management assigns issues and attachments associated with the original document to the new transmittal.

Delivering Transmittals

When you generate transmittals from submittals, drawings, or revisions, they are placed automatically in the Transmittal Queue. From the queue, you can print the transmittal. Once the transmittal is created, you can also print, fax, or e-mail it to one or more participants directly from its document window. If you send a transmittal via e-mail, you can select the Include Attachments option to include any attachments if they are detected by your mail program.

Create Transmittals

To create transmittals:

- 1) Expand a folder for a project in the Project View and select any log.
- 2) Click **Transmittal Queue** at the top of the window.
- 3) In the Transmittal Queue dialog box, select the entries for which you want to create a transmittal and click **Create** or **Create All** to create transmittals for all items in the list. In either case, the transmittals are added to the Transmittals log.

Print, Fax, or Email a Transmittal Directly from its Document Window

To print, fax, or email a transmittal from a document:

- 1) Expand the **Communication** folder for a project in the Project View and click **Transmittals**.
- 2) From the Transmittals log window, open the transmittal that you want to print, fax, or email.
- 3) From the transmittal's document window, choose **Advanced Print** from the **Select an action** drop-down list.
- 4) Choose **Forms, Reports, or Dunning Letters**.
- 5) Choose a form, report, or letter from the list, and then preview, print, or email the document. You can also click **Save As** to save the document in CSV format as a spreadsheet or a spreadsheet with headers.
- 6) Click **Close** when you are finished.

Recording and Tracking Communications

Send a Document to a Correspondence Log

The Contract Management Correspondence Sent log window and Correspondence Received log window logs enable you to track all items you send and receive during the life of your project. Use the Correspondence Received log to record incoming documents, especially those that require follow-up. Use the Correspondence Sent log to record outgoing documents and to help you prepare form letters.

You can use Contract Management's Send to Corr Sent/Send to Corr Rcvd commands to record the currently open document in a Correspondence log, or by manually entering the information directly in the Correspondence log. Contract Management following steps apply to both the Correspondence Sent and Received modules.

The module numbers the item sequentially and enters the name of the person currently logged into Contract Management. Click the **Status** and **Log Information** tabs to view the ball-in-court, priority, status, and who entered the document in the Correspondence log. The **Manually Entered** field on the Log Information tab indicates whether this item was entered manually or sent from a document.

Any dunning letters you print are automatically recorded in the Correspondence Sent log. A separate record, or row in the log, is created for each contact included on the letter. If you do not want to automatically record dunning letters, turn off this default preference by clearing the **Add Dunning Letters to Sent Log** option available on the Communication tab of the Project Settings dialog box.

Send a Document

To send a document:

- 1) Open the document window for the document you want to send to a Correspondence log. You can also do this from a log window.
- 2) From the **Select an action** drop-down list, choose **Send to Corr Sent** (or **Send to Corr Rcvd**).

Note: Contract Management enters all the information about the document in the Correspondence log and includes any attachments in the resulting correspondence sent document.

View Correspondence Document Items

To view correspondence document items:

- 1) Open a correspondence sent document in View mode.
- 2) Click the **Source Document** tab.
- 3) Click the link in the **Description** field to open the original source document (except for dunning letters) to view the details of a sent item.

Note: If you are in Edit Mode, **Description** is not available.

Adding Correspondence Documents Manually

You can manually add documents that are not included in other logs to the Correspondence logs.

To add a correspondence document manually:

- 1) Expand the **Communication** folder for a project in the Project View and click **Corr. Sent** or **Corr. Received**.
- 2) Click **Add Document**.

Note: The module enters the current date and time, Entered By, Manually Entered (set to Yes), and your company name in the **From** (or **To**) field.

- 3) Click each tab in the document window to enter information for the record, including information about the source document.

Add a Letter

During a project, participants often exchange important information through letters. You can record this information in the Letters log. For example, letters that outline contractual obligations or clarify a delay can later function as supporting evidence in a claim.

Letter templates are now done through BI Publisher; Microsoft Word is no longer required. However, letters are created and stored in .rtf format, so if you have Microsoft Word installed on your system, you can still use it to modify letters.

Note: If the temp directory exists on a network drive, Contract Management must be run as a user account and not a system account.

To add a letter:

- 1) Expand the **Communication** folder and click **Letters** to open the Letters log window.



- 2) Click **Add Document** to open a blank Letter document window.

Note: The Issues and Attachments tabs do not appear until after the letter is created.

On the General tab:

- 1) Enter a date for the letter.
- 2) Click **Add** to select contacts that will receive the letter.
- 3) Click **Select From** to select the contact sending the letter.
- 4) Enter a subject and select a template for the letter.

On the Status tab:

Select a **Ball in Court**, **priority**, and **status** for the letter.

On the Distributions tab:

Click **Add** to select the contacts to add to the list.


On the Details Tab:

- 1) Enter the time, due date, and responded date for the letter.
- 2) Click **Select Contract** to choose a contract to link to the letter.
- 3) In the **Reference** field, enter a detailed description of the letter in this field.
- 4) In the **Enclosures** field, enter text information about any enclosures sent with the letter.
- 5) When finished adding all information for the letter, click **Save and Create Letter**.

Check Out a Letter

To check out a letter:

- 1) Expand the **Communication** folder and click **Letters** to open the Letters log window.
- 2) Open in View mode the letter you want to check out. Do not open the letter in Edit mode.

- 3) Click **Check Out** , and click **OK** to confirm that you want to check out the letter.
- 4) On the **Opening <letter name>.rtf** dialog box, do one of the following:
 - ▶ Click **Open with** and select the software with which you want to open the file. Microsoft Word is the default.
 - ▶ Click **Save** and on the next dialog box navigate to the location where you want to save the letter.

Notes:

- Make note of the exact file name and location. You will need this information when checking in the letter.
- You can rename the letter and use this new file name to check the letter back in to Fusion PPM Bridge. The new name will not be saved in the application, only the contents of the letter will be updated.

Check In a Letter

A letter can only be checked in by the person who checked it out, or by an administrator.

To check in a letter:

- 1) Expand the **Communication** folder and click **Letters** to open the Letters log window.
- 2) Open in View mode, the letter which you want to check in.

- 3) Click **Check In** .


- 4) Click **Browse**, navigate to the location where you downloaded the letter, and click **OK**.

Caution: The contents of the letter you check in will overwrite the contents of the letter currently in the application regardless of the file name. Ensure you are checking in the correct letter or data will be lost.

Cancel a Letter Check Out


To cancel a letter check out, you must be the person who checked it out or an administrator.

To cancel a letter check out:

- 1) Expand the **Communication** folder and click **Letters** to open the Letters log window.
- 2) Open in View mode the letter for which you want to cancel the check out.
- 3) Click **Cancel Check Out** , and click **OK** to confirm that you want to cancel the check out.

Download a Copy of a Letter

To download a copy of a letter:

- 1) Expand the **Communication** folder in the Project View and click **Letters** to open the Letters log window.
- 2) Click **Download Letter**  next to the name of the letter you want to download.
- 3) On the **Opening <letter name>.rtf** dialog box, do one of the following:
 - ▶ Click **Open with**, and select the software with which you want to open the file. Microsoft Word is the default.
 - ▶ Click **Save**, and on the next dialog box navigate to the location where you want to save the letter.

Create Templates for Letters

You can define a template for new letters that contains text, logo, and margin information to serve as the basis for the letters you add in the Letter document window. Letter templates are created in BI Publisher. A sample letter template is included with this version of Contract Management.

Note: The Contract Management Help does not attempt to explain how to use BI Publisher. See the BI Publisher documentation for more information about creating additional letter templates.

Generate a New Letter From an Existing Letter

If you need to send a letter similar or identical to an existing one, you can generate a new letter from an existing letter.

To generate a letter:

- 1) Expand the Communication folder for a project in the Project View and click Letters.
- 2) In the Letters log window, click a letter to open its document window.
- 3) In the Letters document window, choose **Select an action, Generate Letter**.
- 4) In the Generate Letter dialog box, select values for the fields and click **Finish**.
A separate letter is generated for each recipient you add in the **Generate Letter** dialog box. Each generated letter is assigned the next available number, in consecutive order, in the Letters log.

Add a Request for Information (RFI)



Open the Request for Information document window:

- 1) Expand the **Communication** folder and click **Request for Information** to open the Requests Log Window.



- 2) Click **Add Document**  to open a blank Request for Information Document Window.



On the General tab:

- 1) Choose a request type from the **Type** drop-down list. This is a required field.
- 2) Click **browse**  next to the **To** field, and select the contact to receive the Request for Information. This is a required field.
- 3) Click **browse**  next to the **From** field, and select the contact that is sending the Request for Information. This is a required field.
- 4) In the **Number** field, enter a number for the Request for Information. This is a required field.
- 5) Choose a date.
- 6) Enter a title for the Request for Information.

On the Review Status tab - Setting up the Approval structure using the method available in versions of Contract Management 11.1 and older:

If you have Request for Information documents that were created in a version of Contract Management prior to version 12.0 (11.1 and older), and you want the new Request for Information documents that you create to have the same approval structure, you can use the approval fields described in this section to add a new RFI. Once you save this document using the fields described in this section to set up the approval structure, you will not be able to use the new approval process.

Note: If you have reports that were built against approval data using the approval fields from versions 11.1 and older, you should use the fields described in this section to set up the approval structure. If you use the new approval process available in versions of Contract Management 12.0 and later, your reports may not work.



- 1) Click **Select Document Owner**  next to the **Document Owner** field to open the Select Contact Dialog Box, and select the document owner. This is the contact responsible for this RFI document. This contact is one that is already linked to a user account when adding contacts or editing an existing contact. When using the existing approval fields, this is not a required field.
- 2) Click **Select Ball in Court**  next to the **Ball in Court** field to open the Select Contact Dialog Box to choose a BIC.
- 3) From the **Priority** drop-down list, select the priority level for this RFI, which will appear in the BIC's action list.
- 4) From the **Status** drop-down list, select a valid status code.
- 5) To approve the RFI, click **Approve**. The default is *No*. You must fill in the **Approved By** information before you can approve an RFI.
- 6) Use **Select** in this section to open the Select Contact Dialog Box to select the authorized contacts to approve the RFI. Either type the dates in the Date fields or select a date from the calendar. Two contacts must sign off on the RFI before you can click **Approve and Save**.
- 7) Click the calendar icon next to the **Approval Date** field to select the date on which the RFI was approved.

On the Review Status tab - Using the workflow-based Approval Process (for Contract Management 12.0 and later):

Prerequisites—Before you begin using the approval process

The following prerequisites must be met before you can use this approval process:

- 1) The companies for this project must be created. See Add Companies and Contacts for more information.
- 2) The contacts for the companies must be created, and linked to a user account. See Add Companies and Contacts for more information.

- 3) The contacts must have view, add, and edit rights for the project.
 - ▶ This is done in the Contract Management Administration Application when the user account is created. Log onto the Administration Application, and click **User Accounts** in the left pane to display the User Account – Edit Window. Use this to add a user account.
 - ▶ Once the user account has been created, you can change access rights by right-clicking on the project name and selecting **Project Access** to display the Project Access Dialog Box. On this dialog box, click **Edit**  next to the user name to display the User Project Access Dialog Box, and set the user project access rights. If the user is not listed for this project, click **Add Users to this Project** on the Project Access Dialog Box, and select the users to add to the project.
- 4) The contacts must have approval rights for the project.
 - ▶ This is done in the Contract Management Administration Application when a user access template is created. Log onto the Contract Management Administration Application, and click **Access Templates** to display the Access Template – Edit Window. After that, the template is assigned to the user account when the user account is created on the User Account – Edit Window.
 - ▶ Once the template has been assigned to a user account, you can change the approval rights by right-clicking on the project name and selecting **Project Access** to display the Project Access Dialog Box. On this dialog box, click **Edit**  next to the user name to display the User Project Access Dialog Box, and set the approval rights. If the user is not listed for this project, click **Add Users to this Project** on the Project Access Dialog Box, and select the users to add to the project.


Note: If any of the preceding prerequisites are not met, the reviewer that you want to select for the approval process will not show up on the list of reviewers from which you can select.


Setting up the approval cycle:

- 1) Select the **Use Approval Process** option to use the new approval process.

This will display the fields for the new approval process, and will hide the fields that would be available for versions of Contract Management prior to version 12.0. Once you enter all the information for the approval process and click **Save**, this option will no longer be visible. After you save the document using the new approval process, you will not be able to go back and use the approval fields that were available in Contract Management 11.1 and older.

Note: If you have reports that were built against approval data using the approval fields available in Contract Management versions 11.1 and older, use the approval fields that were available in Contract Management 11.1 and older to set up the approval structure. If you use this new approval process, the reports that you built against the approval data may not work.

- 2) Click **Select Document Owner**  next to the **Document Owner** field to open the Select Contact Dialog Box and choose the contact responsible for this RFI document. This contact is one that is already linked to a user account when adding or editing an existing contact. This is a required field when using the new approval process.

- 3) Click **Select Ball in Court**  next to the **Ball in Court** field to open the Select Contact Dialog Box to choose a BIC.
- 4) The **Status** field lists the status code for the document. Contract Management will change this field, depending on what action a reviewer designates for a document. When creating a new RFI, the status is *New Item*.
- 5) Use the **Priority** drop-down list to select the priority level for this RFI, which will appear in the BIC's Action List. Priority can be *High*, *Normal*, or *Low*.
- 6) Use the **Workflow** drop-down list to choose the method of approval. This can be one of the following:
 - ▶ **Approve in Sequence**: Use this approval method when the document must be approved in the order in which the reviewers are listed under the **Review** section.
 - ▶ **All must Approve**: Use this approval method when every contact listed under the **Review** section must approve the document before approval is final.
 - ▶ **Any can Approve**: Use this approval method when any contact listed under the **Review** section can approve the document and make the approval final.
- 7) Click **Add Reviewer** to create the list of reviewers. This displays the Select Contact dialog box that you use to choose the reviewers. You must already have added the contacts and linked them to a user account.
- 8) Click the calendar icon to the right of the **Required Start** field to display a calendar that you can use to select the date on which the approval process must start. Use the arrows on either side of the name of the month to select a different month. Use the arrows on either side of the year to select a different year.
- 9) Click the calendar icon to the right of the **Required Finish** field to display a calendar that you can use to select the date on which the approval process must end. Use the arrows on either side of the name of the month to select a different month. Use the arrows on either side of the year to select a different year.
- 10) After setting up all the information and creating the list of reviewers, click **Initiate** to start the approval process. Only one of the following can initiate an RFI:
 - ▶ The project owner
 - ▶ The document owner
 - ▶ A Contract Management administrator

Caution: If you click **Initiate** before all fields are complete, and all reviewers are listed, you will be unable to make any changes in this cycle. The field to the right of the **Initiate** field lists the cycles. You can use the pull down list to pick a different cycle to review. This field will be blank until after the first cycle is initiated.

Read-only fields

The following fields are read-only information fields:

Cycle Days Overdue

This read-only field displays the number of days in this cycle that the approval process has exceeded the Required Finish date.

Cycle Days Elapsed

This read-only field displays the number of days in this cycle that have passed since the Required Start date of the approval process.

Total Days Elapsed

This read-only field displays the total number of days in this cycle that have passed since start of the approval process, including the number of days overdue.

Reviewer

This read-only field lists the contacts who will review and decide whether to approve the document.

Status

Lists what each reviewer decided regarding the document.

Received

This read-only field lists the date on which the reviewer received the document.

Forwarded

This read-only field lists the date on which the reviewer sent the document to the next reviewer on the list.

Held

This read-only field lists the number of days that the reviewer had the document before sending it to the next reviewer on the list.

Comments

Lists each reviewer's comments regarding the document.




On the Question tab:

- 1) From the **Work Impact** drop-down list, select the item that describes the impact.
- 2) From the **Reason for Request for Information** drop-down list, select the reason for the RFI.
- 3) Use the **Question** section to write the detailed request.
- 4) Use the calendar icons in the **Date** and **Date Required** fields to select the date of the RFI, and the date when the answer is due.
- 5) In the **Question Distribution** section, you can do the following:
 - ▶ Click **Add** to open the Add Distribution Dialog Box. Click **Select** to open the Select Contacts dialog box, and select the contacts to which you want to distribute the RFI.

- ▶ Click **Copy Distribution to Answer** to copy the distribution list you created to the **Answer** tab.

6) In the **Proposed Solution** section, enter the details of the proposed solution.


On the Details tab:

- 1) Use the drop-down list to select the Spec Section to which the question applies.
- 2) Click **browse**  next to the **Contract** field to open the Select Contract Dialog Box and select the appropriate contract.
- 3) Click **browse**  next to the **Reference** field to open the Select Document Dialog Box, and select the appropriate document.
- 4) Enter an Architect number if appropriate.
- 5) Click **browse**  next to the **Subcontractor** field to open the Select Contact Dialog Box to choose a subcontractor.
- 6) Enter an Architect number if appropriate.

On the Drawings tab:

Click **Add** to open the Drawings Dialog Box (for Linking a Drawing to an RFI). Use this to link drawings to the request.

On the Schedule tab:

If Contract Management is connected to the P6 EPPM schedule database, you can click **browse**  next to the Activity field to open the Select Activity Dialog Box, and link a P6 EPPM schedule activity with the RFI. Browse does not display unless Contract Management is connected to the P6 EPPM schedule database.

On the Contract Summary tab:

The **Contract Summary** tab has the following subordinate tabs:

- ▶ Details
- ▶ Changes
- ▶ Insurance
- ▶ Invoices
- ▶ Payment Requisitions
- ▶ Submittals

Details tab:

The **Details** tab contains details of the related contract.

Changes tab:

The **Changes** tab contains the change orders and change order requests.

Use **Initiate Change Management** to open a Change Management document window. Use this window to create a Change Management document.

Insurance tab:

The **Insurance** tab lists insurance policies associated with the contract to which the RFI is linked. Click **Add** to open the Insurance Document Window to link a new insurance document to the contract and the RFI.

Invoice tab:

This tab contains invoice information for the contract to which this RFI is linked.

Note: This tab does not appear if you have a requisition against the associated contract.

Click **Add** to open the Invoice Dialog Box to link an invoice document to the contract and this RFI.

Payment Requisitions:

This tab contains Payment Requisition information for the contract to which this RFI is linked.

Note: This tab does not appear if you have an invoice against this contract.

Click **Generate** to open the **Generate Requisition** wizard to create a new requisition for this contract.

On the Issues tab:

This tab lists the issues linked to the RFI.

Click **Link** to open the Select Issue Dialog Box, and select the issues to link to the RFI.

On the Attachments tab:

On the **Attachments** tab, you can do the following:

- ▶ Click **Attach File** to attach a file to the document.
- ▶ Click **Attach from Repository** to attach a document from the content repository.
- ▶ Click **Attach URL** to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

Sending Notices

Use notices to inform project participants of the latest project developments including changes in condition, bulletins, or change sketches.

To add a notice:

- 1) Expand the **Communication** folder for a project in the Project View and click **Notices**.
- 2) Click **Add Document**.
- 3) On the **General** tab, use the **Type** drop-down list to specify whether the notice is a change in condition, bulletin, or change sketch.
- 4) Click **Select To** to select the notice recipient.
- 5) Click **Select From** drop-down list to select the person who is sending the notice.
- 6) The **Number** and **Type** are automatically entered. You can only update these fields while adding the notice.
- 7) Enter a title for the notice.
- 8) Click each tab to enter more information for the notice.
- 9) Click **Save** when finished.

Sending Noncompliance Notices

The Noncompliance Notices log window lists every noncompliance document. These types of change notices inform project participants of deviations from the contract specifications. For example, the owner might send a noncompliance notice to the general contractor because of a violation such as not abiding by the contract safety and health requirements. The GC will then generate a noncompliance notice to the appropriate or involved sub-contractor. Most of the time the recipient will need to return brief details of corrective actions needed/taken.

To add a noncompliance notice:



Open the Noncompliance document window:

- 1) Expand the **Communication** folder and click **Noncompliance Notices** to open the Noncompliance Notices Log Window.




- 2) Click **Add Document** to open a blank Noncompliance Notice Document Window.

On the General tab:

- 1) Choose a notice type from the **Type** drop-down list. This is a required field.
- 2) Click **Select**  next to the **To** field, and select the contact to receive the noncompliance notice. This is a required field.
- 3) Click **Select**  next to the **From** field, and select the contact who is sending the noncompliance notice. This is a required field.
- 4) In the **Number** field, enter a number for the noncompliance notice. This is a required field.
- 5) Choose a date.
- 6) Enter a title for the noncompliance notice.

On the Status tab:

- 1) Click **Select Ball in Court**  next to the **Ball in Court** field, and choose a Ball in Court for the noncompliance notice.
- 2) From the **Priority** drop-down list, choose a priority.
- 3) From the **Status** field, choose a status.

On the Description tab:

- 1) Choose a reason from the **Reason for Noncompliance Notice** drop-down list.
- 2) Enter a detailed description.
- 3) Enter the appropriate name in the **Signed By** field.
- 4) Choose the date.




On the Corrective Actions tab:

- 1) In the **Corrective Action** field, enter a detailed description of the corrective action taken to resolve the problem.
- 2) Enter the appropriate name in the **Signed By** field.
- 3) Choose the date.
- 4) In the **Required Date** field, choose the required completion date for this noncompliance notice.

Generate an RFI from an RFI

Although you can add a Request for Information (RFI) by manually entering the required information, using the Generate feature saves time. In addition to reducing data entry by copying data from an existing document to a new one, generating ensures that the information in related documents is consistent.

To generate an RFI:

- 1) From the Requests Log Window, open the Request for Information Document Window from which you want to copy information.
- 2) From the **Select an action** drop-down list, choose **Generate Document** to start the Generate Request for Information Wizard.
- 3) From the **Type** drop-down list, select **Request for Information**.
- 4) Click **Select To**  next to the **To** field to open the Select Contact Dialog Box to specify the contacts that will receive the document. Click **Exchange**  to switch the **To** and **From** contacts.
- 5) Select *yes* or *no* to determine whether you want Contract Management to assign the next available number.
- 6) The **Contract** field is automatically populated from the source document. To select a different contract, click **Select Contract**  next to the **Contract** field and select a contract.
- 7) Contract Management supplies the required date (seven days from today's date). You can change it.

- 8) Select *yes* or *no* to determine whether to link the new document to the same issues and attachments as the original.
- 9) Click **Finish** to generate the new document.

Add a Notepad

The Notepads module makes it easy to track important details, such as comments, work lists, and reminders. Create a different notepad for each category of information you need.

Writing notes is a two-step process: first add a notepad that refers to a specific subject, and then add as many items as you want to the notepad about that subject.

To add a new notepad document:

- 1) Expand the **Communication** folder and click **Notepads** to open the Notepads Log Window.




- 2) Click **Add Document**. The Notepad Document Window opens.

On the General tab

- 1) Enter a name in the **Notepad** field.
- 2) Enter a brief description of the purpose of this notepad in the **Description** field.
- 3) Select the owner of this notepad. Click **Select Coordinator** to open the Select Contact Dialog Box to choose the coordinator.



On the Status tab

- 1) Click **Select Ball in Court**  to open the Select Contact Dialog Box to choose the contact that is responsible for action on the item in the **Ball In Court** field.
- 2) Select the priority level for this notepad, which will appear in the coordinator's Action List.

On the Notepad Items tab

- 1) Click **Add** to open the Notepad Item Dialog Box.
- 2) In the **Item No.** field, Contract Management numbers the new item sequentially.
- 3) Contract Management enters the system date in the **Opened** field. You can edit each of the date fields. If the item is closed, click **Select Date** next to the **Closed** field to select the date the item was closed. If the notepad item has already been resolved, click **Select Date** next to the **Closed** field to select the date the item was resolved.
- 4) Enter other details about the notepad item in the remaining fields in the **Notes** section.
- 5) Link any issues and attach files to the item as necessary.
- 6) Click **Save and Add Another** to add another notepad item. Click **Save and Close** when you are finished.

On the Details tab

- 1) Click **Select Contract**  and select the contract associated with this notepad. The Select Contract Dialog Box will open. Click **Clear**  to clear the field.
- 2) If this notepad is associated with a Change Management document, Contract Management displays the number in this field.

On the Custom Fields tab:

If you want to define any additional information about a project, create custom fields by right-clicking on the top-level folder (All Projects), and choosing **Custom Fields**. The **Custom Fields** tab only displays when one or more custom fields have been defined for the module.

On the Issues tab

Click **Link** to display the Select Issue Dialog Box. Use this dialog box to link to the notepad document. Repeat this step to add other issues.

On the Attachments tab

- ▶ Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.
- ▶ Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the repository. See Configure the Content Management Version Document and Attachment Feature for more information.
- ▶ Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

On the Versions tab

You can maintain different versions of the notepad document on the **Versions** tab. Once you save changes to your document, choose **Select an action, Version Document** to create a new version of the current document. For more information about versions, see Version Document Overview.

To save the document

Click **Save** when finished.

Delete Notepad Information

You can delete an item from a notepad, or delete an entire notepad.

- 1) To delete an item, click **Delete** corresponding to the item on the **Notepad Items** tab.
- 2) To delete the entire notepad, from the Notepad document window choose **Delete Document** from the **Select an action** drop-down list. Once you confirm the deletion, Contract Management also deletes any links to issues.

Add a Telephone Record

Important project information is often communicated via telephone conversations. For example, follow-up calls that clarify the work included in bid estimates or that discuss delays that can be used later as supporting evidence in a claim. Contract Management provides a Telephone Records log for you to record the date, content, and parties involved in each call.





To add a telephone record:

- 1) Expand the **Communication** folder and click **Telephone Records** to open the Telephone Records Log Window.




- 2) Click **Add Document**. The Telephone Record Document Window opens, with the General tab displayed.

On the General tab:

- 1) Enter the subject of the call.
- 2) Contract Management automatically enters the number for the record. You can edit this number.
- 3) In the **To** section, click **Select To**  next to the **To** field to open the Select Contact Dialog Box. Select the contact name receiving the call. Click **Clear**  to clear the field. Contract Management automatically fills in the **Name**, **Phone**, and **Ext** fields based on the contact selected. You can edit this information.
- 4) In the **From** section, click **Select From**  next to the **To** field to open the Select Contact Dialog Box. Select the name of the contact. Click **Clear**  to clear the field. Contract Management automatically fills in the **Name**, **Phone**, and **Ext** fields based on the contact selected. You can edit this information.



On the Status tab:

- 1) Click **Select Ball in Court**  next to the **Ball in Court** field, to open the Select Contact Dialog Box. Select the contact name to be the designated BIC.
- 2) From the **Priority** drop-down list, select a priority for the record.

On the Description tab:

Use the Description tab to enter notes from the telephone conversation.

On the Details tab:

- 1) Contract Management automatically fills in the **Entered by** field. You cannot change this field.
- 2) Contract Management automatically enters the current date and time, which you can change.
- 3) Click **Select Contract**  next to the **Contract** field to open the Select Contract Dialog Box. Select the name of the contract to which this record applies. Click **Clear**  to clear the field.

On the Issues tab:

This tab lists the issues linked to the telephone record.

Click **Link** to open the Select Issue Dialog Box, and select issues to link to the telephone record.

On the Attachments tab:

On the **Attachments** tab, you can do the following:

- ▶ Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.
- ▶ Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the repository. See *Configure the Content Management Version Document and Attachment Feature* for more information.
- ▶ Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

On the Custom Fields tab:

If you want to define any additional information about a project, create custom fields by right-clicking on the top-level folder (All Projects), and choosing **Custom Fields**. The **Custom Fields** tab only displays when one or more custom fields have been defined for the module.

On the Versions tab:

You can maintain different versions of the telephone record document on the **Versions** tab. Once you save changes to your document, choose **Select an action, Version Document** to create a new version of the current document. For more information about versions, see *Version Document Overview*.

Save the document:

Click **Save** when finished.

Emailing Forms

It is possible to email any document generated within Contract Management provided that you properly set up that functionality. This requires that the SMTP Server be properly configured within Contract Management. See the installation guide for Oracle or MSSQL.

You can email document windows as forms in PDF files, as well as a link back to the actual Contract Management module document using the E-Mail dialog box.

To email forms:

- 1) From a document window, choose **E-Mail Form** from the **Select an action** drop-down list.

- 2) In the E-Mail dialog box, enter a recipient, a subject, and any remarks.
- 3) You can select the **Include Attachments** option to send attachments in the email.
- 4) Click **OK** to send the email.

When the recipients receive the email, they can either open the PDF to display the form (or DOC file if it is a letter) or click the link to open the document window.

Create a Safety Notice

To create a safety notice:

- 1) Expand the **Communication** folder for a project in the Project View and click **Safety**.
- 2) Click **Add Document**.
- 3) In the Safety Violation document window, the new safety notice is assigned the next available number and the current date is entered.
- 4) Edit the required fields on the tabs as necessary.
- 5) Click **Save**.

Import Email into the Correspondence Received Log

In Contract Management 12.0 and later, users can import email from an external email mailbox into the Correspondence Received log window. In order to do this, the Contract Management administrator must alter the project settings on the Project Settings dialog box for the project to enable this feature. Once the feature is enabled in the Project Settings, you can then import email into the Correspondence Received log file.

This topic describes how to enable the import feature, and how to import email.

To enable email import on the Project Settings dialog box:

- 1) Right-click the name of the project for which you want to import email, and click **Project Settings**.
- 2) On the Project Settings dialog box, click the **Communication** tab.

- 3) In the **E-Mail Integration** section, select the **Enable Import of Correspondence Received** option, and then use the information in the following table to set up the import:

| Field | Description |
|---------------------|--|
| Import Attachments | Select this option to enable the import of attachments. The contents of this drop-down list are set in the Administration Application. In the Administration Application, click Content Management . |
| Automate Import | Use the arrows to set the time of day that Contract Management should automatically start the import of Correspondence Received. |
| Populate To Field | Select this option to send the Correspondence Received to a specific contact. Click the Select link to select the contact to which the imported Correspondence Received should be sent. Only one contact can be selected. If you click the Select link next to the company name, the field will be populated with the primary contact for that company. To choose contact other than the primary contact, expand the company list, and click the Select link next to the contact name. |
| Populate From Field | Select this option to have Contract Management automatically fill in the name of the contact sending the correspondence. |

- 4) From the **Protocol** drop-down list, choose one of the following email protocols:
- ▶ POP3
 - ▶ POP3S
 - ▶ IMAP
 - ▶ IMAPS
- 5) In the **Server Name** field, enter the name of the server on which the email that you want to import is stored.
- 6) The **Port Number** field will automatically show the corresponding default value for the Protocol you selected in step 4. Default values are:

| Protocol Selected | Default Port No. |
|-------------------|------------------|
| POP3 | 110 |
| POP3S | 995 |
| IMAP | 143 |
| IMAPS | 993 |

- 7) In the **Server Name** field, enter the name of the server where the email that you want to import into the Correspondence Received Log is stored.

- 8) In the **Password** field, enter the password used to log on to the server where the email that you want to import into the Correspondence Received Log is stored.
- 9) After you enter all the information, click **Test Connection**. If the connection is correctly set up, you should see the following message:

E-mail connection successful.

To import the email into the Correspondence Received Log:

After you correctly set up the project settings to enable email import, do the following to actually import the email:

- 1) Under the project, in the **Communication** section, click **Corr. Received** to display the Correspondence Received log.
- 2) Click **Select an action** and choose **Import E-mail**. The email will be displayed with the subject formatted as: *email:<email subject name>*.

Note: The email is only imported once. The next time you import email, only those received since the last import will be retrieved.

Tracking Email Sent Through Contract Management

It is possible to email any document generated within Contract Management, provided that you properly set up that functionality.

In Contract Management versions 12.0 and later, by enabling the Enable CC: for Outgoing E-Mail feature, one person can receive a copy of all email sent through Contract Management. In order to do this, the Contract Management administrator must alter the project settings on Project Settings dialog box for the project to enable this feature.

To enable CC: for outgoing email you must have administrative rights to the project and then do the following:

- 1) Log on to Contract Management, right-click the name of the project for which you want to use the CC: feature to track outgoing email, and click **Project Settings**.
- 2) On the Project Settings dialog box, click the **Communication** tab.
- 3) Select the **Enable CC: for Outgoing E-Mail** option.
- 4) In the **CC: E-Mail Address** field, enter the email address of the person who should receive a copy of every form or letter sent through Contract Management for a particular project.
- 5) (Optional) In the **Reply to: E-Mail Address** field, enter the email address for a recipient who will also receive a copy of the email.
- 6) Click **Save**.

Note: To change the person who should receive copies of all emails, simply repeat steps 1 through 5 of the preceding procedure.

Safety Overview

Companies are committed to eliminating work injury and conforming to OSHA requirements. Recording safety violations, safety concerns, and injuries on the job site is critical for conforming to OSHA regulations and keeping records in case of possible lawsuits. The Contract Management Safety module enables you to track safety violations and accidents. Use the Safety Violation/Injury or Illness Report Document Window to create and edit safety notices.

There are three areas the Safety log addresses:

- ▶ Injury or illness reports: Fill out these reports each time there is an accident, injury, or illness at a site. You can also record "near miss" items and use them for training to help prevent future mishaps. Also, once an injury or illness report is recorded, you can send email to a distribution list to inform contacts what is documented.
- ▶ Safety violation notices: You can create and print out a safety notice to inform a vendor of a potential hazard and email it to contacts in a distribution list.
- ▶ Federal reporting requirements: The Safety module satisfies OSHA's 300, 300a, and 301 federal reporting requirements. Individual states may have additional requirements. It is up to you to be aware of these regulations. You can print the forms required by OSHA. Any company with more than 10 employees is required to track information for OSHA.
 - ▶ Form 301 is one of the first forms a company must fill out when an injury or illness has occurred. This form, along with forms 300 and 300a, helps the employer and OSHA develop a picture of the extent and severity of work-related incidents. According to public law 910596, this form must be kept on file for five years following an incident.
 - ▶ Form 300 is the log of work related injuries and illnesses. Companies must complete form 300 for every work-related illness or injury. One form is required for each person involved.
 - ▶ Form 300a (300 Summary) is required to be posted at the workplace from February 1 to April 30 of the year following the one covered on the form. All employees and former employees are entitled to review form 300 entries in their entirety upon request as part of OSHA's record keeping rules.

Viewing or Changing Safety Notice Details

To view or change safety notice details:

- 1) Expand the **Communication** folder for a project in the Project View and click **Safety**.
- 2) In the Safety log window, click a document name to open the document window.
- 3) In the document window:
 - a. Click the **Status** tab to view or change the Ball in Court contact, Priority, Status, and so on for the safety document.
 - b. Click the **Employee** tab to enter information about the employee.
 - c. Click the **Incident** tab to enter information about the incident.
 - d. Click the **Injury or Illness** tab to record details of any injury or illness that occurred.
 - e. Click the **Details** tab to view the project manager to whom the safety violation pertains to, and any associated fine levied against the company.
 - f. Click the **Distribution List** tab to record the names of contacts that should receive a copy of the safety violation notice.

- g. Click the **Actions Taken** tab to see historical records of changes made to the safety notice. Any changes made to fields in this notice corresponding to the columns on this tab will add a new row. This tab is not editable. You can view the row by choosing **View** from the **Select an action** list.
- h. Click the **Issues** tab to link issues to the safety notice.
- i. Click the **Attachments** tab, use **Attach File**, **Attach from Repository**, and **Attach URL** to attach pertinent documents or URLs.

Note: Attach from Repository does not display unless the administrator sets Contract Management content management repository properties in the Contract Management. If set, you can attach documents from an Oracle UCM or Microsoft SharePoint repository.



- 4) If you make any changes to the safety notice, click **Save**.

Note: If an Injury or Illness Report is being generated, the Case Number is incremented automatically.

Generate a Safety Notice Based on an Existing One

Safety notices often contain similar information. To reduce data entry time, use the Generate Wizard to create a copy of a safety notice, and then edit the copy to reflect any differences.

To generate a safety notice:

- 1) Expand the **Communication** folder and click **Safety** to open the Safety Log Window.
- 2) Open the document you want to copy.
- 3) From the **Select an action** drop-down list, choose **Generate Document** to start the Generate Safety Notice Wizard. The Generate Safety Notice dialog box will open.
- 4) From the **Type** drop-down list, choose the type of safety notice (Safety Violation) to generate.
- 5) Click **Select To**  to open the Select Contact Dialog Box. Choose the contact to send the notice to.
- 6) Click **Select From**  to open the Select Contact Dialog Box. Choose the contact sending the notice.
- 7) In the **Number** field, enter the number for the notice.
- 8) In the **Title** field, enter a title for the notice.
- 9) Select the appropriate options for the sections you want to copy to the safety notice.
- 10) Click **Finish** to generate the new notice.

Note: If an Injury or Illness Report is being generated, the Case Number is incremented automatically, but all other fields in the Injury or Illness section are left blank.

Recording Meeting Minutes

Add a Meeting Minutes Document

The Meeting log keeps track of information about meetings such as when a meeting took place, the purpose of the meeting, who attended, what was discussed, and what decisions were made.

Add a meeting minutes document:

- 1) Expand the **Communication** folder and click **Meeting Minutes** to open the Meeting Minutes log window.



- 2) Click **Add Document** to open a blank Meeting Minutes log window.




On the General tab:

Enter a subject and number for the meeting minutes.

On the Status tab:

- 1) Select a Ball in Court and priority.
- 2) To approve the meeting minutes, in the **Approved by** section, enter a company, contact, and approved date.
- 3) Click **Approve and Save**.

On the This Meeting tab:

- 1) Click **Select Date** and select the meeting date.
- 2) Enter the time of the meeting in the **Time** field.
- 3) Enter the location of the meeting in the **Location** field.
- 4) Click **Select Coordinator**  next to the **Coordinator** field, and choose the meeting coordinator.
- 5) Click **Select Contract**  next to the **Contract** field, and choose the contract to which this meeting applies. Click **Clear**  to clear the field so that you can pick a different coordinator.
- 6) The **Change Management Number** field will only contain a value if you chose **Initiate CM** from the **Select an action** drop-down menu to initiate Change Management from this meeting minutes document.
- 7) If this is the latest meeting regarding this contract, select the **Latest** option.

On the Business Item tab:

This tab lists the business items discussed during this meeting. Click **Add** to open the Business Item dialog box. Use this dialog box to add information on the items discussed during the meeting.

On the Attendees tab:

Use this tab to enter attendees to the meeting. Click **Add** to open the Attendee dialog box. In this dialog box, add information about the people who attended the meeting.

On the Custom Fields tab:

If you want to define any additional information about a project, create custom fields by right-clicking on the top-level folder (All Projects) and choosing **Custom Fields**. The **Custom Fields** tab only displays when one or more custom fields have been defined for the module.

On the Issues tab:

Use this tab to link any issues that apply to this meeting. Click **Link** to open the Select Issue dialog box. Add any issues that apply to this meeting.

On the Attachments tab:

Use this tab to link any attachments that apply to the meeting. These can be files or URLs.

- 1) Click **Attach File** to open the Attach File dialog box to attach a file to this meeting.
- 2) Click **Attach from Repository** to open the Attach Document dialog box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the repository. See *Configure the Content Management Version Document and Attachment Feature* for more information.
- 3) Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to this meeting.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

On the Versions tab:

You can maintain different versions of the meeting minutes document on the **Versions** tab. Once you save changes to your document, choose **Select an action, Version Document** to create a new version of the current document. For more information about versions, see **Version Document Overview** (on page 226).

When you finish adding all the information for the correspondence document, click **Save**.

Generate a New Meeting from the Last Meeting Minutes

During a project, meetings are often held at regular intervals; the same people attend, and the agenda consists of the open items from the previous meeting. In Contract Management, you can create a new meeting from an old one using the Generate command. When you generate a new meeting from an existing one, Contract Management copies attendees and any business items that were not closed from the original meeting to the new one.

To copy meeting minutes information:

- 1) Expand the **Communication** folder and click **Meeting Minutes** to open the Meeting Minutes log window.
- 2) Open the meeting minutes document that you want to copy. The Meeting Minutes document window will open.
- 3) From the **Select an action** drop-down list, choose **Generate Document**.
- 4) Enter the **Subject, Number, Date, Time, and Location** for the new meeting. Contract Management copies the subject, time, and location from the meeting minutes document you are copying. Contract Management enters the next available number in the **Number** field and the current date in the **Date** field.
- 5) Select the **Yes** options if you want to link the new meeting to the same issues and attachments as the old meeting.
- 6) Click **Finish**.

Note: Only business items with the following status types are copied forward: *New Item, Old Business, or Open* types. All other items are left in their prior meeting unchanged. Items copied forward get a status of *Old Business*.

Approving Meeting Minutes

Meeting minutes are generally approved after sending the document to the attendees and getting their comments.

To approve minutes:

- 1) Expand the **Communication** folder for a project in the Project View and click **Meeting Minutes**.
- 2) Open a document and in the document window click the **Status** tab.
- 3) Click **Edit Document**.
- 4) In the Approved by section, enter the **Company, Contact, and Approved Date** for the meeting minutes. The contact is the person who approved the meeting minutes.
- 5) Click **Approve and Save** to approve the meeting minutes document. The **Approved** field displays *Yes* indicating that the meeting minutes are approved.

Using the Advanced Print Function

After you enter the minutes for a meeting, you can print copies and distribute them to the attendees to remind them of their responsibilities. Standard reports, forms, and dunning letters are provided for you to use to print the meeting minutes.

To use the advanced print function:

- 1) Open the document window for the item you want to print.
- 2) Click **Print** at the top right of the screen.

- 3) On the Print dialog box, click the option next to the type of document you want to print (for example, Reports).
- 4) Choose the document from the list of documents in the box.

Working with the Control Center

The Control Center contains information about either a selected project, a group of projects, or all projects. When no projects are open, the Control Center shows information relevant to all projects within the selected folder. When you select a project, the Control Center shows information specific to that project (some items enable you to choose whether to display information on all projects or just the selected project by clicking the customize icon from items offering this option).

You can also right-click the project and choose Project Settings to edit general information, key parties, schedule information, and a variety of project preferences for the project.

You can customize the Control Center to display the information you want. For example, you can include items for reports, your Inbox, requests for information (RFIs), charts showing outstanding issues and requests, and any actions and alerts. The Actions item contains the items in your court that need to be addressed. The Alerts item contains items that need to be addressed immediately.

You can place up to 12 items in the Control Center, and you can save this arrangement as My Workspace. The next time you start Contract Management, you can use this workspace or select one of the standard types delivered with the product. These include Administrative Assistant, General Contractor, Owner, Architect, and so on.

Viewing the information in the Control Center at the start of each workday reminds you of what you need to accomplish, who you need to contact, and when deadline items are due through actions and alerts. This information is generated by and/or directed to you, depending on your access permissions. An example of using items for viewing important information is shown on the next page.

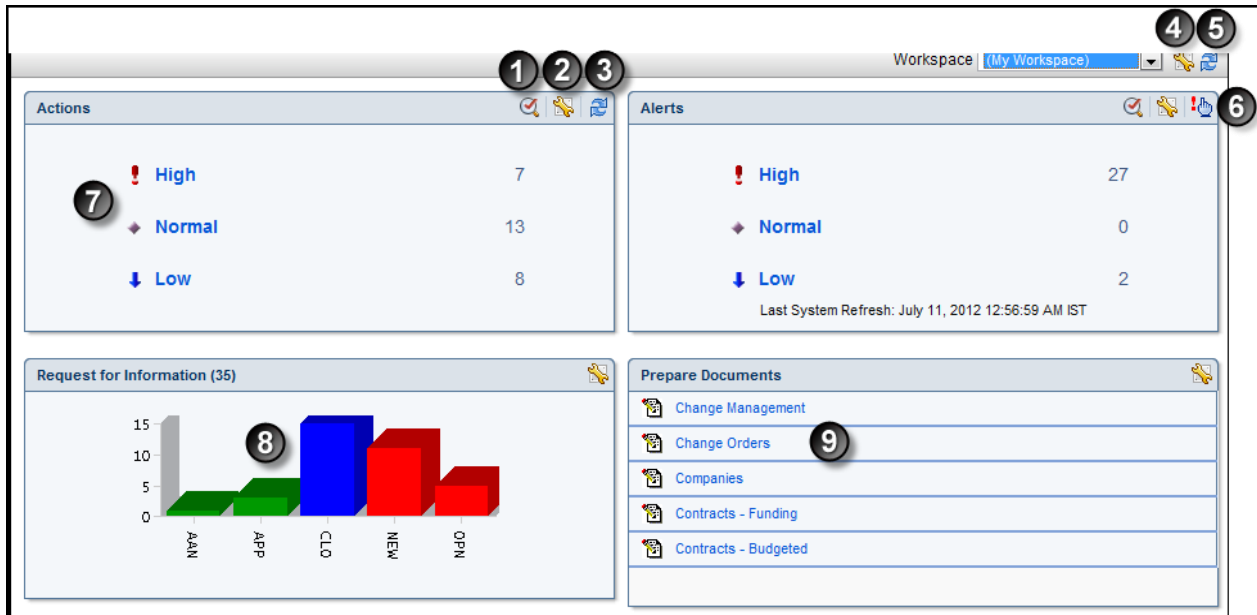


Table of Screen Elements

| Item | Description |
|------|--|
| 1 | View All Actions: Use this icon to view all documents in a portlet. |
| 2 | Customize: Use this icon to customize the portlet. For example, for the Actions portlet you can set preferences for the Actions object in the Workspace and configure which documents appear in the Actions List and how they appear. |
| 3 | Refresh: Use this icon to refresh the portlet so it reflects all current changes. |
| 4 | Customize This Page: Use this icon to customize the workspace. You can add or remove portlets to the workspace. |
| 5 | Refresh Page: Use this icon to refresh the page so it reflects all current changes. |
| 6 | Subscriptions: Use this icon to view the alerts to which you are subscribed. |
| 7 | Actions Portlet: Click a level of action (High, Normal, Low) to access documents in your court that require you to take an action, and print a report corresponding to these action items for the project. |
| 8 | Request for Information Portlet: Click a section of the chart to display a list of Requests for Information documents. |
| 9 | Prepare Documents Portlet: Use these links to display the selected report. |

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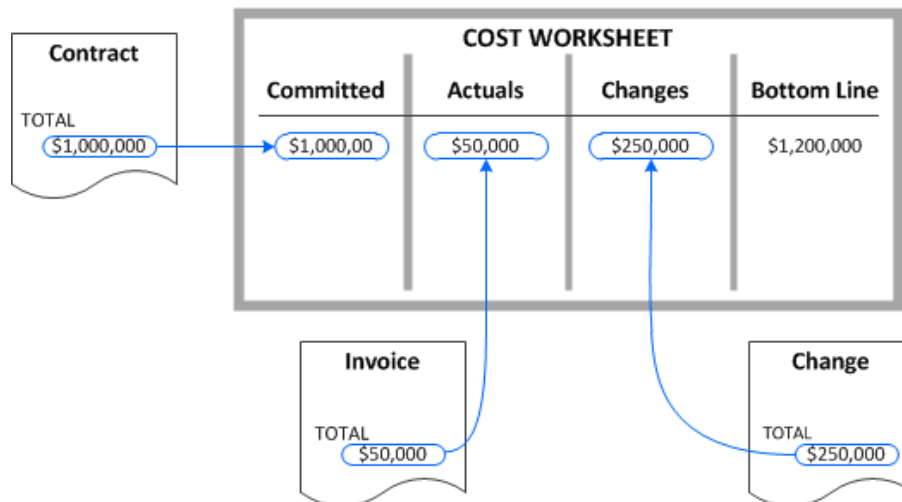
Setting Up and Using the Cost Worksheet

How Costs Are Tracked

The Cost Worksheet provides a central location where you can collect and track your costing information and quickly check the financial status of your project. The Cost Worksheet tracks costs distributed from contracts, purchase orders, requisitions, proposals, change orders, and trends. Use the Cost Worksheet to closely track budgeted costs, committed costs, actual expenditures, and budget revisions caused by changes.

Note: Using the Cost Worksheet is optional; you can use cost documents (listed above) independently. However, if you collect cost information in the Cost Worksheet, use it with all your cost-related documents.

Figure 1: How Costs Are Tracked



Items the Cost Worksheet Tracks

The Cost Worksheet tracks four categories of cost information:

- ▶ Estimated includes the procurement estimate, buyout, purchasing buyout, original estimate, estimate accuracy, and estimated gross profit.
- ▶ Budgeted includes the original budget amount, approved revisions to the budget, revised budget amount, pending budget revisions, manual adjustments to the budget, and the projected budget.
- ▶ Committed includes the original commitment amount, approved revisions to committed costs, the revised commitment, pending revisions to committed costs, estimated revisions to committed costs, and the projected commitment.
- ▶ Actuals includes money you paid and money you received.
- ▶ Variance is the difference between your budgeted and committed costs. Variance includes original variance, approved variance, pending variance, and projected variance.

You can use the Order Code field to vary the sort order of your Cost Worksheet from the cost code order.

The chart below shows the main categories of the Cost Worksheet and their subcategories. The bullets indicate where the module places money in the Cost Worksheet when you distribute an amount from a contract, PO, invoice, requisition, trend, change order, or proposed change order.

In the Contracts and POs rows of the chart, the module can distribute the amount to the Original Budget or Original Commitment section of the Cost Worksheet. When you distribute the contract or PO amount, select the Budget or Commitment category, and the Original subcategory is automatically selected.

Figure 2: Cost Category Distribution Table

| Type of Document | Cost Category Distribution | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-----------------------------------|----------------------------|--------------------|----------------|-------------------|---------------------|-------------|------------------|---------------------|--------------------|--------------------|-------------------|---------------------|-------------|----------------------|----------------------|-------------------|-------------------|------------------------|--------|-------------------|------------------|----------------|------------------|-------------------|-------------------|------------------|--------------------|-------------------------|-----------------------------|------------------|----------------------------|------------------------------|----------------------|--------------------|------------------|-----------|---|--|--|
| | Budget | | | Commitment | | | Estimate | | Actuals | | Variance | | Funding | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Original Budget | Approved Revisions | Revised Budget | Pending Revisions | Estimated Revisions | Adjustments | Projected Budget | Original Commitment | Approved Revisions | Revised Commitment | Pending Revisions | Estimated Revisions | Adjustments | Projected Commitment | Procurement Estimate | Original Estimate | Estimate Accuracy | Estimated Gross Profit | Buyout | Purchasing Buyout | Actuals Received | Actuals Issued | Actuals Expended | Original Variance | Approved Variance | Pending Variance | Projected Variance | Original <Custom> | Approved <Custom> Revisions | Revised <Custom> | Pending <Custom> Revisions | Estimated <Custom> Revisions | <Custom> Adjustments | Projected <Custom> | <Custom> Percent | | | | |
| Column | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | a | b | c | d | e | f | g | h | i | | | | |
| Contracts | X | | | | | | | X | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | |
| POs | | | | | | | | X | | | | | | | | | | | | | | | | | | | | X | | | | | | | | | | | |
| Proposals | | | | X | | | | | | X | | | | | | | | | | | | | | | | | | | | | | X | | | | | | | |
| Change Orders | X | X | X | | | | | X | X | X | | | | | | | | | | | | | | | | | X | X | | X | | | | | | | | | |
| Trends | X | X | X | X | X | | | X | X | X | X | X | | | | | | | | | X | X | X | | | | X | X | X | X | X | X | X | | | | | | |
| Invoices | | | | | | | | | | | | | | | | | | | | | * | † | ‡ | | | | | | | | | | | | | | | | |
| Procurement | | | | | | | | | | | | | | | X | X | X | X | X | X | | | | | | | | | | | | | | | | | | | |
| Requisitions | | | | | | | | | | | | | | | | | | | | | * | † | ‡ | | | | | | | | | | | | | | | | |
| Calculated by the module | | | X | | | | X | | X | | | | | X | | | X | X | X | X | | | X | X | X | X | | | X | | | | | | | X | X | | |
| Cost Worksheet Column Calculation | | A+B | | | | | A+B+D+E+F | | H+I | | | | | H+I+K+L+M | | | P-Q | A-P | P-H | O-H | | | | | A-H | (A-B)+(H-I) | (A-B)+(H-I)(K) | (A+B+D+E+F)+(H+I+K+L+M) | | b+c | | | | | | b+c+e+h+g | | | |

*If Contract/PO is distributed to Committed
 †If Contract amount is distributed to Budgeted
 ‡If Contract is distributed to Funding

Add a Cost Code to the Cost Worksheet

Use cost codes to break down costs in the Cost Worksheet. If you already use cost codes that are 30 or fewer characters long to categorize costs, you can continue using them with Contract Management.

Cost codes are like categories in a checkbook. For example, if your mortgage payment is \$1,000 a month, \$700 may apply to interest and \$300 to principal. When you record the \$1,000 payment in your check register, you might distribute it to principal and interest categories for income-tax reporting purposes.

Similarly, you may have a contract for \$50,000, of which \$25,000 is for rough carpentry and \$25,000 is for finish carpentry. To track each carpentry cost separately in the Cost Worksheet, you might create two cost codes, Rough and Finish, and distribute \$25,000 to each.

To add a cost code to the Cost Worksheet:

- 1) Expand **Contract Information** in the Project View and click **Cost Worksheet** to open the Cost Worksheet Log Window.



- 2) Click **Add Document** to open the Cost Worksheet Dialog Box (for Adding a Cost Code).
- 3) Enter the cost code.
- 4) Enter a title.
- 5) If you want to manually sort the order of cost codes in the Cost Worksheet Log Window, enter an order code corresponding to the desired location in the list.
- 6) If there is a specific amount of money planned for this cost code, enter the amount in the **Planned to Commit (\$)** field.
- 7) Enter a description.
- 8) Click **Save and Close** to add the cost code to the Cost Worksheet.

Note: You can create cost codes up to 30 characters; they can consist of any combination of letters, numbers, and special characters. You cannot add a cost code named **Not Costed**.

Tips

To delete a cost code from the Cost Worksheet, select the cost code, and then choose **Delete Cost Code** from the **Select an action** drop-down list.

Defining Cost Codes

Cost code definitions enable Contract Management to interpret cost codes so that you can sort and display cost information flexibly in custom reports. For example, if the cost code 06 100 D represents direct costs (D) related to rough carpentry (CSI division 06 100), you need to define the components that make up this cost code.

To define a cost code:

- 1) Right-click on the top-level folder (All Projects) and choose **Cost Code Definitions**.

- 2) In the Cost Code Definitions dialog box, click **Add** to open the Cost Code Definition dialog box to add a new cost code.

Caution: Do not close this dialog box. This will prevent anyone from using Contract Management until the service is restarted by an administrator. Click either **Save & Close** when finished with the rest of this procedure or **Cancel**.

- 3) Enter a name for the component of the cost code in the **Definition Name** field.
- 4) Enter a **Description** of the component.
- 5) Enter the Position in the Cost Code of the Start character. This must be between 1 and 30.
- 6) Enter the **Length** of the Cost Code component. This must be between 1 and 30.
- 7) On the Cost Code Definition dialog box, click **Add** to open the Cost Code Title dialog box.
- 8) Enter a **Value** for the Cost Code.
- 9) Enter a **Title** for the Cost Code.
- 10) Click either **Save and Close** or **Save and Add Another**.

Note: To define cost code definitions, you must be the only user logged into Contract Management. All other users must be logged out.

When you add a cost code, you can refer to the definitions created here to properly format the complete cost code.

Breaking down cost codes enables you to use the definitions to customize cost reports by filtering, sorting, and grouping on any part of your definition. For example, the single-character CATG cost code in the preceding example creates a report containing all cost codes that are not Overhead, sorted by cost code and grouped within their categories, with the title for the category from the cost code definitions printed above each section.

Copying Cost Codes and Titles

Copying the cost codes and titles from one project to another in the same database makes it easy to create closely related or similar projects. Specify the From and To projects and which codes you want to transfer.

Note: You cannot copy cost codes to a project that has existing cost codes.

To copy cost codes and titles:

- 1) In the Project View, right-click on the project to which you want to copy codes and choose **Copy Cost Codes**.
- 2) Select the project from which you want to copy codes.
- 3) Select a specific cost code then click **Add**, or click **Add All** to copy all the cost codes from one project to another.
- 4) Choose **Remove** or **Remove All** if you change your mind about which codes to copy from one project to another. You cannot remove an existing cost code from the "Copy to" project.

5) Click **OK**.

Open the project to which you copied the cost codes, and then open the Cost Worksheet to view the copied information. Cost codes and titles are copied to the project without any of the distributions.

Distribute Costs to the Cost Worksheet

The following steps describe how to distribute contract costs to the Cost Worksheet. Follow the same procedure to distribute costs for any of the other documents.

To distribute costs:

- 1) Open the document window for which you want to distribute costs.
- 2) Click the **Line Items** tab.
- 3) Click either **Add Lump Sum** or **Add Unit Price** to open the corresponding Item dialog box.
 - a. Enter the **Lump Amount** or the **Unit Price** and fill in all the other necessary information.
 - b. In the **Costing** section:
 1. Click **Add** to open the Select Cost Code Dialog Box. Select a cost code to distribute to. You can add as many cost codes as necessary.
 2. Enter the amount to distribute in the **Distributed** field.
 - c. Click **Save and Close** to distribute the costs to the Cost Worksheet.
- 4) Click **Save** on the document window.

From a contract or purchase order document window, values are distributed to either the **Budget** or **Committed** section of the Cost Worksheet. Using Project Settings, you can set Contract Management so that the entire amount of the item will be distributed to defined cost codes.

Since most Contract Management documents from which you can distribute costs relates to a specific contract or purchase order, you should always distribute contract costs first.

Distributing Costs from Proposals and Change Orders

When you distribute costs from proposals, costs are categorized as pending in the Cost Worksheet. When you distribute costs from change orders, costs are categorized as approved or pending, based on the status code entered on the Status tab of the change order. Approved costs have a status of Approved. If the status is anything other than Approved, Closed, or Rejected, costs associated with the change are Pending.

Note: To access the Status Dictionary, right-click on the top-level folder in the Project View, and then click **Dictionaries, Status**.

To ensure that the Cost Worksheet works properly, you must include at least one of each of the following status types in the Status Dictionary: New, Approved, Open, Closed, and Rejected. You cannot delete the last status code for each of these status types. For example, if only one status with a status type of Approved is included in the Status Dictionary, you cannot delete that status.

If you change the status of any change document to Closed or Rejected, the module retains the document's cost distributions but removes this information from the Cost Worksheet and the Contract Summary tab.

Manually Adjusting the Cost Worksheet

Use trends—a manager's expectation of future costs—in conjunction with the Cost Worksheet to track possible cost increases.

To add or transfer money within the Cost Worksheet without modifying the original contract or PO or adding a change order add a **Trend document**, and then distribute its cost to the Cost Worksheet.

Distributing Costs Using Change Management

Change management is a work process that automatically creates the documents necessary to track a change from the initial request through approval. Change management links the documents for reporting purposes, and updates the Cost Worksheet at each step in the work process according to your specifications.

Using the Change Management tab in Project Settings, you supply the document type you want to create and the corresponding column on the Cost Worksheet where you want to distribute change amounts. Each budgeted and committed value creates a document that is then posted to the Cost Worksheet areas you specify.

You can also enable editing previous Change Management phases and copying cost codes from previous phases.

When you add values for one of the phases—Estimated, Quoted, Negotiated, or Final—in a Change Management document, the designated documents are generated based on the information you provide. Click Change Management in the Contract Information folder to access this document type.

The cost codes are automatically assigned from the corresponding contract/PO for the cost distribution. If more than one cost code exists for the originating contract/PO, the document value is treated as a lump sum value, and it is placed in a cost code called Not Costed. You can then distribute the value among the appropriate cost codes.

Note: If the contract has only one cost code, the entire document amount is distributed to that cost code.

The next time you enter a value in a phase to continue the Change Management work process, the cost codes created in the holding table are based on the prior document in the work process costing scheme. You can, however, add cost codes to subsequent documents as necessary in the work process.

Getting the Information You Need from the Cost Worksheet

After you set up the Cost Worksheet and distribute costs to it, start using it to monitor your project's financial condition. You can see as much or as little detail as you need.

For a quick glance at the current status, review the totals at the bottom of the Cost Worksheet.

For a detailed look at the costs associated with a specific cost code, click the Cost Code document icon, and then click each tab to see detailed cost information for the corresponding area of the Cost Worksheet.

Using Other Contract Management Features with the Cost Worksheet

Attach word-processor documents, drawings, or other text or picture files to Cost Worksheet log entries. Click the Attachments tab to attach an electronic version of a CAD drawing or sketch even if you have a printed version. You can also link costs to issues to track problems or conditions. The module automatically links any documents generated from the cost to the same issues.

You can also use Find, Filter, Sort, and Group to locate and organize costs or assign custom fields to the records to help categorize them for reporting. If you use grouping, you can total the values in each primary group in the Cost Worksheet.

Custom (Funding) Cost Worksheet Section Overview

Use this feature to be able to cost to a third, customizable cost category in the Cost Worksheet. When you enable *Show Funding Cost Worksheet* on the Cost Options tab of the Project Settings Dialog Box, a new module called *Contracts <Custom> (Funding)* appears in the Contract Information folder of the project in the Project View. Several new <Custom> columns also appear in the Cost Worksheet. You can then create new custom contracts as a third cost category customized for your business, and then create any change documents and trends against the custom contract. The custom documents are costed to the Custom columns in the Cost Worksheet.

On the Details tab of a custom Contract Document Window, the Cost Category field indicates that this contract is being costed to the custom columns of the Cost Worksheet. You can change the term <Custom> to any term that applies to your situation. Use the Folders Dialog Box to change the name of the Custom Contracts (Funding) module, and the Customize Text Dialog Box to change "Custom" to an appropriate term.

Notes:


- If a change order is linked to a <Custom> contract, the change order's Cost Category is set to <custom>. <Custom> change orders added outside of Change Management collect changes costed to that cost category.
 - For trends, the <Custom> option is added below Commitment in the Cost Category drop-down.
-

Cost Worksheet Columns

When this feature is activated, the following columns are added to the Cost Worksheet log window after the Commitment Percent column:

- ▶ Actuals Expended

Calculation: Total amount of requisitions and invoices distributed to <Custom> Estimated.

- ▶ Original <Custom>
Calculation: Total amount of contracts, Purchase Orders, and trends distributed to <Custom> Original.
 - ▶ Approved <Custom> Revisions
Calculation: Total amount of approved <Custom> Change Orders and trends.
 - ▶ Revised <Custom>
Calculation: Original <Custom> plus Approved <Custom> Revisions.
 - ▶ Pending <Custom> Revisions
Calculation: Total amount of Change Orders, Proposals, and trends distributed to <Custom> Pending.
 - ▶ Estimated <Custom> Revisions
Calculation: Total amount of trends distributed to <Custom> Estimated.
 - ▶ <Custom> Adjustments
Calculation: Total amount of trends distributed to <Custom> Adjustment.
 - ▶ Projected <Custom>
Calculation: Original <Custom> plus Approved <Custom> Revisions plus Pending <Custom> Revisions plus Estimated <Custom> Revisions plus <Custom> Adjustments.
 - ▶ <Custom> Percent
Calculation: Actuals Expended multiplied by 100 divided by (Original <Custom> plus Approved <Custom> Revisions).
- 

Managing Contracts and Purchase Orders

About Contracts

A contract is a written agreement in which one party agrees to perform specialized work for another party for a certain price. Contract work can involve labor only or labor and materials; examples include excavation, plumbing, and landscaping. A contract usually includes a description of the work to be performed, a list of special terms and conditions that apply to the contract, the start and finish dates, and the negotiated price.

Purchase orders document the purchase of materials or services. The information in a purchase order includes a description of the items ordered, payment terms, the negotiated price, and the required delivery date.

Use contracts and purchase orders to define the initial terms and amounts associated with a project and the project participants. Later, you can track other documents, such as change orders, against these contracts and purchase orders.

Creating Contracts

Once you set up a contract, you can create related submittals, generate materials delivery records and requisitions, track changes, and monitor costs.

To create a contract:

- 1) Expand **All Projects** and expand a project.
- 2) In the project, expand the **Contract Information** folder.
- 3) In the **Contract Information** folder, double-click **Contracts - Budgeted**, **Contracts - Committed**, or **Contracts - Funding**.
- 4) On the **Contracts** log window, click **Add Document**.
- 5) On the **Contracts** document window, click the **General** tab.
- 6) On the **General** tab:
 - a. Click the browse buttons for the **To** and **From** fields to select companies bound by the contract. Click **Address** to update the information.

Note: The application automatically enters the default company as the From contact.

- b. Choose a number for the contract. The new contract is automatically assigned the next available number.
 - c. Click **Select Date** to choose a date for the contract. The application automatically enters the current date.

7) On the Contracts document window, click **Save**.

On the Line Items tab, you can create either both lump sum or unit price contracts in the same document. If the contract involves payment of a single lump sum for services, click **Add Lump Sum**. If the contract contains itemized labor or material costs, click **Add Unit Price**.

Contract Management helps you organize and manage contracts with lump sum and/or unit prices.

Creating Default Markup Categories for Changes

To create default markup categories for changes:

- 1) From the Contract or Purchase Order document window, choose **Markup for Changes** from the **Select an action** drop-down list. No calculations are performed here. If you link change orders or proposals to this contract, the values entered in this section will apply to them.
- 2) On the Markup for Changes dialog box, click **Add Markup** to add a new markup value.
- 3) On the Markup dialog box, type a **Markup %** or a **Markup Amount**, but not both. Click the **Select Source Cost Code** icon to which you want to apply the markup.

Note: If you entered markup values on the **Markup** tab, Project Settings (right-click on the project and choose **Project Settings**), when you click **Get Markup**, the corresponding fields in this section are automatically completed. You can edit this information. The edited values will override the values on the Project Settings **Markup** tab.

Using WBS Summary Activities for Contracts

When associating/updating lump sum contract dates with Contract Management schedule dates, use WBS Summary activities for global or master-level analysis. Individual activities are better suited for line item contracts. Since WBS Summaries comprise a group of activities and corresponding resources that are monitored collectively, they can fit easily into the related contract requirements for lump sum payment.

Notes:

- You can use the early or actual start and finish dates of an associated activity from a linked schedule.
- You cannot delete a contract/purchase order that has approved change orders against it.

Caution: If you delete a contract or purchase order, the related invoice, all Cost Worksheet references to the invoice, all Cost Worksheet references to the contract or purchase order, and any issue links are also deleted. Materials delivery records, change and request documents, and requisitions related to the contract or purchase order remain intact.

Creating Submittals from a Contract or Purchase Order

You can create submittals from a contract or purchase order. Submittals help you ensure contract compliance by tracking who received what and when they received it.

To create a submittal from a contract or purchase order:

- 1) Open a Contract or Purchase Order document in edit mode.
- 2) Then add unit price line items on the **Line Items** tab.
- 3) On the **Contract** tab, click the **Submittals** sub tab, and then click **Add** to create a new submittal. The date recorded for the generated document is the current date, which you can change.
- 4) You can click **Select** to assign existing submittals to the contract or purchase order.

Generating Materials Delivery Records from a Contract or Purchase Order

For contracts and purchase orders, you can generate a materials delivery record while creating or editing the contract or purchase order. This saves you the extra steps of exiting the current document and then creating a new Materials Delivery document from the Contract Management workspace. The materials delivery document you generate enables you to record materials delivered to the site.

To generate a materials delivery record from a contract or purchase order:

- 1) Open a Contract or Purchase Order document in edit mode.
- 2) Click the **Line Items** tab, and then click **Add Unit Price** to add the unit price line items.
- 3) In the Contract Item window, specify a unit price or lump sum, and then enter a unique material code in the **Material Name** field (do not choose an existing code if you want to generate a Materials Delivery document from the contract or purchase order).
If you are not certain whether the code you want to use already exists, click the **browse** button next to the **Material Name** field to display the Select Materials dialog box, and check the existing codes. Leave the material code for a line item blank if you do not want to generate a materials delivery record for it.
- 4) Type an identifier in the **Activity ID** field. The browse button next to the **Activity ID** field only displays when Contract Management is connected to the P6 EPPM schedule. Otherwise, enter the Activity ID code manually.
- 5) In the **Costing** section, enter Cost Code information.
- 6) Link any appropriate issues, and attach any appropriate files or URLs.
The **Attach from Repository** link does not display unless the administrator sets Contract Management content management repository properties in the Contract Management Administration Application. If set, you can attach documents from an Oracle UCM or Microsoft SharePoint repository.
- 7) Click **Save and Close** when finished.
- 8) On the Contract or Purchase Order document window, from the **Select an action** drop-down list choose **Generate Materials Delivery**. On the Generate Materials Delivery dialog box, choose whether to link the materials delivery to the same issues and/or attachments as the original contract or purchase order.

- 9) Click **Finish** to create the records. The next time you access the Materials Delivery log window, the document that you generated from the contract (or purchase order) will be listed in the log.

Generating Requisitions from a Contract or Purchase Order

The module can use lump sum and/or unit price line items from the costed contract/purchase order to automatically create a requisition and its schedule of values.

Set Lump Sum/Unit Price Preferences and Retainage Calculations for New Requisitions

If the contract/purchase order has not yet been created, right-click on the project in the Project View and choose Project Settings. Set the default preferences for requisitions for all new contracts/purchase orders on the Requisitions tab.

To configure retainage per existing contract/purchase order, open the Contract or Purchase Order document window, and choose Cost Options from the Select an action drop-down list. The values you enter in the Schedule of Values section are used to create each line item number in the requisition schedule of values.

Use the Requisition Summary tab in a Requisition document window to specify retainage calculations per individual requisition.

Note: After you generate the first requisition from the contract/purchase order, create periodic payment applications from the originating requisition by choosing Select an action, Generate Requisition from the Requisition document window.

Generate the First Requisition for a Project Payment

To generate the first requisition for a project payment:

- 1) Open a Contract or Purchase Order document window.
- 2) Choose **Generate Requisition** from the **Select an action** drop-down list.
- 3) On the Generate Requisition dialog box, select the **Period To** for the requisition, and then choose whether to link the same issues and attachments to it as the contract.
- 4) Click **Finish**.
- 5) Enter the requisition information in the Requisition document window.

About the Cost Worksheet

Use the Cost Worksheet to keep detailed records of the money associated with your project, including amounts budgeted, committed, and spent or received, as well as amounts you received or expect to receive as the result of changes.

Distributing Budgeted and Committed Costs to the Cost Worksheet

You can distribute contract costs to the Budgeted or Committed tabs of the Cost Worksheet, and distribute purchase order costs to the Committed tab. Use the Budgeted tab for the total amount available to spend on the project; use the Committed tab for amounts you have agreed to pay someone else.

Note: Distributing contract or purchase order costs is optional. You do not have to use the Cost Worksheet to use a contract or purchase order. If you use the Cost Worksheet, you should set up cost codes when you first add a project.

To distribute costs:

- 1) Open a Contract or Purchase Order document window.
- 2) Click **Edit document**.
- 3) On the Line Items tab, click either **Add Lump Sum** or **Add Unit Price**.
- 4) Insert an amount in the **Lump Amount** or **Unit Price** field.
- 5) In the Costing section, click **Add** and select a Cost Code to which you are distributing the contract or purchase order. (You can click **Add Multiple Cost Codes** to add more than one cost code at a time.)
- 6) Enter the amount to distribute in the **Distributed** field, and then click **Add Balance**. If you do not distribute the entire contract or purchase order amount, the remainder is applied to a cost code called NOT COSTED. Select a cost code to which to apply the amount.
- 7) Click **Save and Close** to distribute the costs to the Cost Worksheet.

Reviewing Contract Status

Use the Contract Summary tab in a Contract document window to review all pending and approved cost changes associated with a contract, and to see the sum of invoices to date and the remaining balance.

Click the Changes subordinate tab to view all change documents associated with the contract. Costs associated with each document are listed in either the Approved Changes or Pending Changes column, depending on the document's status. Costs associated with documents that have an Approval status code appear in the Approved Changes column; costs and documents with other status codes are shown in the Pending Changes column. Documents with status codes of Closed or Rejected are not displayed on the Contract Summary tab.

Note: You can also view all insurance policies, invoices, requisitions, and submittals associated with the contract.

Using Trends

Why Use Trends?

Changes are inevitable in any phase of a project, from the outset as design deliberations and associated budget amounts are negotiated, through final payment approval as work is completed. Most participants in the process, owner and subcontractor alike, will be presented with expected revisions. Trends are provided as a place to record expectations of future costs or other items that will most likely affect budgeted costs in the near future. You can place these values in trends, and incorporate them in the project as they occur; you can also use trends to perform “what-if” analysis on a backup of the project so you can see how they affect costs.

Keep in mind that trends are usually not definite changes (although they can be), unlike those you record in change documents; they typically represent probable future costs. For example, if the pipe you will be ordering for delivery at a construction site costs \$10 per foot at the time your bid is submitted, but the same pipe is expected to increase to \$12 per foot when your bid will be accepted, you can expect the pipe will be \$12 per foot when you place the order. Trends can be used to represent adjustments, revisions, estimates, or actuals—they can be as flexible as you require.

Once you record a trend, you can add it to the Cost Worksheet by distributing its cost to a cost code and assigning the amount to a column used for revisions or adjustments to the original budget, or for any other cost area. You can then track these possible cost changes and fine-tune your budget.

Adding a Trend

Use trends to add and track anticipated costs that may change the project scope as they occur.

To add a trend:

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Trends**.
- 2) Click **Add Document**. The new trend is automatically assigned the next available number. The module also enters the current date and your user name in the Entered By field. You can cost the trend amount to the selected Cost Category on the Cost Worksheet. You can also create a new trend from an existing trend.


To view or change Trend details:

- 1) Click the **Status** tab to view or change the ball in court contact, priority, or status of the trend.
- 2) Use the **Remarks** tab to enter comments about the trend.
- 3) Use the **Details** tab to view additional information, such as who initiated the trend, an associated activity ID, and other schedule and change details.
- 4) Click the **Line Items** tab when you want to enter itemized costs for the trend.
- 5) Attach related issues or attachments to any trend document.
- 6) Click **Save**.

Generate a Trend from a Trend

You can create a new trend based on an existing one using the Generate Wizard.

To generate a trend:

- 1) Expand the **Contract Information** folder and click **Trends** to open the Trends Log Window.
- 2) Open the trend document that you want to copy, and do one of the following to start the Generate Trend Record Wizard:
 - ▶ Choose **Select an action, Generate Trend**.
 - ▶ Click **Generate Trend** .

Contract Management supplies a number for the trend, but you can edit it.

- 3) Choose **Yes** if you want to distribute the new trend to the same cost codes as the original, link the new trend to the same issues and attachments as the original, and close out the original trend.
- 4) Click **Finish** to generate the new trend.

Note: If you select *No* to copying cost codes when generating, Contract Management copies all the line items as *Not Costed*.

Distribute Costs to the Cost Worksheet Overview

The Cost Worksheet Document Window provides a central location for tracking all project costs. You can compare budget and committed costs to actual costs for each work element. Open the Cost Worksheet Log Window from the Contract Information folder. Costs are organized by Cost Codes, which represent various categories of project work. Using the Project Settings Dialog Box, you can set which cost documents are distributed.

Use the Contract Management Cost Worksheet to keep detailed records of the money associated with your project, including amounts budgeted, committed, spent or received; and amounts you received or expect to receive as the result of changes.

You can distribute contract or purchase order costs to the Budgeted or Committed sections of the Cost Worksheet. Use the Budgeted tab for the total amount available to spend on the project; use the Committed tab for amounts you have agreed to pay someone else.

To break down the value of a contract, purchase order, proposed change, change, invoice, requisition, or trend, distribute the associated costs to one or more cost codes in the Cost Worksheet.

Notes:

- Distributing contract or purchase order costs is optional. You do not need to use the Cost Worksheet to use a contract or purchase order.
 - You may want to Add a Cost Code to the Cost Worksheet when you first add a project. Cost codes categorize costs in your project and enable you to meaningfully distribute and track amounts on the Cost Worksheet.
-

Distribute Costs to the Cost Worksheet

The following steps describe how to distribute contract costs to the Cost Worksheet. Follow the same procedure to distribute costs for any of the other documents.

To distribute costs:

- 1) Open the document window for which you want to distribute costs.
- 2) Click the **Line Items** tab.
- 3) Click either **Add Lump Sum** or **Add Unit Price** to open the corresponding Item dialog box.
 - a. Enter the **Lump Amount** or the **Unit Price** and fill in all the other necessary information.
 - b. In the **Costing** section:
 1. Click **Add** to open the Select Cost Code Dialog Box. Select a cost code to distribute to. You can add as many cost codes as necessary.
 2. Enter the amount to distribute in the **Distributed** field.
 - c. Click **Save and Close** to distribute the costs to the Cost Worksheet.
- 4) Click **Save** on the document window.

From a contract or purchase order document window, values are distributed to either the **Budget** or **Committed** section of the Cost Worksheet. Using Project Settings, you can set Contract Management so that the entire amount of the item will be distributed to defined cost codes.

Since most Contract Management documents from which you can distribute costs relates to a specific contract or purchase order, you should always distribute contract costs first.

Preparing Requisitions for Payment

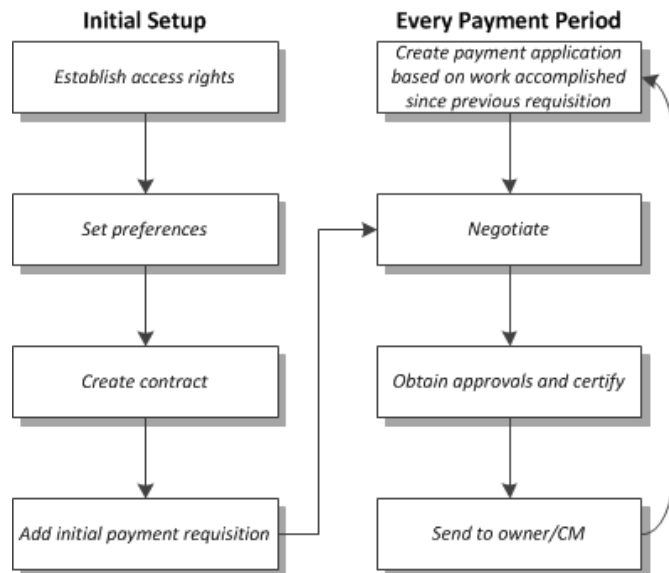
Requisitions Process Overview

Requisitions, or formal requests for payment, are usually issued by general contractors to the owner on a monthly basis as portions of work on a project are completed. Subcontractors or vendors submit requisitions to the general contractor for their portions of the work. Once the initial requisition with line items is established at the end or beginning of the next month (or other pay cycle established between the contract parties), an application for payment based on the original requisition is updated, certified, and sent. This requisition update/issuing cycle continues until the work is completed and the general contractor has been paid in full in accordance with the contract agreement.

Requisitions are based on a contract or purchase order established in Contract Management for the project. You can use lump sum and/or unit price line items from the contract or purchase order to automatically create the requisition schedule of values. As the project progresses, a requisition is issued each pay period to the owner from the general contractor for completed work. The line item or lump sum costs are negotiated until a payment agreement is reached and the requisition is approved and certified. Line item costs can be distributed to the Cost Worksheet. (Using the Cost Worksheet is optional.) When you are ready for the final copy, use Contract Management to print the form for the necessary signatures and certification.

This requisition update/issuing cycle continues until the work is completed and the GC and subcontractors have been paid in full in accordance with the contract agreement. The following diagram illustrates a typical cycle.

Figure 3: Requisition Update/Issuing Cycle Chart



Materials for delivery and approved change orders applicable to each period are collected and added to the corresponding requisition. In addition, the predetermined retainage calculation per line item or percent complete is applied to the current amount due.

Setting Up Requisitions

You can create payment requisitions for all contracts and purchase orders. Depending on your role, you may issue payment requests as well as receive payment requests. For example, if you are a general contractor, you receive requisitions from subcontractors and you issue requisitions to the owner. You can distribute requisition amounts to the Cost Worksheet Log Window's Actuals Issued or Actuals Received column and then compare the actual costs to the budgeted or committed costs for various work items.

To set up a requisition:

- 1) Set Access Rights to Certify Requisitions.
- 2) Set Cost Options and Requisition Preferences.
- 3) Generate a Requisition from a Contract or Purchase Order.
- 4) Create a Schedule of Values/Add Line Items to a Requisition.
- 5) Calculate Retainage.

Other features you can use with requisitions:

- ▶ To locate and organize your requisitions, use Find, Sort, Filter, or Group.
- ▶ To link an existing requisition, contract, or purchase order to an issue, click the **Issues** tab on the Requisition Document Window. When you generate a requisition, Contract Management enables you to link issues from the linked requisition. This helps you track the information in both documents.

You can use custom fields to provide additional information about each schedule of values line item. Custom fields represent categories of information such as project phase or responsible manager, or provide additional date, cost, or quantity information about an item.

The combination of entries in these fields determines schedule of value preferences and retainage calculations for all Requisition Document Windows. Requisition options are also available from the Contract Document Window or Purchase Order Document Window so you can modify this information to make it applicable to the individual contract/purchase order from which you are generating the requisition.

Setting requisition preferences in this dialog box affects only new contracts and purchase orders. To change requisition preferences on an existing contract or purchase order, edit the Requisition Document Window from the associated contract or purchase order document window.

Create the Requisition

Follow these steps to set up the first requisition for each contract or purchase order:

- 1) Set access rights to requisitions and for certifying them.
- 2) Create the requisition and schedule of values. There are two ways to do this:
 - ▶ Open the contract, and generate the first requisition in order to have all Contract Line Items automatically populate the Requisition Schedule of Values. This powerful feature eliminates the need to manually create the Schedule of Values.
 - ▶ Open the Requisition log window, and add a new requisition. Go to the Requisition Document window for the newly created requisition, and manually create the Schedule of Values.

- 3) Negotiate the payment amount.
- 4) Approve and certify the requisition.
- 5) Start the cycle for the next payment period by opening the latest requisition against the contract and generating the next requisition.

Note: If you use both requisitions and invoices, you typically generate requisitions from contracts and invoices from purchase orders.

Assuming requisition access rights have been set and preference defaults are being used in generating requisitions (steps 1 and 2), this section discusses step 3 in the process—creating a requisition.

Create the First Requisition for a Project Payment

To create the first requisition for a project payment:

- 1) Expand the **Contract Information** folder for a project in the Project View and click one of the Contracts modules or the Purchase Orders module.
- 2) To generate a requisition, open the contract or purchase order document for which you want to generate a requisition, and choose **Generate Requisition** from the **Select an action** drop-down list.
- 3) You can change the default Period To date on the Generate Requisition dialog box to issue a payment application for a different time frame. Click on the calendar beside the **Period To** field to select a date. Each requisition for payment covers the time period between Period To dates for the last requisition and the current requisition.
- 4) On the Requisition document window, select the party to which the contract or PO was issued in the **To** field. In the **From** field, select the party that initiated the contract or PO.

The module sequentially numbers requisitions that refer to the same contract or purchase order starting with 00001 (you can change this number). It also copies the total amount from the specified contract/purchase order to the **Original Contract Sum** field on the requisition.

Note: You can also click **Add Document** to add a new requisition while in the Payment Requisitions log or Requisition document window (in View mode).

Add Line Items to an Uncertified Requisition

Add line items to an uncertified requisition:

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Payment Requisitions**.
- 2) Open the requisition to which you want to add line items.
- 3) On the Requisition document window, click the **Schedule of Values** tab to view the items transferred from the contract or purchase order.

- 4) To create each line item number do one of the following:
 - ▶ Open the Contract/Purchase Order document window for the existing contract/purchase order and select Cost Options from the Select an action drop-down list. Enter values in the **Start with this line item** and **Increment line items by** fields in the Cost Options dialog box.
 - ▶ In the Project View, right-click the project to which you want to add line item numbers and select Project Settings. In the Project Settings dialog box, click the Requisitions tab, and enter values in the **Start with this line item** and **Increment line items by** fields.

If a unit tax amount per line item or a lump tax per lump sum exists for the originating contract/purchase order, the entire amount is totaled and placed on a separate line called Total Tax.

Add a Line Item in Lump Sum, Unit Price, Headers, Subtotal, or Blank Line Item Format

From the Schedule of Values tab for an uncertified requisition, you can create five types of line items: Unit Price, Lump Sum, Subtotal, Header, or Blank line.

To add a line item:

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Payment Requisitions**.
- 2) Open a requisition and click the **Schedule of Values** tab.
- 3) On the **Schedule of Values** tab:
 - ▶ Click **Add Unit Price** to add material line items.
 - ▶ Click **Add Lump Sum** to add line items involving labor.
 - ▶ Do one of the following to organize information on the Schedule of Values tab:
 - Click **Add Header** in the **More Commands** drop-down list to organize line items by work package or cost category.
 - Click **Add Subtotal** in the **More Commands** drop-down list to total a group of items.
 - Click **Add Blank Line** in the **More Commands** drop-down list to separate lines for better organization.
- 4) When you finish creating line items and entering the scheduled values, the grand total for the Scheduled Value column (column C) should equal the Original Contract Sum on the Contract Summary tab. The module notifies you if these numbers do not match when you attempt to close the Requisition document window, and it displays the amount needed to balance the two numbers. Adjust the schedule of values for existing line items, or create new line items and schedule values to balance the totals.

Tips

- ▶ Line items are listed numerically. To group the line items by a general category and then calculate subtotals for each group, enter appropriate item numbers for the header and subtotal. To arrange the data in the order you want, click the document icon next to the line item you want to edit. Change the Item Number and click **Save and Close** to view the changes.
- ▶ Headers are not required to calculate subtotals. If you enter items and subtotals only, all line items are summarized between subtotals. You can also use the blank line item type to separate and group items in the schedule of values. The next sequential item number is used, but all other columns are blank for this item type. Blank lines do not affect subtotals.

All Applicable Parties Approve the Requisition

The requisition is certified by the last approver and returned to the appropriate contact via any of the following: email, a remote access program, regular mail, or fax.

Costs are Distributed

Costs are calculated (including retainage), and line items or lump sum costs are distributed to the Cost Worksheet in the Actuals Issued (owner's committed costs), Actuals Received (the general contractor's budgeted costs), and Actuals Expended (the funded costs) columns.

Create Periodic Payment Requisitions Based on the Previous Requisitions for the Contract/Purchase Order

- 1) Open the document window for the previous month's certified requisition for the contract/purchase order.
- 2) Choose **Generate Requisition** from the **Select an action** drop-down list.
- 3) Follow the steps in the Generate Requisition wizard to create the current requisition. Select the options to "get" approved change orders, materials for delivery, and schedule information for the current requisition.
- 4) Click **Finish** when done with the wizard.

Tips

Use a filter to separate requisitions received from those sent from the Payment Requisitions log.

Update the Current Requisition

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Payment Requisitions**.
- 2) Open the document window for a requisition.
- 3) Click the **Schedule of Values** tab.
- 4) On the **Schedule of Values** tab, edit each line item to change the value for **This Period** or **Percent Complete** based on work completed this period.

5) Click the **Review Status** tab, and certify the requisition.

Tips

If you associated Contract Management module schedule activities with requisition line items or with the contract/purchase order, select the **Get Schedule** option in the Generate Requisitions wizard to update the total percentage of work completed for the period to date (%G/C column) in the schedule of values using the activities' percent complete.

Adding a Requisition

Requisitions must be linked to a contract or a purchase order. You should create your contract or purchase order, establish its cost options, and then generate the first requisition for payment from the contract or purchase order.

To add a requisition:

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Payment Requisitions**.
- 2) Click **Add Document**.
- 3) In the Add Requisition wizard:
 - a. Select the **Contract/PO** to which to link the requisition.
 - b. Select a **To** contact (for example, the GC receiving the request for payment).
 - c. Select a **From** contact (for example, the subcontractor submitting the requisition for payment).
 - d. The module uses the current date for the **Period To**, which you can change.
- 4) Click **Finish** to create the new requisition for payment.

Record Progress for Requisitions

Follow these general steps to generate monthly requests for payment:

- 1) Expand the **Contract Information** folder and click **Payment Requisitions** to open the Payment Requisitions Log Window.
- 2) Follow the steps in Generate a Payment Requisition from an Existing Requisition to generate the requisition.
- 3) Record progress.

Throughout the project, only one requisition for payment should be active (uncertified) for each contract. If you try to add a new requisition before certifying the previous application, Contract Management reminds you about the previous uncertified requisition, but will accept a new one.

To record progress:

In the Requisition Detail Dialog Box (which is used to fill in the requisition's Schedule of Values section), enter the value of completed work for the current period in This Period (column E). If you don't know the actual amount, enter the total percentage of work completed in % Complete (column G). The percentage represents work completed and stored materials for all periods to date, not just the current period. If you have associated P6 EPPM schedule activities with requisition line items, you have the option (during the "get") of updating the total percentage of work completed for all periods to date using the current schedule activity's percent complete.

If you enter a value in This Period (column E), Contract Management calculates the progress percentage by dividing Completed and Stored to Date, D+E+F (column G) by the Scheduled Value (column C).

If you enter a percentage in Completed and Stored to Date, D+E+F (column G), Contract Management calculates the value in This Period (column E) by multiplying the percentage by the Scheduled Value (column C), then subtracting from this value the sum of all Previous Applications (column D):

$$\text{Column E} = (\text{Column G}\% \times \text{Column C}) - \text{Column D}$$

Update Stored Materials for Requisitions

In Materials Presently Stored, Not in D or E (column F), enter the value of stored materials for the project. When you edit the value in column F, Contract Management recalculates both the cost and percentage values in Completed and Stored to Date, D+E+F (column G).

If there is a value in either column E or F and you try to enter a different percentage in column G, Contract Management ignores your entry because the percentage in column G always equals the cost value in column G divided by the Scheduled Value (column C). To enter a new percentage, first delete the values in columns E and F, and then enter the new percentage. Contract Management calculates the value of work completed This Period (column E), but does not enter any value in column F.

Calculate Retainage for Requisitions

If you record retainage by entering a percentage, Contract Management calculates the retainage for completed work and stored materials. If you choose to record retainage in the **Total Retainage** field in the Requisition Summary section, be sure the value you enter includes completed work and stored materials for all periods to date. (To edit the **Total Retainage** field, you must choose the **Enter Total Retainage in the Requisition Summary** option in the Requisition Options dialog box for the contract or purchase order.) If you choose to record retainage by editing each line item in the Schedule of Values section, enter the total retainage for stored materials and completed work or enter a percentage in the **Retain %** field (column I).

The two values in column I are linked. If you enter a currency value, Contract Management calculates the percentage. If you enter a percentage, Contract Management calculates the value by multiplying the percentage by the Completed and Stored to Date, D+E+F value (column G).

Contract Management sums the values in Column I and displays the total in the **Completed and Stored To Date** field in the **Requisition Summary** section. No separate retainage value for stored materials is calculated.

Calculate Tax Amounts for Requisitions

If you chose the **Enter the Tax Rate on Line Items (Column J) and Let Contract Management Calculate the Tax to Date Amount** option in the Cost Options dialog box for the contract/purchase order (or the Project Settings Dialog Box if you are not generating the requisition for a contract/purchase order), you can enter the tax percentage for each line item in the **Tax Rate** field (column J). Contract Management calculates the tax amount by multiplying the percentage by the value in Completed and Stored to Date, D+E+F (column G). Contract Management displays the sum of all tax amounts in the **Tax to Date** field in the requisition's **Summary** section.

Using Other Features with Requisitions

Contract Management asks if you want to link to the same issues and attachments when generating a new payment requisition from an existing requisition or contract/PO. If you choose to link to the same issues, the requisition is then included when you organize and cross-reference project documents by issues. You can also use custom fields to provide additional information about each line item on the schedule of values. Custom fields represent categories of information, such as project phase or responsible manager, or provide additional date, cost, or quantity information about an item. You can also use Search, Filter, Sort, and Group to locate and organize your requisitions.

Certify a Requisition

You should review the values in the Requisition Summary and Schedule of Values tabs of the Requisition Document Window before certifying a requisition. A requisition cannot be certified if the grand total for the Scheduled Value column does not equal the Contract Sum To Date.

After verifying the information in the Payment Requisition, make sure the appropriate names and dates appear on the Status tab, and click **Certify and Save**. Verify that you want to certify the requisition when prompted. You need to certify the requisition to close it out for the current period.

In general, you should not edit a certified requisition because this document has already been approved. Also, the values in a certified requisition form the basis of payment for the next period. When you add a new requisition, Contract Management rolls forward summary and detailed cost information from the previous requisition. If you change values in a previously certified requisition, you may have to manually update each of the subsequent requisitions.

Generate a Payment Requisition from an Existing Requisition

If you want to create the next payment requisition for the same contract based on an existing payment requisition, you can generate one instead of having to reenter all of the information again.

To generate a payment requisition from an existing requisition:

- 1) Expand the **Contract Information** folder and click **Payment Requisitions** to open the Payment Requisitions Log Window.
- 2) Open the Requisition Document Window you want to use as the basis for the new requisition.

- 3) From the **Select an action** drop-down list, choose **Generate Requisition** to open the Generate Requisition wizard. The Generate Requisition dialog box will open.
- 4) Enter the new **Period To** date for the new requisition.
- 5) Select the following options as necessary:
 - ▶ Select **Get Approved Change Orders** to bring approved change orders into this requisition.
 - ▶ Select **Get Materials Delivery** to bring material deliveries into this requisition.
 - ▶ Select **Get Schedule Percent Complete** to update the % Complete G/C column for each row of the **Schedule of Values** section with the percent complete of the row's associated P6 EPPM schedule activity. Contract Management will automatically calculate This Period based on the linked activity Percent Complete.

Notes:

- If there are no approved changes associated with the contract, then **Get Approved Changes** is disabled, and changed to **There are No Approved Change Orders to Get**.
- If there are no materials associated with the contract, then **Get Materials Delivery** is disabled, and changed to **There are No Materials to Get**.
- If there is no schedule hooked up, then **Get Schedule Percent Complete** is disabled, and changed to **There is No Schedule Information to Get**.

-
- 6) Click **Yes** or **No** to indicate whether to link the new document to same issues as the original.
 - 7) Click **Yes** or **No** to indicate whether to link the new document to same attachments as the original.
 - 8) Click **Yes** or **No** to indicate whether to copy the custom fields from the original Requisition.
 - 9) Click **Next**. If the options in step 5 are disabled, **Next** will be disabled. In that case, skip step 10.
 - 10) The Get windows will open depending on which options you chose in step 5. Choose the options you want to "get" into the new requisition and click **Next**.
 - 11) Click **Finish**. The new requisition will appear in the log.

When you create the next requisition for payment, Contract Management copies all information from the previous requisition to the new one. Contract Management makes the following changes on the Schedule of Values and Requisition Summary tabs of the new requisition:

- ▶ Contract Management gives the requisition the next sequential Application Number.
- ▶ In the **Period To** field, Contract Management enters the date that is one month later than the previous requisition's Period To date. It assumes progress payments are made monthly. You can enter a different date.
- ▶ Contract Management copies all line items and values from the previous requisition to the new requisition's **Schedule of Values** tab. This Period (Column E) values now equal zero, unless you do a get through this wizard.




- ▶ Contract Management adds all This Period (column E) and Materials Presently Stored, Not in D or E (column F) values from the previous requisitions to the sum of all Previous Applications (Column D) if you have cleared the **% of Stored Materials** option in the Cost Options Dialog Box for the contract/purchase order from which the requisition is being generated (or from the Requisitions tab in the Project Settings Dialog Box for a new contract/purchase order).
- ▶ To instruct Contract Management to retain costs for materials stored in the Materials Presently Stored, Not in D or E (Column F) in the Schedule of Values when generating a new requisition, select the **% of Stored Materials** option in the Requisition Options dialog box for the contract/purchase order from which the requisition is being generated (or from the Requisitions tab in the Project Settings dialog box for a new contract/purchase order).
- ▶ The Previous Amount Certified value in the **Requisition Summary** section now includes the amount certified in the previous application; the **Amount Certified** field equals zero.

Distribute Actual Costs to the Cost Worksheet for Requisitions

The Cost Worksheet provides a central location for tracking all project costs. You can compare budget and committed costs to actual costs for each work element. Open the Cost Worksheet Log Window from the Contract Information folder. Costs are organized by cost codes, which represent various categories of project work.

Use the Requisition Detail Dialog Box to distribute the amounts recorded for work completed this period (Column E in the Requisition Document Window Schedule of Values tab) to the Actuals tab of the Cost Worksheet. Click Add to open the Select Cost Code Dialog Box to add a V row.

To distribute costs for requisitions:

- 1) Expand the **Contract Information** folder in the Project View and click **Payment Requisitions** to open the Payment Requisitions Log Window.
- 2) Click **Edit document**  next to the payment requisition document for which you want to distribute costs.
- 3) Click the **Schedule of Values** tab and click **Edit**  next to the item for which you want to distribute costs.
- 4) In the Requisition Detail Dialog Box, distribute the value of work completed this period to one or more cost codes by scrolling down to the **Costing** section (or by clicking **costing**  at the top of the dialog box) and clicking **Add** to open the Select Cost Code Dialog Box.

You should distribute amounts to the same cost code used to distribute the original contract sum.

If you attempt to close the Requisition Detail dialog box without distributing the entire amount, Contract Management distributes the remaining amount to the **Not Costed** cost code. Using the Project Settings Dialog Box, you can set Contract Management so that the entire amount must be distributed to defined cost codes.

5) Click **Add** to select another cost code. Click **Save and Close** when finished.

Contract Management automatically distributes the amounts in the Requisition Detail Dialog Box to either the **Actuals Issued** or **Actuals Received** column in the Cost Worksheet:

- ▶ If the contract shown at the top of the Requisition document window was distributed to the **Original Budget** column, Contract Management automatically distributes the requisition amounts to the **Actuals Issued** column.
- ▶ If the contract amount was distributed to the **Original Commitment** column, Contract Management automatically distributes the requisition amounts to the **Actuals Received** column.

Note: If the line item is costed to only one Cost Code, Contract Management will automatically distribute the amount in This Period (column E) to that cost code.

Sending a Requisition

After a requisition is submitted, the contracting parties negotiate and eventually agree on an amount. The requisition is then certified, and you (the contractor) can submit it to the owner for payment. The method you use to relay the requisition depends on your physical location and interaction with the database server on which the project resides.

You can use the Send to Inbox feature or E-mail Form feature to send correspondence to the owner/construction manager.

Send a Requisition to a Local User's Inbox

- 1) From the document window for the requisition you want to send, choose **Send to Inbox** from the **Select an action** drop-down list.
- 2) Select a recipient from the **Send to** drop-down list, add any comments, and click **Send**.

When the addressee opens his/her Inbox, it contains an entry for the requisition you sent. When the addressee clicks the Inbox document, it opens the document.

Sending a Requisition to a Non-Contract Management User Using Email:

If you are working in a trailer at the job site, and need to send a certified requisition:

- 1) From the document window for the requisition you want to send, choose **E-mail Form** from the **Select an action** drop-down list.
- 2) Select a contact, add any comments, and click **OK**.

The addressee will receive the requisition as a PDF attachment, and will include a link to the document.

Recording Invoices

Adding Invoices to a Contract or Purchase Order

You can use the Invoices tab of a contract or purchase order document to record bills that have been issued or received relating to the selected contract or purchase order.

Note: You can use either invoices or requisitions with contracts or purchase orders, not both. If the contractor purchase order has a requisition against it, invoices will not be available.

Each time you record a payment in an invoice, the balance on the contract or PO changes immediately. Although you can distribute the amount of an invoice to multiple cost codes, you cannot include individual line items or retainage in an invoice. Use a requisition instead of an invoice if you need to include a list of the items covered by a particular payment, or if you want to withhold a portion of the payment until work is completed.

Set Project Settings for Invoices

The Default Invoice Amount to Contract/PO Balance option in the Contracts/POs tab of the Project Settings dialog box determines how the Amount field is used in new invoices. It also specifies whether to automatically use the cost codes from the associated PO to distribute the amount to the Cost Worksheet.

To set project settings for invoices:

- 1) From the Project View, right-click the project you are working with, and choose **Project Settings**.
- 2) On the Project Settings dialog box, click the Contracts/POs tab.
- 3) Select the **Default Invoice Amount to Contract/PO Balance** option to have the module fill the **Amount** field with the balance of the PO when you create a new invoice.

The module also distributes the value in the Amount field using cost codes from the associated PO. If necessary, you can change the value in the Amount field, and redistribute the new value to the cost codes as necessary.

- 4) Click **Save** when finished.

Close Out a PO Using One Invoice

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Purchase Orders**.
- 2) Open the Purchase Order you want to work with, and click **Edit Document** (if you are not in Edit mode).
- 3) Click the **Contract Summary** tab, and click the **Invoices** sub tab.
- 4) Click **Add** to add a new invoice to this purchase order.

- 5) A unique invoice number is created, the current date is entered as the invoice date, and the specification section from the PO is used as the invoice title. Enter the payment date, check number, status, and activity ID (if applicable), and click **Save**.

Note: If you change the invoice amount, you must redistribute costs.

- 6) In the Invoice window, click the **Costing** tab to add one or more cost codes to be associated with the invoice.

Close Out a PO Using Multiple Invoices

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Purchase Orders**.
- 2) Open the PO to which you want to attach an invoice.
- 3) Click the **Contract Summary** tab, and then click the **Invoices** sub tab.
- 4) Click **Add** to create a new invoice. The next invoice number is created, the current date becomes the invoice date, and the specification section from the PO becomes the invoice title.
- 5) The amount entered for the new invoice equals the contract/PO balance. The module uses the value in the **Amount Billed** field, and creates cost distributions based on the cost codes assigned to all line items in the contract/PO. These values are automatically posted to the Cost Worksheet. If necessary, change the value in the **Amount Paid** field, and change the invoice title to accurately describe the content of the invoice.
- 6) Enter the payment date, check number, status, and activity ID, and save the invoice document.
- 7) Click **Save and Add Another** for any other invoices you need to add. Modify the fields as needed, and click **Save and Close** when you are finished adding invoices.

Tips

If you want to distribute invoices using the cost codes assigned to the PO, select the **Default Invoice Amount to Contract/PO Balance** option on the Contracts/POs tab of the Project Settings dialog box.

Delete an Invoice Entry

- 1) To delete an invoice, open the contract or PO document window that contains the invoice you want to delete.
- 2) On the **Contract Summary** tab of the document, click the **Invoices** sub tab.
- 3) Click **Delete** for the row that contains the invoice you want to remove. When you delete an invoice, the module also deletes any cost distributions.

Distribute Actual Costs to the Cost Worksheet for Invoices

The Cost Worksheet provides a central location for tracking all project costs. You can compare budgeted and committed costs to actual costs for each work element. Open the Cost Worksheet Log Window from the Contract Information folder. Costs are organized by cost codes, which represent various categories of project work. Using Project Settings Dialog Box, you can set which cost documents are distributed.

Once you've recorded the payment in the Invoice Dialog Box, you can distribute it to the Actuals side of the Cost Worksheet by opening an invoice and using the Costing section.

- ▶ Invoices for a contract or purchase order you originally distributed to Budget are distributed to Actuals Issued.
- ▶ Invoices for a contract or purchase order you originally distributed to Committed are distributed to Actuals Received.

Costing out your invoices is optional. You do not have to use the Cost Worksheet to use invoices or requisitions. Also, you can only cost out your invoices if you costed out the associated contract or purchase order.

If you know you'll be using the Cost Worksheet, there are three ways to add cost codes:

- ▶ Create a project template that contains your standard cost codes.
- ▶ Right-click on the top-level folder, and choose cost codes to, and select Copy Cost Codes.
- ▶ Add a Cost Code to the Cost Worksheet.

If you do not distribute the entire amount of the invoice, Contract Management applies the non-distributed amount to a cost code called Not Costed. Using Project Settings, you can set Contract Management so that the entire amount of the invoice is distributed to defined cost codes.

Using Change Management

Change Management Overview

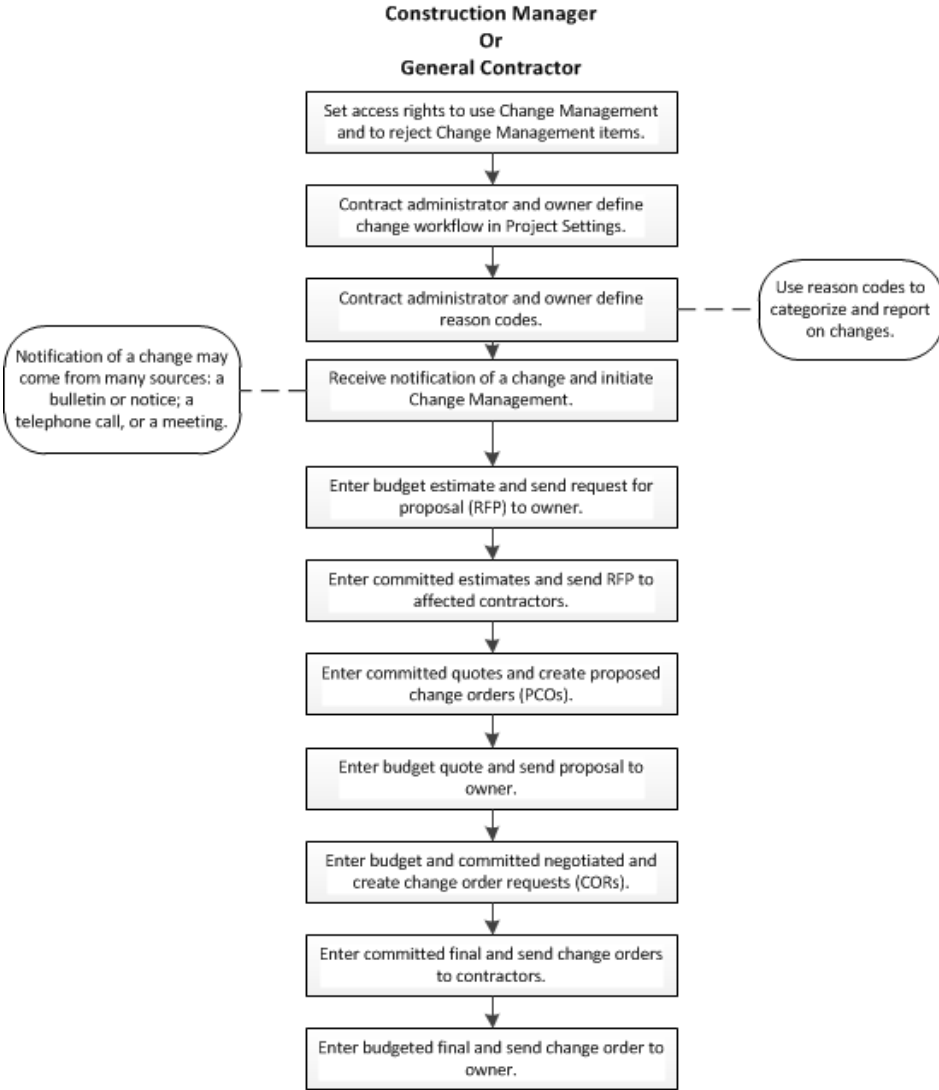
Use Change Management to cost all generated documents, post generated documents to any portion of the cost worksheet, and create committed contracts and purchase orders. Change Management provides a central location where you enter all necessary contract, contractor, and costing information about a change. At any stage of the process, you can see the current status of the change, including estimates, costs, documents, and responsibilities of all parties.

Controlling changes involves notifying and coordinating affected project participants as well as containing costs and the schedule for the project. The Change Management Document Window provides an overview of each change from the estimate phase to final approval for both budgeted and committed costs. Since the change process in a project differs according to the nature of each change and the methods a company employs for recording and tracking changes, the Change Management module of Contract Management enables you to create a customized workflow to meet your company's needs for tracking and resolving changes.

Construction managers (CMs) or general contractors (GCs) can use Change Management to coordinate work and disseminate change information to all affected parties. For example, they must notify the owner of any changes that might affect the schedule or value of the budget contract, control quotes from contractors or subcontractors, negotiate with both the owner and contractors or subcontractors to properly compensate the affected parties, and circulate approval notices to all affected parties once the change is approved.

The following diagram illustrates the typical Change Management process for Construction Managers or General Contractors.

Figure 4: Change Management Process



Setting Change Management phases and options

Change Management phases and options are set on the Project Settings Dialog Box. You can determine which budgeted and committed documents are created for the Budget, Quoted, Negotiated, and Final phases, and which cost types to associate with each. It is not necessary to use all the phases if they are not required for your processes. For more information, see Specify Project Settings.

Specifying Change Management Project Settings

Change Management preferences enable you to define the Change Management work process. Typically, the contract administrator and the owner determine the Change Management work process required for the project soon after the contract is awarded.

Create the Change Management Work Process

- 1) From the Project View, right-click a project and choose **Project Settings**.
- 2) Click the **Change Management** tab.
- 3) On the **Change Management** tab:
 - a. Specify the document type you want to create and the corresponding column on the Cost Worksheet where you want to distribute costs when you use Change Management.
 - b. Use the options to specify Change Management preferences. When you finish making changes, click **Save**.

Tips

- ▶ You can customize the Change Management work process even further by customizing blank change types, or proposal types, and including them in your Change Management work process.
- ▶ You can modify your Change Management project settings at any time; however, the changes apply only to new documents generated from Change Management. Any documents already created from Change Management remain unchanged.

Restrict Access to Change Management Information

If you use the module in a multiuser environment and exchange information with project participants, you must ensure that other users cannot alter the Change Management work process set in the Project Settings dialog box or see your budget information in Change Management documents. To prevent project participants from viewing your budget information, you can restrict access to the project by contact.

To set access rights:

- 1) Right-click the project in the Project View for which you want to restrict access to Change Management, and choose **Project Access**.
- 2) Click edit for the user whose access rights you want to configure.
- 3) In the User Project Access dialog box, configure access rights for Change Management.
- 4) Click **Save and Close** when finished.

Define Change Management Reason Codes

You can add change reasons for Change Management. You can then use the reasons for filtering, grouping, and sorting.

To add a change reason code:

- 1) Right-click on the top-level (All Projects) folder, choose **Dictionaries, Reason Codes**. Reason Code Dialog Box opens.

- 2) Click **Add** to open the Reason Code Detail Dialog Box.
- 3) In the **Reason Code** field, enter a reason code up to 12 characters in length.
- 4) In the **Title** field, enter a title of up to 23 characters for the new reason code.
- 5) From the **Move Below** drop-down list, select the location below which you want to insert the definition.
- 6) When you finish entering the reason code, click **Save and Close**.

Note: Reason codes defined here appear in all projects in the project database.

Initiate Change Management from Other Document Types

Although you can initiate Change Management by expanding the Contract Information folder in the Project View and choosing Change Management, it is more typical to initiate it from other document types. For example, if you use Request for Information (RFI) documents and receive an unexpected answer requiring a change, you can initiate Change Management directly from the RFI to create the change. Change Management can be initiated from the following document windows:

- ▶ Contracts
- ▶ Daily Reports
- ▶ Issues
- ▶ Meeting Minutes
- ▶ Notepads
- ▶ Noncompliance Notices
- ▶ Notices
- ▶ Punch Lists
- ▶ Purchase Orders
- ▶ Requests for Information (RFI)
- ▶ Trends

To initiate Change Management:

- 1) Open the relevant document log window.
- 2) From the **Select an action** drop-down list, choose **Initiate CM**.
- 3) Enter the information about the change in the Change Management Document Window. See the General tab of the Add a Change Management Document help topic.

Add a Change Management Document

Once you receive notification of an impending change, you can easily enter information in Change Management to track the progress of the change through to its approval.

Notes:

- Before using Change Management, set project preferences in the Project Settings Dialog Box. Although default settings are provided, you should configure the settings as necessary to reflect your company's change processes.
- You can restrict access by contact to prevent contractors with whom you exchange information from seeing Change Management information not pertaining to them in the User Project Access Dialog Box.

To add a Change Management document to another document:


It is typical to initiate Change Management from other document types. For example, if you use Request for Information (RFI) documents and receive an unexpected answer requiring a change, you can initiate Change Management directly from the RFI to create the change. Change Management can be initiated from the following document windows: Contracts, Daily Reports, Issues, Meeting Minutes, Notepads, Noncompliance Notices, Notices, Punch Lists, Purchase Orders, Requests for Information (RFI), Transmittals, or Trends.

To initiate Change Management from another document:

- 1) Open the relevant document log window.
- 2) Open the document from which you want to initiate Change Management.
- 3) From the **Select an action** drop-down list, chose **Initiate CM**. The Change Management Document Window opens, with the General tab displayed.

To add a Change Management document from the Change Management module:

- 1) Expand **Contract Information** in the Project View and click **Change Management**.

- 2) Click **Add Document** . The Change Management Document Window opens, with the General tab displayed.

Note: The budgeted contract is automatically selected if there is only one in the application. If you have more than one, select the one you want.

The following sections describe how to use the Change Management document window:


On the General tab:

- 1) Contract Management enters a number for the document in the **Number** field, and links all documents created from Change Management to each other using this number. You can edit this number now, but you cannot edit it once you save the document.
- 2) In the **Dated** field, enter the date the change process began. Contract Management automatically enters the current date as the default.

- 3) In the **Title** field, enter a title for the change document.


Note: The title is carried forward to all change documents generated from this Change Management document.

On the Status tab:

- 1) Click **browse**  next to the **Ball in Court** field and select a contact to use as the Ball in Court.
- 2) Select a priority and status for the document.

On the Budget tab:

You can use the **Budget** tab to set up the workflow for changes made through Change Management. It is not necessary to use all four phases (Estimated, Quoted, Negotiated, and Final) if all are not necessary for your site's processes. For more information on the Change Management process, see Change Management Overview.

- 1) Click **Select Contract**  and select the budgeted contract.
- 2) Select the **Disputed** option if the contract is being disputed.
- 3) Use **Start Estimated Phase**, **Start Quoted Phase**, **Start Negotiated Phase**, or **Start Final Phase** to enter the budget documents for each phase of the Change Management process. The phases that display on the **Budget** tab depend on how the Change Management module was set up on the Project Settings Dialog Box.

Note: To be able to change the budgeted contract, you must clear the budgeted phases first.

On the Commitments tab:

Use this tab to enter the commitment documents for the appropriate phase of the Change Management process.

- 1) Click **Add** to add a single commitment for a phase (Estimated, Quoted, Negotiated, or Final).
- 2) Click **Add Multiple Estimates** to add multiple commitment documents from companies that have committed contracts to the Change Management Estimated phase.

Note:

- In order to use markup, you must open the document and add it directly.
 - The type of document created during each phase depends on how the Change Management module was set up on the Project Settings Dialog Box.
-



On the Remarks tab:

Use this tab to enter any remarks or additional information regarding the Change Management document.

On the Documents by Phase tab:

Use this tab to review any documents created during the Change Management process.

On the Details tab:

- 1) Select a reason code for the change from the **Reason for Change** drop-down list.
- 2) Select the scope of the document.
- 3) Click **browse**  next to the **Referenced Document** field to choose a document to reference from this change.
- 4) If you are linking to P6 EPPM, select the Activity ID associated with the change by clicking **browse**  next to the **Activity ID** field to open the Select Activity Dialog Box.

On the Custom Fields tab:

This tab only displays when one or more custom fields have been defined for the module. Each custom field assigned to the Change Management module is shown with applicable values. Custom fields enable you to define additional information about a project. Define custom fields by right-clicking on the top-level folder in the Project View and selecting Custom Fields.

Custom fields cannot be defined when any users other than the Contract Management administrator are logged onto the application. For more information, see Custom Fields Overview and Add Custom Fields.

Use this tab to enter date information for the custom fields.

On the Issues tab:

Click **Link** to display the Select Issue Dialog Box. Use this dialog box to link any issues to the change document.

On the Attachments tab:

- ▶ Click **Attach File** to attach a file to the document.
- ▶ Click **Attach from Repository** to attach a document from the content repository. These documents are external to Contract Management. This will not display unless the administrator configured Contract Management to use the repository. See Configure the Content Management Version Document and Attachment Feature.
- ▶ Click **Attach URL** to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

On the Versions tab

You can maintain different versions of the Change Management document on the **Versions** tab. Once you save changes to your document, choose **Version Document** from the **Select an action** drop-down list, to create a new version of the current document. For more information about versions, see Version Document Overview.

Save the document:

When you are finished editing the change document, click **Save**.

Proposals and Change Orders

Proposals

The Proposals module includes proposed change orders (PCOs), change order requests (CORs), estimates (ESTs), and requests for proposals (RFPs). Click **Proposals** in the Contract Information folder from the Project View to review proposals. These documents solicit a bid to perform a specific activity or outline the cost and duration of a specific change. You can edit existing proposals from the Proposals log.

Use the tabs to view or enter information for the proposal. Click the Summary tab to review contract summary information. You can use this tab to view details or to create markup categories for this proposal. Click the **Details** tab to view remarks about the proposal as well as Change Management information and important dates. The Line Items tab contains information about itemized changes.

Change Orders

Click **Change Management** in the Contract Information folder to add or review change orders. Change orders specify a redirection of plans or introduce new items to the schedule. Change orders also show any approved increases or decreases in costs and contract item allowances.

Use the tabs to view or enter information for the proposal. The Review Status tab contains approving authorities. Click the Summary tab to review contract summary information. Click **Get Markup** on the Markup for Changes sub tab to copy markup values from the contract.

Note: Change orders are typically generated from Change Management, but if you want to be able to collect other change orders into a change order, you must add it from the Change Orders log (not from Change Management).

Markup Overview

A project's success requires effectively managing change during a project. Change Management is designed to help you track the change process more accurately. You can also manage overhead and profit by using markup in change documents.

Markup enables you to add overhead, profit, or any other markup categories you create to change documents. It automates overhead and profit calculations in Change Management.

You can set default values or percentages for overhead, profit, and other markup categories by using the Markup section of the contract or purchase order against which the change is written. The default values are then used for all markup calculations for changes to that contract or purchase order.

You can set different markup values for individual contracts and purchase orders. When applying overhead, you may need to change the percentage in certain situations. You can have different markup values based on total labor, material, and equipment costs. You can apply markup to your budgeted costs or direct costs, as well as to the total committed costs.

Markup provides you with a comprehensive method for managing changes from the initial estimate to the final approval, including reporting to compare the total of initial change costs plus the total markup for changes and the combined costs for changes. There is a printable form for Proposals and change documents with markups.

When applying markup, the module calculates the amount to mark up on the Markup for Changes tab of a change order or proposal document as follows:

- ▶ If a source cost code is used, the applied cost for that row is used as the amount to apply markup against.
- ▶ If there is no source code, the previous Subtotal amount will be marked up.
- ▶ If there is no previous Subtotal row, the Document Start row's Total Cost column will be marked up.

What You Can Do With Markup

- ▶ Set default markup values for overhead, profit, and other markup categories that you create. The default values are used in all markup calculations. Typically you will collect all Proposals from committed parties, roll the costs and codes of each document to create a change document to the customer or owner of a project. You can add overhead and profit (markup) prior to submitting that change document.
- ▶ Set separate markup values for different contracts and purchase orders. When applying overhead, you may need to change the percentage. You can apply markup to your budgeted costs and committed direct costs.
- ▶ Have different markup values based on total labor, material, and equipment costs.
- ▶ Set default values for overhead and profit, but you can also add additional markup values for each document.
- ▶ Assign markup categories using a percentage rate or a flat amount with both types.
- ▶ Set markup values at the contract or purchase order level, similar to requisitions.
- ▶ Specify the target cost code to which you want to apply the markup amount.
- ▶ Set the order in which markup categories are applied.
- ▶ Specify a source cost code, which enables you to break down costs into individual components.

Information You Can Get from Markup

Markup gives you a comprehensive method for managing changes from the initial estimate to the final approval, including reporting to compare the total of initial change costs plus the total markup for changes and the combined costs for changes. There is a new form for Proposal and change documents with markups, which you can print.

Project Settings Dialog Box Markup Tab

The Project Settings Dialog Box contains markup fields in which you can enter a description, percent, or fixed markup amount. The target cost code column is a drop-down of all cost codes.

When adding a new contract or purchase order, you can click Get Markup to get the markup defaults from the Project Settings dialog box and store them in the Contract Document Window Markup for Changes tab or the Purchase Order Document Window Markup for Changes tab. You can then modify the markup defaults on a per contract or purchase order basis.

Where Markup is Used



Contract Management enables you to apply markup to change orders and proposals in Change Management.

- ▶ If you use Change Management, you can generate a Budgeted change from the existing changes in the Change Management Document Window Budget tab. You can add the markup to the commitments changes, and produce a budgeted change for that total.
- ▶ If you do not use Change Management, you can apply markup to individual change orders or proposals.

Create Default Markup Values

The Markup tab on the Project Settings dialog box contains fields in which you can enter any description, percent, or fixed amount you want. The Target Cost Code column contains all cost codes.

To create default markup values:

- 1) Right-click on a project in the Project View and choose **Project Settings** to open the Project Settings Dialog Box.
- 2) Click the **Markup** tab.
- 3) Click **Add Markup** to open the Markup Dialog Box.
- 4) Enter a description for the markup.
- 5) Enter the **Markup %** and **Markup Amount (\$)**.
- 6) Click **Select Target Cost Code**  next to the **Target Cost Code** field to open the Select Cost Code Dialog Box to choose the cost code to which you want to apply the markup value.
- 7) Use the **Remarks** section to enter any additional information about the markup.
- 8) Click **Select Source Cost Code**  next to the **Source Cost Code** field to open the Select Cost Code Dialog Box to choose a specific source cost code. Contract Management calculates the amount of markup that is applied from the Distributed Value in the Cost Inspector of all cost distributions that match the specific cost code.
- 9) Click **Save and Close** to close the dialog box.

10) Click **Organize Rows** to select the order in which to apply the markup categories. Click **Save** when you are finished editing the order.

Tips

- ▶ When adding a new contract or purchase order, the module pulls the markup defaults that you enter, and uses them in the contract or purchase order.
- ▶ Even if you enter default markup values, you can modify the markup values on a per contract or purchase order basis.
- ▶ Using source cost codes enables you to break down costs into individual components. Instead of basing markup on one lump sum (such as overall cost), you can divide the cost into labor, materials, and bond, and apply markup categories to each of those. The module calculates the amount of markup that is applied from the distributed value of all cost distributions that match the specific cost code.
- ▶ You can use wild cards in the **Source Cost Code** field. Use a question mark (?) to replace one letter or an asterisk (*) to replace multiple letters. For example, if you have cost codes A1B and A2B, and you enter A?B, both cost codes will be found. Similarly, if you use A*, all cost codes that begin with A will be found.
- ▶ For more information on setting markup preferences, see Specify Project Settings.

Apply Markup Values to Change Orders and Proposals

If you do not want to use the default markup values, you can apply separate values to individual change documents. The new values will apply only to the change document to which they are applied. To apply markup, do the following:

- 1) Expand the **Contract Information** folder in the Project View and click **Change Orders**.
- 2) Click **Add Document**. The module enters the current date.
- 3) Select the document type, the **To** and **From** parties, and add any other information relevant to the change order.
- 4) Click the **Summary** tab.
- 5) Click the **Markup for Changes** subordinate tab.
- 6) To add a new markup item below the current row, click **Add Markup**.
- 7) To select the order in which to apply the markup categories, click **Organize Rows**.
- 8) To update the markup amounts based on any changes that were made to the document value and cost distributions, click **Get Markup**.
- 9) To add subtotals, click **Add Subtotal**.

Using Subtotals When Applying Markup

Subtotals are cumulative. When you click **Add Subtotal**, a Subtotal row is added to the bottom of the list.

Use **Organize Rows** to move the new row to the desired location. If you use Markup %, the markup cost is taken from the Total Cost column, or the previous Subtotal Total Cost column, and calculated in the Markup Amount column.

Collect Changes into a Change Order

This procedure is for change orders created independently (not in Change Management). If you created change orders in Change Management, the collect changes function is not available.

To add change orders outside of Change Management and collect changes, you must select the Enable document creation outside of change management option on the Change Management tab of the Project Settings Dialog Box. Change orders added outside of Change Management cannot be created until you have collected at least one change order or proposal document (using Collect from Changes on the Line Items tab).

The change order or proposal:

- ▶ Must be associated with the same contract or purchase order.
- ▶ Must not have been collected into another change order.
- ▶ Must not have a status of Closed, Disapproved, Not Applicable, or Rejected. Additionally, change orders cannot have a status of Approved.

To collect changes into a change order:

- 1) From the Change Orders Log Window, open the Change Order Document Window in Edit mode into which you want to collect changes.
- 2) Click the **Line Items** tab.
- 3) Click **Collect from Changes** to open the Collect Changes Dialog Box.
- 4) Select the options next to the changes you want to collect, and then click **Next**.
- 5) Click **Yes** or **No** to choose whether to link the new document to the same issues as the original.
- 6) Click **Yes** or **No** to choose whether to link the new document to the same attachments as the original.
- 7) Click **Yes** or **No** to choose whether to append the current document markup from the collected documents. If **Yes**, this appends the markup from the collected documents to the bottom of the current document markup.
- 8) Click **Finish**.


Approve a Change Order (Not Using the Workflow-Based Approval Process)

The final step in the change process is approving the change order. The procedure described here applies when not using the workflow-based approval process.

Use the Review Status tab to approve a change order. The Summary tab summarizes the contract history to date.

To approve a change order:

- 1) Expand the **Contract Information** folder and click **Change Orders** to open the Change Orders Log Window.
- 2) Open in Edit mode the Change Order Document Window that you want to approve.
- 3) Click the **Review Status** tab.

- 4) You must enter contacts in at least the first two of the three **Approved by** sections:
 - a. In the **Approved by** section, click **Select Contact** to open the Select Contact Dialog Box and select the name of the contact approving the change order.
 - b. Click **Select Date**  next to the **Approved Date** field and select the date. You must enter the date before you can approve the change order.
- 5) Click **Approve and Save**. The **Approved?** field changes to yes, and the **Status** field changes to *Approved*. Once the change order is approved, the document can no longer be edited.

Notes:

- When costing, Contract Management transfers the change order cost distributions from the Pending Revisions column to the Approved Revisions column of the Cost Worksheet. Using the Project Settings Dialog Box, you can set Contract Management so that the entire amount of the change order must be distributed to defined cost codes.
 - An approved change order is not editable. To edit the change order, the change order must not be approved. Click **Edit Document** and confirm that you do not want to approve the change order.
 - If you added the change order through Change Management, you can approve it without collecting.
 - Change orders added independently (not in Change Management) cannot be approved until you have collected at least one change order document into it (using **Collect from Changes** on the **Line Items** tab).
-

Generate Change Documents from Change Management

The process of generating documents is essentially the same for each document type in the work process.

Prepare to Generate Documents from Change Management

Before you generate documents, you should specify contract information on the Budget tab.

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Change Management**.
- 2) Click **Add Document**.

- 3) Click the **Budget** tab, click **Select** and choose the contract.

Notes:

- If only one budgeted contract/PO exists, it is automatically selected on the Budget tab.
- On the Budget tab, you can only select contracts that are distributed to the Budgeted side of the Cost Worksheet. Use the Commitments tab to select any committed contract/PO.

- 4) On the **Commitments** tab, click **Add** and choose the phase. You will choose the contract when you start the first phase.
- 5) Click **Save**.

Generate a Document

- 1) On the **Budget** or **Commitments** tab for a new Change Management document, click the appropriate **Start Estimated Phase**, **Start Quoted Phase**, **Start Negotiated Phase**, or **Start Final Phase**.
- 2) Enter information for the phase and click **Save**.
- 3) Click **Return to Change Management** at the top of the page.

Note: If there is no value for a phase, no document exists for that phase. A \$0.00 value may have documents.

- 4) On the **Commitments** tab, you can add rows for as many contractors as the change requires. Click **Add** to create a row for the contractor. Select the phase and click **OK**. Enter information for the phase and click **Save**. Click **Return to Change Management** at the top of the page. You can also click **Add Multiple Estimates** to include multiple rows if you are obtaining bids from several contractors for the same work.

Delete Generated Documents

While you can review a change document from the associated log after Change Management generates it, you cannot delete the document from any log or document window other than Change Management. For example, if you generate an RFP from Change Management, you can open that document in the Proposals log, but you cannot delete it from there. You must delete the document using Change Management. Click **Clear Phase** to delete a generated document. You cannot delete a document from a phase if there are later phases that have generated documents. For example, if you want to delete the Budget Estimate document, but you generated a Budget Quoted document, you must delete the Budget Quoted document before you can delete the Budget Estimate document.

Delete Change Management Documents

To delete a Change Management document, open the document you want to delete, and choose **Delete Document** from the **Select an action** drop-down list. Deleting a Change Management document deletes all the documents that were generated from it and removes any information posted to the Cost Worksheet.

Costing Generated Documents

Costing information is assigned to generated documents based on the contract (for the first generated document) or the last generated document. When you start the first phase on the budgeted or committed side, click **Copy from Contract** on the Line Items tab to copy line items and costing from the contract to this document. For subsequent phases, line items and costing are copied from the previous phase.

Change management enables you to post to the portion of the cost worksheet that best suits your company's needs. Amounts from the generated documents are automatically posted to the cost worksheet when you assign cost distributions, except when you clear the Include option for commitments.

Use costing for a contractor in the Cost Worksheet To add commitments to the cost worksheet, select the **Include** option in the Commitment dialog box (while in Edit mode). To remove commitments from the cost worksheet, clear the **Include** option; costing information is removed from the cost worksheet.

Note: Costing information is retained for documents for which you did not select the **Include** option, but the values are not posted in the cost worksheet.

Caution: You can select the Include option for more than one of the same contractor type. However, if you select the **Include** option for multiple contractors who are bidding on the same work, all checked contractors will be posted to the cost worksheet.

Using multiple rounds of negotiations Through Change Management, you can perform multiple rounds of negotiations in the negotiated phase for both budget and commitments.

Copy commitments into a budget Using Change Management, you can copy multiple commitments for a particular phase into one document on the budget side for any phase, and you can carry over the cost codes.


Add Multiple Commitment Documents to the Change Management Document

Using the Change Management module, you can add multiple commitment documents from companies that have committed contracts to the Estimated phase.

- 1) Expand **Contract Information** in the Project View and click **Change Management** to open the Change Management Log Window.
- 2) Open the Change Management document and click the **Commitments** tab.
- 3) Click **Add** to add a commitment row.
- 4) In the Add Commitment Row dialog box, select a row and click **OK**.

Note: The options that are enabled depend on how the Change Management function was set up on the Project Settings Dialog Box.

- 5) Click **Add Multiple Estimates**. The Add Multiple Estimates dialog box will open.

- 6) Click **Select From**  to open the Select Contact Dialog Box to choose the From contact.
 - 7) Contract Management supplies the **Change Date** (today's date), the **Required Date** (today's date plus seven days), and carries the **Title** and the **Description** from the change management document.
 - 8) Click **Add Companies** to open the Select Companies Dialog Box and select companies. Contract Management displays all companies that have committed contracts or purchase orders.
 - 9) Click **Finish** to add the estimates. Contract Management creates a commitment row for each contract/purchase order you selected.
-

Entering Change Orders and Proposals without Using Change Management

Prerequisite: Turn on the Functionality

Before you can enter Change Orders or Proposals directly in the Change Orders Log file or in the Proposals Log file, you must do the following to enable the functionality:

- 1) Right-click on a project name in the Project View, and choose **Project Settings**.
- 2) Click the **Change Management** tab.
- 3) Select the **Enable document creation outside of Change Management** option, and click **Save**.

Add a Change Order Outside of Change Management

Use the Change Orders log to enter changes or add new items to the schedule. For more information on the fields described below, see the Change Order Document Window.

Prerequisites:

This procedure explains how to add a change order directly in the change orders module. You can only do this if you enabled the feature. You can also add a change order using Change Management.






Add the Change Order:

- 1) Expand the **Contract Information** folder and click **Change Orders** to open the Change Orders Log Window.







- 2) Click **Add Document** to open a Change Order Document Window.

On the General tab:

- 1) Select the change type from the **Type** drop-down list.
- 2) Click **Select Contract**  next to the **Contract** field to open the Select Contract Dialog Box, and choose the contract to which this change applies. This information will be carried through the rest of the change order.
 - ▶ When you select a contract, the **To** field will be filled in with the contact information for the contract. To change this, click **Select To**  next to the **To** field, and then select the appropriate contact to inform about the change.
 - ▶ When you select a contract, the **From** field will be filled in with the information for the contact initiating the change. To change this, click **Select From**  next to the **From** field, and choose the appropriate contact that is initiating the change. Click **Switch** to switch  the contacts in the **To** and **From** fields.
- 3) The **Number** field is filled with the number for the change order.
- 4) In the **Title** field, enter a title for the change document.
- 5) Click **Select Date**  next to the **Date** field is filled with the current date. To change the date, use the calendar, and choose the date the change process began.

On the Review Status tab:

- 1) Mark the **Use Approval Process** field to enable the approval process.
- 2) Click **Select Document Owner**  next to the **Document Owner** field and select the document owner.
- 3) Click **Select Ball in Court**  next to the **Ball in Court** field and choose the ball in court contact.
- 4) From the **Priority** drop-down list, choose the priority for the change order.
- 5) From the **Status** drop-down list, choose the status for the change order.
- 6) To approve a change order, at least two contacts must sign off on the order. Click **Select Contact**  and **Select Date**  and enter the information for two contacts that approve the order. Once two contacts are entered, click **Approve and Save** to approve the order.

On the Summary tab:

The Summary tab displays a summary of the costs associated with the contract to which this change order is linked.

- 1) On the Details subordinate tab, click **Update Totals** to recalculate the fields in this section from the change documents related to the linked contract.
- 2) Select the **Include Pending Changes** option to total the sum of all changes that have been filed but not yet approved for the linked contract.
- 3) On the Markup for Changes subordinate tab you can apply overhead and profit values to the change order.
- 4) Click **Add Markup** or **Add Subtotal** to open the Markup Dialog Box to add markup or markup detail.
- 5) Click **Get Markup** to populate the fields on the **Markup for Changes** tab.
- 6) Click **Organize Rows** to set the order in which you want the markup categories applied to the document.
- 7) On the Collected Changes subordinate tab you can view information about proposals and change orders collected into this change order. Click the document icon to open the collected document.

On the Line Items tab:

Use the Line Items tab to enter itemized changes for the change order.

- 1) Click **Add Lump Sum** to open the Contract Item/Lump Sum/Unit Price Dialog Box to enter lump sum line item rows for this change order.
- 2) Click **Add Unit Price** to open the Contract Item/Lump Sum/Unit Price Dialog Box to enter unit price line item rows for this change order.
- 3) Click **Copy from Contract** to open the Copy From Contract Dialog Box to copy the line items from the linked contract to this change order.

- 4) Click **Collect from Changes** to open the Collect Changes Dialog Box to Collect Changes into a Change Order into this one. (The **Collected Changes** section also appears.)


Note: Change orders entered directly in the Change Orders module must have at least one change collected into it. (Change orders entered in Change Management have different options.)

On the Details tab:

- 1) Enter any detailed information in the **Description** field.
- 2) From the **Spec Section** drop-down list, choose the spec code.
- 3) Click **Select Date** next to the **Required Date** field and choose a required date.
- 4) Click **Select Date** next to the **Acknowledged Date** field and choose an acknowledged date.
- 5) From the **Reason for Change Order** drop-down list, choose a reason code for the change.
- 6) In the **Initiator Log Number** field, enter the number associated with the person initiating the change order.
- 7) In the **Respondent Log Number** field, enter the number associated with the person who should respond to the change order.

On the Schedule tab:

The Schedule tab is used only when the project is connected to a P6 EPPM database.

- 1) Click **Select**  next to the **Activity ID** field to open the Select Activity Dialog Box and select the activity associated with the change. Then select the appropriate activity.
- 2) Click **Select Date** next to the **Start** and **Finish** fields and select a date for each.

On the Custom Fields tab:

The Custom Fields tab enables you to define additional information about a project. Define the custom fields by right-clicking on the top-level folder (All Projects), and choosing **Custom Fields**.

On the Issues tab:

Click **Link** and link any issues to the change document.

On the Attachments tab:

On the **Attachments** tab you can do the following:

- ▶ Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.
- ▶ Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the Repository. See *Configure the Content Management Version Document and Attachment Feature* for more information.

- ▶ Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document. Click **Save** when finished.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

On the Versions tab:

You can maintain different versions of the change orders document on the Versions tab. Once you save changes to your document, choose **Select an action, Version Document** to create a new version of the current document. For more information about versions, see Version Document Overview. This tab is only visible when the document is opened in view mode, not in edit mode.

Save the document:

When you finish adding the change order, click **Save**.





Add a Proposal Outside of Change Management


Note: This procedure explains how to add a proposal directly in the Proposals module. You can only do this if you enabled the feature. You can also add a proposal using Change Management.

To add a Proposal:


- 1) Expand the **Contract Information** folder and click **Proposals** to open the Proposals Log Window.



- 2) Click **Add Document**  to open a Proposal Document Window document window. **Add Document** only displays when creation of documents outside of Change Management is enabled.
- 3) Click the **General** tab. From the **Type** drop-down list, select **Request for Proposal**.
- 4) Click **Select Contract**  next to the **Contract** field to open the Select Contract Dialog Box to choose the contract to which this Proposal applies.
- 5) Click **Select To**  next to the **To** field to open the Select Contact Dialog Box. Use this dialog box to choose the company or contact to receive the Proposal.
- 6) Click **Select From**  next to the **From** field to open the Select Contact Dialog Box. Use this dialog box to choose the company or contact creating the Proposal.
- 7) Contract Management automatically assigns a number in the **Number** field. You can change this number.
- 8) In the **Title** field, enter a title for the proposal document.

- 9) In the **Date** field, enter the date the proposal process began or click **Select Date**  and choose one.

On the Status tab:

- 1) Click **Select Ball in Court**  next to the **Ball in Court** field to open the Select Contact Dialog Box, and select the Ball in Court.
- 2) From the **Priority** drop-down list, select the priority level.
- 3) From the **Status** drop-down list, select the status of the proposal document.

Note: In most cases, the person creating the proposal document would not also be an approver.

- 4) To approve a proposal, at least two contacts must sign off on it and be entered in two **Acknowledged by** sections with the approval dates.

On the Line Items tab:



Use the Line Items tab to enter itemized costs for the proposal.

- 1) Click **Add Lump Sum** to open the Contract Item/Lump Sum/Unit Price Dialog Box to enter lump sum line item rows for this proposal. See Add a Lump Sum Item to a Proposal Document for more information.
- 2) Click **Add Unit Price** to open the Contract Item/Lump Sum/Unit Price Dialog Box to enter unit price line item rows for this proposal.
- 3) Click **Copy from Contract** to open the Copy From Contract Dialog Box to copy the line items from the linked contract to this proposal.

On the Details tab:

- 1) Enter any detailed information in the **Description** field.
- 2) From the **Spec Section** drop-down list, choose the spec code.
- 3) From the **Required Date** pop-up calendar, choose the required date.
- 4) From the **Acknowledged Date** pop-up calendar, choose the acknowledged dates.
- 5) From the **Reason for Request for Proposal** drop-down list, choose the reason code for the change.

On the Schedule tab:

- 1) Click **Select**  next to the **Activity ID** field to enter the Activity ID associated with the change. The Select Activity Dialog Box will open.
- 2) Click **Select Date**  next to the **Start** and **Finish** fields to enter dates for these fields.
- 3) Enter the **Time Change** (days).

On the Issues tab:

Use this tab to link this Proposal to existing issues. Click **Link** to open the Select Issue Dialog Box, and select an issue.

On the Attachments tab:

- ▶ Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.
- ▶ Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the Repository. See *Configure the Content Management Version Document and Attachment Feature* for more information.
- ▶ Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

On the Custom Fields tab:

If you want to define any additional information about a project, create custom fields by right-clicking on the top-level folder (All Projects), and choosing **Custom Fields**. The Custom Fields tab only displays when one or more custom fields have been defined for the module.

On the Versions tab:

You can maintain different versions of the Proposal document on the Versions tab. Once you save changes to your document, choose **Select an action, Version Document** to create a new version of the current document. This tab only displays when the document is opened in view mode, not in edit mode. For more information about versions, see *Version Document Overview*.

Save the document:

Click **Save** when finished.



Using Procurement

The Procurement Process

Contract Management procurement enables you to enter and track information for procurement items and the related scope items that make up the procurement item. Anyone who needs to procure materials or labor can use this module. Use the Procurement Items Log Windows to track documents and procurement item document windows to track bids and award contracts.

You can use procurement to track bids from contractors on materials that you require or on a job that you need done. Once the item is open for bid, you can track who is bidding, see how much they bid, and award the contract or purchase order to the winning bidder. You can also view Procurement Statistics Dialog Box and Bidder Statistics Dialog Box, which include how much the bidders bid, and which items they have been awarded.

Costing is done at the scope item level (one level below the procurement item level). Contract or purchase order awards are done at the procurement item level or the scope item level.

Note: The Procurement module covers the bidding process and contract award within the bidding process.

You can enter and track information per procurement item. When the bidding is complete, you can award the procurement item to a contract or purchase order, and you can also generate materials. You can also view statistics on bidders, including how much they bid on various items, and which items they have been awarded.

Any user with access rights can enter data in a procurement document. You can set the security options to prevent users from viewing and entering data that you do not want them to have access to. This enables you to prevent users from seeing information in this module.

Initiating Procurement

Once you know the details of the materials you require or the job you need done, create a new procurement item document in which you will enter all bids and other relevant information.

You can create a log of procurement item documents in the following two ways: You can import existing items from an estimating package, or you can enter them manually.

Import Procurement Item Documents

To save time, you can import documents from an estimating package. To import, you must know the name of the file, and the file must be properly formatted.

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Procurement**.
- 2) In the Procurement Items log window, choose **Import** from the **Select an action** drop-down list.
- 3) In the Import dialog box, click **Browse** to locate the file to import and click **Import**. The items appear in the log.

Create a New Procurement Item Document

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Procurement**.
- 2) Click **Add Document**.
- 3) On the **General** tab:
 - a. Select a section from the **Spec Section** drop-down list.
 - b. Enter a title in the **Title** field.
 - c. Select a type from the **Purchase Type** drop-down list.
 - d. Select a division from the CSI Division drop-down list.
- 4) Click the **Status** tab and select a status for the procurement item from the **Status** drop-down list.
- 5) Click **Save**.


Add Scope Items to the Procurement Item

After creating a procurement item, you should first add the individual components (scope items) that make up the procurement item up for bid.

New scope items appear in the left column of the Bid Tabulation tab. You can add as many scope items as necessary to the procurement item.

To add scope items to the procurement item:

- 1) In the procurement item, click the **Bid Tabulation** tab and click **Add** next to Scope Items to open the Add Scope Item Dialog Box.
- 2) From the **Cost Code** drop-down list, select the cost code for the scope item.
- 3) In the **Title** field, enter the title for the scope item.
- 4) Enter the **Quantity** and **Unit Price** information, or enter a **Lump Sum**.
- 5) Click **Add Sum Item** to add sub-items to the scope item. See Add Sub Items to Scope Items.

Note: Click **Add Detail Items**  to the left of the sub item to which you want to add a detail item. See Add Detail Items to Sub Items.

- 6) Add any comments to the **Comments** field.
- 7) Click **Save and Add Another** to add more scope items or click **Save and Close** when finished.

Tips:


Click **Re-Sync** to recalculate the values in the Total column to make the values at the top level equal the values entered in the sub-levels. Clicking **Re-Sync** "rolls up" the values from the sub-levels, and recalculates the top level values. This is beneficial in instances where the top-level values were entered before the lower values, and thus may no longer match those values. See Procurement Overview for more information on top-down/bottom-up calculations and Re-Sync.

Add Sub Items to Scope Items

You can add a second level below scope items, called sub items, to break down the scope items into more specific components.

To add sub items to scope items:

- 1) From the Add Scope Item Dialog Box, click **Add Sub Item**, or press F7, to add a sub item row.

Note: You can also add sub items directly in the Bid Tabulation tab of the Procurement Item document window by clicking **Add Sub Item**  next to the scope item row.


- 2) Select a spec section from the **Spec Section** drop-down list.
- 3) Enter a title in the **Title** field.
- 4) Enter **Quantity** and **Unit Price** information, or enter a **Lump Sum**.
- 5) Click **Save and Close**. The sub item will appear indented below the scope item in the Bid Tabulation tab of the Procurement Item document window.

Add Detail Items to Sub Items

You can add a third level, which will fall below sub items, called detail items, to make bidding even more specific.

To add detail items to sub items:

From the Add Scope Item Dialog Box, click **Add Detail Items**  to the left of the sub item to which you want to add a detail item, or press F8, to open the Add Detail Item Dialog Box.

Note: You can also add detail items directly in the Bid Tabulation tab of the Procurement Item document window by clicking **Add Detail Item**  next to the sub item row.

- 1) Enter a title for the detail item.
- 2) Enter **Quantity** and **Unit Price** information, or enter a **Lump Sum**.
- 3) Use the **Comments** field to enter any additional information.
- 4) To add more items to the list, click **Save and Add Another**. If you are finished, click **Save and Close**. The row will appear indented below the sub item in the Bid Tabulation tab of the Procurement Item document window.

Add Alternate Items to the Procurement Item

You can add alternate items that do not belong with scope items. For example, if you want elm trees, but you know they probably won't be available, use the Alternates section on the Bid Tabulation tab to add maple trees as an alternate item for bid. Alternate items are not included in the total amount of the procurement item. If you use an alternate item and want to award it, you must move the item to either the Scope Items or General Items section.

To add alternate items:

- 1) In the procurement item, click the **Bid Tabulation** tab and click **Add** next to Alternates to open the Add Alternate Dialog Box.
- 2) In the **Title** field, enter the title for the scope item.
- 3) Enter the **Quantity** and **Unit Price** information.
- 4) Add any comments to the **Comments** field.
- 5) Click **Save and Add Another** to add more alternate items or click **Save and Close** when finished.

Add General Items to the Procurement Item

You can add general items that do not belong with scope items. General items are costed similarly to scope items, but cannot be broken down into sub and detail items. For example, you might consider some costs, such as freight or taxes, as general, rather than scope items.

To add general items:

- 1) In the procurement item, click the **Bid Tabulation** tab and click **Add** next to General Items to open the Add General Item Dialog Box.
- 2) From the **Cost Code** drop-down list, select the cost code for the general item.
- 3) In the **Title** field, enter the title for the general item.
- 4) Enter the **Quantity** and **Unit Price** information.
- 5) Add any comments to the **Comments** field.
- 6) Click **Save and Add Another** to add more general items or click **Save and Close** when finished.

Edit the Original and Procurement Estimates

After you have added scope and other items, you can edit the original and procurement estimates by clicking **edit estimate**. The values you enter when you first add **scope**, **sub**, **detail**, **general**, or **alternate** items are the original estimate values. If you edit the estimates after they are entered, the procurement estimate values are edited, and not the originals.

Note: You can edit original estimates if you have access rights to do so, and only in the Edit Estimate Worksheet dialog box. The access rights are set in the Project Access dialog box.



Add Bidders to Procurement Items

You can add as many bidders as necessary that have made or will make bids on the items.

To add bidders:



- 1) Open the procurement item document window to which you want to add a bidder and click the **Bid Tabulation** tab.
- 2) Click **Add Bidder** to add the names of contacts that are making bids.

Note: You can also use the Record Bid Dialog Box to add bidders.



- 3) In the Add Bidder Dialog Box click **Select Bidder**  to open the Select Bidder Dialog Box and choose the name of the bidder.
- 4) Update the **Bid Received Date** if necessary. Contract Management automatically enters the system date.
- 5) Click **Select Signed By**  to open the Select Contact Dialog Box to insert the names of the contacts that received the bids.
- 6) Click **Select Date** to enter a date in the **Signed By Date** field.
- 7) Enter the names of any witnesses who saw the bid.
- 8) Click **Save and Add Another** to add more bidders. Click **Save and Close** when finished.

Edit an Existing Bid

To edit the bid:

- 1) From the Project View, expand the **Contract Information** folder and click **Procurement** to open the Procurement Items Log Window.
- 2) Click **Edit document**  next to the appropriate document to open the Procurement Item Document Window.
- 3) Click **Record Bid**  or choose **Record Bid** from the **Select an action** drop-down list.
- 4) Select the **Edit an Existing Bid** option and then from the drop-down list select the bidder whose bid you want to edit. Click **Continue**.
- 5) The Edit Bid Worksheet Dialog Box opens for you edit the bidder's bids. The bids appear on the Bid Tabulation tab of the Procurement Item Document Window.
- 6) Edit the appropriate information on the worksheet.
- 7) Click either **Save and Close** (if you have no other bids to edit) or **Save and Edit Next** to choose another bid to edit.

An alternate way to edit the bid:

- 1) From the Project View, expand the **Contract Information** folder and click **Procurement** to open the Procurement Items Log Window.
- 2) Click **Edit document**  next to the appropriate document to open the Procurement Item Document Window.
- 3) Click the **Bid Tabulation** tab and click **Edit bid**  next to one of the bidder's names.
- 4) The Edit Bid Worksheet Dialog Box opens for you edit the bidder's bids. The bids appear on the **Bid Tabulation** tab of the Procurement Item Document Window.
- 5) Edit the appropriate information on the worksheet.
- 6) Click **Save and Close** if you are finished or **Save and Edit Next** to choose another bid to edit.

View Procurement Log Statistics

You can view percentages and other general statistics about all documents in the procurement log.

- 1) From the Project View, expand the **Contract Information** folder and click **Procurement** to open the Procurement Items Log Window.
- 2) Choose **View Log Stats** from the **Select an action** drop-down list to open the Procurement Statistics Dialog Box.
- 3) Click **Close** when finished viewing the statistics.

View Bidder Statistics

You can view statistics about all bidders that have made bids on items in the procurement log.

To view bidder statistics:

- 1) From the Project View, expand the **Contract Information** folder and click **Procurement** to open the Procurement Items Log Window.
- 2) From the Procurement Items log window, choose **View Bidder Stats** from the **Select an action** drop-down list to open the Select Bidder Dialog Box.
- 3) Click **Select** next to the bidder whose statistics you want to view. They will be displayed on the Bidder Statistics Dialog Box.
- 4) Click **Close** when finished viewing the statistics.

Award a Procurement Item to a Bidder


Once all bids are in on a procurement item and marked as complete, you can award a contract or purchase order to a bidder.



Notes:

- Only procurement items that have completed bids can be awarded. Bids are entered and completed in the Edit Bid Worksheet Dialog Box.
 - Generally, a contract is awarded for materials and labor, while a purchase order is awarded for materials only.
 - You can award a single item or multiple items at the same time.
-

Award Multiple Procurement Items to a Bidder

To award multiple procurement items to a bidder:


- 1) Expand the **Contract Information** folder for a project in the Project View and click **Procurement**.
- 2) From the Procurement Items Log Window, click **Award Items**  to open the Award Contract/PO Dialog Box.
- 3) In the **Award Type** field, select whether you are awarding a contract or a purchase order.

- 4) For the **Award To** field, click **Select Bidder**  to open the Select Bidder Dialog Box to choose the bidder that won the award.
- 5) For the **From** field, click **Select Contact**  to change the contact awarding the bid.
- 6) In the **Contract/PO Document For** field, enter why the contract or purchase order is being awarded.
- 7) For the **Create Line Items For** option, choose whether to create one line item in the contract or purchase order for the entire procurement item, or to create line items for each scope and general item.
- 8) For the **Create/Select Material Records Per Line Item** option, choose **Yes** to create or link a materials delivery document for each line item. Click **Next**.

Note: If you chose to create line items for each scope and general item, the scope and general items appear as line items in an upcoming screen.


- 9) Select the options for the procurement items you want to award to this bidder. Click **Next**.
- 10) If you have any scope or general items that are not costed, the Cost Scope and General Items screen will appear in which you must choose a cost code for each item. Click **Select** to open the Select Cost Code dialog box to choose a cost code. Click **Next**.

Note: This screen only displays if the contracts or purchase orders options are selected as must be fully costed in the **Cost Options** tab of the Project Settings Dialog Box. If the options are cleared, this screen will not appear.


- 11) If you chose to create line items for each scope and general item, and to create a materials delivery document for each line item (in the first screen), the scope and general items appear as line items in the next screen, titled Create or Select Materials for Each Contract/PO Line Item. Use this screen to create or select materials for each contract or purchase order line item.
- 12) Select the specification section for each item from the drop-down lists (if you chose to create line items for each scope and general item).
- 13) Click **browse**  to open the Select Material Dialog Box to choose the material to which to apply to each line item.
- 14) Click **Next** to finish the contract or purchase order award.
- 15) Enter a contract or purchase order number and date. Enter any additional comments. Choose whether to link the new contract or purchase order to the same issues and attachments as the procurement item.
- 16) Click **Finish**. The new Contract Document Window or Purchase Order Document Window opens, and is added to the respective log window.
- 17) Line items for each scope and general item appear on the Line Items tab, or one line item for each entire procurement item, depending on which option you chose in the first award screen.
- 18) The cost of the contract or purchase order is assigned to the **Original Commitment** or **Original Budget** column in the Cost Worksheet, depending on which option you chose in the first award screen. (Purchase orders are applied to the **Original Commitment** column.)

Award a Single Procurement Item to a Bidder


To award a single procurement item to a bidder:

- 1) Expand the **Contract Information** folder for a project in the Project View and click **Procurement**.
- 2) From the Procurement log window, open the Procurement Item document window for the item you want to award.
- 3) Click the **Bid Tabulation** tab and click **Award This Item** to open the Award Contract/PO Dialog Box.
- 4) From the **Award Type** list, select whether you are awarding a contract or purchase order.
- 5) For the **Award To** field, click **browse**  to open the Select Bidder Dialog Box to choose the bidder that won the award.
- 6) In the **Contract/PO Document For** field, enter why the contract/purchase order is being awarded.
- 7) For the **Create Line Items For** option, choose whether to create one line item in the contract or purchase order for the entire procurement item, or line items for each scope and general item.
- 8) For the **Create/Select Material Records Per Line Item** option, choose **Yes** to create or link a materials delivery document for each line item. Click **Next**.

Note: If you chose to create line items for each scope and general item, the scope and general items appear as line items in an upcoming screen.

- 9) If you have any scope or general items that are not costed, a screen titled *Cost Scope and General Items* appears in which you must choose a cost code for each item. Click **browse**  to open the Select Cost Code dialog box to choose a cost code. Click **Next**.

Note: This screen only displays if the contracts or purchase orders options are selected as must be fully costed on the Costing tab of the Project Settings Dialog Box. If the options are cleared, this screen will not appear.

- 10) If you chose to create line items for each scope and general item, and to create a materials delivery document for each line item (in the first screen), the scope and general items appear as line items in the next screen, titled *Create or Select Materials for Each Contract/PO Line Item*. Use this screen to create or select materials for each contract or purchase order line item.
- 11) Select the specification section for each item from the drop-down lists (if you chose to create line items for each scope and general item).
- 12) Click **browse**  to open the Select Material Dialog Box to choose the material to which to apply to each line item. Click **Next** to finish the contract or purchase order award.
- 13) Enter a contract or purchase order number and date. Enter any additional comments. Choose whether to link the new contract or purchase order to the same issues and attachments as the procurement item.
- 14) Click **Finish**.

- 15) The new Contract Document Window or Purchase Order Document Window opens, and is added to the respective log window. Line items for each scope and general item appear on the Line Items tab, or one line item for the entire procurement item, depending on which option you chose in the first award screen.
- 16) The cost of the contract or purchase order is assigned to the Original Commitment or Original Budget column in the Cost Worksheet, depending on which option you chose in the first award screen. (Purchase orders are applied to the Original Commitment column.)

Unaward a Procurement Item

To unaward a procurement item, you can either delete the associated contract or purchase order that was generated during the award process, or delete all line items associated with the procurement item in the contract or purchase order.

Delete a Procurement Item

Only unawarded procurement item documents can be deleted. If the procurement item has been awarded, you must first unaward it by deleting the associated contract or purchase order that was generated during the award process, or delete all line items associated with the procurement item in the contract or purchase order. Next, from the procurement item document you want to delete, choose **Delete Document** from the **Select an action** drop-down list. Click **Yes** to confirm the delete.

Creating and Tracking Issues

Link Documents to Issues Overview

An issue is a problem that must be resolved before a project can be completed or it is a condition that can lead to contract changes or claims. Organizing project information by issue lets you quickly review each problem that may affect the project schedule or completion cost.

In Contract Management, you can link issues to several documents of any type, such as a submittal, daily report, or request for information (RFI). You may want to create an issue to:

- ▶ Gather relevant documents quickly when you are involved in a claim.
- ▶ Track all information related to a company when you experience ongoing problems with that company.
- ▶ Group different documents related to a topic that led to a formal change order, such as an RFI.
- ▶ Track every change document related to a contract or purchase order.

You can create an issue at any point during a project and link documents to it as the project progresses. For example, if a labor shortage is noted on a daily report, create an issue named Labor and link the daily report to it. You can also search for multiple documents and link them all to an issue at the same time. This was previously known as building issues.

You can link an issue to any Contract Management module document except the Cost Worksheet and other issues (you cannot link one issue to another issue). You can also link some items within documents to issues. For example, meeting-minute business items can be linked to different issues than the meeting minute document that contains them. Other items that can be linked to issues include contract/purchase order (PO) items; requisition schedule of value line items; change and proposal line items; daily report visitors, equipment, and labor; submittal revisions; drawing revisions; punch list items; notepad items; and materials delivery tickets.

Add an Issue


To add an issue:

- 1) In the Project View, expand the project you are working in.
- 2) Expand the **Project Information** folder and click **Issues**.




- 3) Click **Add Document**.
- 4) Use the information below to edit the issue.

On the General tab:

- 1) Enter a title.
- 2) Enter an issue code.
- 3) Edit the **Number** field if desired. Contract Management automatically enters a number.
- 4) Click **Select Date**  next to the **Opened** and **Closed** fields and select the appropriate dates. Contract Management automatically enters the current date in the **Opened** field.

- 5) Click **Select Contract**  next to the **Contract** field to choose a contract to which the issue applies.

On the Status tab:

- 1) Click **Select Ball in Court**  next to the **Ball in Court** field to choose a contact for the issue.
- 2) Select a priority and a status from the drop-down lists.

On the Linked Documents tab:

This tab lists information about the documents linked to the issue. For new issues, the fields will be blank.

On the Attachments tab:

- ▶ Click **Attach File** to attach a file to the document.
- ▶ Click **Attach from Repository** to attach a document from the content repository. These documents are external to Contract Management. This will not display unless the administrator configured Contract Management to use the repository. See Configure the Content Management Version Document and Attachment Feature.
- ▶ Click **Attach URL** to attach a web address to the document.

Save the issue:

When you are finished editing the issue, click **Save**.

Remove a Document Link from an Issue

To unlink a document from an issue:

- 1) In the Project View, expand the project you are working in.
- 2) Expand the **Project Information** folder and click **Issues**.
- 3) Click the title of the issue from which you want to remove a linked document.
- 4) Click the **Linked Documents** tab.
- 5) Click **Unlink** for the document you want to unlink from the issue.
- 6) Click **Yes** to confirm.

Search for Documents to Link to an Issue

During a project you may decide to link several documents to an issue at the same time. For example, you may have completed Phase 1, and want to link all Phase 1 documents to an issue to keep track of them. The Contract Management Search feature allows you to do this quickly.

To search for documents and link them to an issue:

- 1) Select a project in the Project View. Click **Search** in the upper right corner of the Workspace to open the **Search window**.
- 2) In the **Search** field, enter the keywords relating to the documents that you want to search for.

- 3) To search for multiple words in one field, use a space between words. For example, insurance liability. Contract Management lists documents that contain any of the words.
- 4) Mark the **Include Attachments** checkbox to search for the keywords in attachments.
- 5) Click **Search** to begin the search. Contract Management lists the search results at the bottom of the window.
- 6) Contract Management selects all the document checkboxes by default.
- 7) To prevent documents from being linked to an issue, unmark the checkboxes for the respective documents.
- 8) Click **Link Selected Results to an Issue** and choose the issue to which you want to link the documents.
- 9) For a new issue, click **Add Issue** and enter a code and a descriptive title.
- 10) Click **OK** when finished. The selected documents are linked to the issue.

Logging and Tracking Information

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Tracking Drawings

Drawings Overview

The primary function of the Drawings log and Drawing Sets log is to expedite the distribution of documents.

You can use the Drawings and Drawing Sets logs to:

- ▶ Log new drawings
- ▶ Group drawings by set with the Drawing Sets log
- ▶ Distribute drawings by creating distribution lists for mass distribution
- ▶ Review drawing history via drawing revisions
- ▶ Generate transmittals

Drawing development and control are handled by various project participants in the distribution phase of the contract process. Once drawings are approved for construction, the construction work can begin, signaling the start of the distribution phase.

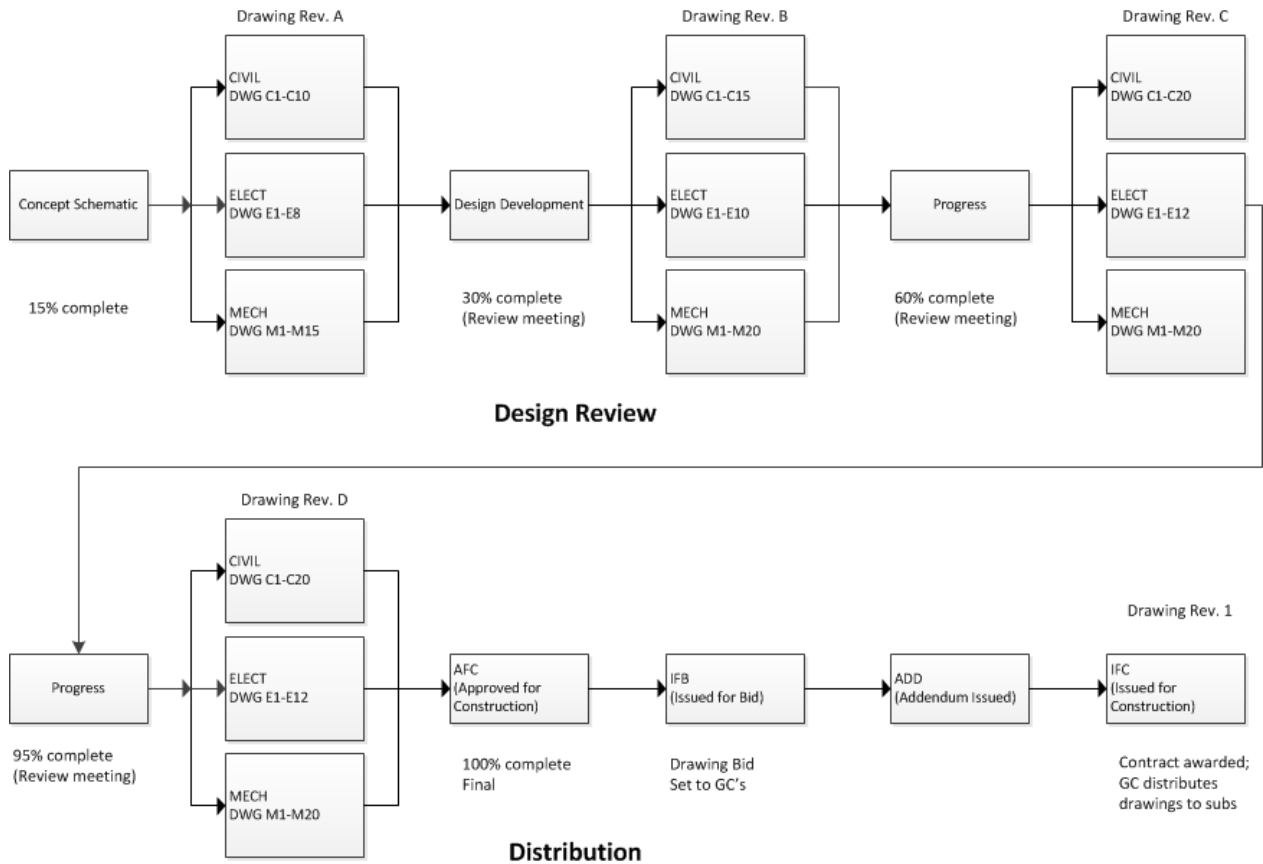
At this point, the contract is awarded, and the construction manager (CM), general contractor (GC), or subcontractor becomes involved in this phase of the drawing process. The CM or GC is responsible for coordinating all construction work and disseminating drawings to the mechanical, electrical, plumbing, and other subcontractors and vendors for construction or procurement and submittal processing.

Through the Drawings log and the Drawing Sets log, Contract Management helps you perform the following functions for drawings submitted for bid, approval, construction, or other contract requirements/negotiations.

- ▶ Maintain an accurate history of revisions to see who changed what and why.
- ▶ Determine and maintain distribution lists for drawing implementation and coordination.
- ▶ Identify how many copies are being sent and to whom.
- ▶ Reduce data entry by automatically creating transmittals for each revision.

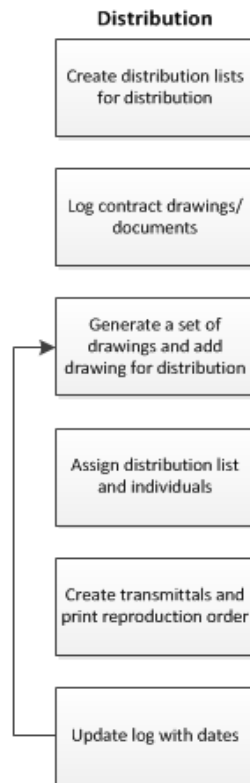
The following diagram provides a workflow of the general stages of the design review and distribution cycles. The distribution cycle is supported.

Figure 5: Workflow Diagram for Design Review and Distribution Cycles



- ▶ Design development and review coordinates and tracks each piece of the design in the Issued For Design (IFD) phase (30%, 60%, 90% to 100% complete).

- ▶ Distribution occurs when construction is underway—Issued For Bid (IFB) and Issued For Construction (IFC) phase—to keep all parties informed.



Setting up Drawing Data

Start by setting up the standard data used to categorize and identify drawings.

Define Distribution Lists

Distribution lists contain the names of individuals you want to include when distributing drawings. The Company Directory should already contain information for these individuals, since the distribution lists are based on company information. You can use defined distribution lists in any project in the same database. Distribution lists are established per project using the project contact list or globally for all projects in the same database using the group contact list.

Define Drawing Phases

You can define specialized phase names for drawings such as IFC - Issued for Construction, IFB - Issued For Bid. Once you define drawing phase (status) codes, you can use them in any project in the same project group.

To define a phase:

- 1) Right-click on the top-level (All Projects) folder and choose **Dictionaries, Drawings, Drawing Phases**. The Drawing Phases Dialog Box opens.

- 2) Click **Add** to open the Drawing Phases Detail Dialog Box.
- 3) In the **Phase** field, enter a name for the phase of up to 8 characters.
- 4) Enter a description.
- 5) From the **Move Below** drop-down list, select the location below which you want to insert the definition.
- 6) When you finish entering the drawing phase, click **Save and Close**.

Note: Phases defined here appear in all projects in the project database.

Define Disciplines for Drawings

Standard drawing disciplines come with Contract Management (for example: Electrical, Mechanical, Architecture, or Civil). You can define disciplines for drawings to categorize your drawings depending on how your company tracks the review and distribution of drawings. Once you define drawing disciplines, you can use them in any project in the project group. Discipline categories can be used to sort, filter, and report drawing information.

To create a discipline:

- 1) Right-click on the top-level (All Projects) folder and choose **Dictionaries, Drawings, Disciplines**. This opens the Disciplines Dialog Box.
- 2) Click **Add** to open the Disciplines Detail Dialog Box.
- 3) In the **Discipline** field, enter a discipline up to 12 characters in length.
- 4) In the **Title** field, enter a title up to 23 characters in length.
- 5) From the **Type Name** drop-down list, select the location below which you want to insert the definition.
- 6) Click **Save and Close** to create the new discipline code.

Note: Disciplines defined here appear in all projects in the project database.

Define Drawing Areas

To assist in determining the portion of a project to which a specific drawing applies, you can define specific drawing areas such as Lobby, Foyer, Office, and so on. Once you define drawing areas for a project, they are specific to that project only.

Define Paper Sizes

You can define paper sizes associated with drawing types issued for specific disciplines. For example, architectural drawings can be various sizes: 9x12 inches, 12x18 inches, and so on. Once paper sizes are defined, you can assign them to individual drawings or for drawing sets when you send multiple copies for review or distribution.

To define a paper size:

- 1) Right-click on the top-level folder, and choose **Dictionaries, Drawings, Paper Sizes**. The Paper Sizes Dialog Box opens.

- 2) Click **Add** to open the Paper Sizes Detail Dialog Box.
- 3) In the **Type** field, enter a type of up to 16 characters.
- 4) In the **Measurements** field, enter measurements of up to 36 characters.
- 5) From the **Move Below** drop-down list, select the location below which you want to insert the code.
- 6) Click **Save and Close** to save the new paper size code.

Note: Paper sizes defined here appear in all projects in the project database.

Define Bid Packages

To keep track of all drawings and corresponding revisions issued by different contractors to bid on work during the design phase of the drawings process, you can define a bid package for each contractor and log the drawings by bid package in the Drawings log. You can modify this list if additional contractors submit drawings for bid. The bid packages you define are available in the drop-down list for the Bid Package field for your selection when logging drawings. You can also filter and sort by bid package.

To create a bid package:

- 1) Right-click on the top-level (All Projects) folder and choose **Dictionaries, Drawings, Bid Packages**. This opens the Bid Packages Dialog Box.
- 2) Click **Add** to open the Bid Packages Detail Dialog Box.
- 3) In the **Bid Package** field enter a name of up to 15 characters.
- 4) Enter a description.

Note: Bid packages defined in the Bid Packages dialog box appear in all projects in the project group.

- 5) From the **Move Below** drop-down list, select the location below which you want to insert the definition.
- 6) Click **Save and Close** to save the new bid package code.

Define File Numbers

If you have a filing system set up specifically for drawings, you can define the file numbers then select the appropriate number when you log drawings.

To create a file number:

- 1) Right-click on the top-level folder and choose **Dictionaries, Drawings, File Numbers**. The File Numbers Dialog Box opens.
- 2) Click **Add** to open the File Numbers Detail Dialog Box.
- 3) In the **File Number** field, enter a file number of up to 12 characters.
- 4) Enter a description.
- 5) From the **Move Below** drop-down list, select the location below which you want to insert the definition.

- 6) Click **Save and Close** to save the new file number code.

Note: File numbers defined here appear in all projects in the project database.

Adding Drawing Documents

Use the Drawings log to identify and track drawings, specifications, and other supporting documentation to meet contractual requirements and ensure completion of work-site obligations. Tracking drawings through the Drawings log enables you to maintain a list of drawing revisions for the distribution cycle; review the drawing's current status—latest revision date and sent date; and review sets that contain the drawing. Typically, distribution revisions are added when a set is created, but you can also add them using the Drawings log.

Add a Drawing

Use the Drawings log to maintain and identify drawings, specifications, and other supporting documentation so you can meet contractual requirements and ensure completion of your work. Tracking drawings through the Drawings log enables you to maintain a history of drawing revisions along with each revision's received and sent dates.



To add a drawing:

- 1) Expand the **Logs** folder and click **Drawings** to open the Drawings Log Window.




- 2) Click **Add Document** to open the Drawing Document Window.

On the General tab:

- 1) Enter a drawing number and title for the drawing.
- 2) Click **Select Designer**  to choose the designer from the Select Contact Dialog Box.
- 3) Click **Select Date**  next to the **Issued Date** field to select the date on which the drawing was issued.
- 4) Use the **Spec Section** drop-down list to choose the spec section to which the drawing applies.
- 5) Use the **Latest Bid Package** drop-down list to choose the bid package if one exists for the drawing.

Note: The **Latest Revision Number** and **Latest Revision Date** fields are read-only. Contract Management populates these as you create revisions for the drawing.

On the Status tab:

- 1) Click **Select Ball in Court**  to open the Select Contact Dialog Box. Choose the Ball in Court contact for the drawing.
- 2) Use the **Priority** drop-down list to choose the priority for the drawing.

- 3) Use the **Phase** drop-down list to choose the phase that applies to the drawing.
- 4) In the **Progress** field, you can enter the percentage that reflects how far along the drawing is in the review process.
- 5) If required, enter a Bid Package, Area, File Number, and Spec Section for the drawing.



On the Revisions tab:

The **Revisions** tab shows the latest revision information for the drawing. Use this section to create revisions and distribution lists for the drawing.

To add a new revision to the drawing click **Add**. Each revision gets its own distribution list, issues, and attachments. To delete a revision, click **Delete** next to the revision number on the **Details** subordinate tab.


The **Revisions** tab has the following subordinate tabs:

On the Details tab:

- 1) Enter a **Revision Number** and a **Title** for the drawing.
- 2) Click **Select Date**  next to the **Revision Date** field, and choose the date for the drawing revision.
- 3) Click **Select Date**  next to the **Received Date** field, and choose the date on which you received the drawing.

On the Revisions Distributed to tab:

To create a new distribution list:

- 1) Click **Add** to open the Add Distribution Dialog Box to create a distribution list.
- 2) Click **Select Date**  next to the **Sent Date** field to change the date if necessary.
- 3) Click **Select** to open the Select Contacts Dialog Box and select the contacts to receive the drawing. Click **Save** when finished.
- 4) Click **Save** when finished.

To create a distribution list from another revision:

- 1) Click **Copy from Previous Revision** to open the Copy From Previous Revision Dialog Box.
- 2) Click **Select** to open the Select Contacts Dialog Box, and select the contacts to receive the drawing. Click **Save** when finished.

On the Issues tab:

Click **Link** to open the Select Issue Dialog Box to link an issue to the drawing revision.

On the Attachments tab:

- ▶ Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.
- ▶ Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the repository. See Configure the Content Management Version Document and Attachment Feature for more information.

- ▶ Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

On the Sets Containing This Drawing tab:

The **Sets Containing This Drawing** tab contains a list of all the sets to which the drawing belongs. Click **Select** to open the Select Drawing Set Dialog Box and choose the drawings sets to which to add this drawing.

On the Details tab:

- 1) From the **Discipline** drop-down list, you can select the discipline to which the drawing belongs.
- 2) From the **Area** drop-down list, you can select the area to which the drawing belongs.
- 3) From the **File Number** drop-down list, you can select the file number that applies to the drawing if a file number has been defined.

Note: These numbers are defined by right-clicking on the top-level (All Projects) folder, selecting **Dictionaries**, **Drawings**, and then **File Numbers**.

- 4) From the **Contract** drop-down list, you can select the contract to which the drawing belongs.

On the Issues tab:

To link an issue to the drawing, click **Link** to open the Select Issue Dialog Box, and select the issue.

On the Attachments tab:

- ▶ Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.
- ▶ Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the repository. See Configure the Content Management Version Document and Attachment Feature for more information.

- ▶ Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

Save the Drawing document:

Click **Save** when finished.

Adding Drawing Documents in the Drawings Log

- 1) Expand the **Logs** folder for a project in the Project View and click **Drawings**.
- 2) Click **Add Document**.
- 3) Enter information in the **Drawing Number**, **Title**, and **Issued Date** fields.
- 4) Click the browse button next to the **Designer** field to choose the designer.
- 5) Enter any other pertinent information on the **Status** and **Details** tabs. On the Details tab, you can link the drawing to a contract.
- 6) Click **Save** when finished.

Create Revisions for a Drawing

- 1) In the Drawing document window for which you want to create revisions, click the **Revisions** tab.
- 2) On the **Revisions** tab, click **Add**.
- 3) Enter the revision number and title and select a revision date.
- 4) Click the sub tabs on the **Revisions** tab to enter details about the revision.
- 5) Click the **Revision Distribution To** tab to select contacts to receive the revision.
- 6) Click **Add**.
- 7) In the Add Distribution dialog box:
 - a. Click **Select** and select the contacts that will receive the revision. When you finish selecting the contacts to receive the revision, click **Save**.
 - b. Type the number of copies and choose the paper size for each contact.
 - c. Click **Save**. The module enters this information as configured in the Company Directory, but you can change it at any time.
- 8) Click **Save** when you are finished creating the revision.

Review Drawing Sets

The Sets Containing this Drawing tab in the Drawing document window enables you to see all information about the drawing sets to which this drawing belongs, including the revision number, set title, its phase, progress, and creation date. If this section does not contain any information, the drawing is not part of a set. The value in the Revision Number in Set field is the number of the drawing when it was added to the set. It is not the latest revision number.

Generate Multiple Drawings

The easiest way to create a master list of all drawings related to a project is to add one drawing for each discipline, and click Generate Document to create the remaining drawings. After the master list is complete in the Drawings log, you can create a set by discipline or phase in the Drawing Sets log.

To generate multiple drawings:

- 1) From the Drawings log window, open the drawing you want to copy, and click **Generate Document** in the **Select an action** drop-down list.
- 2) In the Generate Drawings dialog box, enter the number of drawings you want to generate and the drawing number to assign to the first of the new drawings. The other generated drawings will be automatically numbered sequentially using this number.
- 3) Select whether to link the new drawings to the same issues and attachments as the original.
- 4) Click **Finish**.

All attributes of the original drawing, such as title, phase, and discipline, are copied to the new one; existing revisions are also copied. You can change any of these items within each generated drawing.

Creating Drawing Sets


Drawings are often contained in sets for easy distribution and record keeping. Typically, sets correspond to phases such as Schematic, Issued For Bid, and Issued For Construction, and can be part of a change order, bulletin, or request for information (RFI). You can create sets from the Drawing Sets log, and then distribute the drawings to obtain a bid for work or to inform the recipient of the approved construction design. Since the recipients do not return these drawings to the originating person, you only need to track the names of persons to whom the drawings were sent and the dates they were sent.

Add a Drawing Set


The Drawing Sets log contains information for each drawing set in the project. This information includes the name of the set, ball in court, progress, phase, and priority.

To add a new Drawing Set:


- 1) Expand the **Logs** folder and click **Drawing Sets** to open the Drawing Sets Log Window.

- 2) Click **Add Document**  to open a new Drawing Set Document Window.

On the General tab:

- 1) Enter a name and title for the drawing set.
- 2) Click **Select Date** , and choose a date for the set.
- 3) If there is a bid package for the project, use the **Latest Bid Package** drop-down list to choose the package.

On the Status tab:

- 1) Click **Select**  next to the **Ball in Court** field to choose the Ball in Court contact.
- 2) Use the **Priority** drop-down list to choose the priority (High, Medium, or Low). This will appear in the BIC's Action List.
- 3) If applicable, use the **Phase** drop-down list to choose the phase to which the drawing set applies.
- 4) If applicable, enter the percent of progress on the drawing set in the **Progress** field.

On the Drawing in this Set tab:

- ▶ Click **Record** to open the Record Drawings Dialog Box to select drawings, make revisions to them, and add them to this drawing set.
- ▶ Click **Select** to open the Select Drawing Dialog Box to add drawings directly to this set without making revisions.

On the Distributed To tab:

- ▶ For drawings that were selected into the set, click **Add** to open the Add Distributions Dialog Box to select the contacts to which you want to distribute the drawing set.
- ▶ For any drawings you recorded and revised in this set, click **Copy from Drawings** to open the Add Distributions Dialog Box to copy the contacts in the previous revision to the new revision.

On the Issues tab:

To link an issue to the equipment, click **Link** to open the Select Issue Dialog Box, and select the issue.

On the Attachments tab:

- ▶ Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.
- ▶ Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the repository. See *Configure the Content Management Version Document and Attachment Feature* for more information.

- ▶ Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

Save the Drawing Sets document:

Click **Save and Close** when finished.

Generate a Set

After the revisions are tracked, the set may need to be reissued to the distribution list.

To generate a set:

- 1) Expand the **Logs** folder for a project in the Project View and click **Drawing Sets**.
- 2) Open a drawing set.
- 3) In the Drawing Set document window, click **Generate Document** in the **Select an action** drop-down list.
- 4) In the Generate Drawing Set dialog box:
 - a. Enter a name, title, and date for the set.
 - b. Select **Yes** for the **Copy the revisions that were in the original set** option if you want to copy the drawings' latest revisions into the new set.
 - c. Select **Yes** for the **Link the new Drawing Sets to the same Issues as the original** option if you want to issue the copy of the set exactly as the original.
 - d. Click **Save**.

Create Transmittals for Drawing Sets

When you create a drawing set, entries are created in the Transmittal Queue for each contact you specified for distribution. To set this preference, select the **Create Transmittals from Distribution List** option on the Communication tab in Project Settings (right-click on the project in the Project View).

To create transmittals:

- 1) Open any module log, and click **Transmittal Queue** in the upper right side of the header.
 - 2) Select the drawing set transmittals you want to create and click **Create**.
 - 3) Click **Close** when finished.
-

Managing Submittals


The Submittal Process

The following steps provide an overview of the typical process for entering a submittal package and tracking its progress.

- 1) Add a submittal package
- 2) Add submittals
- 3) Record each review cycle
- 4) Specify distribution
- 5) Establish the schedule
- 6) Track status
- 7) Update the submittal when necessary

Add a Submittal Package

Contract Management enables you to group related submittals into packages for better organization. For example, you can create a package for all submittals pertaining to a specific supplier, floor of a building, or area of work. You can also create submittal packages to track sets of shop or contract drawings.

Note: To add existing submittals to a package, you must open the submittal you want to add to a package and on the General tab, click **browse**  next to the **Package** field and select the submittal package.


To add a submittal package:

- 1) In the Project View, expand the project you are working in.
- 2) Expand the **Logs** folder and click **Submittal Packages**.


3) Click **Add Document** .

- 4) Use the information below to edit the submittal package.

On the General tab:





- 1) Enter a unique identification code for the package in the **Package** field. You can identify the package using the standard Construction Specifications Institute MasterFormat/CSI Codes.
- 2) Enter a title to identify the package.
- 3) Click **browse**  next to the **Contract** field to associate a contract with the package.

On the Status tab:

- 1) Click **browse**  next to the **Ball in Court** field to select the Ball in Court responsible for acting on the submittal package.
- 2) Select a priority and status for the package.

On the Workflow Template tab:

The workflow applies to all submittals subsequently added to the package.


- 1) Click **browse**  next to the **Received from** field to select the contact from which you will receive the submittal package.
- 2) Click **browse**  next to the **Sent to** field and select the contact to which you will send the submittal package.
- 3) Click **browse**  next to the **Returned by** field and select the contact that will return the submittal package to you.
- 4) Click **browse**  next to the **Forwarded to** field and select the contact to which you will forward the submittal package.


On the Submittals tab:

On the Submittals tab, you can do the following:

- ▶ Add a submittal and add it to the package using the Package field on the General tab.
- ▶ Add multiple submittals to a submittal package.
- ▶ Update submittals in a submittal package.
- ▶ Generate a submittal from an existing submittal.

On the Schedule tab:

Click **Schedule**  to open the Schedule Dialog Box to view early/actual start and finish dates, original and remaining durations, percent complete, and total float for a document linked to a P6 EPPM activity.

The Activity ID field references a scheduled activity from the linked P6 EPPM schedule, if you are linked to one. Click **browse**  to open the Select Activity Dialog Box to choose an activity. If you are not connected to a P6 EPPM activity, you can enter an activity ID to link an activity to the package.

On the Issues tab:

Click **Link** to open the Select Issue Dialog Box and link an issue to the submittal package. You can link more than one issue.

On the Attachments tab:

- ▶ Click **Attach File** to attach a file to the document.
- ▶ Click **Attach from Repository** to attach a document from the content repository. These documents are external to Contract Management. This will not display unless the administrator configured Contract Management to use the repository. See Configure the Content Management Version Document and Attachment Feature.

- ▶ Click **Attach URL** to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

Save the submittal package:


When you are finished editing the submittal package, click **Save**.

Add Submittals to a Submittal Package

Add New Submittals from the Submittal Packages Log

To add new submittals from the submittal packages log:

Note: You can only add new submittals to the Submittal Packages log when you are in the Submittal Packages log. To add existing submittals to the log, you must open the submittal and add (see Add Existing Submittals from the Submittals Log).

- 1) In the Project View, expand the project you are working in.
- 2) Expand the **Logs** folder and click **Submittal Packages** to open the Submittal Packages Log Window.
- 3) Open the submittal package document to which you want to add a submittal.
- 4) Click **Add a Submittal** .
- 5) Enter the details of the submittal in the Submittal Document Window (see also Adding a Submittal for more information) and click **Save** when finished.
- 6) Each new submittal is automatically assigned this package number and the package workflow is copied to the submittal.

Add Multiple New Submittals from the Submittal Packages Log



To add multiple new submittals from the Submittal Packages log:

- 1) In the Project View, expand the project you are working in.
- 2) Expand the **Logs** folder and click **Submittal Packages** to open the Submittal Packages Log Window.
- 3) Open the submittal package document to which you want to add submittals.
- 4) Click the **Submittals** tab and click **Add Multiple Submittals**. The Add Submittals Wizard opens.
- 5) Enter the number of new submittals to add to the package.

- 6) Edit the starting **Submittal Number** if necessary. Contract Management provides a starting submittal number.
- 7) Select whether to link the new submittal to the same issues as the original.
- 8) Click **Next**.
- 9) For each of the new submittals:
 - a. Enter a title.
 - b. Select a category.
 - c. Select a type.
- 10) Click **Finish**. The new submittals are added to the **Submittals** tab.




Add Existing Submittals from the Submittals Log

To add existing submittals from the submittals log:

- 1) In the Project View, expand the project you are working in.
- 2) Expand the **Logs** folder and click **Submittals** to open the Submittals Log Window.
- 3) Click **Edit document**  next to the submittal to which you want to add to the package. The document will open in Edit mode.
- 4) On the **General** tab, click **browse**  next to the **Package** field to open the Select Submittal Package Dialog Box. Select the submittal package to which you want to add the submittal.
- 5) Click **Save** when finished. The submittal is now part of the package you specified.

Remove a Submittal from a Package

To remove a submittal from a package without deleting the submittal:

- 1) Expand the **Logs** folder and click **Submittal Packages** to open the Submittal Packages Log Window.
- 2) Click **Edit document**  next to the submittal package you want to edit. The Submittal Package Document Window will open in Edit mode.
- 3) Click the **Submittals** tab.
- 4) Click the name of the submittal that you want to remove from the package.
- 5) Click **Edit Submittal**  to edit the document.
- 6) On the **General** tab, click **Delete**  next to the **Package** field to remove the submittal from the submittal package. The submittal will still exist in the Submittals Log Window but it will not be part of this package.

Adding a Submittal

Use the Submittals Log Window to add new submittals and view all of your current submittals whether they are in a package or not.



To add a submittal:

- 1) In the Project View, expand the project you are working in.
- 2) Expand the **Logs** folder and click **Submittals**.



- 3) Click **Add Document** .
- 4) Use the information below to edit the submittal.

On the General tab:

- 1) To add the submittal to a submittal package, click **browse**  next to the **Package** field and select a submittal package from the resulting dialog box.
- 2) Enter a unique code in the **Submittal** field to identify the submittal. The code can be up to 15 characters long.
- 3) Enter a title.
- 4) Edit the **Number** field if desired. Contract Management automatically enters a number.
- 5) Use the drop-down lists to select a category and type for the submittal.
- 6) Click **Select Date**  next to the **Required Start** and **Required Finish** fields and select the appropriate dates.

Notes:

- You can define different submittal types in the Submittal Type dialog box (with no projects open, right-click the top-level folder in the Project View, select **Dictionaries, Submittal, Types**). You can do the same for categories.
 - If a date is not selected, the module automatically calculates the required start and required finish based on the Submittal Preparation Start date and the Approval Period Finish date respectively. To do this, on the Schedule tab, you must pick a successor activity, specify the lead times for the two activities, and click **Update from Lead Time**.
-

Delete a Submittal

To delete a submittal:

- 1) Expand **Logs** in the Project View and click **Submittals**.
- 2) From the Submittals Log Window, open the submittal in View mode by clicking the underlined name of the document.
- 3) From the **Select an action** drop-down list, choose **Delete Submittal**.
- 4) Click **Yes** to confirm the delete.

Delete a Submittal Package

Caution: When you delete a package, all submittals in the package are also deleted.

To delete a submittal package:

- 1) From the Submittal Packages Log Window, open the submittal package you want to delete.

- 2) From the **Select an action** drop-down list, choose **Delete Package**.
- 3) Click **Yes** to confirm the delete.

Generate a Submittal from an Existing Submittal

Submittals often contain several similar items. There will be times you will need a new submittal that is similar to an existing one. To reduce data entry time, generate a copy of a submittal and update it as necessary.


Generate a Submittal from the Submittals Log

To generate a submittal from the Submittals log:

- 1) Expand the **Logs** folder for a project in the Project View and click **Submittals**.
- 2) From the Submittals log window, open the submittal that you want to copy in View or Edit mode.
- 3) In the Submittal document window, select **Generate Submittal** from the **Select an action** drop-down list. The Generate Submittals dialog box will open.
- 4) Enter the number of new submittals you need and specify whether to link the submittals to the same issues and attachments as the original submittal.
- 5) Click **Finish** to add the new submittals to the log. The dialog box will close and the document window for the new submittal will open.
- 6) On the **Submittals** document window, click **Edit Submittal** to edit the document. See Adding a Submittal for more information.

Generate a Submittal from the Submittal Packages Log

To generate a submittal from the Submittal Packages log:

- 1) Expand the **Logs** folder for a project in the Project View and click **Submittal Packages**.
- 2) From the Submittal Packages log window, open the package that contains the submittal you want to copy by clicking the package's name.
- 3) Click the **Submittals** tab.
- 4) Click **Generate Submittals**  next to the submittal that you want to copy. The Generate Submittals dialog box will open.
- 5) Enter the number of new submittals you need and specify whether to link the submittals to the same issues and attachments as the original submittal.
- 6) Click **Finish** to add the new submittals to the log. The dialog box will close and the document window for the new submittal will open.
- 7) On the **Submittals** document window, click **Edit Package** to edit the document. See Adding a Submittal for more information.

Tracking and Updating a Submittal Using Review Cycles

The Review Cycles tab in the Submittal document window shows the complete history for a submittal, starting with the first revision. If you are linked to a Contract Management module schedule, and are using its activities on the Schedule tab, the module automatically updates submittal schedule activities when you update dates in the Review Cycles tab of the Submittal document window.

Record a Review Cycle

To record a review cycle:

- 1) Expand the **Logs** folder for a project in the Project View and click **Submittals**.
- 2) From the **Submittals** log window, click the submittal title to open the selected submittal.
- 3) On the **Review Cycle** tab, click **Add**. The revisions will be automatically numbered sequentially, beginning with 001. You can change the sequential number.
- 4) Click the review cycle's number to open the review cycle. Each revision is categorized into different tabs to record related details.
- 5) On the **General** tab, type a description of this review cycle, and enter the dates when the submittal changed hands. The review cycle begins when a date is entered in the **Received** field.

Update from the First Review Cycle

To update from the first review cycle:

- 1) When you enter a submittal **Received** date on the **Review Cycles** tab, the start date for the submittal preparation activity is updated and the option next to the date is selected to indicate an actual start for this activity on the **Schedule** tab of the submittal document.
- 2) When you enter a **Sent** date on the **Review Cycles** tab to indicate when the submittal was sent for review:
 - ▶ The **Finish** date for the submittal preparation activity is updated.
 - ▶ The option next to the finish date is selected on the **Schedule** tab of the submittal document to indicate an actual finish.
 - ▶ One day is added to the **Sent** date to update the start date of the approval period activity.
 - ▶ The option next to the **Start** date is also selected to indicate that this activity has started.
- 3) When you enter a submittal returned date:
 - ▶ The finish date for the approval period activity is updated.
 - ▶ The option next to the date is selected to indicate an actual finish for this activity on the **Schedule** tab of the submittal document. The status of the revision does not need to be approved for this to happen.
- 4) If this review cycle is approved, the **Resubmit** start and finish dates on the **Schedule** tab of the submittal document remain blank.

- 5) If the review cycle is rejected or has a status other than *Approved*, all current schedule dates on the submittal **Schedule** tab are retained.
 - ▶ If rejected, you would normally start a new review cycle.
 - ▶ This process can be continued until you finally approve the submittal.

Update from Any Subsequent Review Cycle

- 1) When you enter a submittal received date:
 - ▶ The module updates the start date for the resubmit activity on the **Schedule** tab of the submittal document with the received date in this revision.
 - ▶ The **Start** option is selected to indicate that the next submittal cycle has started, as long as the finish date for an approval period activity is selected.
 - ▶ The schedule dates are set using the next lowest revision number on the **Review Cycles** tab.
- 2) When you enter a submittal returned date and change the status to *Approved*:
 - ▶ If the finish date for an approval period activity is entered, the finish date for the resubmit activity is updated on the **Schedule** tab with the returned date in this revision and is marked as an actual finish.
 - ▶ This process occurs for any review cycle after the first cycle.
- 3) If a review cycle after the first cycle is rejected, you would normally start a new review cycle.
 - ▶ Any changes to review dates or status will update the **Schedule** tab of the submittal document using the same conditions listed above.
 - ▶ If you clear a review date, the **Schedule** tab dates related to that date are also cleared.

Note: The Received, Sent, and Returned dates are transferred to the **Submittal Preparation (Start)**, **Submittal Preparation (Finish)**, and the **Approval Period (Finish)** date fields in the **Schedule** section respectively.

You can also export this data to a Contract Management module schedule to create or update the activities in the related P6 EPPM schedule.

Send a Submittal to Multiple Reviewers

Sometimes you will want more than one person to review a submittal. When two or more participants review a submittal at the same time, Contract Management treats their review information as a set. When calculating status percentages, Contract Management treats a set of reviewers as one review cycle. You can only add multiple reviewers while a submittal has no review cycles.


In an *All Must Approve* review, the reviewer who is currently the BIC must approve the review before it is sent to the next reviewer. When a reviewer approves the submittal and enters a returned date, the BIC moves to the next highest reviewer number until everyone has approved the submittal. Once all of the reviewers approve the submittal and enter a returned date, the submittal coordinator becomes the BIC and will see an approved status for the submittal. If any reviewer rejects the submittal, the BIC moves to the submittal coordinator for attention and does not move to the next reviewer.

The reviewer with the highest value in their Number field acts as the BIC first. Unless reviewer numbers are manually adjusted, the last reviewer to be added will have the highest number.


To have multiple people review a submittal:

- 1) In the Project View, expand the project you are working in.
- 2) Expand the **Logs** folder and click **Submittals**.



- 3) Click **Add Document** .
- 4) Add the necessary information to the submittal. See Adding a Submittal.
- 5) Click the **Workflow** tab, and mark the **Multiple Reviewers** checkbox (this is available only if there are no review cycles).
- 6) Click the **Review Cycles** tab, and click **Add**. Save your changes when prompted.


Note: On the General tab, the **Sent To** and **Returned By** fields indicate that multiple reviewers are involved.

- 7) Click the **Multiple Reviewers** subordinate tab, and click **Add** to open the Revision Set Dialog Box.
- 8) Click **Select Reviewer**  and choose a reviewer from the resulting dialog box. The dialog box will close when you select someone.
- 9) Enter information for the reviewer, including date sent and returned, status, number of copies, description, remarks, drawing date, and reviewer number and status.
- 10) Click **Save and Add Another** for to add another reviewer. Repeat step 9 to enter information for this reviewer also. Click **Save and Close** when finished. Each reviewer appears as a separate row on the Multiple Reviewers tab.

For any revision that consists of multiple reviews, the module determines the most critical record in the set and displays those dates on the Review Cycles tab. The most critical record is the one with the fewest dates entered, indicating that responses for this revision have not been received, sent, returned, or forwarded by the appropriate Ball in Court (BIC) on time, causing a significant delay in the submittal process. If the number of dates for more than one reviewer is the same, the row with the earliest date farthest to the right is used.

Update Submittals in a Submittal Package

If you have submittals in a package, you can update the submittals from the Submittal Package Submittals tab.

- 1) In the submittal package that you are working in, click the **Submittals** tab and click **Update Package**. The Update Submittals in a Package dialog box will open.
- 2) Mark the checkboxes next to the submittals you want to update, and click **Next**.
- 3) Click **Select Date**  to update any of the date fields and select a status for the submittals. All submittals that you selected on the previous page will be updated with the information you provide. Only fields with actual dates will be used.
- 4) Click **Next**.

- 5) On the next page answer the questions for the submittals and click **Finish**. The dialog box will close.

Using Schedule Activities for Reference and to Update Submittals

If you use P6 EPPM to schedule projects, you can use the Schedule tab in the submittal document to reference and update the activities associated with your submittals with early/actual start and finish dates from the schedule activities. On the Schedule tab, selected options for the Start and Finish fields indicate an actual start or finish date for the activity. Cleared options indicate early start and finish dates.

Update Scheduling Information

Click **Update from Schedule** on the Schedule tab in the Submittal document window. You can also customize the Workspace to update submittals by clicking **Customize this Page** to add an Update Submittals object to the Workspace.

Note: If the top-level folder is highlighted in the Project View, and you click **Update** from Schedule/Update from Lead Time in the Update Submittals object in the Workspace, all schedules linked to Contract Management module projects will be updated. If one project is highlighted in the Project View, only the schedule linked to that project is updated.

Record Scheduling Information

Click the **Schedule** tab in the Submittal document window and click **Select** in the Activity ID column to select activities from the linked P6 EPPM schedule. Whenever the P6 EPPM schedule has been updated, click **Update from Schedule** to ensure that you are using the most current dates. The Lead Time field for submittal activities is updated based on the durations for the selected schedule activities.

Note: The module assumes you are using activities with conventional, finish to start relationships, and it calculates dates based on a seven-day workweek calendar.

Specify the Activity That Succeeds the Current One

Select the applicable activity from the Successor Activity field. The dates for all other start and finish times are based, in succession, on the date of the selected successor activity. For example, the finish date of the Delivery Time activity is one day before the start date of the Successor activity. If the start date of the Successor activity is 12/30/09, the finish date of the Delivery Time activity is 12/29/09. This ensures that materials needed to perform the Successor activity are delivered in time for construction to begin.

Specify the Submittal Activity Duration

To calculate the start date for the activity, enter the number of days to deduct from the finish date of the activity specified. For example, if you enter 30 days for the lead time for an activity with a finish date of 12/29/09, the start date for that activity becomes 11/30/09. If you change the number in this field or change an activity after dates have been calculated, you are prompted to overwrite the dates with new start and finish dates.

If you use P6 EPPM activities to update submittal activity dates, the lead time calculation is based on the number of days of duration for each schedule activity.

If you do not use schedule activities to update submittal activity dates, you can manually enter the days of lead time necessary for each submittal activity to complete. You must first specify the Successor activity and its corresponding dates, and enter the lead time for the remaining submittal activities. To update the dates for activities based on the Successor activity dates and the lead times entered, click **Update from Lead Time** on the Schedule tab of the Submittal document. The original dates will be overwritten with dates calculated from the lead times.

Viewing the Status and Details of a Submittal

On the General and Status tabs of the Submittal document window, you can quickly check who is currently responsible for a submittal item, how long the individual has had it, and how many days it is overdue.

On the Details tab in the Submittal document window, enter the number of items attached to the submittal, the company and initials of the contact who produced the submittal items (Source), a drawing number, and the company or name of the contact who filed the drawing, and filed date, if applicable.

You can optionally select a date for the first Approved By person (the primary submittal contact for the project) when he or she approves the submittal; the module does not supply a value for this field. The module completes the second Approved By Date field when the submittal has a status of Approved. You can change this date.

Submittals Bar Chart

You can view the Submittals log in a bar chart. The Submittals Bar Chart window provides a graphical representation of the Submittals log window in a schedule format, similar to the Schedule Data window. The bar chart shows submittals that have a Required Start date or at least one latest date (Received, Sent, Returned, or Forwarded).

To access this feature, choose **Bar Chart** from the Submittals log window Layout menu.

Create a Distribution List for a Submittal

Add contacts to the distributions section of a submittal when you want to send copies of the submittal to other contacts.

To create a distribution list for a submittal:

- 1) In the Project View, expand the project you are working in.
- 2) Expand the **Logs** folder and click **Submittals**.

- 3) Open the submittal for which you want to create a distribution list.
- 4) Click the **Review Cycles** tab and then click the **Distributions** subordinate tab.
- 5) Click **Add** to open the Distribute Submittal Dialog Box.
- 6) Enter the number of copies of the submittal you are sending to the contacts.
- 7) Enter any additional information about the review cycle in the **Remarks** field.
- 8) Click **Select**. In the Select Contacts Dialog Box, add the contacts to which you want distribute the submittal. Click **Save** to return to the Distribute Submittal dialog box.
- 9) Mark the **Transmit** checkbox next to the contacts for which you want to create a transmittal entry in the transmittal log.
- 10) Click **Save** when finished in the **Distribute Submittal** dialog box. The selected contacts appear in the Distributed To column.

Note: To delete contacts from the distribution list, click **delete** corresponding to the contact you want to delete on the Distributions tab. Click **Yes** to confirm the deletion.

Produce Transmittals from Submittals

Depending on the settings in the Project Settings Dialog Box, Contract Management can automatically create an entry in the Transmittal Queue Dialog Box for each contact listed on the Distributions subordinate tab of a submittal Review Cycle tab as well as each contact designated as a Sent or Forwarded contact for each review cycle. Then, each time you update the Sent or Forwarded dates in a review cycle, a transmittal queue entry is created for the contact designated as the Sent or Forwarded contact.

From the Transmittal Queue, you can create transmittals shown in the log and print them. You can also combine transmittal items to the same user.

To produce a transmittal from the Transmittal Queue:

- 1) Click the **Transmittal Queue** link at the top of the page.

Note: By default, this dialog box contains an entry for each item on the Distributions subordinate tab of a submittal Review Cycle tab. It also contains a list of the submittals for which you have entered (or edited) a date in either the **Sent** or **Forwarded** field on the Review Cycles tab.

- 2) Select the radio button for the transmittal you want to create and click **Create** to create the transmittal. You can also click **Create All** to create transmittals for all items in the list.

Note: If you selected **Combine Transmittals to same contact**, all of the combined items will appear in the transmittal log. If you selected **Print Transmittals during create**, when you click **Create** or **Create All**, the transmittals will print.

3) Click **Close** when finished.


Note: For every attachment and issue linked to the original submittal, Contract Management creates an attachment and issue for the transmittal.

Tracking Materials Delivery

Record Visitors

In a daily report, you can use the Visitors tab to record the names of visitors to the site and the companies they represent.

To record visitors:

- 1) Expand the **Logs** folder and click **Daily Reports** to open the Daily Reports Log Window.
- 2) Open the report to which you want to add visitors.
- 3) Click the **Visitors** tab and click **Add** to open the Daily Visitor Log Dialog Box.
- 4) Enter the time and the company name.
- 5) Click **Select Name**  to open the Select Contact Dialog Box to select the visitor.
- 6) Enter any remarks.
- 7) Link issues or add attachments to the visitor.
- 8) Click **Save and Close** when finished, or click **Save and Add Another** to add another visitor.

Adding Materials Delivery Records

Add a Materials Delivery document when you need to keep close track of what material has been delivered to you, how much was delivered, what's left to be delivered, and how much you've actually spent on material to date.

Tracking material deliveries is a two-step process:

- 1) Create a materials delivery document for each material you plan to track.
- 2) Update the document each time you receive a delivery of that material.

You can add materials delivery documents directly in the Materials Delivery Log Window, or Generate Materials Delivery Documents from a Contract or PO. Generally, if you set up unit price contracts or purchase orders, and plan to track material deliveries, it's faster to generate them.

The module will automatically link the Line Item number on the Requisition tab of the Materials Delivery document window with the correct line item from the requisition's Schedule of Values tab if you generate both the material and the requisition from the same contract/PO. The order of generation is not important.

Generate Materials Delivery Documents From a Contract or PO

- 1) From an open Contract document window or Purchase Order document window from which you want to generate a materials delivery document, click the **Line Items** tab, and then click **Add Lump Sum** or **Add Unit Price**.
- 2) Enter the appropriate values on the Contract Item dialog box.

Note: In the **Material Name** field, you must enter a new, unique material code. Do not select an existing one from the drop-down list.

- 3) Click **Save and Close** when finished entering information on the Contract Item dialog box. This returns you to the contract or purchase order document you have open.
- 4) Choose **Generate Materials** from the **Select an action** drop-down list.

Note: If there are no new materials to generate, a message will appear indicating this.

- 5) When the Generate Materials wizard opens, select whether to link the document to the same issues and attachments as the contract or purchase order.
- 6) Click **Finish**. Contract Management generates materials delivery documents for each unit price item with a material code.

Add Materials Delivery Documents Directly to the Materials Delivery Log

- 1) Expand the Logs folder for a project in the Project View and click **Materials**.
- 2) Click **Add Document**.
- 3) Enter the information about the material you plan to track.
- 4) As you create each document, add the corresponding deliveries on the **Delivery Ticket** tab. Click **Add** on the **Delivery Ticket** tab to add a delivery ticket.
- 5) Record the date received, quantity delivered, and delivery location.
The quantity received is copied to the **Delivered** field (on the Cost tab), and the total value of the delivery (**Total** field) and the remaining balance (**Balance** field) are calculated.
When the balance equals zero, the module copies the date of the last delivery to the Final Delivery field on the Billing and Delivery tab.

Record a Delivery

To record a delivery:

- 1) Expand the **Logs** folder for a project in the Project View and click **Materials**.
- 2) From the Materials log window, open a materials delivery document.
- 3) Choose **Add Delivery** from the **Select an action** drop-down list. Enter the information about the material delivered and save it. A new line is then added to the Delivery Ticket tab of the document.

Using P6 EPPM Schedule Dates

Once you link Contract Management to a P6 EPPM schedule, you can view early and actual start and finish dates, original and remaining durations, percent complete, and total float for individual activities you associate with Contract Management module documents.

Click the **Schedule** icon at the top of the page, or click the **Schedule** tab while in a Contract Management module document (in which you have entered an activity from the linked P6 EPPM project).

You can use schedule activities as a reference or use their early/actual schedule dates to update dates in Contract Management module documents. For materials delivery, you can choose to update the start date and the completion date on the Schedule tab in the Materials Delivery document window with the start date and completion date of the activity ID you select.

Adding a Materials Delivery Ticket and Posting to Multiple Materials

When a delivery is made, you usually receive types of materials you have received before, which already exist in your materials log. You can log multiple items that have been delivered on a ticket all at once through the Materials Delivery log.

You can add a materials delivery ticket from the Materials Delivery log for one material or multiple materials. To add a materials delivery ticket:

- 1) Click **Record Deliveries**, and enter a number for the ticket. Click **Add** to list all available materials. You can quickly log multiple materials as having been delivered against that ticket.
- 2) Select the materials that have been delivered from the list and click **Save**.
- 3) After you click **Save**, you can enter additional information, such as the quantity and location, for each item in the ticket. The delivery is then posted to the Delivery Ticket tab of the Materials Delivery document window.

Note: You can also add materials from the Materials tab of a daily report.

Including Materials Deliveries on Requisitions

Contracts usually require partial payments at regular intervals based on the amount of work accomplished and materials installed. The contract price is divided into a list of component prices or work items, so that progress can be measured more precisely. This list, called a schedule of values, accompanies each payment requisition. At the end of each period, a requisition for payment is submitted that shows the value of work performed and materials installed since the last payment.

Materials delivered and approved change orders applicable to each period can be collected and added to the corresponding requisition. When you generate a new requisition, you are prompted to “get” approved changes, materials delivery, and/or schedule dates.

For example, if you have a contract that requires pipe, and you must purchase the pipe, the units of pipe are recorded in the Line Items tab of the Contract document window. You can generate a materials delivery document from the contract, and once the pipe arrives, enter the arrival date in the Delivery Ticket tab of the Materials Delivery document window.

Next, generate a requisition from the contract to get paid for the pipe. In the Requisition document window’s Schedule of Values tab, choose **More Commands, Get Materials Delivery** to collect costs on the materials you purchased for the period. Contract Management prompts you to “get” approved change orders, materials deliveries, and/or schedule dates. If there are no materials associated with the contract in the defined time period, the **Get Materials Delivery** option is not available. Select the options for the materials to “get” and click **Finish**. The materials information is then inserted in the **Schedule of Values** tab in the Requisition document window. You can then send the requisition to the recipient’s Inbox, or print a form.

You can also generate a new requisition from the existing requisition, and get materials. In the Requisition document window, choose **Generate Requisition** from the **Select an action** drop-down list.

When you generate a new requisition from an existing requisition, you are also prompted to **Get Approved Changes** and **Get Schedule Percent Complete** on the Generate Requisition dialog box.

You can set cost options for how costs for materials are handled when generating a new requisition. To access the Cost Options dialog box, choose **Select an action, Cost Options** from a Contract or Purchase Order document window. Preferences set here apply to this contract/PO and override the preferences set in the Requisitions tab of the Project Settings dialog box.

The Delivery Ticket tab in the Materials Delivery document window contains a Requisitioned Date column that indicates when a delivery has been included in a requisition for payment. The Requisitioned Date is blank until you perform a “get” in the requisition.

Using Daily Reports

Prepare a Daily Report

Daily reports provide a history of project events, including a description of physical conditions, a summary of the work accomplished at the job site, lists of materials used and delivered, a log of visitors to the site, and a report of any problems encountered that day.

You can also include activities from a linked P6 EPPM project when you create a daily report. The report shows all activities that should be underway based on their early dates. You can also limit the activities included by using the contact/responsibility activity code from the P6 EPPM Activity Codes Dictionary.

Use the Daily Reports document window to enter information about important daily events during your project. This kind of detailed information can become important when you need to explain delays or justify costs.

Multiple users from the same company can add daily reports on the same day. Each daily report document contains information for one contact. If you have multiple contacts, each contact should prepare a separate report each day.



To prepare a daily report:

- 1) Expand the **Logs** folder and click **Daily Reports** to open the Daily Reports Log Window.



- 2) Click **Add Document**.
- 3) Use the information below to edit the daily report.


On the General tab:

- 1) Click **Select Contractor**  to choose the contractor associated with the report.
- 2) Edit the **Date** and **Day** fields if necessary. Contract Management supplies the system date and day.
- 3) Enter a report number and period.
- 4) To associate a contract with the daily report, click **Select Contract**  and choose a contract.

On the Status tab:

Select the priority and Ball in Court for the report.

To approve the daily report, do the following:

- 1) Click **Select Contact**  and select the contact approving the report. The contact's company will appear in the **Company** field.
- 2) Click **Select Date** to choose the date the report was approved.
- 3) Click **Approve and Save**. You must fill in the Approved by information before you can approve a report.

On the Work Activity and Additional Comments tabs:

Use these tabs to record descriptions of progress, delays, new conditions, problems, and anything else that may affect the project schedule or cost.

On the Equipment tab:

Use the **Equipment** tab to view, edit, or Add Equipment Records information.

On the Field Force tab:

Use the **Field Force** tab to view, edit, or Add a Field Force Record information.

On the Visitors tab:

Use the **Visitors** tab to view, edit, and Record Visitors information for visitors who visit a work site.

On the Materials tab:

Click **Add** to open the Delivery Ticket Dialog Box to enter information about an item delivered to the site that day.

Materials added here link to the Materials Delivery Document Window to keep track of what has been delivered and what has not for any particular contract. Materials are linked to a contract, so selecting a material in the Delivery Ticket dialog box also selects the contract to which the material is linked.

Click **Record Delivery Ticket** to open the Record Delivery Ticket Dialog Box to create a delivery ticket and record multiple materials to it.

On the Schedule tab:

If you have Contract Management connected to the P6 EPPM database, you can use the fields on this tab to schedule activities.

Click **Add** to open the Daily Schedule Record Dialog Box and select an underway schedule activity from the linked P6 EPPM project.

Click **Get Activities** to get schedule activities from P6 EPPM.

On the Weather tab:

Enter information about the weather for the day. This tab has the following subordinate tabs:

Details tab: Use the **Length of Suitable Conditions** drop-down list to select the amount of time that weather conditions were acceptable.

Period 1, Period 2, and Period 3 tabs: Use these tabs to divide the day into three periods. For each period, enter the weather conditions and their impact.

On the Issues tab:

Click **Link** open the Select Issue Dialog Box to link an issue to the daily report. You can link more than one issue.

On the Attachments tab:

- ▶ Click **Attach File** to attach a file to the document.
- ▶ Click **Attach from Repository** to attach a document from the content repository. These documents are external to Contract Management. This will not display unless the administrator configured Contract Management to use the repository. See Configure the Content Management Version Document and Attachment Feature.
- ▶ Click **Attach URL** to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

Save the daily report:





When you are finished editing the daily report, click **Save**.

Record Resource Usage

Use the Equipment and Field Force tabs of a daily report to list the equipment and labor resources used during the day.

Record Equipment Usage

To record equipment usage:

- 1) Expand the **Logs** folder for a project in the Project View and click **Daily Reports**.
- 2) From the Daily Reports log window, click **edit**  next to the document for which you want to record resource usage to open the Daily Report Document Window.
- 3) Click the **Equipment** tab.
- 4) Click **Add** to open the Daily Equipment Record Dialog Box.
- 5) Click **browse**  next to the **Source** field to open the Select Company Dialog Box and select the source of the equipment.
- 6) Enter a **Description** for the equipment, and enter the number of Units.
- 7) Select the **Equipment Type** and the **Work Area**.
- 8) If the equipment is idle, select the **Idle** option.
- 9) If the equipment is rented, select the **Rented** option. The following two fields become active when you select this option:
- 10) Click the calendar  icon next to the **Acquired** field to choose the date on which the equipment was acquired.
- 11) Click the calendar  icon next to the **Due Back** field to choose the date on which the equipment should be returned to the supplier
- 12) Use the **Remarks** field to enter any additional relevant information.



- 13) To link an issue to the equipment, in the **Issues** section click **Link** to open the Select Issue Dialog Box, and select the issue.
- 14) To attach a file or URL to the equipment, go to the Attachments section:
- 15) Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.
- 16) Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the Repository. See Configure the Content Management Version Document and Attachment Feature for more information.
- 17) Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

- 18) Click **Save and Close** when finished, or click **Save and Add Another** to add another equipment usage record.

Record Personnel Information

To record personnel information:

- 1) Expand the **Logs** folder for a project in the Project View and click **Daily Reports**.
- 2) From the Daily Reports log window, open the daily report which you want to edit.
- 3) Click the **Field Force** tab.
- 4) Click **Add** to open the Daily Labor Record Dialog Box.
- 5) Click **browse**  next to the source field, and select the company supplying the personnel.
- 6) For each appropriate category (Supervisors, Foremen, Journeymen, and Apprentices), enter the number of personnel, and the total hours.
- 7) If there is a Change Number associated with the personnel, click **browse**  to open the Select Document dialog box, and click **Select** next to the appropriate document.
- 8) Use the **Remarks** space to enter any additional relevant information for the personnel.
- 9) To link an issue to the Field Force, in the **Issues** section click **Link** to open the Select Issue Dialog Box, and select the issue.
- 10) To attach a file or URL to the equipment, go to the Attachments section:
- 11) Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.

- 12) Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the Repository. See Configure the Content Management Version Document and Attachment Feature for more information.
- 13) Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document.


Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

- 14) Click **Save And Close** when finished, or click **Save and Add Another** to add another resource.

Record Visitors

In a daily report, you can use the Visitors tab to record the names of visitors to the site and the companies they represent.

To record visitors:

- 1) Expand the **Logs** folder and click **Daily Reports** to open the Daily Reports Log Window.
- 2) Open the report to which you want to add visitors.
- 3) Click the **Visitors** tab and click **Add** to open the Daily Visitor Log Dialog Box.
- 4) Enter the time and the company name.
- 5) Click **Select Name**  to open the Select Contact Dialog Box to select the visitor.
- 6) Enter any remarks.
- 7) Link issues or add attachments to the visitor.
- 8) Click **Save and Close** when finished, or click **Save and Add Another** to add another visitor.

Record Material Deliveries

Use the Materials tab of a daily report to record information about the items delivered that day.

As you record deliveries on the Materials tab, Contract Management copies a matching delivery document from the Materials tab of the daily report to the Delivery Tickets tab of the Materials Delivery Log Window.

Note: When different contracts are issued for the same material, record each delivery separately.

To record material deliveries:

- 1) Expand the **Logs** folder and click **Daily Reports** to open the Daily Reports Log Window.

- 2) Open the daily report for which you want to record materials delivery.
- 3) Click the **Materials** tab.
- 4) Click **Add** to open the Delivery Ticket Dialog Box.

Notes: You can also Add a Materials Delivery Document and add multiple materials to the ticket.

- 5) Enter information about the material delivery.
- 6) Link issues or add attachments to the record.
- 7) Click **Save and Close** when finished, or click **Save and Add Another** to add another record.

Linking Daily Reports and Materials

When you record deliveries on the Materials tab, each material available for selection is linked to its contract or purchase order. The matching delivery record is then copied from the Materials tab in the Daily Reports document window to the Delivery Tickets tab in the Materials Delivery document window.

Assign Multiple Materials to a Daily Report at Once

From the Materials tab, you can create a material ticket, and quickly assign material deliveries to the daily report.

For example, to record materials deliveries on a daily report, do the following:

- 1) Click **Record Delivery Ticket** on the **Materials** tab.
- 2) Enter a ticket number and location in the Record Delivery Ticket dialog box.
- 3) Click **Add** to add materials to the delivery ticket. All available materials from the Materials Delivery log are displayed in the Select Material dialog box.
- 4) Select the materials to add to the daily report from the list and click **Save**.
- 5) Type materials and delivery information for the selected materials.

Including Schedule Activities

You can include activities from the linked P6 EPPM project when you create a daily report. The daily report shows all activities that should be underway (with no actual finish) based on their date range (start to early finish) falling within or on the date of the daily report in the Contract Management module. By including underway schedule activities, you can compare actual progress to the schedule and convey that information to the participants to whom you send the report.

You can also limit the activities included in the daily report by using a specific activity code from the P6 EPPM Activity Codes Dictionary. By default, this code is Responsibility. To copy activities from the P6 EPPM schedule into the Daily Report document window's Schedule tab for only the contractor appearing in the daily report:

- 1) Define the Responsibility code in the Activity Code Definitions dialog box for the project database to which your Contract Management module project links.


- 2) Assign activities to this contractor using the Responsibility code in the P6 EPPM project.
- 3) You must also select the **Use Responsibility to Filter Activity Retrieval in Daily Reports** option on the Schedule tab in the Project Settings dialog box to specify that you want to run this activity code selection to filter activities for the daily report.
- 4) In the Daily Report document window, click the **Schedule** tab to see a list of activity IDs:
 - ▶ Titles
 - ▶ Start (ES) and Finish (EF) dates
 - ▶ Percent Complete (PCT)
 - ▶ Original and remaining durations (RD)
 - ▶ Total Float (TF)
 - ▶ Free Float (FF) of each underway activity from the P6 EPPM project
 - ▶ Worked On is checked if work has been performed for an activity
- 5) On the **Schedule** tab, click **Add** to add schedule activities and to include underway schedule activities and/or meetings on the report.
- 6) On the Daily Schedule Record dialog box, click the **browse** button for the **Activity ID** field if available to associate a P6 EPPM schedule activity from the linked project to this daily report.
- 7) Use the **Issues** section to link an issue to the Daily Schedule Record.
- 8) Use the **Attachments** section to attach documents or a URL to the report. You can attach documents from an Oracle UCM or Microsoft SharePoint repository if the Contract Management administrator set the functionality in the Contract Management Administration Application.

Note: If the Use Responsibility to Filter Activity Retrieval in Daily Reports option is selected on the Project Settings dialog box Schedule tab, only the linked P6 EPPM activities that have an RESP value assigned to them will display in the Contractor field of the Daily Report document window. If the option is cleared, all linked P6 EPPM activities in the same date period will appear.

Record Weather Conditions

You can track weather conditions for the day in the daily report for up to three periods or shifts.

To record weather conditions:

- 1) Expand the **Logs** folder for a project in the Project View and click **Daily Reports**.
- 2) In the Daily Report log window, click **edit**  for the daily report you want to update.
- 3) Click the **Weather** tab, and enter information about the weather for each period on the Period sub tabs.
- 4) Click the **Details** tab, and select an amount of time from the **Length of suitable conditions** drop-down list.

Adding Attachments

You may want to include a photograph taken at the job site, a drawing submitted for bid by a subcontractor, or other files with your daily report to clarify a point or substantiate a decision. You can do so by attaching the file to the report. This is especially useful if you took a digital photo at the job site; you can simply attach the file to that day's daily report.

Attach a file to a daily report:

- 1) Click **Daily Reports** in the Logs folder in the Project View, and click the document icon for the daily report.
- 2) On the **Attachments** tab you can do the following:
 - ▶ Click **Attach File** to select the file you want to attach to the daily report.
 - ▶ Click **Attach from Repository** to attach a document from an Oracle UCM or Microsoft SharePoint repository. This does not display unless the administrator sets Contract Management content management repository properties in the Administration Application.
 - ▶ Click **Attach URL** to attach a web address to the daily report.

You can also attach files to individual components of the daily report. For example, you can attach files to items available on the Field Force or Materials tabs. In this case, any files you attach apply only to the specific item to which you attach them, not to the entire daily report.

Note: Attachments added to a row in the Materials tab also appear in the corresponding delivery record in the Materials Delivery log.

Generate a Daily Report Based on an Existing Report

Daily reports often contain several similar items. To reduce data entry time, use the Generate Wizard to create a copy of a daily report and edit the copy to reflect any differences.

To generate a daily report:

- 1) Expand the **Logs** folder and click **Daily Reports** to open the Daily Reports Log Window.
- 2) Open the daily report that you want to copy, and choose **Generate Document** from the **Select an action** drop-down list.
- 3) Edit the **Date**, **Day**, **Report Number**, **Company**, and **Report Period** fields as necessary, and then click **Next**.
- 4) Select options based on which parts of the original report you want to copy to this new report.
- 5) Click **Finish**. The new Daily Report Document Window opens.

Tracking Insurance Certificates

Add an Insurance Policy

The Contract Management Insurance module provides a convenient place to record information about the insurance policies for all project participants. Use this module to keep track of the policies you carry for your company, and those of the companies that work for you.

Construction contractors carry several types of insurance for their company and employees, and some contracts require proof of insurance for all project participants, including subcontractors. With the Contract Management Insurance module, you can conveniently store information about relevant insurance policies for all project participants, including worker's compensation and bonding.





To add an insurance document:

- 1) Expand the **Logs** folder and click **Insurance** to open the Insurance Log Window.




- 2) Click **Add Document** to open a blank Insurance Document Window. Contract Management automatically sets the **Status** to *New Item*.


On the General tab:

- 1) Click **Select Insured**  next to the **Insured** field to open the Select Contact Dialog Box to choose the insured party.
- 2) Click **Select Policy Type**  next to the **Policy Type** field to open the Select Insurance Policy Dialog Box to choose the policy type.
- 3) Enter the policy number and the name of the insurance provider.
- 4) Click **Select Contact Person**  next to the **Contact Person** field to open the Select Contact Dialog Box to choose the contact for the policy.
- 5) Click **Select Date**  and select dates for the **Effective Date** and **Expiration Date** fields for the policy.
- 6) Enter the policy limit.

On the Status Tab:

- 1) Click **Select Ball in Court**  next to the **Ball in Court** field to open the Select Contact Dialog Box to choose the BIC.
- 2) Select the priority and status of the insurance document.

On the Details tab:

- 1) Click **Select Contract**  next to the **Contract** field to open the Select Contract Dialog Box to choose the contract between your organization and the insured party.
- 2) Use the **Remarks** area to enter any additional information.

On the Issues tab:

To link an issue to the drawing, click **Link** to open the Select Issue Dialog Box, and select the issue.

On the Attachments tab:


You can do the following:

- ▶ Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.
- ▶ Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the repository. See Configure the Content Management Version Document and Attachment Feature for more information.
- ▶ Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

Save the Insurance document:

Click **Save** when finished.



Producing Punch Lists

Create Punch Lists

The Punch Lists module is a convenient place for you to document lists of related items that must be completed before the project can be finished. For example, before a contract can be closed out, damages incurred during construction must be repaired, and missing equipment must be noted. Punch lists make it easy to document and track the status and cost of outstanding items.





To create a punch list:

- 1) Expand the **Logs** folder and click **Punch Lists** to open the Punch Lists Log Window.




- 2) Click **Add Document** to open a blank Punch List Document Window.

On the General tab:


- 1) In the **Punch List** field, enter the name of the punch list.
- 2) In the **Title** field, enter a title that describes the contents of the punch list.
- 3) Click **Select To**  next to the **To** field to open the Select Contact Dialog Box to choose the recipient of this punch list. Click **Clear**  to clear the selected contact.
- 4) Click **Select From**  next to the **From** field to open the Select Contact Dialog Box to choose the person issuing this punch list. Click **Clear**  to clear the selected contact.

On the Status tab:



- 1) Click **Select Ball in Court**  next to the **Ball in Court** field to open the Select Contact Dialog Box, and select the BIC for the punch list.
- 2) From the **Priority** drop-down list, select the priority for the punch list.

On the Punch List Items tab:

This tab contains the list of punch list items.

- 1) Click **Edit**  next to an item to edit the item.
- 2) Click **Add** to add a new punch list item. See Add Items to a Punch List for information on adding a new item.

On the Details tab:

- 1) In the **Description** field, enter a detailed description or summary of the punch list contents.
- 2) Click **Select Contract**  to open the Select Contract Dialog Box to choose a contract to link to the punch list. Click **Clear**  to clear the selected contract.
- 3) If this punch list is associated with a Change Management document, Contract Management displays the number in this field. You cannot edit this field.

On the Issues tab:

Click **Link** to open the Select Issue Dialog Box, and link an issue to the punch list. You can link more than one issue.

On the Attachments tab:

- ▶ Click **Attach File** to open the Attach File Dialog Box to attach a file to the document.
- ▶ Click **Attach from Repository** to open the Attach Document Dialog Box, which you can use to attach a document from the content repository. These documents are external to Contract Management, and are not part of the documents created in Contract Management. This will not display unless the administrator set the Contract Management project content management properties to use the repository. See *Configure the Content Management Version Document and Attachment Feature* for more information.
- ▶ Click **Attach URL** to open the Attach URL Dialog Box to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.



Save the Punch List document:




Click **Save** when finished.

To assign custom fields to your punch lists, right-click on the top-level (All Projects) folder and choose **Custom Fields** to open the Custom Fields Dialog Box. You can arrange them according to your own categories.

Add Items to a Punch List

You can add related items to a punch list by doing the following:

- 1) Expand the **Logs** folder and click **Punch Lists**.
- 2) From the Punch Lists log window, open the punch list to which you want to add items.
- 3) Click the **Punch List Items** tab, and click **Add** to open the Punch List Item Dialog Box.
- 4) Contract Management numbers the new item sequentially, enters the system date in the **Opened** field, and enters a date that is seven days from the current date in the **Required** field. You can edit each of these fields.
- 5) If the item is closed, click **Select Date**  next to the **Closed** field to select the date the item was closed.
- 6) In the **Status** section of the Punch List item dialog box:
 - a. Click **Select**  next to the **Ball in Court** field to open the Select Contact Dialog Box and select the BIC for the punch list item.
 - b. From the drop-down lists, select the Priority and the Status for the punch list item.

- 7) In the **Location** section of the Punch List item dialog box:
 - a. From the **Area**, **Room**, and **Elevation** drop-down lists, select the options to which the punch list item pertains. Contract Management assigns the item a status of *New Item*.
 - b. In the **Location** field, enter the site location for the punch list item.
- 8) In the **Description** section of the Punch List item dialog box, enter any comments or additional information regarding the punch list item.
- 9) In the **Schedule** section of the Punch List item dialog box:
 - a. If the project is linked to a P6 EPPM schedule, click **Select**  to open the Select Activity Dialog Box to select an activity for the item.
 - b. Click **Select Date**  next to the **Start** field, and select the early or actual start date from the linked schedule. A selected option indicates an actual date.
 - c. Click **Select Date**  next to the **Finish** field, and select the early or actual finish date from the linked schedule. A selected option indicates an actual date.
- 10) In the **Details** section of the Punch List item dialog box:
 - a. Use the **Responsible Item** drop-down list to cross-reference another punch list item. For example, you might create a punch list item for one party that affects a second party. When you create a punch list item for the second party, you can cross-reference the original punch list item in this field so the second party can look it up.
 - b. In the **Value** field, enter the value for the punch list item.
- 11) In the **Issues** section of the Punch List item dialog box, click **Link** to open the Select Issue Dialog Box and link an issue to the punch list item. You can link more than one issue.
- 12) In the **Attachments** section of the Punch List item dialog box:
 - ▶ Click **Attach File** to attach a file to the document.
 - ▶ Click **Attach from Repository** to attach a document from the content repository.
 - ▶ Click **Attach URL** to attach a web address to the document.

Note: If you are using Firefox, and if the Attachment Storage Type for the project is set to File Server in the Contract Management Administration application, then you cannot attach files while the **I am currently connected to the file server** option in the User Settings dialog is selected. To open the User Settings dialog, navigate to the **Control Center**, right click **All Projects**, and then click **User Settings**.

Save the Punch List item:

Click **Save and Close** to close the dialog box and save the new punch list item.

Saving Document Versions

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Versioning Documents Overview

Version Document Overview

Documents in any of the Contract Management modules often go through many changes as the project progresses. Maintaining accurate project documents is an integral part of the project. Contract Management provides a Version Document feature to maintain a history of the changes for each module in the Contract Management database. Use the feature to create new versions of a document at different stages which will provide a "snapshot" of the project at various stages.

Notes:

- The Version Document feature is only available if Contract Management is configured to connect to the Oracle Universal Content Management Repository or the Microsoft SharePoint content management system. For more information on configuring this feature, see the installation guide for Oracle or MSSQL.
- The process for creating versions of Invoices and Worksheets is slightly different. For information on creating versions of an invoice, see [Create Invoice Versions](#). For information on creating versions of a worksheet, see [Create Cost Worksheet Versions](#).

Contract Management uses a content repository (Oracle Universal Content Management or Microsoft SharePoint) to maintain versions of both the document and any attachments. The document version will be stored as an .html file.

Caution: If you delete or move document versions directly in the repository itself, or if you switch repositories in Contract Management, you will be unable to create new versions of the previously versioned documents.

With the Document Version feature, you can:

- ▶ Automatically store a version of a document in the content repository.
- ▶ Manually store one or more versions of a document in the content repository.
- ▶ View All Document Versions.
- ▶ Store attachment properties for a version.
- ▶ Choose whether to store attachments in the document repository or on a file server.
- ▶ Specify the location where the attachments will be stored in the content repository.
- ▶ Store multiple versions of an attachment.
- ▶ View all versions of an attachment.
- ▶ Migrate all attachments created in versions of Contract Management 12.1 or earlier to the content repository.

Set Version Document Preferences

Configuring the Version Document and Attachment Features

When configuring the Content Management version and attachment feature, Oracle Primavera recommends that you set the attachment storage type only when creating new projects, or when a plan is in place to migrate the attachments for an existing project to the new repository. Switching back and forth between the file server and the content repository is not recommended.

- 1) Log on to the Contract Management Administration Application.
- 2) Click the **Content Management** link.
- 3) For new projects:
 - a. To automatically version documents, select the **Version Documents on Save for new projects** option.
 - b. To use the repository for attachments, select the **Store attachments in the repository for new projects** option.
- 4) Click the name of the appropriate project to select it.
- 5) To automatically create a new version of a document when you save the document, select the option in the **Version Documents on Save** column for the selected project.
- 6) Click the field under the **Attachment Storage Type** field, and then click the arrow to choose which type of storage to use for the attachments (File Server or Repository).
 - ▶ If you chose **File Server** as the storage type, go to step 7.
 - ▶ If you chose **Repository** as the storage type, go to step 10. The attachments will automatically be stored on the repository under the project and contract. You do not choose the location.
- 7) Click the (box plus sign) icon to specify a location for attachments for the project. All attachments for this project will go in the same location.
- 8) Under the **Location Name** field, enter the name of the location file server where the attachments will be stored.
- 9) Under the **Path** field, click the blank area under the word "Path," and then click **browse**. This displays the Select Folder dialog box. Navigate to the proper location, click the folder, and then click the **Select Folder** button.
- 10) Click **Save** when finished.

Using the Version Document Feature

Working with the Version Documents Feature

You must use the Contract Management Administration Application to set up the Contract Management Document Versioning feature.

Contract Management offers different ways to version a document, worksheet and invoice. Read through the following information to learn more about versioning a new document, invoice, cost worksheet or accessing versions of a document.

Accessing Previous Document Versions

If you have a document version checked out from the content repository, you will not be able to view that version from Contract Management. You must first undo the checkout, and then you will be able to view the version from Contract Management.

Caution: If you delete or move document versions directly in the repository itself, or if you switch repositories in Contract Management, you will be unable to create new versions of previously versioned documents.

To access a previous version of a document:

- 1) From the module log window, open the document in view mode.
- 2) Click the **Versions** tab. This tab will only be visible when the document is in view mode, and not in edit mode.
 - ▶ Contract Management displays a default list of last ten versions created in reverse chronological order.
 - ▶ To view a list of all versions when there are more than ten stored in the repository, select the **Show all Versions** option to display the whole list.
- 3) Click the document icon for the version you want to review.

Creating Document Versions

Caution: If you delete or move document versions directly in the repository itself, or if you switch repositories in Contract Management, you will be unable to create new versions the previously versioned documents.

To create a new version of a document:

- 1) From the appropriate module log window, open the document in view mode. Do this by clicking the name of the document, not the edit document icon.
- 2) Click the **Versions** tab. The document must be in view mode, not in edit mode, or the Versions tab will not display.
- 3) From the **Select an action** drop-down list, select **Version Document**.

- 4) Click **Yes** in response to the *Do you want to version this document?* prompt. The new version information will be listed on the Versions tab.

Creating Invoice Versions

You can create versions of an invoice from any of the Contract or Purchase Order document windows. If an invoice was created for a document, you cannot create or version a payment requisition for it. Conversely, if a payment requisition was created for a document, you cannot create or version an invoice for it.

To version an invoice:

- 1) From the Contract or Purchase Order log window, click the name of the document, not the edit document icon, to open the document in view mode.
- 2) On the **Contract Summary** tab, click the **Invoice** subordinate tab.
- 3) On the **Invoice** subordinate tab, click the underlined title link for the invoice to open it in the view mode. Do not click the edit document icon.
- 4) Click **Version Document** on the invoice.
- 5) Click **Yes** in response to the *Do you want to version this document?* prompt.
- 6) In the Invoice window, click the **Versions** tab. All versions of the current invoice will be listed here in reverse chronological order. Click a document to open a version.

Creating Cost Worksheet Versions

You can create a new version of the Cost Worksheet log from the Cost Worksheet log window. Cost Worksheets often undergo many changes over a period of time. The Version Worksheet option helps you to maintain a set of versions of a worksheet log. You can analyze and compare different versions to view the changes between them.

To create a new version of a worksheet log:

- 1) On the Cost Worksheet log window, choose **Version Worksheet** from the **Select an action** drop-down list.
- 2) Click **Yes** in response to the *Do you want to version this document?* prompt.
- 3) From the **Select an action** drop-down list, choose **View Worksheet Versions** to open the Cost Worksheet Versions window. The new version information will be listed on the Cost Worksheet dialog box.

View All Document Versions

Caution: If you delete or move document versions directly in the repository itself, or if you switch repositories in Contract Management, you will be unable to create new versions of the previously versioned documents.

To access a list of all document versions:

- 1) Open in View mode the document for which you want to view the versions.

- 2) Click the **Versions** tab. On the Versions tab there is a default list of the last ten versions created in reverse chronological order.
- 3) To view a list of all versions when there are more than ten stored in the repository, select the **Show all Versions** option to display the whole list.
- 4) To sort the list in a different order, click one of the headers (**Version**, **User Account**, or **Date**).

Exchanging Contract Management Data

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Exchanging Contract Management Data with a P6 EPPM Schedule

Working with P6 EPPM Schedules

Setting Up P6 EPPM Schedules for Use with Contract Management

If you use Contract Management and P6 EPPM, you can exchange project data between the products in the way that works best for your organization. This section suggests steps for setting up projects to benefit from the interchange.

Management Checklist

Setting up a smooth export/import process between Contract Management and P6 EPPM requires some initial planning. The owner, construction manager, or other person responsible for managing contracts should work with P6 EPPM project controls coordinator to build the schedule and standardize the procedures used to create and update projects.

Note: You can import Contract Management data into P6 EPPM 3.5x, 4.0, 4.1, and 5.0.

P6 EPPM project controls coordinator should perform the following steps before importing Contract Management data:

- 1) If you plan to export requisition data to update costs in the P6 EPPM project, specify two decimal places for calculations in the P6 EPPM project for compatibility with Contract Management schedule of values cost.
- 2) When assigning cost codes to activities in the P6 EPPM project, do not assign resources to activities for which you plan to update costs. The costs are exchanged as expenses rather than resources. Also, make sure the cost codes are the same as those being used in the Contract Management database from which you are exporting data.
Cost codes exchanged between the P6 EPPM project and Contract Management should be no longer than 30 characters.
Contract Management exports all cost codes and corresponding distribution amount per document, but will not recognize the cost code for activities with an assigned resource associated with their cost code.
- 3) If you plan to create new activities in the P6 EPPM project from Contract Management, define the Responsibility activity code in the P6 EPPM Activity Codes dialog box. The company abbreviation in the Contract Management Company Directory will be assigned as Responsibility code values for the new activities during the export.
- 4) Notify the person responsible for Contract Management contract control that these steps have been completed.
- 5) The Contract Management administrator links the P6 EPPM project to the Contract Management project and incorporates the schedule activities in the documents. The data can then be imported into P6 EPPM.

Contract Management Documents Linked to Activities

You can import data from Contract Management to create and update activities in a P6 EPPM project for the following types of documents:

- ▶ Change Orders
- ▶ Drawing Sets
- ▶ Purchase Orders
- ▶ Budgeted Contracts and Committed Contracts
- ▶ Materials
- ▶ Requisitions (Schedule of Values)
- ▶ Daily Reports
- ▶ Procurement Items
- ▶ Punch Lists
- ▶ Submittals

You can also create cost accounts and RESP codes in a P6 EPPM schedule by exporting data from Contract Management.

You can associate and update dates for the following Contract Management documents with P6 EPPM activities:

- ▶ Change Management
- ▶ Materials
- ▶ Punch List Items
- ▶ Change Order Line Items
- ▶ Noncompliance Notices
- ▶ Purchase Orders and Purchase Order Line Items
- ▶ Budgeted Contract Line Items/Committed Contract Line Items
- ▶ Notices
- ▶ Requests for Information
- ▶ Daily Reports
- ▶ Procurement Items
- ▶ Submittals and Submittal Packages
- ▶ Drawing Sets
- ▶ Proposals
- ▶ Trend Line Items

Linking to a P6 EPPM Schedule

You can link projects scheduled in P6 EPPM to Contract Management projects. Once this link is established, you can use activities in these projects to build and update Contract Management project data. You can create a connection from the Contract Management to any P6 EPPM project. You can then specify the project name in Contract Management using the Schedule tab in the Project Settings dialog box.

Note: Before you can access schedule data, you need to set up the P6 EPPM connection using the Contract Management Server Configuration utility. See the installation guide for Oracle or MSSQL for more information.

Note the following before linking Contract Management to a P6 EPPM project:

- ▶ You can link one P6 EPPM project group or project per Contract Management project.
- ▶ Contract Management assumes a continuous, seven-day work calendar for the linked P6 EPPM project regardless of its calendar assignment in the P6 EPPM schedule.
- ▶ You must update the data for the P6 EPPM project each time you change values in the Activity Codes dialog box. In P6 EPPM, choose **File, Commit Changes**, and **File, Refresh Data** to refresh the data and save changes.

Connect a Contract Management Project to a P6 EPPM Project

- 1) Right-click on the project name in the Project View and choose **Project Settings**.
- 2) Click the **Schedule** tab.
- 3) Select **Primavera** from the **Schedule** drop-down list.
- 4) Select a database from the **Database** drop-down list.
- 5) Select the P6 EPPM project to which you want to connect from the **Project** drop-down list.
- 6) Click **Save**. P6 EPPM activities will appear in Activity ID selection lists within Contract Management documents for the linked project.

Notes:

- Even if you do not have access to P6 EPPM from your PC, you can view schedule data from within a Contract Management project.
 - You must manually change activity IDs associated with existing Contract Management documents if the Contract Management project is later linked to a different P6 EPPM project.
-

Display a Chart of All Activities in the Linked P6 EPPM Project

Click **Schedule** in the **Project Information** folder for a project to display a chart of all activities in the linked P6 EPPM project. The activities are listed by early start date.

Importing Contract Management Data into P6 EPPM Projects

You can import Contract Management data into P6 EPPM projects to create or status activities. When you create new activities in the P6 EPPM project from Contract Management, the activity ID and description, early start, early finish, cost code and title, and company abbreviation (for the RESP activity code in the P6 EPPM project) are added.

To import Contract Management data into a P6 EPPM project:

- 1) Open the P6 EPPM project into which you want to import.
- 2) Choose **File, Import from Contract Management**.
- 3) After selecting the options you want to import into P6 EPPM, click **Import**.
- 4) Before the import begins, the **Contract Management Import Report** dialog box appears. This dialog box shows all fields that will be updated. Click **Commit Changes** to execute the import.
- 5) Once complete, you can view the updated information in P6 EPPM. You can also open the original documents in the Contract Management from the link in P6 EPPM. Customize the activity detail to show the Contract Management Docs tab. Highlight the Contract Management document and click **View**.

Assigning Activity IDs to Contract Management Documents

After you create all the necessary activities in the P6 EPPM schedule and link the Contract Management project to it, you can assign activity IDs to Contract Management documents and view early and actual start and finish dates, original and remaining durations, percent complete, and total float for individual activities.

Note: Once a Contract Management project has been linked to a P6 EPPM schedule, activities can no longer be manually entered into Contract Management. They can only be selected from the list of P6 EPPM schedule activities. To manually enter an activity into Contract Management, you must disconnect the project from the P6 EPPM schedule.

To assign activity IDs:

- 1) Open the Contract Management document in Edit mode.
- 2) Click the **Schedule** tab.
- 3) Click **Select** on the Schedule tab to select an activity ID to assign to the document. To view activity data, click the **Schedule** icon. You can use this function in contracts, submittals, requisitions, daily reports, and other documents in which you assigned activity IDs.

If you are working with submittals, the seven different activities associated with the submittal are displayed. Other documents display one activity.

You can create activities and update actual dates and costs for P6 EPPM activities based on the associated Contract Management document for which you have recorded start or completed dates. Use P6 EPPM activities to update submittal activity dates. If you choose to update submittals from the schedule, the dates are updated from the linked application. When you select an activity in the **Submittal Preparation** field, the start date will update the required start date. Updating the Approval Period finish date will update the required finish date. If you choose to update submittals from the lead time, the dates are calculated based on the duration of each schedule activity.

Importing Field Mappings from Contract Management into P6 EPPM

The downloaded release contains a list of the field mappings when an import of Contract Management data is performed from within P6 EPPM. The Contract Management mappings document lists the field mappings for the transfer from Contract Management 9.x and later to P6 EPPM (using the import from Contract Management utility in P6 EPPM).

Access these files from the downloaded release media.

P6 EPPM Notes:

- P6 EPPM task table information can be found on the Status Tab in P6 EPPM.
- P6 EPPM taskactv table information can be found on the Codes Tab in P6 EPPM.
- P6 EPPM projcost table information can be found on the Expenses Tab in P6 EPPM.
- P6 EPPM actvcode and actvtype table information can be found in Activity Code dictionaries. Select Enterprise, Activity Codes.
- P6 EPPM account table information can be found in the Cost Account dictionary. Select Enterprise, Cost Accounts.

Contract Management Module Notes:

- The following Contract Management documents are found in the Logs folder: Drawing Sets, Daily Reports, Materials, Punch Lists, and Submittals.
 - The following Contract Management documents are found in the Contract Information folder: Budgeted Contracts, Committed Contracts, Purchase Orders, Schedule of Values, and Change Orders.
-

Retrieving Field Mappings from P6 EPPM into Contract

The field mappings from P6 EPPM into Contract Management are listed in the Contract Management mappings document, available from your downloaded release media.

Exchanging Contract Management Module Data with Other Applications

Exporting Contract Management Module Data to Other Applications

You can export Contract Management module data into .CSV format as a spreadsheet or a spreadsheet with headers. Select any export report from the export report environment, and create the export file using the Save As function from the Export window.

Note: You must have access rights to export data.

To export data from a Contract Management module project:

- 1) Right-click on a project in the Project View and click **Export**. In the Export window select the document type from which you want to export, and click **Show**.
- 2) Click **Preview** to view the document.
- 3) Select the report that corresponds to the type of data you want to export. Reports are available for contacts, contracts, purchase orders, cost codes, daily reports, drawings, notepads, notices, punch lists, requests for information, specification sections, and submittals.

For example, to export cost codes and titles, select **r_export_cost_codes** from the list. Click **Preview** after you select a report.

Note: The Export window automatically defaults to the library that corresponds to the log you are in.

- 4) Click **Save As**, and select an export format in the **Files of Type** field in the **Save** window. To retain the column headings in the exported file, choose the Spreadsheet with Headers option.

Note: If you click **Save As** and the report or form you selected contains multibyte characters, see **Saving Reports and Forms with Multibyte Characters** (on page 237).

- 5) In the **Save In** field, select the folder in which you want to store the export report; in the **File Name** field, type a name to identify the report without an extension, which Contract Management supplies automatically when you specify a file type. Click **Save**.

Saving Reports and Forms with Multibyte Characters

When you click Save As, and the report or form you selected contains multi-byte characters perform the following steps.

To save reports and forms with multibyte characters:

- 1) In the **Save** dialog box, click the arrow on the right side of the **Save in** field, and navigate to the location where you want to save the document.
- 2) In the **File name** field enter a name for the document.

- 3) Click the arrow on the right side of the **Files of type** field and choose **Spreadsheet** or **Spreadsheet with Headers**.

Note: Multi-byte documents saved in CSV Spreadsheet with Headers format will not display properly in Microsoft Excel. Use Notepad to display these documents.

Importing Data from Other Applications

You can import data from comma-separated value (.CSV Spreadsheet with Headers) files to insert and update data for the modules listed below. The import file must contain specific table and column names on the first line of the CSV file being imported. The best way to set up an import file is to first export data from Contract Management to the CSV Spreadsheet with Headers format, since Contract Management supplies the correct field name placement when you run the export.

Follow these guidelines for preparing import files:

- ▶ Use an export CSV Spreadsheet with Headers file as a template for the import file.
- ▶ You cannot import fields that cannot be edited on-screen.
- ▶ The first row must be a *header*.
- ▶ Each row in the import file can contain both master and detail column information; master and detail columns can be interspersed.
- ▶ Import files must include all key fields for the type of data imported; for example, import files for the Company Directory must include the contact initials.

| Imported Data | Key Field Names |
|-------------------------------|---|
| <i>Company Data*</i> | <i>VNMT.vendor_abbrev</i> <i>VNDT.initials (to import addresses)</i> |
| <i>Cost Worksheet</i> | <i>CSMT_TABLE.cost_code</i> |
| <i>Submittals†</i> | <i>SBPK.package_number</i> <i>SBMT_TABLE.submittal_no</i> |
| <i>Specification Sections</i> | <i>SPEC.section_value</i> |
| <i>Punch Lists</i> | <i>PNMT.punch_list_name</i> <i>PNDT.item_number</i> |
| <i>Notepads</i> | <i>NPMT.note_pad</i> <i>NPDT.item_number</i> |

| | |
|---------------------------------|---|
| <i>Requests for Information</i> | <i>CRQT.to_vendor</i> <i>CRQT.from_vendor</i> <i>CRQT.change_number</i> <i>CRQT.item_type</i> |
| <i>Drawings</i> | <i>DWMT_TABLE.drawing_number</i> |
| <i>Contracts/POs</i> | <i>CNMT_TABLE.item_type</i> <i>CNMT.document_number</i> |
| <i>Daily Reports</i> | <i>CNMT_TABLE.from_vendor</i> <i>DRMT.vendor_abbrev</i> <i>DRMT.report_date</i> <i>DRMT.report_period</i> |
| <i>Notices</i> | <i>DRMT.vendor_abbrev_ini</i> <i>CNTE.item_type</i> <i>CNTE.to_vendor</i> <i>CNTE.from_vendor</i> |
| <i>Procurements</i> | <i>PROCURE_ITEM.spec_section</i> <i>PROCURE_ITEM.purchase_type</i> <i>PROCURE_ITEM.csi_division</i> <i>PROCURE_ITEM.title</i> |
| | <p>* If you are importing contact initials, the VNMT.vendor_abbrev must be included in each VNDT.initials record.</p> <p>† You can only import submittals that are in packages. If importing only SBMT rows, you still must include the SBPK.package_number in the import file.</p> |

To import data to a Contract Management module project:

- 1) Right-click on the project you want to import data and click **Import** to open the Import window.
- 2) Edit the **File** and **Location** fields. Click **Import** to import the data; this process adds new records to the specified document or updates records if they exist. If duplicate records are encountered during the import, they are ignored.
- 3) When the import process is complete, click **Close**.

- 4) Import automatically displays a status window containing row numbers of duplicate rows, columns that were ignored, and any other errors.
- 5) Click **Print** to get a printed record of all the errors.

Import Specifications

This section lists the fields that can be imported into Contract Management for each module and table.

| Module | Contract Management Module Table Name | Column Name |
|---------------|--|--------------------|
| Company | VNMT | company_name |
| Company | VNMT | contract_number |
| Company | VNMT | dbe |
| Company | VNMT | default_initials |
| Company | VNMT | default_location |
| Company | VNMT | mbe |
| Company | VNMT | remarks |
| Company | VNMT | spec_section |
| Company | VNMT | tax_id_number |
| Company | VNMT | vendor_abbrev |
| Company | VNMT | vendor_role |
| Company | VNMT | wbe |
| Contact | VNDT | address_line_1 |
| Contact | VNDT | address_line_2 |
| Contact | VNDT | address_line_3 |
| Contact | VNDT | beeper_phone |
| Contact | VNDT | city |
| Contact | VNDT | copies |

| | | |
|-----------|------------|-----------------|
| Contact | VNDT | country |
| Contact | VNDT | country_code |
| Contact | VNDT | extension |
| Contact | VNDT | fax |
| Contact | VNDT | initials |
| Contact | VNDT | location |
| Contact | VNDT | mail_address |
| Contact | VNDT | mail_method |
| Contact | VNDT | mobile_phone |
| Contact | VNDT | name |
| Contact | VNDT | office_phone |
| Contact | VNDT | paper_size |
| Contact | VNDT | postal_code |
| Contact | VNDT | state |
| Contact | VNDT | tax_id_number |
| Contact | VNDT | title |
| Contracts | CNMT_TABLE | Accepted_By |
| Contracts | CNMT_TABLE | Accepted_by_1 |
| Contracts | CNMT_TABLE | Accepted_by_2 |
| Contracts | CNMT_TABLE | Accepted_Date_1 |
| Contracts | CNMT_TABLE | Accepted_Date_2 |
| Contracts | CNMT_TABLE | Bill_Add_Line_1 |
| Contracts | CNMT_TABLE | Bill_Add_Line_2 |
| Contracts | CNMT_TABLE | Bill_Add_Line_3 |
| Contracts | CNMT_TABLE | Bill_City |
| Contracts | CNMT_TABLE | Bill_Company |
| Contracts | CNMT_TABLE | Bill_Country |

| | | |
|-----------|------------|------------------------|
| Contracts | CNMT_TABLE | Bill_Postal_Code |
| Contracts | CNMT_TABLE | Bill_Country_Code |
| Contracts | CNMT_TABLE | Bill_State |
| Contracts | CNMT_TABLE | Bill_Vendor_Abbrev_ini |
| Contracts | CNMT_TABLE | Completion_Date |
| Contracts | CNMT_TABLE | DBE |
| Contracts | CNMT_TABLE | Description |
| Contracts | CNMT_TABLE | Document_Date |
| Contracts | CNMT_TABLE | Document_Number |
| Contracts | CNMT_TABLE | Fob_Via |
| Contracts | CNMT_TABLE | Freight |
| Contracts | CNMT_TABLE | From_Add_Line_1 |
| Contracts | CNMT_TABLE | From_Add_Line_2 |
| Contracts | CNMT_TABLE | From_Add_Line_3 |
| Contracts | CNMT_TABLE | From_City |
| Contracts | CNMT_TABLE | From_company |
| Contracts | CNMT_TABLE | From_Country |
| Contracts | CNMT_TABLE | From_Country_Code |
| Contracts | CNMT_TABLE | From_Postal_Code |
| Contracts | CNMT_TABLE | From_State |
| Contracts | CNMT_TABLE | From_Vendor |
| Contracts | CNMT_TABLE | From_Vendor_ini |
| Contracts | CNMT_TABLE | Item_type |
| Contracts | CNMT_TABLE | Lump_Cost |
| Contracts | CNMT_TABLE | Lump_Tax |
| Contracts | CNMT_TABLE | Lumo_Tax_Rate |

| | | |
|-----------|------------|------------------------|
| Contracts | CNMT_TABLE | Managers_Name |
| Contracts | CNMT_TABLE | MBE |
| Contracts | CNMT_TABLE | Reference_Number |
| Contracts | CNMT_TABLE | Ref_Activity_ID |
| Contracts | CNMT_TABLE | Ref_Cost_Account |
| Contracts | CNMT_TABLE | Ref_Cost_Category |
| Contracts | CNMT_TABLE | Remarks |
| Contracts | CNMT_TABLE | Ship_Add_Line_1 |
| Contracts | CNMT_TABLE | Ship_Add_Line_2 |
| Contracts | CNMT_TABLE | Ship_Add_Line_3 |
| Contracts | CNMT_TABLE | Ship_City |
| Contracts | CNMT_TABLE | Ship_Company |
| Contracts | CNMT_TABLE | Ship_Country |
| Contracts | CNMT_TABLE | Ship_Country_Code |
| Contracts | CNMT_TABLE | Ship_State |
| Contracts | CNMT_TABLE | Ship_Vendor_Abbrev_ini |
| Contracts | CNMT_TABLE | Ship_Vendor_Abbrev |
| Contracts | CNMT_TABLE | Spec_Section |
| Contracts | CNMT_TABLE | Start_Date |
| Contracts | CNMT_TABLE | Status |
| Contracts | CNMT_TABLE | Terms |
| Contracts | CNMT_TABLE | To_Add_Line_1 |
| Contracts | CNMT_TABLE | To_Add_Line_2 |
| Contracts | CNMT_TABLE | To_Add_Line_3 |

| | | |
|-----------|------------|-------------------|
| Contracts | CNMT_TABLE | To_City |
| Contracts | CNMT_TABLE | To_Company |
| Contracts | CNMT_TABLE | To_Country |
| Contracts | CNMT_TABLE | To_Country_Code |
| Contracts | CNMT_TABLE | To_Postal_Code |
| Contracts | CNMT_TABLE | To_State |
| Contracts | CNMT_TABLE | To_Vendor_ini |
| Contracts | CNMT_TABLE | Unit_Cost |
| Contracts | CNMT_TABLE | Unit_Tax |
| Contracts | CNMT_TABLE | WBE |
| Contracts | CNMT_TABLE | Has_Started |
| Contracts | CNMT_TABLE | Has_Completed |
| Contracts | CNDT_TABLE | Ball_in_court |
| Contracts | CNDT_TABLE | Ball_in_court_ini |
| Contracts | CNDT_TABLE | Completion_Date |
| Contracts | CNDT_TABLE | Item_Number |
| Contracts | CNDT_TABLE | Material_Code |
| Contracts | CNDT_TABLE | Package_Number |
| Contracts | CNDT_TABLE | Quantity |
| Contracts | CNDT_TABLE | Ref_Activity_Id |
| Contracts | CNDT_TABLE | Ref_Resource |
| Contracts | CNDT_TABLE | Sales_Tax |
| Contracts | CNDT_TABLE | Sales_Tax |
| Contracts | CNDT_TABLE | Status |

| | | |
|---------------|------------|---------------------|
| Contracts | CNDT_TABLE | Stock_Description |
| Contracts | CNDT_TABLE | Submittal |
| Contracts | CNDT_TABLE | Units |
| Contracts | CNDT_TABLE | Unit_Price |
| Cost Codes | CSMT_TABLE | cost_code |
| Cost Codes | CSMT_TABLE | title |
| Cost Codes | CSMT_TABLE | projected_to_commit |
| Daily Reports | DRMT | Additional_Comments |
| Daily Reports | DRMT | Daily_Report |
| Daily Reports | DRMT | Day_of_week |
| Daily Reports | DRMT | Precipitation |
| Daily Reports | DRMT | Report_Date |
| Daily Reports | DRMT | Report_Number |
| Daily Reports | DRMT | Report_Period |
| Daily Reports | DRMT | Sy |
| Daily Reports | DRMT | Temperature |
| Daily Reports | DRMT | Vendor_Abbrev |
| Daily Reports | DRMT | Vendor_Abbrev_ini |
| Daily Reports | DRMT | Wind |
| Daily Reports | DREQ | Description |
| Daily Reports | DREQ | Equipment_Source |
| Daily Reports | DREQ | Equipment_Type |
| Daily Reports | DREQ | Remark |
| Daily Reports | DRLB | Apprentices |

| | | |
|---------------|------------|-------------------|
| Daily Reports | DRLB | Category |
| Daily Reports | DRLB | Change_Number |
| Daily Reports | DRLB | Field_Source |
| Daily Reports | DRLB | Foreman |
| Daily Reports | DRLB | Journeymen |
| Daily Reports | DRLB | Remark |
| Daily Reports | DRLB | Supervisors |
| Daily Reports | DRLB | Work_Area |
| Daily Reports | DRVS | Company_Repsnted |
| Daily Reports | DRVS | Remark |
| Daily Reports | DRVS | Time_of_Visit |
| Daily Reports | DRVS | Vendor_Abbrev |
| Daily Reports | DRVS | Vendor_Abbrev_ini |
| Daily Reports | DRVS | Visitor_Name |
| Drawings | DWMT_TABLE | area |
| Drawings | DWMT_TABLE | bid_package |
| Drawings | DWMT_TABLE | designer |
| Drawings | DWMT_TABLE | designer_ini |
| Drawings | DWMT_TABLE | discipline |
| Drawings | DWMT_TABLE | drawing_number |
| Drawings | DWMT_TABLE | drawing_phase |
| Drawings | DWMT_TABLE | file_number |
| Drawings | DWMT_TABLE | spec_section |
| Drawings | DWMT_TABLE | title |

| | | |
|---------------|------|----------------------|
| Notepads | NPMT | contract_number |
| Notepads | NPMT | description |
| Notepads | NPMT | note_pad |
| Notepad Items | NPDT | ball_in_court |
| Notepad Items | NPDT | ball_in_court_ini |
| Notepad Items | NPDT | date_closed |
| Notepad Items | NPDT | date_opened |
| Notepad Items | NPDT | date_required |
| Notepad Items | NPDT | item_number |
| Notepad Items | NPDT | notes |
| Notepad Items | NPDT | status |
| Notices | CNTE | Approved_Date |
| Notices | CNTE | Ball_in_court |
| Notices | CNTE | Ball_in_court_ini |
| Notices | CNTE | Change_Date |
| Notices | CNTE | Change_Issue |
| Notices | CNTE | Change_Number |
| Notices | CNTE | Cntr_From_Vendor |
| Notices | CNTE | Cntr_From_Vendor_ini |
| Notices | CNTE | Cntr_Sys_Type |
| Notices | CNTE | Cntr_to_Vendor |
| Notices | CNTE | Cntr_To_Vendor_ini |
| Notices | CNTE | Completion_Date |
| Notices | CNTE | Contract_Number |

| | | |
|---------|------|---------------------|
| Notices | CNTE | Cost |
| Notices | CNTE | From_Vendor |
| Notices | CNTE | From_Vendor_ini |
| Notices | CNTE | From_Manager |
| Notices | CNTE | Has_Completed |
| Notices | CNTE | Has_Started |
| Notices | CNTE | Item_Type |
| Notices | CNTE | Ref_Activity_Id |
| Notices | CNTE | Ref_Cost_Account |
| Notices | CNTE | Ref_Cost_Category |
| Notices | CNTE | Ref_From_Abbrev |
| Notices | CNTE | Ref_From_Abbrev_ini |
| Notices | CNTE | Ref_To_Abbrev |
| Notices | CNTE | Ref_To_Abbrev_ini |
| Notices | CNTE | Ref_Type |
| Notices | CNTE | Remarks |
| Notices | CNTE | Required_Date |
| Notices | CNTE | Responded_Date |
| Notices | CNTE | Spec_Section |
| Notices | CNTE | Start_Date |
| Notices | CNTE | Status |
| Notices | CNTE | Time_Change |
| Notices | CNTE | To_Manager |
| Notices | CNTE | To_Vendor |

| | | |
|-----------|------------|----------------------|
| Notices | CNTE | To_Vendor_ini |
| Proposals | CPMT_TABLE | Approved_Date |
| Proposals | CPMT_TABLE | Approved_Date_2 |
| Proposals | CPMT_TABLE | Ball_in_court |
| Proposals | CPMT_TABLE | Ball_in_court_ini |
| Proposals | CPMT_TABLE | Change_Date |
| Proposals | CPMT_TABLE | Change_Issue |
| Proposals | CPMT_TABLE | Change_Number |
| Proposals | CPMT_TABLE | Cntr_From_Vendor |
| Proposals | CPMT_TABLE | Cntr_From_Vendor_ini |
| Proposals | CPMT_TABLE | Cntr_Sys_Type |
| Proposals | CPMT_TABLE | Cntr_To_Vendor |
| Proposals | CPMT_TABLE | Cntr_To_Vendor_ini |
| Proposals | CPMT_TABLE | Completion_Date |
| Proposals | CPMT_TABLE | Contract_Number |
| Proposals | CPMT_TABLE | Contract_Type |
| Proposals | CPMT_TABLE | From_manager |
| Proposals | CPMT_TABLE | From_Vendor_ini |
| Proposals | CPMT_TABLE | Has_Started |
| Proposals | CPMT_TABLE | Has_Completed |
| Proposals | CPMT_TABLE | Item_type |
| Proposals | CPMT_TABLE | Lump_Cost |
| Proposals | CPMT_TABLE | Lump_Tax |
| Proposals | CPMT_TABLE | Lump_Tax |

| | | |
|-----------|------------|---------------------|
| Proposals | CPMT_TABLE | Ref_Activity_Id |
| Proposals | CPMT_TABLE | Ref_Cost_Account |
| Proposals | CPMT_TABLE | Ref_Cost_Category |
| Proposals | CPMT_TABLE | Ref_From_Abbrev |
| Proposals | CPMT_TABLE | Ref_From_Abbrev_ini |
| Proposals | CPMT_TABLE | Ref_Number |
| Proposals | CPMT_TABLE | Ref_To_Abbrev |
| Proposals | CPMT_TABLE | Ref_To_Abbrev_ini |
| Proposals | CPMT_TABLE | Ref_Type |
| Proposals | CPMT_TABLE | Remarks |
| Proposals | CPMT_TABLE | Required_Date |
| Proposals | CPMT_TABLE | Responded_Date |
| Proposals | CPMT_TABLE | Signed_by_1 |
| Proposals | CPMT_TABLE | Signed_by_2 |
| Proposals | CPMT_TABLE | Spec_Section |
| Proposals | CPMT_TABLE | Start_Date |
| Proposals | CPMT_TABLE | Status |
| Proposals | CPMT_TABLE | Time_Change |
| Proposals | CPMT_TABLE | Title |
| Proposals | CPMT_TABLE | To_Manager |
| Proposals | CPMT_TABLE | To_Vendor |
| Proposals | CPMT_TABLE | To_Vendor_ini |
| Proposals | CPMT_TABLE | Unit_Cost |
| Proposals | CPMT_TABLE | Unit_Tax |

| | | |
|-------------|------------|-------------------|
| Proposals | CPMT_TABLE | Vendor_Role |
| Proposals | CPDT_TABLE | Ball_in_court |
| Proposals | CPDT_TABLE | Ball_in_court_ini |
| Proposals | CPDT_TABLE | Completion_Date |
| Proposals | CPDT_TABLE | Description |
| Proposals | CPDT_TABLE | Item_Number |
| Proposals | CPDT_TABLE | Material_Code |
| Proposals | CPDT_TABLE | Quantity |
| Proposals | CPDT_TABLE | Ref_Activity_Id |
| Proposals | CPDT_TABLE | Ref_Item_Num |
| Proposals | CPDT_TABLE | Ref_Resource |
| Proposals | CPDT_TABLE | Sales_Tax |
| Proposals | CPDT_TABLE | Sales_tax |
| Proposals | CPDT_TABLE | Start_Date |
| Proposals | CPDT_TABLE | Status |
| Proposals | CPDT_TABLE | Stock_Number |
| Proposals | CPDT_TABLE | Units |
| Proposals | CPDT_TABLE | Unit_Price |
| Punch Lists | PNMT | contract_number |
| Punch Lists | PNMT | from_vendor |
| Punch Lists | PNMT | from_vendor_ini |
| Punch Lists | PNMT | long_descrpt |
| Punch Lists | PNMT | punch_list_name |
| Punch Lists | PNMT | short_descrpt |

| | | |
|-------------------------|------|-------------------|
| Punch Lists | PNMT | to_vendor |
| Punch Lists | PNMT | to_vendor_ini |
| Punch List Items | PNDT | ball_in_court |
| Punch List Items | PNDT | ball_in_court_ini |
| Punch List Items | PNDT | date_closed |
| Punch List Items | PNDT | date_required |
| Punch List Items | PNDT | description |
| Punch List Items | PNDT | duplicated_by |
| Punch List Items | PNDT | elevation |
| Punch List Items | PNDT | item_number |
| Punch List Items | PNDT | location |
| Punch List Items | PNDT | ref_activity_id |
| Punch List Items | PNDT | responsible_item |
| Punch List Items | PNDT | room |
| Punch List Items | PNDT | status |
| Punch List Items | PNDT | value |
| Request for Information | CRQT | answer |
| Request for Information | CRQT | approved_date |
| Request for Information | CRQT | approved_date2 |
| Request for Information | CRQT | ball_in_court |
| Request for Information | CRQT | ball_in_court_ini |
| Request for Information | CRQT | change_date |

| | | |
|-------------------------|------|---------------------|
| Request for Information | CRQT | change_issue |
| Request for Information | CRQT | change_number |
| Request for Information | CRQT | cntr_from_vndr |
| Request for Information | CRQT | cntr_from_vndr_ini |
| Request for Information | CRQT | cntr_to_vndr |
| Request for Information | CRQT | cntr_to_vndr_ini |
| Request for Information | CRQT | completion_date |
| Request for Information | CRQT | contract_number |
| Request for Information | CRQT | contract_type |
| Request for Information | CRQT | cost |
| Request for Information | CRQT | from_manager |
| Request for Information | CRQT | from_vendor |
| Request for Information | CRQT | from_vendor_ini |
| Request for Information | CRQT | has_completed |
| Request for Information | CRQT | has_started |
| Request for Information | CRQT | item_type |
| Request for Information | CRQT | ref_activity_id |
| Request for Information | CRQT | ref_from_abbrev |
| Request for Information | CRQT | ref_from_abbrev_ini |

| | | |
|-------------------------|------|-------------------|
| Request for Information | CRQT | ref_number |
| Request for Information | CRQT | ref_to_abbrev |
| Request for Information | CRQT | ref_to_abbrev_ini |
| Request for Information | CRQT | ref_type |
| Request for Information | CRQT | remarks |
| Request for Information | CRQT | required_date |
| Request for Information | CRQT | responded_date |
| Request for Information | CRQT | sign_by1 |
| Request for Information | CRQT | signed_by2 |
| Request for Information | CRQT | spec_section |
| Request for Information | CRQT | start_date |
| Request for Information | CRQT | status |
| Request for Information | CRQT | time_change |
| Request for Information | CRQT | title |
| Request for Information | CRQT | to_manager |
| Request for Information | CRQT | to_vendor |
| Request for Information | CRQT | to_vendor_ini |
| Specification Section | SPEC | description |
| Specification Section | SPEC | section_value |
| Submittal Packages | SBPK | contract_number |

| | | |
|--------------------|------------|---------------------------|
| Submittal Packages | SBPK | forwarded_to |
| Submittal Packages | SBPK | forwarded_to_ini |
| Submittal Packages | SBPK | package_number |
| Submittal Packages | SBPK | received_from |
| Submittal Packages | SBPK | received_from_ini |
| Submittal Packages | SBPK | required_finish |
| Submittal Packages | SBPK | required_start |
| Submittal Packages | SBPK | returned_by |
| Submittal Packages | SBPK | returned_by_ini |
| Submittal Packages | SBPK | sent_to |
| Submittal Packages | SBPK | sent_to_ini |
| Submittal Packages | SBPK | status |
| Submittal Packages | SBPK | submittal_no |
| Submittal Packages | SBPK | title |
| Submittals | SBMT_TABLE | appr_activity |
| Submittals | SBMT_TABLE | approval_finish |
| Submittals | SBMT_TABLE | approval_lead_time |
| Submittals | SBMT_TABLE | approval_start |
| Submittals | SBMT_TABLE | approve_has_finished |
| Submittals | SBMT_TABLE | approve_has_started |
| Submittals | SBMT_TABLE | code |
| Submittals | SBMT_TABLE | construction_activity |
| Submittals | SBMT_TABLE | construction_finish |
| Submittals | SBMT_TABLE | construction_has_finished |

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| Submittals | SBMT_TABLE | construction_has_started |
| Submittals | SBMT_TABLE | construction_start |
| Submittals | SBMT_TABLE | contract_number |
| Submittals | SBMT_TABLE | delivery_actv |
| Submittals | SBMT_TABLE | delivery_finish |
| Submittals | SBMT_TABLE | delivery_has_finished |
| Submittals | SBMT_TABLE | delivery_has_started |
| Submittals | SBMT_TABLE | delivery_lead_time |
| Submittals | SBMT_TABLE | delivery_start |
| Submittals | SBMT_TABLE | drawing |
| Submittals | SBMT_TABLE | fab_rel_activity |
| Submittals | SBMT_TABLE | fab_release_fin |
| Submittals | SBMT_TABLE | fab_release_lead_time |
| Submittals | SBMT_TABLE | fab_release_st |
| Submittals | SBMT_TABLE | fab_time |
| Submittals | SBMT_TABLE | fabricate_actv |
| Submittals | SBMT_TABLE | fabricate_finish |
| Submittals | SBMT_TABLE | fabricate_lead_time |
| Submittals | SBMT_TABLE | fabricate_start |
| Submittals | SBMT_TABLE | fabstart_has_finished |
| Submittals | SBMT_TABLE | fabstart_has_started |
| Submittals | SBMT_TABLE | filed_app_date |
| Submittals | SBMT_TABLE | filed_vendor |
| Submittals | SBMT_TABLE | filed_vendor_ini |

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| Submittals | SBMT_TABLE | forwarded_to |
| Submittals | SBMT_TABLE | forwarded_to_ini |
| Submittals | SBMT_TABLE | item_number |
| Submittals | SBMT_TABLE | item_in_submttl |
| Submittals | SBMT_TABLE | package_number |
| Submittals | SBMT_TABLE | received_from |
| Submittals | SBMT_TABLE | received_from_ini |
| Submittals | SBMT_TABLE | release_has_finished |
| Submittals | SBMT_TABLE | release_has_started |
| Submittals | SBMT_TABLE | required_finish |
| Submittals | SBMT_TABLE | required_start |
| Submittals | SBMT_TABLE | resubmit_activity |
| Submittals | SBMT_TABLE | resubmit_finish |
| Submittals | SBMT_TABLE | resubmit_has_finished |
| Submittals | SBMT_TABLE | resubmit_has_started |
| Submittals | SBMT_TABLE | resubmit_lead_time |
| Submittals | SBMT_TABLE | resubmit_start |
| Submittals | SBMT_TABLE | returned_by |
| Submittals | SBMT_TABLE | returned_by_ini |
| Submittals | SBMT_TABLE | second_app_code |
| Submittals | SBMT_TABLE | second_app_code_ini |
| Submittals | SBMT_TABLE | second_app_date |
| Submittals | SBMT_TABLE | sent_to |
| Submittals | SBMT_TABLE | sent_to_ini |

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| Submittals | SBMT_TABLE | source_vendor |
| Submittals | SBMT_TABLE | source_vendor_ini |
| Submittals | SBMT_TABLE | submit_act_date |
| Submittals | SBMT_TABLE | submit_activity |
| Submittals | SBMT_TABLE | submit_finish |
| Submittals | SBMT_TABLE | submit_has_finished |
| Submittals | SBMT_TABLE | submit_has_started |
| Submittals | SBMT_TABLE | submit_lead_time |
| Submittals | SBMT_TABLE | submit_start |
| Submittals | SBMT_TABLE | submittal_no |
| Submittals | SBMT_TABLE | title |
| Submittals | SBMT_TABLE | user_appr_date |
| Submittals | SBMT_TABLE | user_code |
| Submittals | SBMT_TABLE | user_code_ini |