



ORACLE® | PRIMAVERA®

**CONTRACT MANAGEMENT  
NON-FINANCIALS USER'S GUIDE**

**FEBRUARY 2014**



## GETTING HELP

The following resources are available to all Primavera users:

- This reference manual, Contract Management Help and the companion **Financial** manual.
- The Construction Technology Group (CTG) Help Desk:  
via phone:       **518-257-3700**  
via email:       **CTGmailbox@DASNY.org**

Additional resources available to DASNY employees:

- Refer to DASNY **Policies and Procedures** for additional information when processing transactions within Contract Management.

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## OBTAINING A DASNY CONTRACT MANAGEMENT ACCOUNT

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New accounts for both internal and external users are requested by the DASNY Project staff by filling out an I.S. Access Request.

Navigate to the DASNY Intranet page.

1. Within **Applications** select **I.S. Access Request**

### Non-DASNY Contract Management

At least two weeks in advance, as IS access request should be submitted for non-DASNY access to Contract Management

- click in the radio button for a New Employee and check the box for non-DA employee making sure that
  - the top portion of the request is filled out for the external person, not the DASNY employee submitting the request
  - In the area for non-DA employee company, you have entered the company for which this person works
  - In the area for non-DA employee e-mail , you have entered that person's e-mail address
- Check the box for Contract Management (Non-DASNY)
- In the comments block on the bottom of the form, enter the project number(s) for the projects you would like the new user to be able to access
- Let the external person know that they will be receiving a non-Disclosure agreement from the Information Security Officer (ISO) and that this form must be signed and faxed back as instructed

### Access to Additional Projects

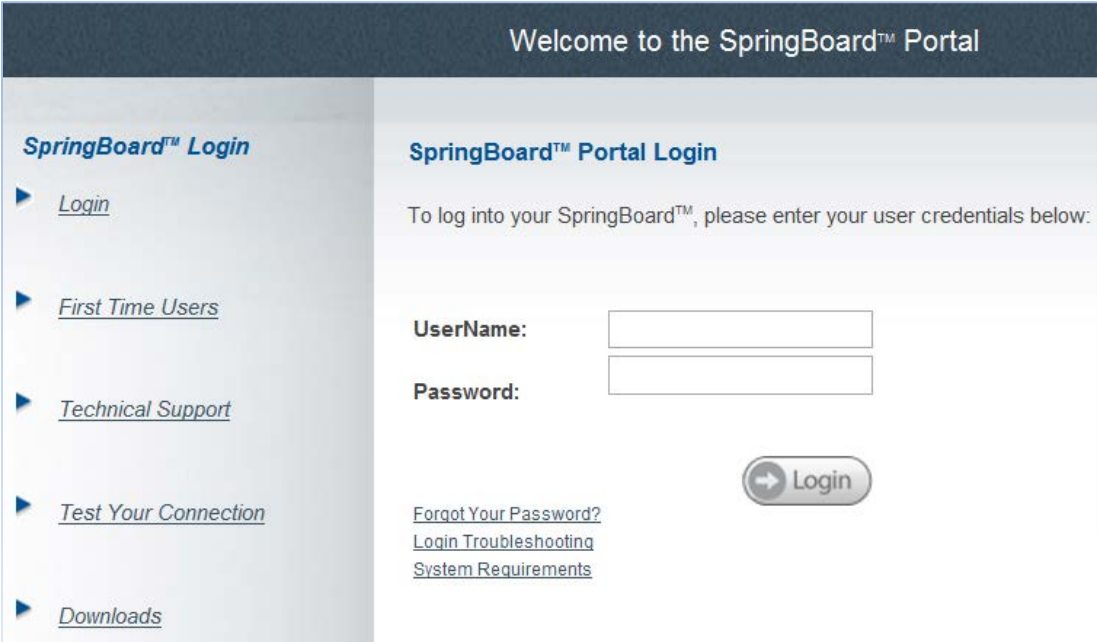
An e-mail from the DASNY Project Manager to the [ctgmailbox@dasny.org](mailto:ctgmailbox@dasny.org) is all that is required to add projects to existing accounts.



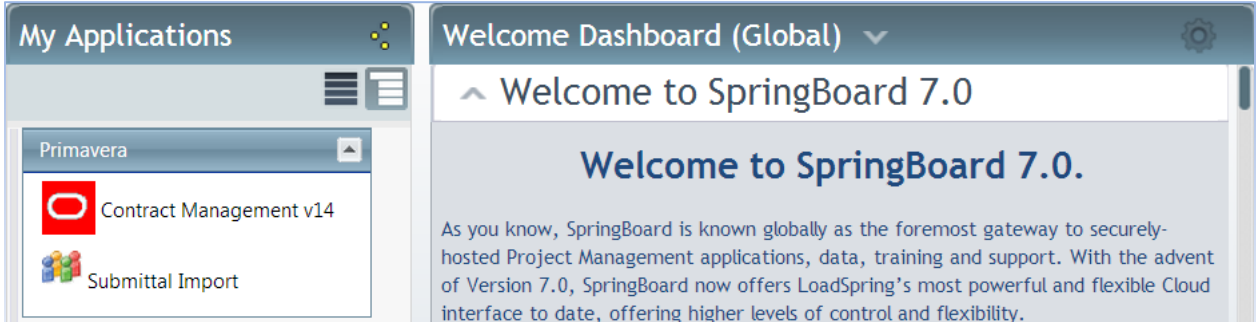
# LOGGING INTO CONTRACT MANAGEMENT

## Logging in from an External Computer

Navigate to [www.myloadspring.com](http://www.myloadspring.com) and enter your UserName and Password into the SpringBoard™ Portal.



Select Contract Management v14 within My Applications.




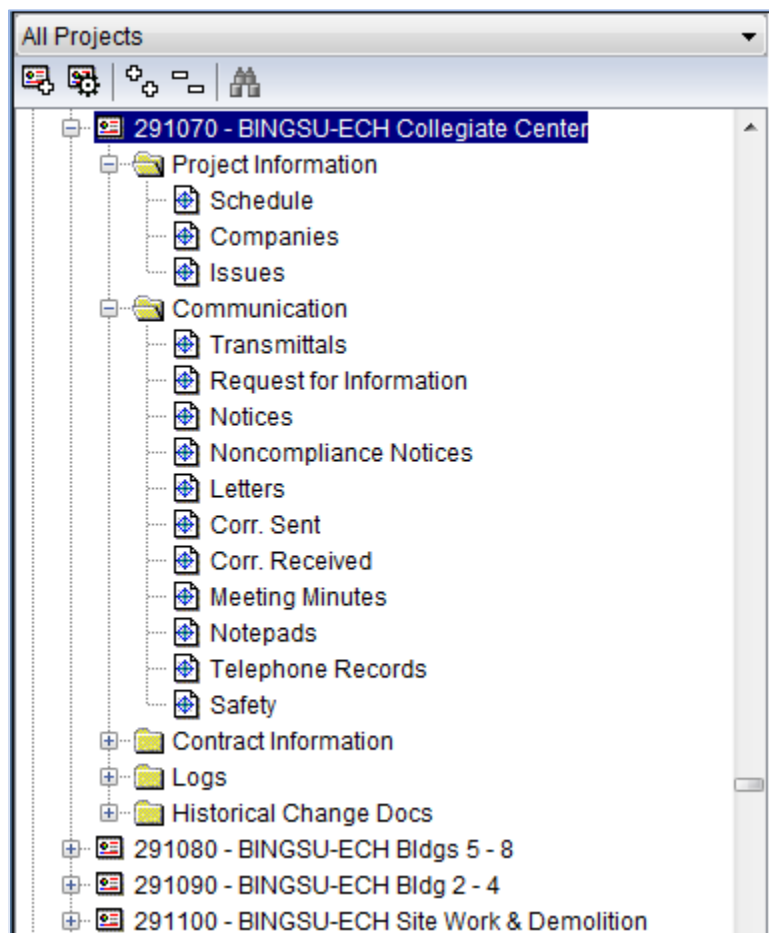
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## THE PROJECTS VIEW






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The **Projects View** is located to the left of the Control Center and only lists the projects you have permission to work in.

Click the  symbol next to a project to expand the folders.



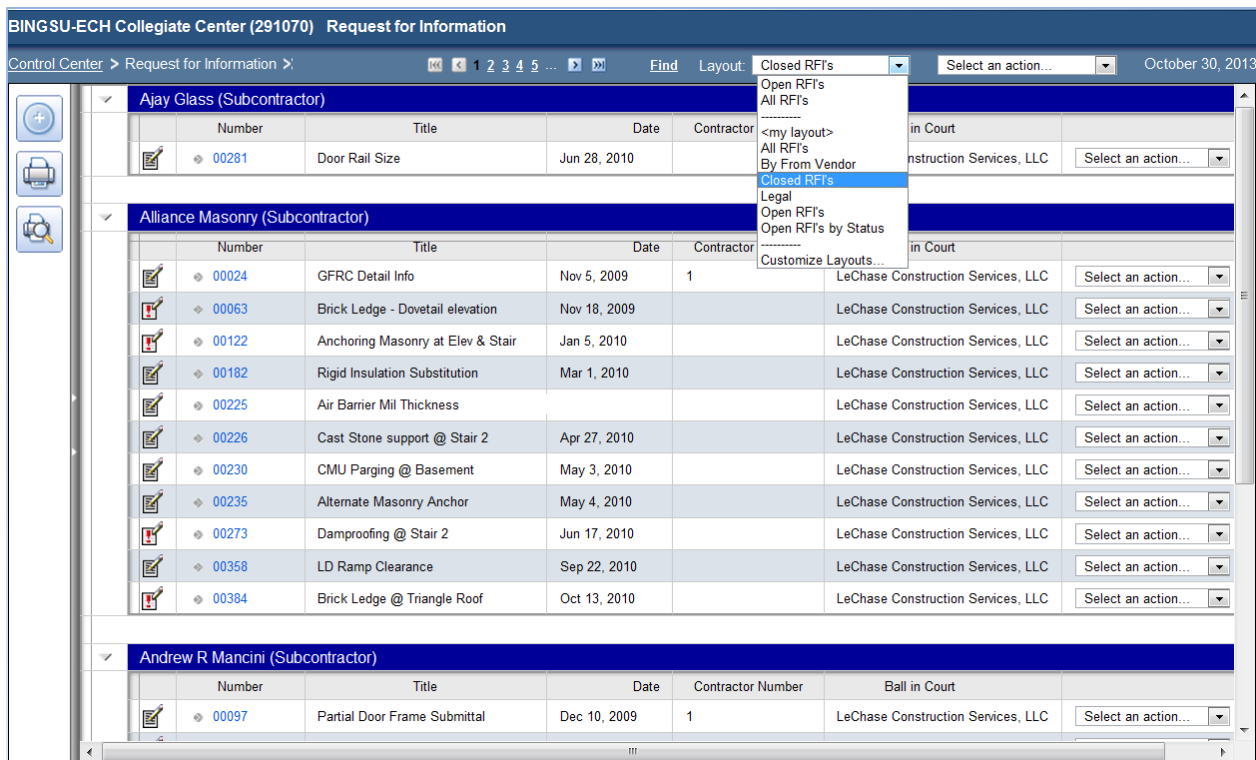
Each project contains **5 folders**:

-  Project Information
-  Communication
-  Contact Information
-  Logs
-  Historical Change Documents

Click the  symbol next to a folder to view the **modules** that are located within the folder.

The modules listed are based on your access.

Single-click on any module name and the **Log** for that module will open.



Number	Title	Date	Contractor	Ball in Court
00281	Door Rail Size	Jun 28, 2010		
00024	GFRC Detail Info	Nov 5, 2009	1	LeChase Construction Services, LLC
00063	Brick Ledge - Dovetail elevation	Nov 18, 2009		LeChase Construction Services, LLC
00122	Anchoring Masonry at Elev & Stair	Jan 5, 2010		LeChase Construction Services, LLC
00182	Rigid Insulation Substitution	Mar 1, 2010		LeChase Construction Services, LLC
00225	Air Barrier Mil Thickness			LeChase Construction Services, LLC
00226	Cast Stone support @ Stair 2	Apr 27, 2010		LeChase Construction Services, LLC
00230	CMU Parging @ Basement	May 3, 2010		LeChase Construction Services, LLC
00235	Alternate Masonry Anchor	May 4, 2010		LeChase Construction Services, LLC
00273	Damproofing @ Stair 2	Jun 17, 2010		LeChase Construction Services, LLC
00358	LD Ramp Clearance	Sep 22, 2010		LeChase Construction Services, LLC
00384	Brick Ledge @ Triangle Roof	Oct 13, 2010		LeChase Construction Services, LLC
00097	Partial Door Frame Submittal	Dec 10, 2009	1	LeChase Construction Services, LLC

To open a document, click the **Edit Icon**  to the left of the document Number/Title.

The top left corner of the screen identifies the type of document or log that is open.

BINGSU-ECH Collegiate Center (291070) Request for Information : 00281 | Burt Hill

Control Center > Request for Information Log > Request for Information > Select an action... October 30, 2013

General Review Status Question Answer Details Drawings Schedule Custom Fields Issues Attachments

Type \* Request for Information

To \* Burt Hill  
Andrew Wagner

From \* LeChase Construction Services, LLC  
Lisa James

Number \* 00281

Date Jun 28, 2010

Title Door Rail Size

\* Required

Save Cancel

On the bottom right corner of every document there is **Save Button**.

After selecting **save**, the document will be switched to **view mode**.



To switch back to edit mode, click **Edit Document**

Clicking [Request for Information Log](#) will return you to the RFI log.

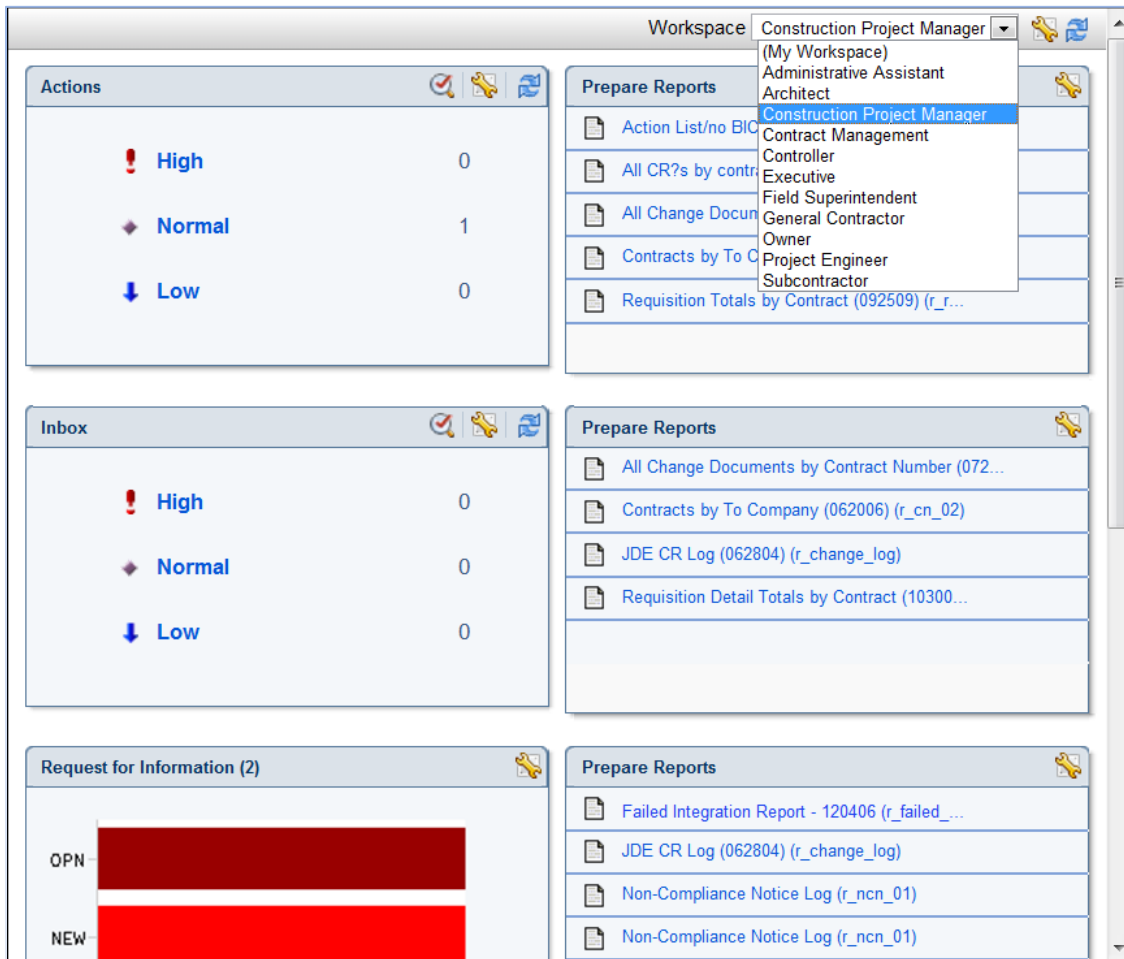
Clicking [Control Center](#) will return you to the main page.

## THE CONTROL CENTER

The right side of the Contract Management home page contains the **Control Center** which contains the **Actions**, **Inbox** and **Request for Information (RFI)** objects that provide shortcuts and information on the project.

The **Construction Project Manager** Workspace also contains links to frequently used Forms and Reports.

These are described in detail on the following pages.



**Note:** The information in the Control Center is related to the project that is activated.

## ACTIONS

The **Actions** object lists all open documents where you have been identified as the Ball-In-Court (**BIC**).

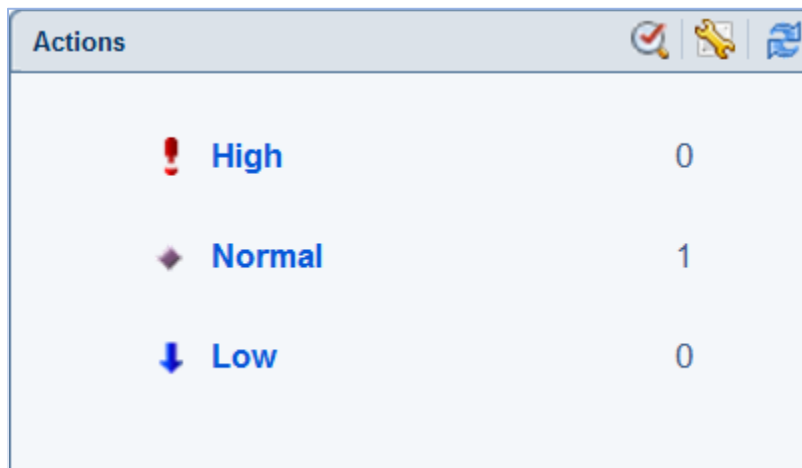
**Note:** The **User Account** field, within Contacts, should be populated for all Users who intend to utilize the **BIC** function.

Each document is listed as a link in Actions.


To view the action list:


1. Start in the **Control Center**.

- Click **View All Actions** .



The **Action List** will open.

Low			
Request for Information			
 Test Whitelist	due in 4 days	Michael Tancredi	320150

2. Click **Edit Icon**  to open the document in edit mode.
3. Click [Return to Action List - All](#) to view other actionable items.
4. Click [Control Center](#) when you are finished working within Actions.

## THE INBOX

The Send to Inbox option provides a method to send a document to other Contract Management users within the application. A comment can be included when using this option.

### Sending Inbox Messages

1. Open the document to be sent.
2. From the dropdown list, select and click “**Send to Inbox**”.

The screenshot shows the 'Control Center' interface for a document titled 'BINGSU-ECH Bldgs 5 - 8 (291080) Requisition : 00008 | Dormitory Authority - State of NY'. The breadcrumb trail is 'Control Center > Payment Requisitions Log > Requisition >'. The document details are as follows:

<b>Contract/PO *</b>	Special Inspections & Material (129926-052)
<b>To *</b>	Dormitory Authority - State of NY Not Applicable
<b>From *</b>	Atlantic Testing Laboratories, Limit Jennifer Bray
<b>Period To *</b>	Mar 15, 2012
<b>Application Number</b>	00008

A dropdown menu is open, showing the following options: Select an action..., Select an action..., Spelling, Print Form, Print Preview, Advanced Print, Send to Corr Sent, Send to Corr Rcvd, **Send to Inbox** (highlighted), E-Mail Form, Record Payment, Generate Requisition, Generate Transmittal, and Delete Document. The date 'October 30, 2013' is visible in the top right corner.

The **Send To Inbox** window will open.

The 'Send to Inbox' dialog box is shown with the following fields:

- Send to \***: Michael Tancredi (dropdown menu)
- Priority**: Normal (dropdown menu)
- Comment**: For your review and approval.

3. From the drop-down list, select and click the addressee the document is being sent to.

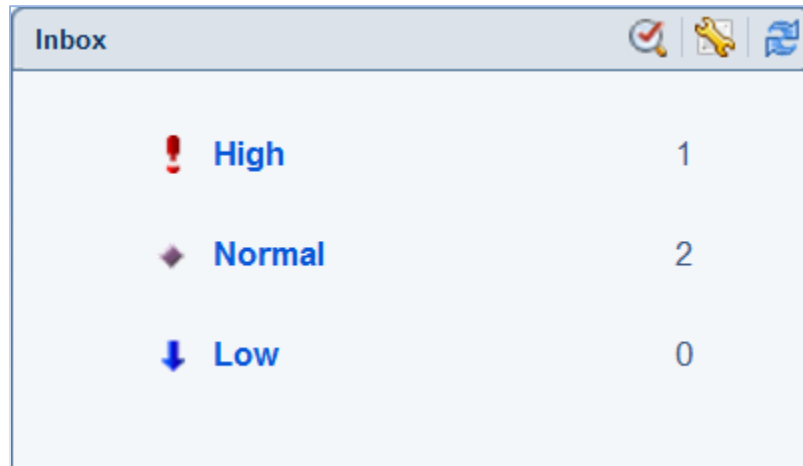
**Note:** Only users who have access to this project appear on this list and the document can only be sent to one user at a time.

4. Type a message in the Comment field.

5. Click .





## Reading Inbox Messages

From the Control Center:



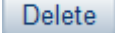

1. Click **View All Inbox Items** .

The Inbox will open.

Normal							
▼	Request for Information						
<input type="checkbox"/>		Set Screw Steel Connectors	Oct 31, 2013	10:39	Michael Tancredi	291080	
<input type="checkbox"/>		Set Screw Steel Connectors	Oct 31, 2013	10:35	Michael Tancredi	291080	

Inbox messages may include documents from all projects you have access to. The project number is indicated next to the name of the person who sent the message.

Inbox messages with comments attached will appear with **Comments** .

2. To remove an item from the inbox, check the checkbox and click .
3. Click the **Edit Icon**  to open a document.

The document will open in edit mode.

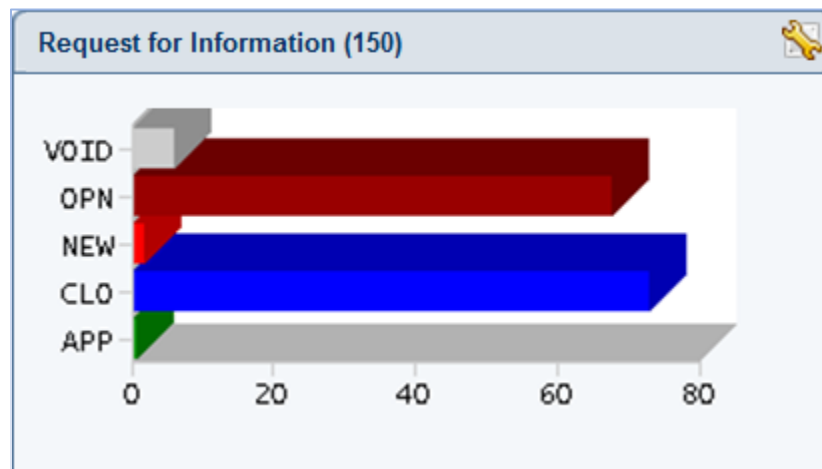
4. Click [Return to Inbox](#) to view other items within your inbox.
5. Click [Control Center](#) when you are finished working in the inbox.



B.06

## THE REQUEST-FOR-INFORMATION BAR CHART

The RFI bar chart is a graphical representation of the number of RFIs in your project.



The bar chart is interactive for the **activated project**. To activate a different project, click on the project number/name in the **project list**.

Click on one of the status bars to open a list of RFI documents.

	Title	Project	To	From	Document No.
	◊ Condensate Vent Pipe	FLDDSO-Install New Boiler,B#67 (254310)	Bergmann Associates Inc.	Unified Mechanical Contractors, Inc.	00002
	◊ Condensate line & Header is 3"	FLDDSO-Install New Boiler,B#67 (254310)	Bergmann Associates Inc.	Unified Mechanical Contractors, Inc.	00007
	◊ Copper water line	FLDDSO-Install New Boiler,B#67 (254310)	Bergmann Associates Inc.	Unified Mechanical Contractors, Inc.	00003
	◊ Housekeeping Pad Under CRU-2	FLDDSO-Install New Boiler,B#67 (254310)	Bergmann Associates Inc.	Unified Mechanical Contractors, Inc.	00005
	◊ Housekeeping Pad for Air Compressor	FLDDSO-Install New Boiler,B#67 (254310)	Bergmann Associates Inc.	Unified Mechanical Contractors, Inc.	00004
	◊ Non Return Gage Vales Security Bldg	FLDDSO-Install New Boiler,B#67 (254310)	Bergmann Associates Inc.	Unified Mechanical Contractors, Inc.	00008

Click **View Document** to open an RFI document.

Refer to the Request for Information chapter for instructions on working with these documents.

## PREPARE REPORTS SHORTCUTS

The right side of the Control Center contains shortcuts to some frequently used reports. These shortcuts provide access to the reports with fewer keystrokes.




For information on accessing all of the available forms and reports, refer to **Section C - Printing Documents and Reports**.

Clicking on any of the reports links in the Control Center will open a print-preview of the report.

A report prompt criteria may open if there are filters built into the report.

Report Criteria		
Column	Status	Reason Code
Criteria:	<input type="text"/>	<input type="text"/>
Or:	<input type="text"/>	<input type="text"/>

Select  to view the report after entering the Report Criteria or leave the fields blank to see all the information available.

## PRINTING DOCUMENTS AND REPORTS

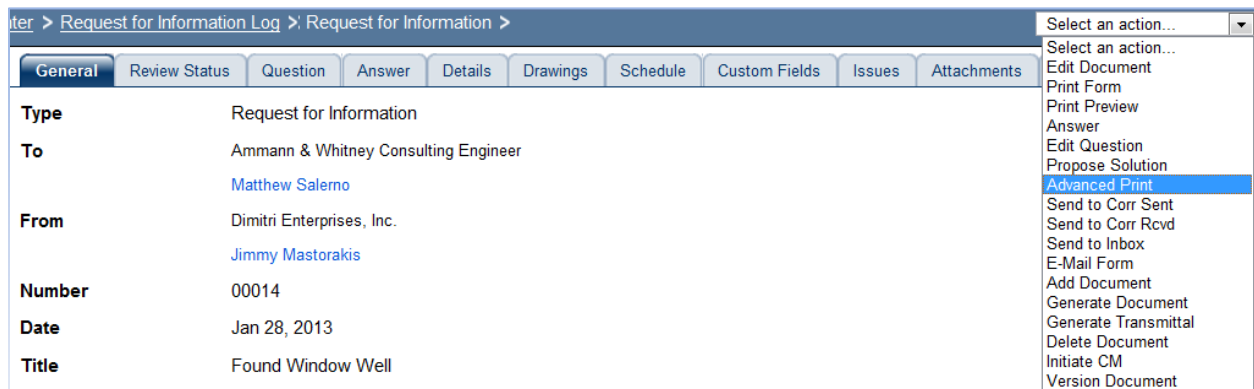
**Forms** and **Reports** are used to print project data that has been entered in Contract Management.

- **Forms** contain information on a single document.
  - For example, the RFI form will print a single RFI document.
- **Reports** are tabulations or summary information involving multiple documents. Some reports contain filters that allow the user to customize the information included in the report.
  - For example, RFI logs are reports.
- **Reports - Dunning Letters** search for all open documents in a log and will create a letter to each contact with a list of all outstanding items in that log.
  - For example, running Reports - Dunning letters in Submittals will produce a letter to each contractor with outstanding submittals as well as a letter to the design consultant listing any submittals that are being held in review.

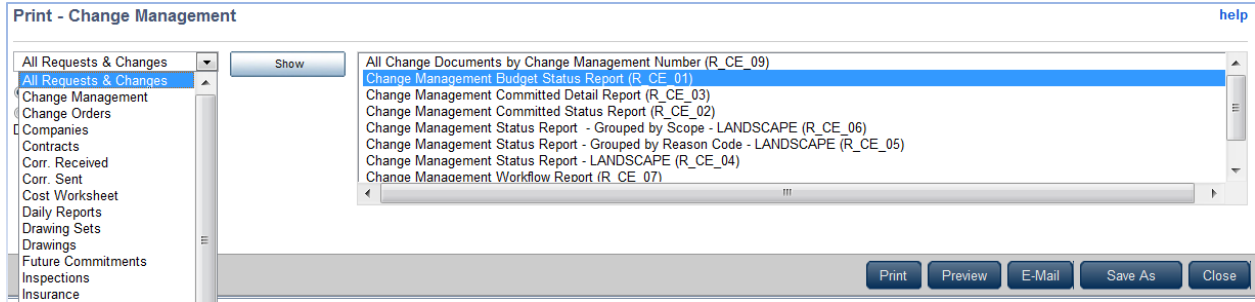
Forms and Reports are specific to each document type and can be found in each log and document. Many modules contain more than one form and report to select from.

### Print a Form

1. Select **Advanced Print** from the drop-down list of the document.




The **Print** window opens.



2. Select the form to be printed.

- Click .

3. To print this form, click .

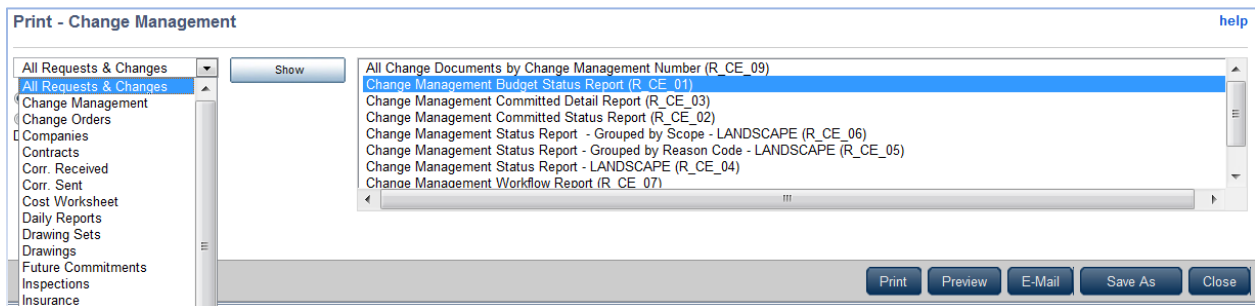
4. Click  to close the Print Window and return to the document.

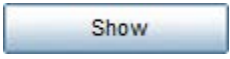
## Print a Report

1. Select **Advanced Print**  while the Project is selected.



The Print Reports window opens.



2. Select the module from the dropdown list and click  for a list of reports available.

3. Select the report to be printed.

- Click .

**Note:** If the **Report Criteria** window opens there is a filter on the report. Many reports have filters that can be input to identify specific conditions.

- Leave the field blank, if the criterion is not known.

4. To print this report, click .

5. Click  to close the Print Window and return to the document.

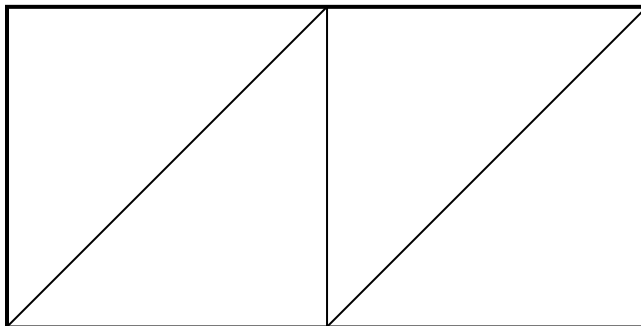
### Add Corporate Logo

A corporate logo will print on forms for a company selected as the “**From**” company on a document.

To have a logo added to CM, send an e-mail to: **CTGmailbox@dasny.org** with the following information.

Image File requirements:

- **File Extensions:** .tif, .gif, .jpeg, .pdf
- The image must have an aspect ratio of 2:1 (twice as long as it is tall) in order to render without distortion.
- **Size:** there are no requirements for the size of the image; it will be scaled down to fit.


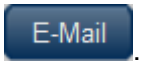


## E-MAIL DOCUMENTS


Forms and Report can be e-mailed from Contract Management.

1. Open the document you wish to e-mail.
2. Select **“Advanced Print”** from the drop-down list.

The Form or Report window will open.

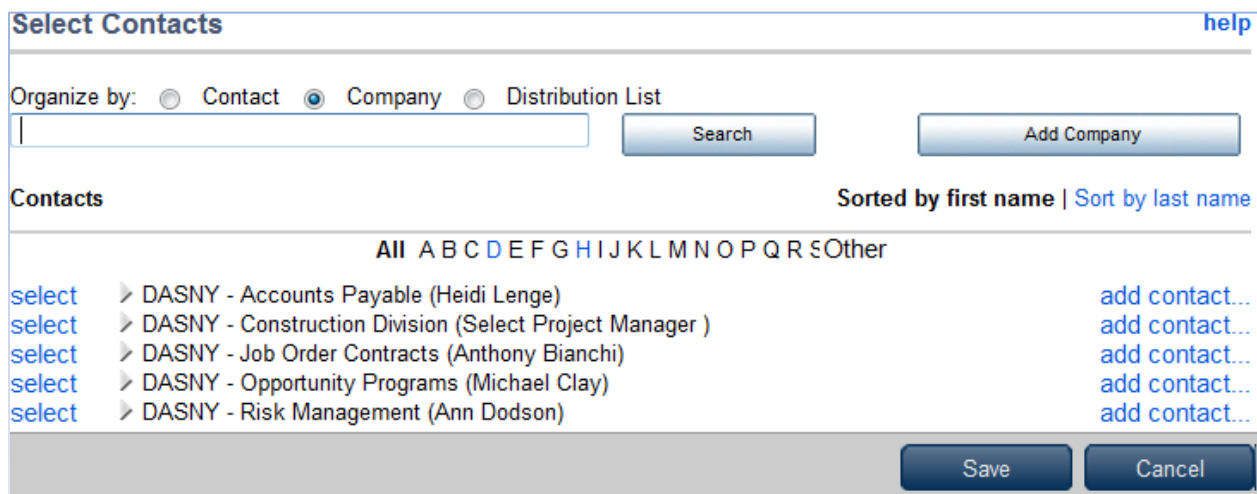
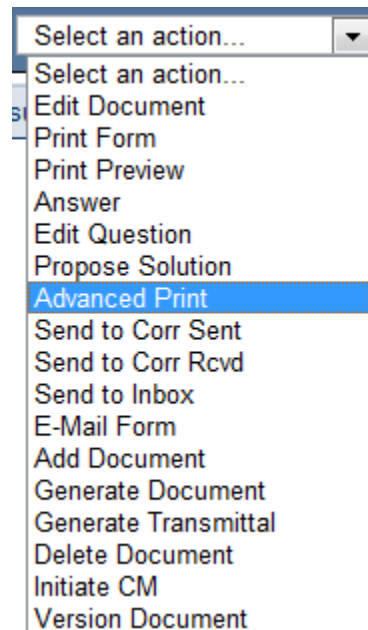
3. Click  and review the document.
4. Click .


The E-mail window opens

5. Click **Select To** , to add names to the e-mail.

To add or edit contacts and distribution lists, refer to **Sections C.07** and **C.08**.


6. Search by **Contact**, **Company** or **Distribution list**.



7. Click  after selecting e-mail recipients.

**Note:** E-mail addresses may also be manually added. A **comma** should be used to

separate e-mail addresses.

8. Enter the **Remarks** for the e-mail. This text will appear in the body of the e-mail message.
9. Click  to send.

Each recipient will receive the document as a PDF.

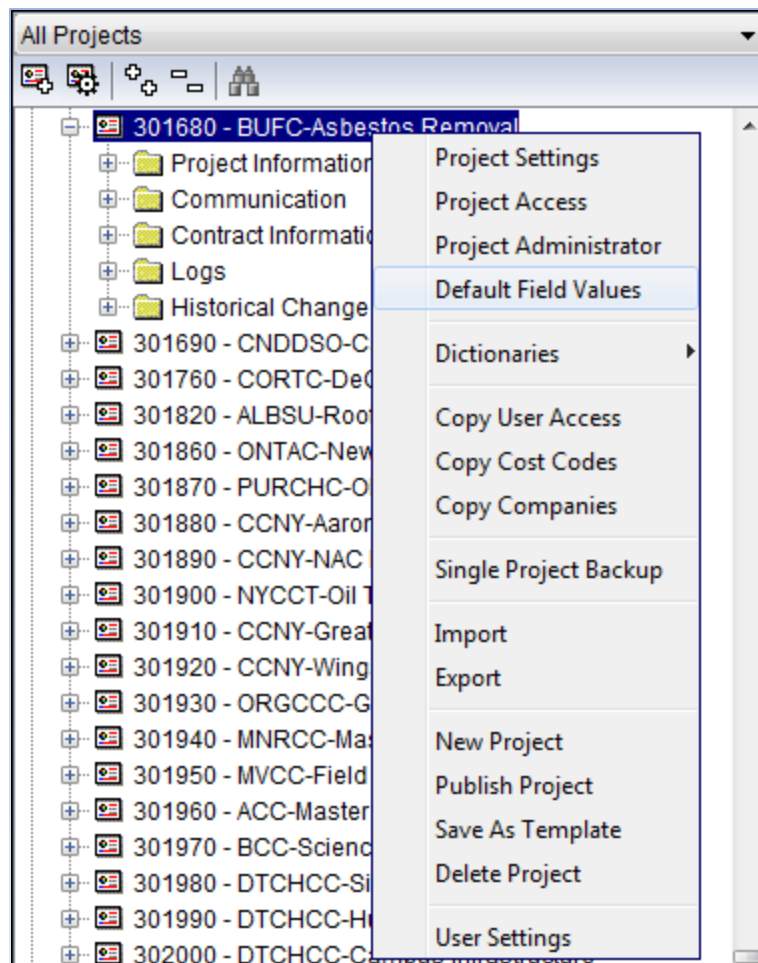
## DEFAULT FIELD VALUES

Default Field Values can be set to identify the value of certain fields in documents. Once set, they will be the same on all documents created in a project.

The fields that can be set are “**To**” Companies, “**From**” Companies and **Due Dates**.

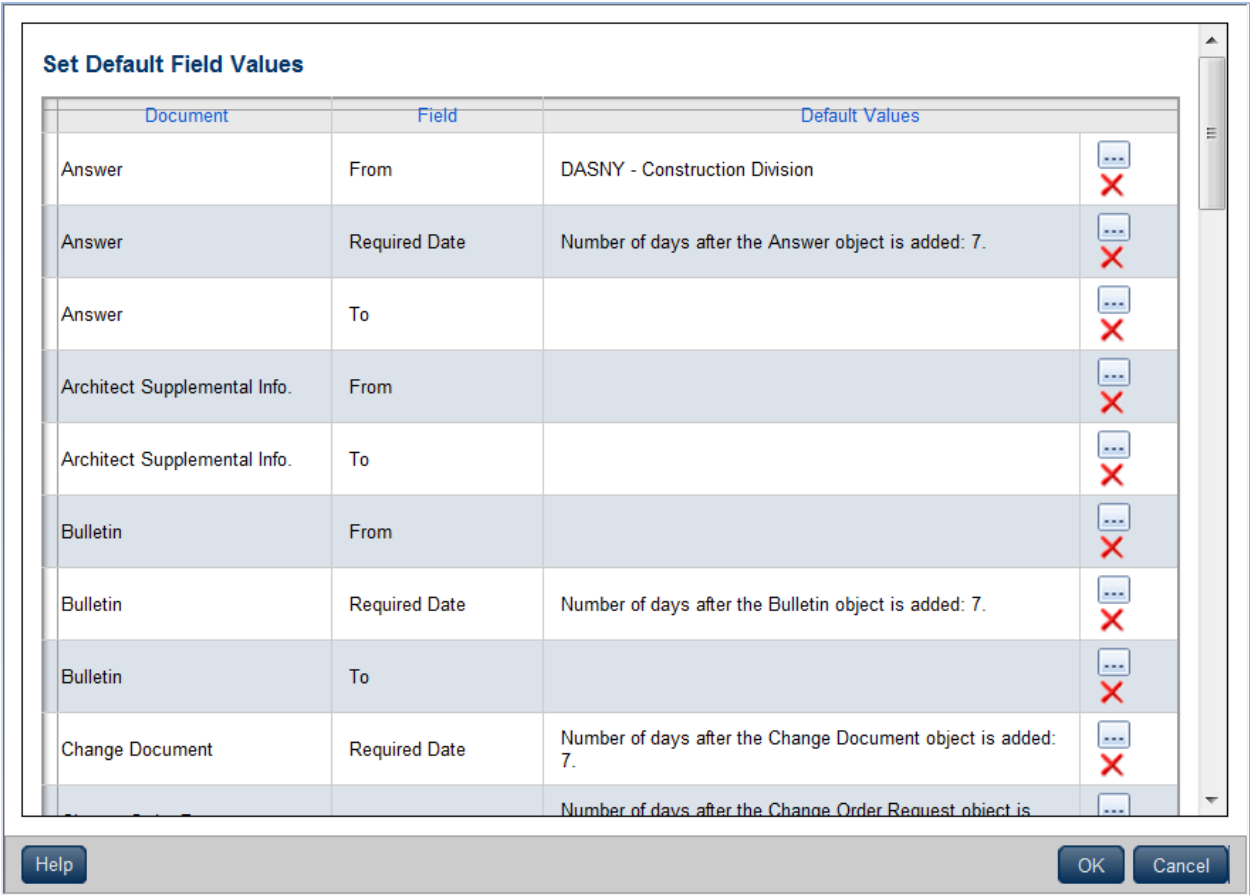
### Set Default Field Values

1. Right-click on the Project Number/Name.
2. Select and click **Default Field Values**.



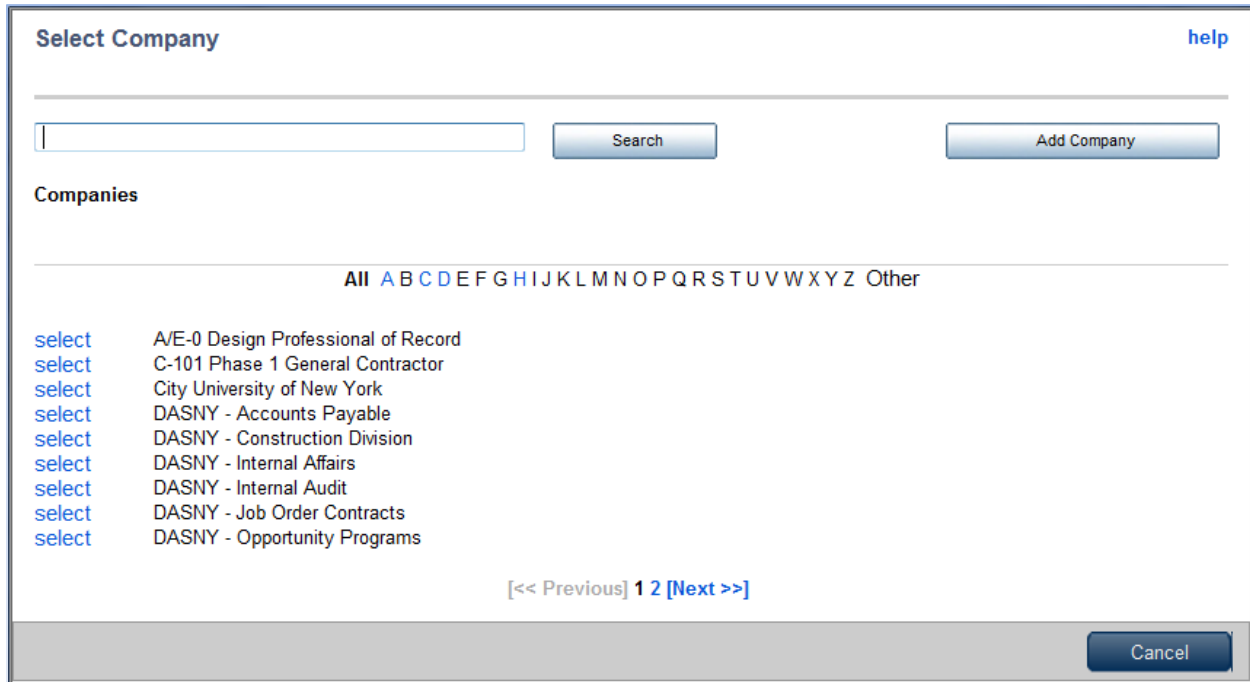


The **Set Default Field Values** window opens.




- 3. Scroll down the list and find the **Document** type the **Default Values** are being set for.
- 4. To change the default value of a “**To**” or “**From**” Company, click **Select**

The **Select Company** window will open.



5. Select the appropriate company.

The Select Company window will close and the company will be added to the Set Default Field Value window.

6. To change the default value of a **date**, click **Select Date** .

The **Select Default Value** window will open.

7. Edit the information as needed.

8. Click .

The Select Default Value window will close and the required date will be updated on the Select Field Values window.

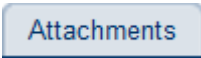
9. Click  after editing Default Field Values.

The Default Field Values will be populated within a document the next time it is created.

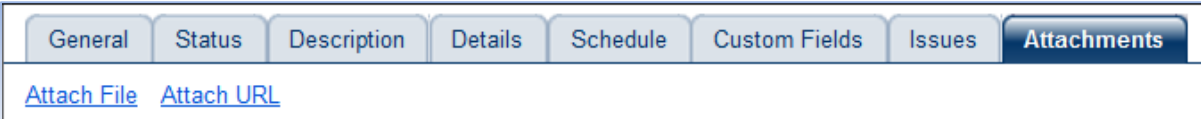
# ATTACHMENTS

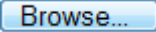
File attachments can be added to any document in Contract Management.

## Adding Attachments

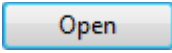
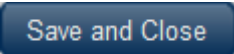
1. Open the document that will receive the file attachment.
2. Select the  tab.

Click [Attach File](#).



3. Click .

The Choose File window opens.

4. Locate the file being attached.
5. Select the file and click .
6. Enter a **Subject** for the file attachment.
7. Click , when finished.

**CAUTION:**

The file size limit for Attachments is **750 MB**.

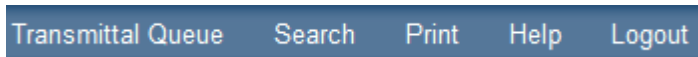
The file name should be *alphanumeric* (A thru Z and 0 thru 9) only.

## SEARCH DOCUMENTS


---

The Search function allows you to query of all the documents and attachments in a project for a specific word or phrase.

1. Start in the Control Center.
2. Select the project being searched in the Projects View.
3. In the upper right hand corner of the screen, select **Search**.



The Search window opens.

4. Enter the text to search for.
5. If including file attachments in the query, click the **Include Attachments** checkbox.
6. Click .




The search may take a few minutes.

When the search is complete it will include all documents that contain the specified text and attachments if the attachment checkbox was checked.

7. To open a document, click on the Description.

### [Attaching Search Results To An Issue](#)

From this window, items can be quickly linked to an **Issue**.

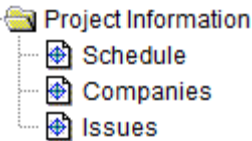
8. Click .
9. To add a new Issue, click .
10. Type in a name for the new Issue and an Issue Code (a short number or abbreviation)
11. Click .

# ISSUES

Issues provide a tool to link documents for organization and retrieval. Documents can be linked to an issue to assist in tracking complications that occur on your project.

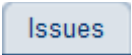
## View Existing Issues in a Project

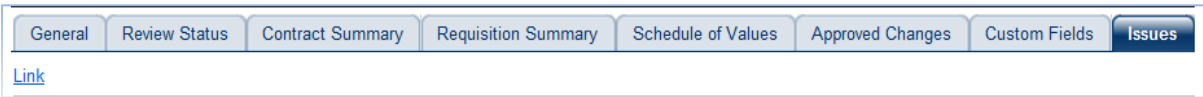
1. Open the **Project Information** folder within the Project.
2. Click **Issues**.
3. To open an existing issue, click the **Title**.





Documents linked to this issue are listed in the  tab.

## Link a Document to an Issue

1. Navigate to the document that you intend to link to an issue.
2. Select the  tab and click [Link](#).



- a) Click [Select](#) to select an existing issue.
- b) Click , to add a new Issue to the project.
  - i) Add a **Title** and an **Issue Code**; an abbreviation or number.
3. Click .

## Create a New Issue within the Issues Module



1. Select **Add Document** .
2. Enter a **Title** and an **Issue Code** (a short abbreviation)

## COMPANIES, CONTACTS AND PLACEHOLDERS

In Contract Management, each project participant is identified as a **Contact**. Each Contact must belong to a **Company** and all companies must have a **Key Contact**.

*Placeholders* provide a method to distinguish companies before contracts are awarded. The placeholder should be updated with actual company information once it is known.

Several companies are added to projects during new project setup; such as DASNY contacts and client contacts.

Refer to **APPENDIX A** for Placeholder Naming Conventions.

### Viewing a Company Log





Open the **Companies Log**.

Change the **Layout** to “**By Role**”. The companies will be grouped by role.

BUFC-Asbestos Removal (301680) Companies: Project List					
Control Center > Companies: Project List > Expand All Collapse All Find Layout: By Role Select an action... October 31, 2013					
<b>Client (Role)</b>					
Placeholder	Company Name	Key Contact	Abbreviation	Tax ID Number	
◆ 137411	SUC At Buffalo	Kris Kaufman	137411		
◆ 118888	State University of New York	State University of Ne	118888		
<b>Contractor (Role)</b>					
Placeholder	Company Name	Key Contact	Abbreviation	Tax ID Number	
◆ C-101	Mark Cerrone Inc.	Michael Bull	150182	161567314	
◆ C-201	Smith Brothers Construction Company,	Michael Clark	113339	160955283	
<b>Design Professional (Role)</b>					
Placeholder	Company Name	Key Contact	Abbreviation	Tax ID Number	
◆ A/E-B	A/E-B Design Professional/Subconsult	To Be Determined	A/E-B		
◆ A/E-0	Watts Architecture & Engineering PC	Kevin O'Connor	130485	161387864	Watts
<b>Dormitory Authority (Role)</b>					
Placeholder	Company Name	Key Contact	Abbreviation	Tax ID Number	
◆ DA-JOCS	DASNY - Job Order Contracts	Anthony J Bianchi	DA-JOCS		dasny
◆ DA-RSK	DASNY - Risk Management	Ann Dodson	DA-RSK		dasny
◆ DA-AUDIT	DASNY - Internal Audit	Kathy Ebert	DA-AUDIT		dasny
◆ DA-OOPS	DASNY - Opportunity Programs	Michael Clay	DA-OOPS		dasny
◆ DA-INT	DASNY - Internal Affairs	Brian Dow	DA-INT		dasny

To open a company, click **Edit Document** . The Company will open.


The contacts within the company will be listed in the **Contacts** tab.

General	Status	Contacts	Remarks	Details	Custom Fields	Issues	Attachments	Versions	
Add <span style="float: right;"><input type="checkbox"/> Show Inactive Contacts</span>									
Initials	Title	Name	User Account	Gender	Job Title	Location	Address Line 1	Address Line 2	Address Line
	FR0	Ms.	Felicia Ridgeway		Female		95 Perry Street	Suite 300	
	K00	Mr.	Kevin O'Connor 		Male	OFFICE	95 Perry Street	Suite 300	
	OG0		Onda Giardina		Accounting		95 Perry Street	Suite 300	

To open an individual contact, click **Edit Document** . The Contacts will open.

### Contacts

**Initials \***

**User Account**  

**Title**


**First Name**

**Middle Name**

**Last Name**

**Full Name**

**Suffix**

**Gender**  

**Job Title**

**Employee ID**

**Salutation**

**Key contact for this company**

**Inactive**

**Address**

**Note:** The **User Account** field should be populated for all Users who intend to utilize the Ball-in-Court function.

In addition to address and telephone number, this page records the contact's E-mail address and if they are the **Key Contact** for the company.

The **Key Contact** is the first name that will appear by default when the company is selected in a document.

## Consultant and Contractor Companies

All companies that have a direct contractual relationship with DASNY are created when the anticipated contracts, *Future Commitments*, are entered in Contract Management.

The placeholder company is added to the Companies module via integration after a Future Commitment is created. Refer to the Financial Users' Guide for additional information.


Because the Future Commitments are usually entered before a selected consultant or contractor is known, these companies often have generic names such as "Phase 1 Electrical Contractor" or "Design Professional of Record". These generic companies are known as **Placeholders** for the company that will be selected.

Refer to **APPENDIX A** for Placeholder Naming Conventions.

## Updating Consultant and Contractor Companies

### **CAUTION:**

Do not add new companies for prime contractors and consultants. Instead, locate their **Placeholder** and update the company name and contacts.

1. Open the **Company Log** (located within the Project Information folder).
2. Select the **By Role** layout.
3. Locate the **Placeholder** for the company being updating.
4. Open the Placeholder by clicking **Edit Document** .
5. Update the **Company Name**.



6. Click **Add Contact** .

The Contact window will open.

7. Entering **Initials** for a contact.
  - a) Enter the initials in the following format: first initial of the first name and first initial of the last name, followed by a numeric character (0-9). For example:
    - i. John Smith – JS0
    - ii. Jill Stevens – JS1
    - iii. Jane Stone – JS2
8. The **User Account** field should be populated for all Users who intend to utilize the Ball-in-Court function.
9. If this is the **Key Contact** for the company, click the checkbox.



10. Enter the Name, Job Title, Address, Phone Numbers and E-Mail for the contact.

11. Click  if there are additional contacts to add to the company; click  when finished.

The Contacts window will close.

12. Confirm that the **Key Contact** has been updated.

**Notes:**

- a) The Company Abbreviation and the Initials of a Contact cannot be edited.
- b) For assistance updating Company abbreviations and Contact initials; contact the *CTG Helpdesk, by e-mail: ctgmailbox@dasny.org or phone: 518-257-3700.*
- c) To remove a contact from a company, click the **Inactive** checkbox.
- d) Inactive contacts will not appear in the “Select Company” window when entering contacts in a document. They can be reactivated if necessary.

**CAUTION:**

**Do not delete contacts from your project.**

**Subcontractor and Sub-Consultant Companies**

Companies that do not have a direct contractual relationship with DASNY, such as Subcontractors and Sub-Consultants, should be added to the Company directory.

Refer to **APPENDIX A** for Placeholder Naming Conventions.

**Add Companies and Contacts Manually**

Within the Project Information Folder:


- 1. Select the Companies module
- 2. Switch to the By Role view.

**Notes:**

- a) Refer to **APPENDIX A** for Placeholder Naming Conventions.
- b) If this is a subcontractor, note the prime contractor’s placeholder.
- c) If this is a sub-consultant, note the design professional’s placeholder.

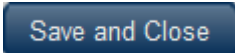
3. Click **Add Document** .

- Enter an “**Abbreviation**”.
- Enter the **Company Name**.
- Select a **Role** from the drop-down menu.

4. Enter the **Placeholder** located within the  tab.

5. Click **Add Contact** .

The contact window will open.

6. Entering **Initials** for a contact.
- a. Enter the initials in the following format: first initial of the first name and first initial of the last name, followed by a numeric character (0-9). For example:
    - i. John Smith – JS0
    - ii. Jill Stevens – JS1
    - iii. Jane Stone – JS2
7. Enter the contact’s Name, Job Title, Address, Phone numbers and E-mail.
8. Select  once finished entering contacts.

## [Copy Companies and Contacts](#)

Check to see if the company is in the **Master Company List** where it can be copied onto a project.

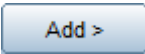

From the Control Center:

1. Select the project number and right-click.
2. A menu will open. Select “**Copy Companies**”.

The Copy Companies window will open. It may take a moment for this window to load.

3. The left side of this window is the **Master Company List**; the right side shows the companies on the selected project.
4. Scroll down the Master List and look for the company to be added to the project. If it is on

the list, click on the company name.

- 5. Click 
- 6. Click  when finished.

If the company is not available within the Master Company List then it must be added to the project manually.

**Manage Emergency Contact Information**

**Emergency Contact** information for a Company can be entered in the **Custom Fields** section of a Contact.



The information will then be available on the **Emergency Contact Listing** report. The report can be found by selecting advanced print within the Companies module.

This designation can be changed and more than one contact can be designated for a company.

## DISTRIBUTION LISTS

Creating **Distribution Lists** on a project will save you time when e-mailing or distributing documents to multiple contacts. Any Contact which is listed in a project's Company Directory can be added to a Distribution List as long as the e-mail address has been verified.

### [Access a Project's Distribution List](#)

1. Open the **Company Log** (located within the Project Information folder).

2. Click **Define Distribution Lists** .

### [Create a New Distribution List](#)

3. Click [Add](#).

**Distribution Lists - Project Companies**

[Add](#)

4. Type an **Abbreviation** and **Title**.
5. Click [Select](#) to add contacts to the list.

**Distribution Lists - Project Companies**

**Add Distribution List**

Abbreviation \*

Title

**Contacts** (from project)

[Select](#)

Name ▲


\* Required

# TRANSMITTALS

## Create a New Transmittal

1. Open the **Transmittals Log** (located within the Communications folder).

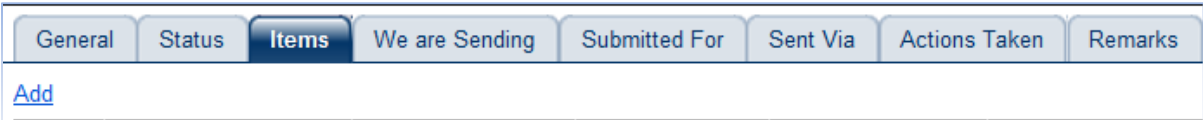
2. Click the **Add Document** .

3. Click **Select**  and pick the 'To' and 'From' contacts.

4. Click on the **Address button**  to enter an address for a contact.

5. Select the **Items** tab.

- Click [Add](#) to begin adding Transmittal items.



6. Enter all appropriate information in this window including the **date** and a **Description** of the item being transmitted.

7. To add additional items, repeats steps above.

8. Click **Save and Close** when finished adding Transmittal items.

- Review the items that have been added.

9. Enter all appropriate information within the **We are Sending**, **Submitted For**,

**Sent Via** and **Actions Taken** tabs.

10. Enter comments within the **Remarks** tab.



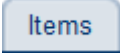

11. Click **Save**, when finished.

## Generate a Transmittal for a Specific Document

When distributing a Contract Management document; a transmittal can be created for it using **Generate Transmittal**.

1. Open the Document.
2. Select and click **“Generate Transmittal”** from ‘Select an action’.



3. Click **Edit Document** .
4. Click **Select**  and pick the **‘To’** and **‘From’** contacts.
5. Select the  tab.
  - Enter all appropriate details within the document as needed.
6. When finished, click .

D.01

# REQUEST FOR INFORMATION

## Create an RFI

- 1. Open the **Request for Information Log** (located within the Communication folder).



- 2. Click **Add Document**.

General	Status	Description	Details	Schedule	Custom Fields	Iss
<b>Type *</b>	Request for Information					
<b>To *</b>	Rafael Vinoly Architects Pc Kenneth Dietz					...
<b>From *</b>	Turner Construction Company Diana Guevara					...
<b>Number *</b>	00970					
<b>Date</b>	Mar 19, 2010					
<b>Title</b>	WQ- 4th FI fin tubes (Horizon)					



- 3. Click **Select** and pick the 'To' and 'From' contacts.

**Notes:**

- a) Once an RFI is saved, the "To" and "From" companies cannot be changed.
- b) You can edit the project's Default Field Values so the correct "To" and "From" contacts are automatically entered in all new documents.


- 4. Enter a **Title** for the RFI.

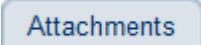
5. Select the  tab.

Work Impact	<input type="text"/>
Request for Information - Reason	<input type="text"/>
<b>Question</b>	
Fourth floor fin tubes have been installed in accordance with drawing M-604 detail M32. However the fin tube riser diagram indicates air vents at 4th floor instead of drain valves. Is the 4th floor fin tube installation acceptable? HEA 2/11/10 RFI 006.	
Question Signed By	<input type="text" value="Diana Guevara"/>
Date	<input type="text" value="Mar 19, 2010"/> 
Required Date	<input type="text" value="Mar 29, 2010"/> 

- Select the potential **Work Impact** from the drop-down list.
- Enter the **Question**.
- Enter the **Date** of the original RFI.
- Edit the **Required Date**, if appropriate (the default is 7 days after the RFI was entered).

6. Select the  tab.

- Record the Contractor RFI number in the **Originating Contractor Number** field.
- Select the **Contractor Name** who submitted the original RFI by clicking **Select** . Click [Select](#) when the contractor has been identified.

7. Select the  tab.

- Attach documents as needed.

8. Click .



D.02

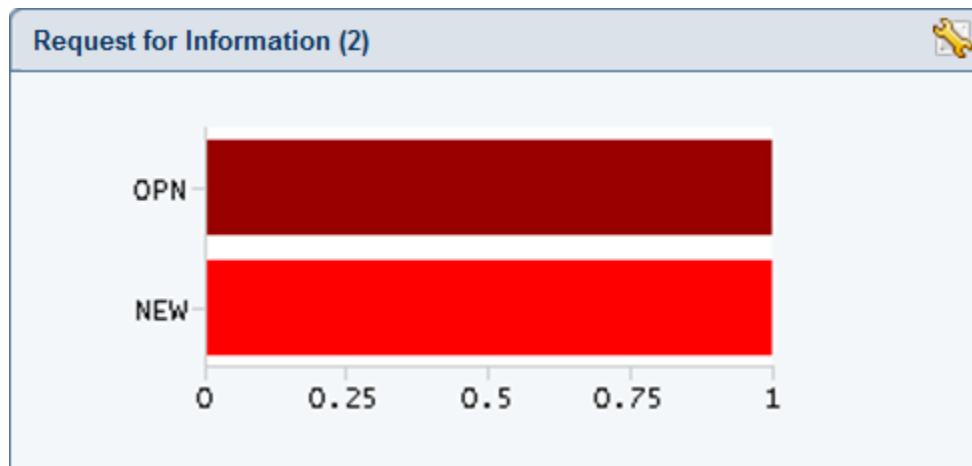
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## ANSWER A REQUEST FOR INFORMATION

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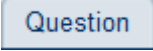

1. Locate the **Request for Information** Bar Chart within the appropriate Workspace.

RFIs that require answers have a status of "NEW".

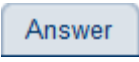


2. Click "**NEW**".
3. Locate the RFI to be answered and click **View Document** .

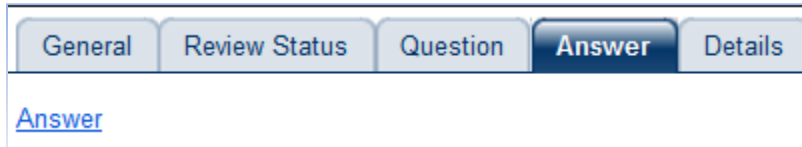
### Review the Question

4. Review the RFI question within the  tab.
5. Review attachments within the  tab.


## Answer the RFI



6. Select the  tab.

- Click [Answer](#).

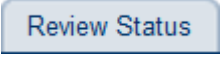


The answer window opens.

<b>Answer</b>	<p>Not only does the fin tube riser diagram indicate air vents, but as per spec 15526 section 3.1, automatic air vents are required at all high points of all piping and as required for removal of air from the system. Drawings and specs are clear on what is required.</p> <p>According to the information indicated in this RFI, 4th floor fin tube has not been installed as per drawings and specs and is therefore not acceptable.</p>
<b>Ball in Court</b>	<input type="text" value="Turner Construction Company"/>  <input type="text" value="Diana Guevara"/>
<b>Answer Signed By</b>	<input type="text" value="Michael Tancredi"/>

- Enter the Answer.
- Update the **Ball in Court** to the person who entered the question by clicking **Select Ball In Court** .
- Click .

7. If the RFI was distributed to a sub-consultant, document it within **Answer Distribution**.

8. Select the  tab.

- Click **Edit Document** .
- Change the **Status** from “**New Item**” to “**Open**”.

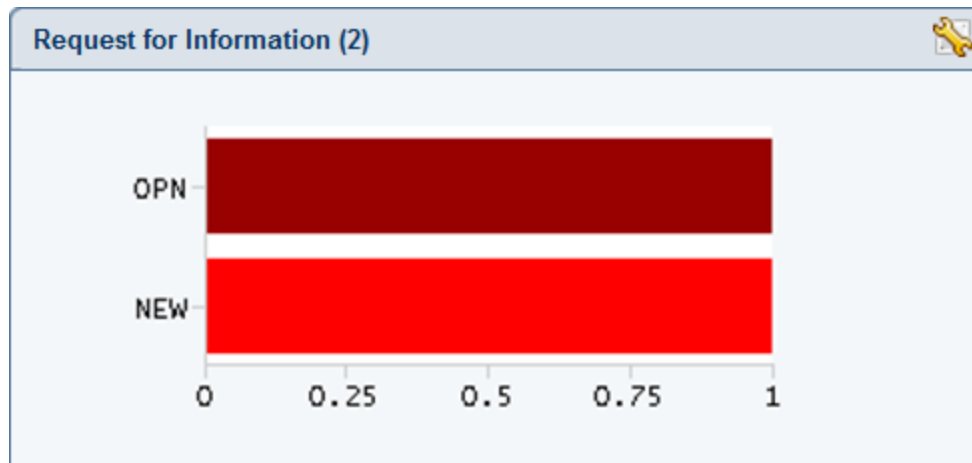
9. Click .


## CLOSE A REQUEST FOR INFORMATION

Once the Request for Information has been answered; the person who initially entered the question should review the answer and determine if it satisfies the question. Only the person who initiated the RFI should close it.

1. Locate the **Request for Information** Bar Chart within the appropriate Workspace.


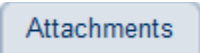
RFI that have been answered (but are not closed) have a status of “**OPEN**” (OPN).



2. Click “**OPN**”.
3. Locate the RFI that needs to be closed and click **View Document** .


The RFI Document opens in **view mode**.

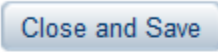


### Review the Question

4. Review the RFI question within the  tab.
5. Review attachments within the  tab.

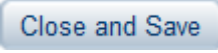
## Close an RFI

6. Click **Edit Document** .

7. Select the  tab.

<b>Status</b>	New Item	▼
<b>Closed?</b>	no	
<b>Closed by</b>		
<b>Company</b>	DASNY - Construction Division	
<b>Contact</b>	Michael Tancredi	
<b>Approved Date</b>	Dec 13, 2013	

8. Enter an **Approved Date**.

9. Click .

The Status will change to Closed, the individual who approved the answer will be documented, and other users will be prevented from re-opening and editing the document.

## BULLETINS AND ASI'S

Design Professional's should enter **Bulletins** and **Architect's Supplemental Information (ASI)** documents directly in Contract Management.

### Create a Bulletin or ASI

1. Open the **Notices Log** (located in the Communication folder).



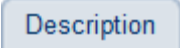
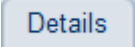


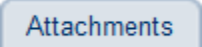

2. Click **Add Document**.

General	Status	Description	Details	Schedule	Custom Fields	Iss
<b>Type *</b>	Bulletin					
<b>To *</b>	DASNY - Construction Division Robert Thelian					...
<b>From *</b>	Polshek Partnership, LLP Joanne Sliker					...
<b>Number *</b>	00001					
<b>Date</b>	Dec 17, 2013					
<b>Title</b>	Dimesion Clarification - dwg A1023					

- Click **Select** and pick the 'To' and 'From' contacts.
- Enter a **Title** for the Bulletin.

#### Notes:

- a) Once the document is saved, the "To" and "From" companies cannot be changed.
- b) You can edit the project's Default Field Values so the correct "To" and "From" contacts are automatically entered in all new documents.
- c) By default, the document type is "**Bulletin**". The document **Type** can be changed to "**Architect's Supplemental Information**" (ASI).

3. Select the  tab.
  - Enter a **Description**, the name of the person responsible for the information, and the **Date**.
4. Select the  tab.
  - Identify the **Contract** most affected by the information by clicking **Select** .
5. Select the  tab.
  - Enter the **A/E project number**.
6. Attach additional documentation as needed within the  tab.
7. Click .

## NON-COMPLIANCE NOTICES

### Record a Non-Compliance Notice

1. Open the **Noncompliance Notices Log** (located within the Communication folder).



2. Click **Add Document**.

General	Status	Description	Corrective Action	Details	Schedule
<b>Type *</b>	Noncompliance Notice				
<b>To *</b>	Casler Masonry Thomas Mucia				...
<b>From *</b>	LeChase Construction Services, LLC Christopher Davenport				...
<b>Number *</b>	00001				
<b>Date</b>	Feb 16, 2011				
<b>Title</b>	Exterior CMU Walls				

- Select **Type**: “Noncompliance Notice” (NCN) or “Safety Non-Compliance Notice”.
- Enter the **Title**.
- Click **Select** and pick the ‘**To**’ and ‘**From**’ contacts.

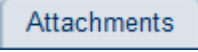
3. Select the **Description** tab.

- Enter a **Description**, the name of the individual responsible for the information in **Signed By** and the **Date**.

4. Select the **Details** tab.

- Select the contractor’s Contract by clicking **Select Contract** and then select the appropriate Contract by clicking [Select](#).
- If there is a document related to this NCN, such as an inspection item or daily report,

**Reference** it here by clicking **Select Reference** .


5. Attach additional documentation as needed within the  tab.

6. Click .

### Status a Non-Compliance Notice

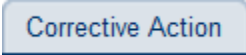
When the issues recorded in a Noncompliance Notice are resolved, it must be documented in Contract Management and the NCN must be closed.


1. Open the **Noncompliance Notices Log** (located within the Communications folder).

2. Click the **Edit Icon**  once the document has been located.

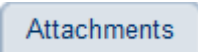
3. Select the  tab.

- Select “**Closed**” from the Status dropdown menu.

4. Select the  tab.

<b>Corrective Action</b>	Contractor to fill all gaps prior to damproofing and exterior brick/ground face installation.
<b>Signed By</b>	<input type="text"/>
<b>Date</b>	<input type="text"/> 

- Enter a description of how the issue was resolved within the **Corrective Action** field, the **name** of the person approving the resolution within **Signed By** and the **Date**.
- If a dollar value of costs or credits associated with this corrective action is known, record it in the **Amount** field.

5. Attach additional documentation as needed within the  tab.

6. Click .

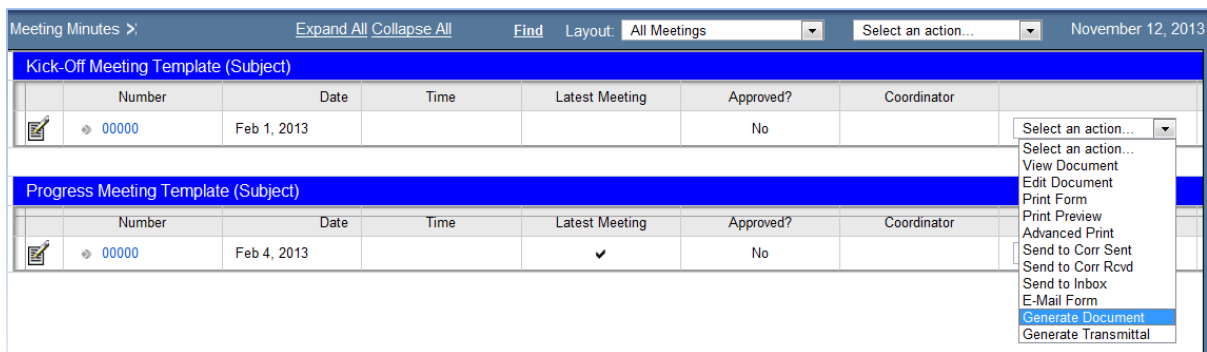


E.01

## CREATE A MEETING AGENDA

Every project has a Kick-off Meeting Template and a Progress Meeting Template that can be copied and customized for each series of meetings held on the project.

1. Open the **Meeting Minutes Log** (located within the Communication folder).
  - Change the **Layout** to “**All Meetings**”.
2. Select and click “**Generate Document**” from the drop-down menu of the appropriate template.



The Generate Meeting Minutes window opens.

### Generate Meeting Minutes

**Subject**

**Number**

**Date \***

**Time**

**Location**

- Enter the **Subject**, **Date**, **Time** and **Location** of the meeting.
- Click **Finish**.

The Generate Meeting Minutes window will close and the new Meeting Minutes document will open.



3. Click **Edit Document** .

4. Select the **This Meeting** tab.

- Click **Select Coordinator** to select the Meeting **Coordinator**.

5. Select the **Business Items** tab.

General	Status	This Meeting	Business Items	Attendees	Issues	Attachments					
<a href="#">Add</a> <a href="#">Update from Schedule</a>											
▲	Number	Description	Status	Ball in Court	BIC Contact	Due	Started	Completed	Activity ID	Order Code	
	A0-00000	INTRODUCTION	Old Business							A0-00000	
	B0-00000	SAFETY	Old Business							B0-00000	
	C0-00000	SCHEDULE	Old Business							C0-00000	
	D0-00000	SUBMITTALS	Old Business							D0-00000	
	E0-00000	CHANGES AND REQUESTS	Old Business							E0-00000	
	F0-00000	OLD BUSINESS	Old Business							F0-00000	
	G0-00000	NEW BUSINESS	Old Business							G0-00000	
	H0-00000	CLOSING	Old Business							H0-00000	

6. To edit an agenda topic, click the **Edit Icon** .

**Notes:**

- There is a list of generic agenda **topics** to use or edit as needed to suit the specifics of the project.
- Business items with numbers ending in “00000” are topics and will print in **bold**.*
- Ball-in-Court and Dates are not required for topics.*
- A topic can be removed by scrolling to the right and clicking [delete](#) .

7. To add a **new Agenda topic** to the Business Items, click [Add](#) .

A new Business Item window will open.

- Enter a **Number** (ending in “00000”) and a **Description** of the new topic.
- **Review** the Business Items and make any necessary changes.
- Click **Save and Close** .

The Business Item window will close.

8. Click Save when finished.

E.02

## RECORD THE MINUTES OF A MEETING

Make a copy of the previous Meeting each time the Meeting Minutes are recorded. Keep the original as a record and edit the copy.

If recording the first minutes in a series of meetings, refer to **Section E – Create a Meeting Agenda**.

### Creating a New Meeting Minutes Document

1. Open the **Meeting Minutes Log** (located within the Communication folder).
2. Change the **Layout** to “**All Meetings**”.
  - Locate the series of Meeting Minutes being recorded.
3. Select and click “**Generate Document**” from the drop-down menu.

Meeting Minutes >							
		Expand All	Collapse All	Find	Layout: All Meetings	Select an action...	December 18, 2
<b>Design Progress Meeting - Bldg B (Subject)</b>							
	Number	Date	Time	Latest Meeting	Approved?	Coordinator	
	00002	Dec 18, 2013	11:00	✓	No	DA-PM	Select an action...
	00001	Dec 4, 2013	09:00		Yes	DA-PM	Select an action... View Document Edit Document Print Form Print Preview Advanced Print Send to Corr Sent Send to Corr Rcvd Send to Inbox E-Mail Form Generate Document Generate Transmittal
<b>Kick-Off Meeting Template (Subject)</b>							
	Number	Date	Time	Latest Meeting	Approved?	Coordinator	
	00000	May 30, 2013			No		

The Generate Meeting Minutes window opens.

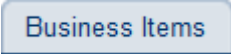
<b>Generate Meeting Minutes</b>	
<b>Subject</b>	Design Progress Meeting - Bldg B
<b>Number</b>	00003
<b>Date *</b>	Jan 2, 2014
<b>Time</b>	11:00
<b>Location</b>	Field Office

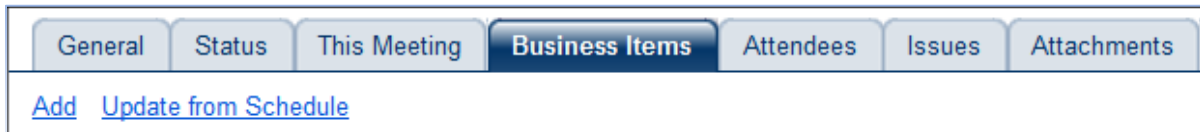
- Edit the **date, time** and/or **location**.
- Do not edit the subject of subsequent meetings. The subject should remain the same within a series of meetings.

4. Click .

The Generate Meeting Minutes window will close and the new Meeting Minutes document will open.

### Entering a New Business Item


1. Open the Meeting Minutes that are being updated.
2. Click [Add](#) within the  tab.



A new Meeting Business Item window will open.

**Meeting Business Item**


**Number**


**Ball in Court**  


**Status**  ▼

**Priority**  ▼


**Description**

**Due**  

**Started**  

- Enter the **Number**; which determines the order of the Meeting Business Item and the topic it will fall under.
- Click **Select** , if the item is actionable, and select the **Ball in Court**.

- Enter the **Description**.
- Enter a **Due Date**, if the item is actionable.
- Enter the date of the meeting when the item was discussed in the **Started** field.

3. Click , when finished adding new Business Items,.

**CAUTION:**

**Only Business Items with a status of New Item, Old Business or Open will carry over to new meetings.**

### Numbering Business Items

This is a suggested numbering system that will keep the business items in order, even if you move them to another topic.

Meeting discussions are generally grouped by topic. example:

**Topics:**

Topics are numbers or letters followed by "00000": **30- 00000**

**Business Items:**

**30- 00201**

The first digits correspond with the Topic **30-**

**30-**

The next 3 digits correspond with the meeting number

**002**

The last 2 digits is the item number

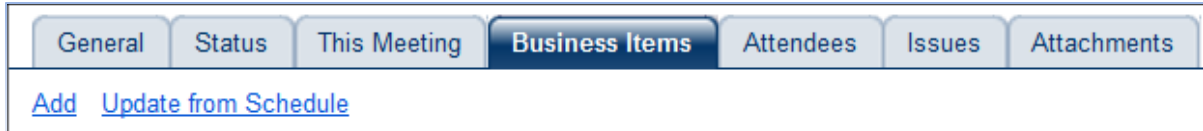
**01**


### Continue a Discussion on an Existing Business Item

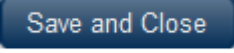
*When discussion continues on one of the existing business items, do not change the original item, create a new one. Number the new item so it will fall immediately after the original item.*

*For example; continued discussion on item 30-00201 would be numbered "30-00201.1".*

1. Click [Add](#) within the  tab.

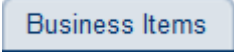



- Enter the **Number** of the Business Item being continued.
- Click **Select** , if the item is actionable, and select the **Ball in Court**.
- Enter the **Description**.
- Enter a **Due Date**, if the item is actionable.
- Enter the date of the meeting when the item was discussed in the **Started** field.

2. Click , when finished.

### Closing Business Items


*Business Items should be closed once the topic of discussion has been concluded.*

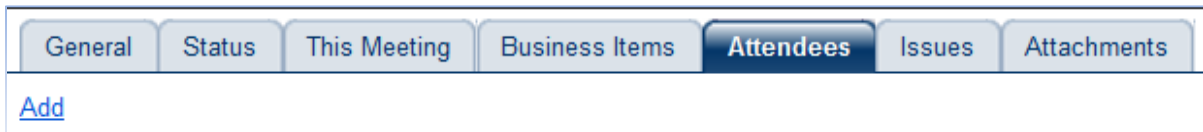
1. Select the  tab.
  - Click the edit icon  on the business item being closed.
  - Change the Status to “**Closed**”.

2. Click  .

*When a **Business** is **closed**, it will not copy to the next Meeting Minutes when using “Generate Document”.*


### Adding Attendees to Meeting Minutes

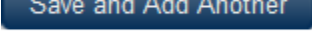
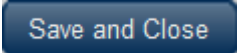
1. Click [Add](#) within the  tab.



- Click **Select**  to add an **Attendee**.

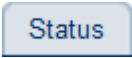


**Attendee**

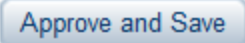
Attendee  

- To add additional attendees; select  and repeat the above steps.
- Select  when finished.

**Note:** It is advantageous to add attendees to the Companies module prior to adding them to Meeting Minutes.


### Approving Meeting Minutes


- Select the  tab and click **Edit Document** .
  - Click **Select Contact**  to enter the **Company** and **Contact** of the person who is responsible for approving the minutes.
  - Select the **Approved Date**.
  - Click **Approve and Save**.

**Approved?** no 

**Approved by**

**Company**

**Contact**  

**Approved Date**  

---

## THE SUBMITTAL COORDINATOR

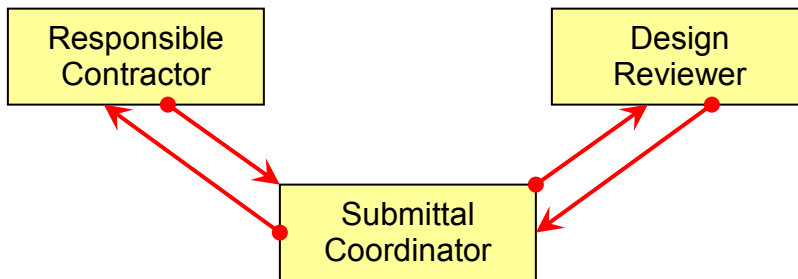
---

### Submittal Process




The submittal process involves three parties:

- The Contractor responsible for submitting the item;
- The Design Professional responsible for reviewing and updating submittal status’;
- The Submittal Coordinator who is responsible for managing the entire process and making sure submittals are submitted and reviewed in accordance with the project schedule.

The **Contractor** and the **Design Reviewer** are specified in each individual Submittal Package. The **Submittal Coordinator** is set in the Project Settings.



### To View or Edit the Submittal Coordinator

1. Right-click on the project within the Control Center.
2. Select **Project Settings**.
3. Select the  tab.
  - Click **Select Submittal Coordinator**  to change the **Submittal Coordinator**.
  - Click [Select](#) to choose the Submittal Coordinator.
4. Click .

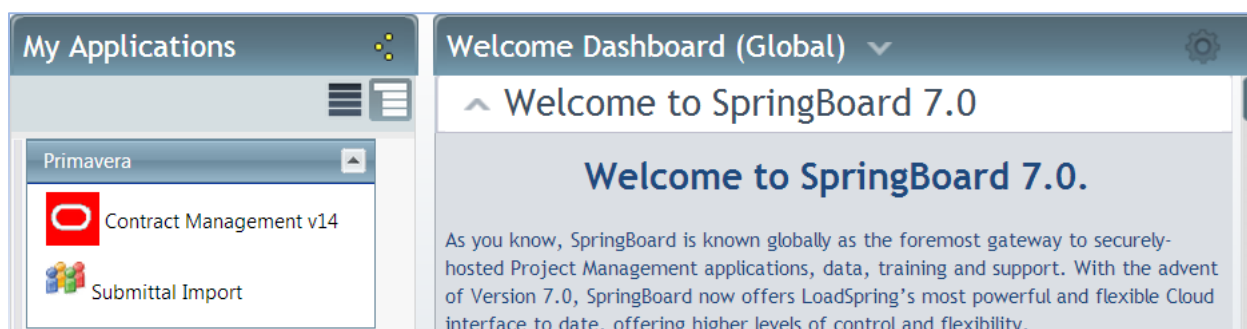


## THE REQUIRED SUBMITTAL LIST UTILITY

Use DASNY's "**Submittal Import**" to create and import the entire list of required submittals into the project. This task should be done early, preferably before any construction contracts have been awarded.

### Create Submittal List

1. Navigate to [www.myloadspring.com](http://www.myloadspring.com) and enter your UserName and Password into the SpringBoard™ Portal.
2. Select Submittal Import within My Applications.



3. Refer to **APPENDIX B** of this manual.
  - Following the instructions, enter the entire required submittal list for your project. You can work on the list, save it, and return to it at a later time if needed. You may also print a copy of the list for your records.
  - When finished, the submittal list will be imported directly into your Contract Management project.

**NOTE:**

- A copy of the submittal list may be exported into excel once it has been imported into Contract Management.
- Submittals cannot be imported into Contract Management from excel

F.03.a

## CREATE SUBMITTAL PACKAGES MANUALLY

### Add Submittal Packages

1. Open the **Submittal Packages** module (located within the Logs folder).

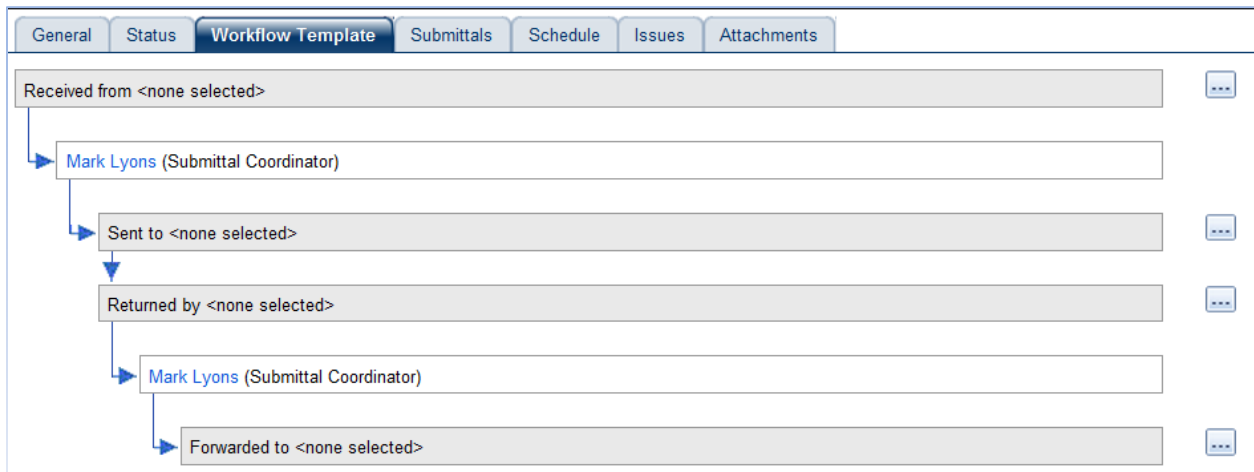
2. Click **Add Document** .

3. Enter the **Package Number**.
  - a. The Package Number should be entered in the following format:
    - i. Spec Section – Placeholder number
  - a. 033000-101


4. Enter the **Title**.

5. Select the **Workflow Template** tab.

- Click **Select**  and select the **Received from, Sent to, Returned by and Forwarded to**.



**Note:** Submittals added to the package will copy the workflow from the Submittal Package.

6. Click **Save**  or continue to the next section to add submittals to the package.

F.03.b

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## SUBMITTAL PACKAGES

---

Additional submittals can be added to the project after the required submittal list has been imported onto the project using the Submittal Import.


When adding submittals into an existing package, the Workflow will be copied from the package into the new submittals.

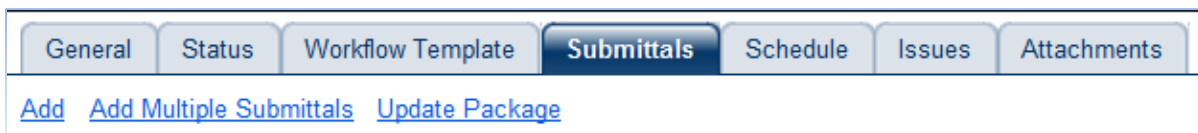
### Find the Submittal Package


1. Open the **Submittal Packages** module (located within the Logs folder).
2. Locate and open the **Submittal Package** that the additional submittals are being added to.
  - a. There is a **Find** option available.

### Add Submittals to a Package


Add submittals individually to maintain sub-paragraph numbering.

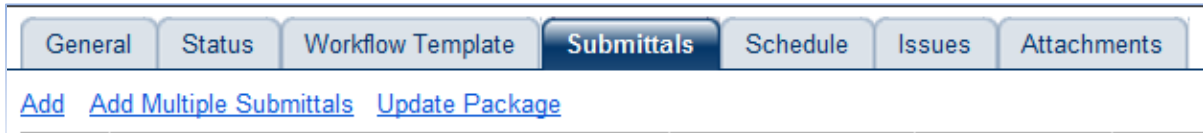
1. Select the  tab.
  - Click [Add](#).



- Enter the **Submittal** number.
  - Enter a **Title, Trade** and **Type**.
  - Enter the **Required Start** and **Required Finish** dates.
2. Click .

## Add Multiple Submittals to a Package

1. Select the  tab.
  - Click [Add Multiple Submittals](#).



- Enter the **Quantity** of new Submittals being created.
- Enter the **Number** of the first submittal.

2. Click .

The new submittals are numbered consecutively starting with the number specified.

3. Enter a **Title**, **Trade** and **Type** for each new submittal.

Most submittals are “**Technical Items**”.


“**Pre-Construction**” are the [General Conditions](#) submittals, such as subcontractors lists and schedules.

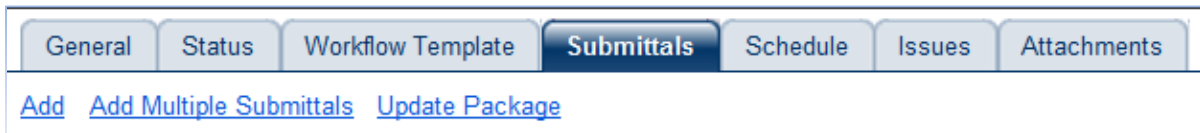
“**Post-Construction**” submittals are [close-out](#) items, such as manuals and as-built drawings.

4. Click .

## Log in Submittals Received from Contractor


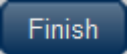
Submittals can be logged into the **Submittal Package**.

1. Select the  tab.
  - Click [Update Package](#).



2. **Select** the submittals that are being logging in.

When selecting more than one submittal; they must have the same log dates.

3. Click .
4. Enter the **Received Date**, the date received from the contractor, and the **Sent Date**, the date sent to the Design Reviewer, in the appropriate fields.
5. Click .

A review cycle will be created and the **Status** of the submittals logged in will automatically be updated to "New Item".

**Note:** Transmittals will be added to the Transmittal Queue.



## DISTRIBUTE SUBMITTALS TO THE REVIEWER


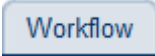
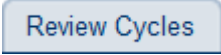

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The Design Consultant/Submittal Coordinator can log the **Dates** Submittals were received from the Contractor into the individual Submittal. Contract Management will generate a transmittal for each Submittal logged.

### Find the Submittal in the Log

1. Open the **Submittals** module (located within the **Logs folder**).
2. Select the “**All by Package**” layout from the drop-down menu.
  - Use the **Find** feature to quickly locate submittals.
  - The log will remain filtered until “**Show All**” is selected.
3. Locate the Submittals being tracked.

### Log in a First Submission



1. Click **Edit Document**  after locating the appropriate submittal.
2. Select the  tab.
  - Review and update the Workflow.
  - “**Received from**” and “**Forwarded to**” should be assigned to the Contractor.
  - “**Sent to**” and “**Returned by**” should be assigned to the Design Reviewer.
3. Select the  tab.
  - Click “**Add**” if there are no review cycles.
  - Enter the **Title** of the submittal in the **Description** field. This description will print on the Transmittal.
  - Enter the **Received on** date and the **Sent on** date.
4. Click .

**Note:** Transmittals will be added to the Transmittal Queue.

Transmittal Queue (4) Search Print Help Logout

### Log in a Resubmission

Use **Review Cycles** to track resubmissions in the original submittal.

1. Open the submittal by clicking **Edit Document** .
2. Select the  tab.

- Click "**Add**".

The previous reviews will remain in the record of the submittal and can be viewed by clicking their number.

- Enter the **Title** of the submittal in the **Description** field. This description will print on the Transmittal.
- Enter the **Received on** date and **Sent on** date.

3. Click .

**Note:** Transmittals will be added to the Transmittal Queue.

Transmittal Queue (4) Search Print Help Logout

## THE TRANSMITTAL QUEUE

Contract Management will automatically generate a transmittal for the Submittal Coordinator each time a Submittal is sent to the Design Reviewer and returned to the Contractor.

Before the transmittals are created, Contract Management places the items in the **Transmittal Queue**. The Queue can create one transmittal for multiple items being sent to the same contact.

### Generate Transmittals from the Queue

1. Click “**Transmittal Queue**”.



2. Click “**Create All**”.


Company	Contact	Item Description	Description
---------	---------	------------------	-------------

The Transmittal Queue will clear.

The transmittal will be added to the Transmittal Log.

### Edit a Transmittal

If adjustments need to be made to a transmittal, open the original document located within the **Transmittals Log**.

1. Open the **Transmittals Log** (located within the Communications folder).
2. Change the Layout to “By Date”.
3. Locate the appropriate transmittal.
4. Click **Edit Document**  to make changes.


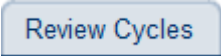


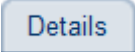
## RECORD STATUS OF REVIEWED SUBMITTALS

### Find the Submittal in the Log

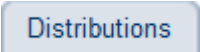
1. Open the **Submittals** module (located within the **Logs folder**).
2. Select the “**In Review**” layout from the drop-down menu.

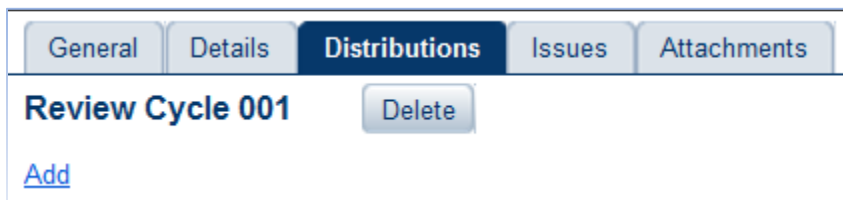
### Status and Track the Reviewed Submittal - (Design Consultant)


1. Open the submittal by clicking the **edit icon** .
2. Select the  tab.
  - Enter **Returned on** Date (date returned to Submittal Coordinator).
  - Select the **Status**.

3. Select the  tab.
  - Record **Remarks** of notes related to the review.

If the Submittal was reviewed by a sub-consultant, record this in the **Distributions** tab.

4. Select the  tab.
  - Click [Add](#).



- Add **Remarks**, if appropriate.
  - Click [Select](#) to locate the appropriate Contact(s) by **browsing** or use the **Search** feature.
5. Click .

## FORWARD REVIEWED SUBMITTALS TO THE CONTRACTOR


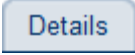
---

A package of reviewed submittals returned from the Design Consultant to the Submittal Coordinator should be **Forwarded to** the Contractor and have the **Date** logged in Contract Management.

### Find the Submittal in the Log

1. Open the **Submittals** module (located within the **Logs folder**).
2. Select the “**Return to Contractor**” layout.

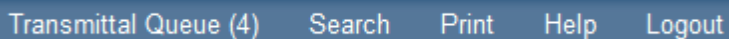
### Logging in a Reviewed Submission

1. Click **Edit Document**.
2. Select the  tab.
  - Enter the date the reviewed submittal was **Forwarded** to the contractor.
3. Select the  tab.

If the design reviewer included any notes; they will be in the **Remarks** field.

4. Click .

**Note:** Transmittals will be added to the Transmittal Queue.



G.01

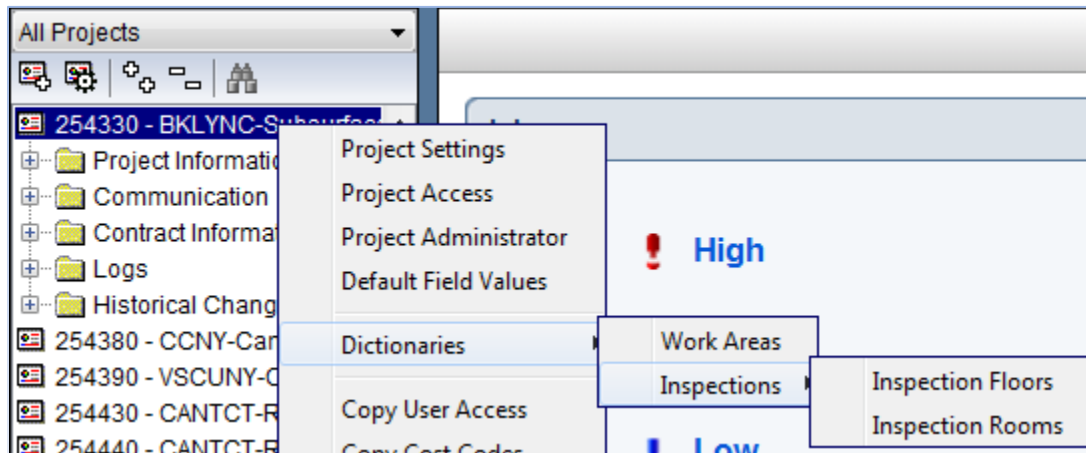
## ENTER DICTIONARY VALUES

When entering Inspections and Daily Reports, *Dictionaries* are available to identify locations.

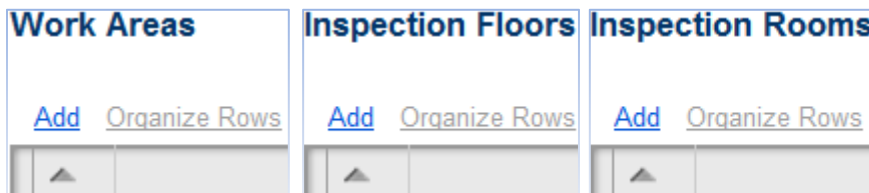
Dictionaries are project specific and need to be defined on a project by project basis.

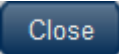
There are Dictionaries offered for **Work Areas**, **Inspection Floors** and **Inspection Rooms**. All three are available in Inspections; the Work Areas Dictionary is available in Daily Reports and the Drawings Log.

1. Right-click Project Number/Name and select the appropriate Dictionary.



2. Click [Add](#).



3. Enter an abbreviation in the **Building**, **Floor** or **Room** field.
4. Enter a **Description**.
5. Click  when finished.

## DAILY REPORTS


Daily Reports are used to document field inspections by DASNY staff or consultants.

When entering daily reports, much of the information is similar from one day to the next. Subsequent reports can be copied and edited as needed from previous reports.

### Create the First Daily Report in a Series

1. Open the **Daily Reports** module (located within the Logs folder).



2. Click **Add Document**.
3. Select the **individual** submitting the daily report by clicking **Select Contractor** .
4. Enter the **Date**.
5. Enter the **Report Number**.

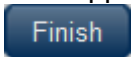
### Create Subsequent Daily Reports

Make of copy of the previous day's Daily Report each time a new report is recorded.

1. Open the **Daily Reports Log** (located within the Logs folder).
2. Select and click "**Generate Document**" from the drop-down of the latest Daily Report.

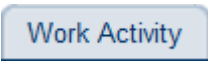
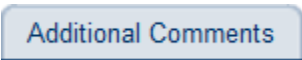
Daily Reports >						Find	Layout: By Date	Select an action...	December 10, 2013
Date	Day	Number	Contractor	Contact					
◆ Dec 9, 2013	Monday	00193	DASNY - Construction Division	Michael Tancredi					
◆ Dec 6, 2013	Friday	00192	DASNY - Construction Division	Michael Tancredi					
◆ Dec 5, 2013	Thursday	00191	DASNY - Construction Division	Michael Tancredi					
◆ Dec 4, 2013	Wednesday	00190	DASNY - Construction Division	Michael Tancredi					
◆ Dec 3, 2013	Tuesday	00189	DASNY - Construction Division	Michael Tancredi					
◆ Dec 2, 2013	Monday	00188	DASNY - Construction Division	Michael Tancredi					
◆ Nov 29, 2013	Friday	00187	DASNY - Construction Division	Michael Tancredi					

The Generate Daily Report window opens.

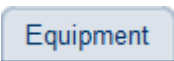
3. Select the appropriate **Date**.
4. Click .

5. Click **Edit Document**


### Work Activity and Additional Comments

6. Select the  tab.
- Enter a general description of the day's activities.
7. Select the  tab.
- Observations of a sensitive nature that occurred during the reporting period should be recorded here.

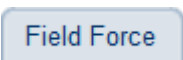

### Equipment

8. Select the  tab.
- Click [Add](#) to record the heavy equipment on site each day.

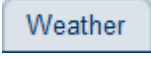
<a href="#">General</a>	<a href="#">Status</a>	<a href="#">Work Activity</a>	<a href="#">Additional Comments</a>	<b><a href="#">Equipment</a></b>	<a href="#">Field Force</a>
<a href="#">Add</a>					

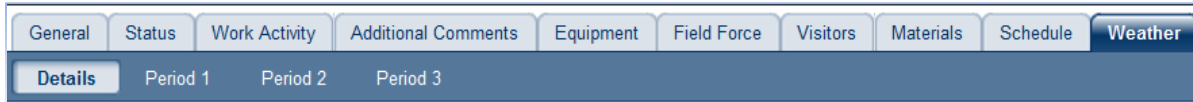
- Select the **Source** contractor by clicking **Select Source** .
- In the **Description** field, enter a description of the equipment used or the subcontractor using it.
- Enter the number of **Units**; choose the **Equipment Type** and the **Work Area** from the drop-down lists.
- Under **Remarks**, enter a description of the work being performed with the equipment.

### Field Force

9. Select the  tab.
- Click [Add](#) to document the number of workers on site for each contractor.
  - Select the Source contractor by clicking **Select Source** .
  - Enter the Trade i.e. Carpenter, Painter, Mason, Teamster etc.
  - Select the Work Area.
  - Enter the **number** of workers and man-hours for each labor classification.
  - Within **Remarks**, enter a description of the work being done by this trade.

## Weather


10. Select the  tab.




- Select the **Length of suitable conditions** within **Details**.
- Record the day's Weather Conditions in the appropriate **Period**.

## Visitors

11. Select the  tab.

- Click [Add](#) to document notable visitors to the site during the report period.
- Select the **Name** of the visitor by clicking **Select Name** .

## Material Deliveries

12. Select the  tab.

- Click [Add](#) to document deliveries to the site during the report period.
- Enter the appropriate information into the Delivery Tickets.

13. Click , when finished.

## Approve Daily Reports

1. Select the  tab.

- Enter the **Approved Date**.
- Click .

## INSPECTIONS

### Create a New Inspection Document

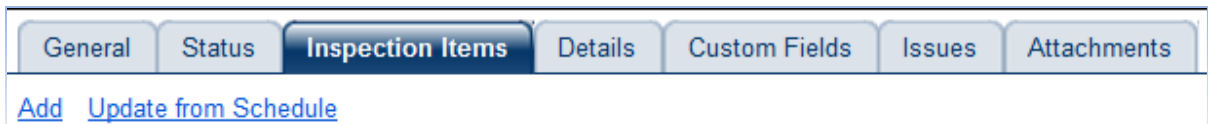
1. Open the **Inspections** module (located within the Logs folder)



2. Click **Add Document**.
3. Enter an **Inspection Number** and **Title**.
4. Select the **To Contact** and **From Contact** by clicking **Select To/From**
5. Select the **Details** tab.
  - Enter a **Description** for the inspection.
6. Select the **Custom Fields** tab.
  - Select the **Inspection Type**.
  - Enter additional information in the **General Comment** field.
  - Select the **Date**.
7. Click **Save**.


### Enter an Inspection Item

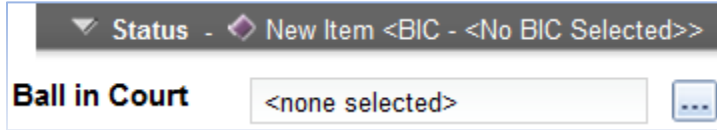
1. Select the **Inspection Items** tab.
  - Click [Add](#) to add a new Inspection Item.



- Enter the date **Opened**.
- Enter the **Required** completion date.

2. Within the **Status** section;

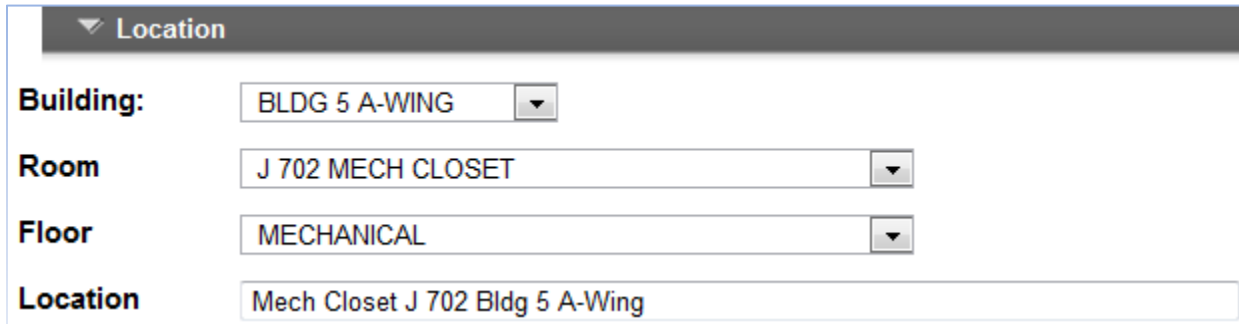
- Update the **Ball in Court** by clicking Select , to identify the individual responsible for the work.



The screenshot shows a header bar with a dropdown menu for 'Status' and a 'New Item' button. Below this, the 'Ball in Court' field is displayed with a text input containing '<none selected>' and a 'More options' icon.

3. Within the **Location** section;

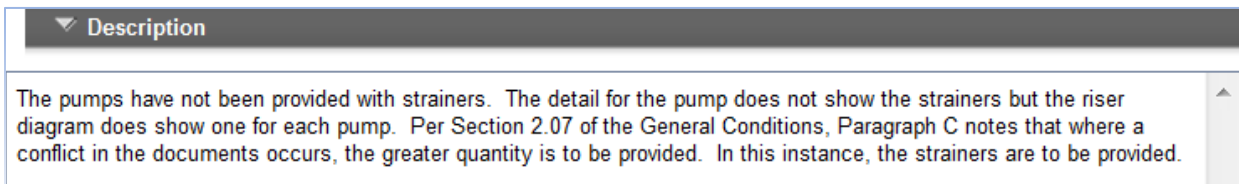
- Select the appropriate values for **Building, Room and Floor**.  
Refer to **Section G – Enter Dictionary Values** for instructions on populating the drop-down lists.
- Enter a brief **Location** description.



The screenshot shows the 'Location' section with three dropdown menus: 'Building' (BLDG 5 A-WING), 'Room' (J 702 MECH CLOSET), and 'Floor' (MECHANICAL). Below these is a text input field for 'Location' containing 'Mech Closet J 702 Bldg 5 A-Wing'.

4. Within the **Description** section;

- Enter a detailed description of the Inspection Item.



The screenshot shows the 'Description' section with a text area containing the following text: 'The pumps have not been provided with strainers. The detail for the pump does not show the strainers but the riser diagram does show one for each pump. Per Section 2.07 of the General Conditions, Paragraph C notes that where a conflict in the documents occurs, the greater quantity is to be provided. In this instance, the strainers are to be provided.'

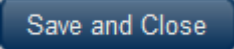
5. Within the **Custom Fields** section;

- Enter the **Engineer's Recommendation**, if applicable.





The screenshot shows the 'Custom Fields' section with a text input field for 'Engineer's Recommendation' and a 'top of page' link.

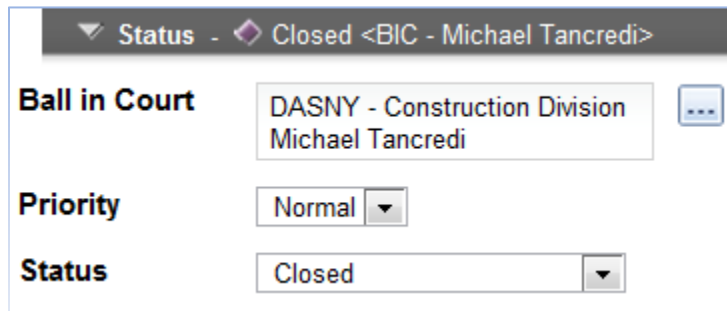





6. Click , when finished.

### Closing Inspection Items


Each Inspection Item is an individual Inspection and is therefore actionable and requires resolution.

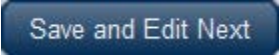

- Open the **Inspections** module (located within the Logs folder).
  - Open the **Inspection** document.
- Select the  tab.
  - Click the **Edit Icon**  on the Inspection Item being closed.
  - Select the date the item was **Closed**.
- Within the **Status** section;
  - Update the **Status** of the inspection item.



Status - Closed <BIC - Michael Tancredi>	
<b>Ball in Court</b>	DASNY - Construction Division Michael Tancredi 
<b>Priority</b>	Normal 
<b>Status</b>	Closed 

- Within the **Custom Fields** section;
  - Enter a description of how the item was resolved in the **Resolution** field.

Custom Fields 		top c
<b>Actionable</b>	No	
<b>Resolution</b>	<p>The roof assembly is only required to be rated if it is 20-feet or less above a floor directly below it. Since the platforms being erected are temporary, the only floor in the shaft is at the 1st Floor which is over 20-feet below. Therefore the roof is not a rated assembly above this shaft or the elevator. The GWB is primarily there to hold the insulation in place, especially in the elevator shaft where it is not permitted to be exposed.</p>	

- To edit additional inspection items, click .
- Click , when finished.

## APPENDIX A

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## PLACEHOLDER NAMING CONVENTIONS

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Following is a list of Placeholder abbreviations and their corresponding roles:

<b>Value:</b>	<b>Used For:</b>
<hr/> <b>Consultants:</b> <hr/>	
A/E-0	Project Architect of Record
C-107, C-207, C-307, etc.	Construction Manager Consultants
A/E-1, A/E-2, A/E-3, etc.	Other Consultants
A/E-1a, A/E-2a, A/E-3a, etc.	Sub-consultants
<hr/> <b>Contractors:</b> <hr/>	
C-101, C-201, C-301, etc.	General Contractors
C-102, C-202, C-302, etc.	Electrical Contractors
C-103, C-203, C-303, etc.	HVAC Contractors
C-104, C-204, C-304, etc.	Plumbing Contractors
C-105, C-106, C-108, etc.	Other Prime Contractors
C-205, C-206, C-208, etc.	Other Prime Contractors
C-109, C-110, C-111, etc.	Other Prime Contractors
C-209, C-210, C-211, etc.	Other Prime Contractors
<hr/> <b>Subcontractors:</b> <hr/>	
C-101A, C-101B, etc.	Subcontractors to C-101
C-102A, C-102B, etc.	Subcontractors to C-102

## THE SUBMITTAL IMPORT UTILITY

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### Required Submittal List Utility

#### Overview

The Required Submittal List Utility (RSLU) works with the Dormitory Authority Project Management System (Contract Management). The Design Professional uses the RSLU to create the list of submission items needed to be submitted by contractors in order to insure the Design Intent will be satisfied. Each item on this list is then assigned to a specific contract placeholder (or multiple placeholders) and imported into the Contract Management project.

The Design Professional may forward the URL for this application to any other members of their design team, so as to allow the appropriate individuals to identify the submissions required for their specific areas of expertise. The RSLU utilizes Contract Management usernames and passwords, and Design Professionals are encouraged to request Contract Management user accounts for every member of their design team so they are able to participate in both the Contract Management and the RSLU systems.

Any number of users can enter submission requirements in the RSLU concurrently, and the application will allow users to save their entries and return at any time to finish their work.

Once all project submission requirements have been imported into the Contract Management project, Contract Management is then used to print the [Contractors Submission Schedule](#) report for inclusion in the Bid Documents.

Following the contractor selection process, Contract Management is then used as the project Submittal Log to track all project submissions and project [close out items](#).

#### Accessing the Required Submittal List Utility

Access at [www.myloadspring.com](http://www.myloadspring.com).

When prompted, enter your username and password.

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## USING THE REQUIRED SUBMITTAL LIST UTILITY

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### Logging In

Access at [www.myloadspring.com](http://www.myloadspring.com). A splash screen will appear that will direct you to the RSLU log on screen.

Enter your username and password. Click the “Login” button.

### Basic Steps for Using the RSLU

Once logged into the RSLU the process of entering the project submission requirements can begin.

**The basic steps to using the RSLU are as follows:**

- Click on Submission Definition to open the [Submittal Definition](#) page.
  - \- Select the Database/Group containing your project (usually EXPPROD).
  - \- Select your project.
  - \- Select a [Spec Section](#).
  - \- Select the Reviewer for that Spec Section.
  - \- Enter all submittals and close out items needed for that Spec Section. Click Apply.
  - \- Repeat the previous four (4) steps for all Spec Sections used in the design.
  - \- Click “Done”.
- Click on [Submission Assignment](#) to open the Submittal Assignment page.
  - \- Select the Database/Group containing your project (usually EXPPROD).
  - \- Select your project.
  - \- [Assign the Spec Sections](#) to the appropriate [Contract Placeholders](#).
  - \- Click “Commit and Close”

All entries will be written from the RSLU into the Contract Management project. Contract Management is then used to print the [Contractors Submission Schedule](#), and following the contractor selection process, Contract Management is then used as the project Submittal Log to track all project submissions and close out items.

Detailed instructions expanding on the above are available in following sections.

## Submittal Definition

The Submittal Definition page is used to define all submissions required by the project design.

To access the Submittal Definition page, click on “Submittal Definition”, located in the upper left-hand corner of the RSLU opening screen.

### **Enter all project submission requirements and close out items as follows:**

Step 1: In the Database/Group field, select the group containing your project (in most cases your project will be located in EXPPROD). Click “Go”.

Step 2: In the Project field, select your project. Click “Go”.

**Note: If you do not see your project , contact your DASNY Project Manager and request access to that project.**

Step 3: Select a [Spec Section](#) used in the design. If the desired Spec Section does not exist, click “Add New” and create a custom Spec Section. Click “Go”.

Step 4: Select the [Reviewer](#) for that Spec Section. The listing of Companies having a Role value equal to “Design Professional” in Contract Management is available in the drop down pick list.

Step 5: Enter the project specification Subparagraph identifier for a submission requirement in the Sub Paragraph fields (the RSLU will automatically punctuate the entry based upon accepted CSI MasterSpec 2005 paragraph structure). Enter a description for the submittal in the Title field (35 characters maximum). Scroll to the right and click “Add”.

Step 6: Repeating Step 5, add all other technical submission and [Close Out](#) requirements needed for the Spec Section in focus. If the item is a special close out item, click in the “Closeout?” checkbox. Be sure to enter the items with adequate granularity to differentiate all elements that are to be provided by the contractor. Click “Apply”.

Step 7: Continue selecting other (or add new custom) Spec Sections, repeating Steps 5 and 6, until all Spec Sections used in the design are completed. It may be helpful to [Print](#) a progress listing of your work at any time during this process.

Step 8: When all submission requirements have been defined, click “Done” (located in upper right-hand corner of the screen) to signify that all submission items needed to be submitted by contractors in order to insure

the Design Intent will be satisfied have been defined.

Step 9: Proceed to the [Submittal Assignment](#) page.

## **Submittal Assignment**

The Submittal Assignment page is used to assign all submissions required by the project design to the contractor (or contractors) who will be required to submit them.

To access the Submittal Assignment page, click on “Submittal Assignment”, located in the upper left-hand corner of the RSLU opening screen.

### **Assign the Spec Sections requirements and close out items as follows:**

Step 1: If the project will have only one prime contractor click in the “Select a single contractor for all project submittals?” checkbox. Select the contractor from the drop down list in the “Contractor selected is the only contractor submitting items in this project.” field. Click “Go”.

Step 2: If the project will have multiple prime contractors click the “Assign Contractor(s)” button.

- In the dialogue box that appears, select a Spec Section and click “Go”.
- Select one contractor responsible for that Spec Section in the “Contractor” field and click “Add”. Repeat to Add any other contractors responsible for that Spec Section.
- Continue selecting Spec Sections and assigning the contractors responsible for each until all Spec Sections have been assigned.

Step 3: click on the [Print](#) button to display a listing of all Spec Sections and the contractor assignments made to each. Check to verify all assignments have been made.

Step 4: When certain that all assignments are complete, click “Commit and Close”. If comfortable with the warning message that appears, click “Continue” and the process that writes the project submission requirements entered in the RSLU to the Contract Management project will proceed.

**Note:** The “Commit and Close” process may take some time to complete, please be patient!

## **Contractors Submission Schedule**

As mentioned earlier, the RSLU is used to identify all project submission and closeout requirements, and to import those requirements into Contract Management. Contract Management is then used to print the Contractors Submission Schedule report for inclusion in the Bid Documents.

All Bid Packages must include a Contractors Submission Schedule report printed from Contract Management.

### **To print the Contractors Submission Schedule report:**

- Step 1: Log into Contract Management. Go to your project, open the Logs folder, and then open the Submittal Packages module.
- Step 2: Select the “Advanced Print” action (located in the left-hand margin of the screen).
- Step 3: Select the “Contractors Submission Schedule” report. Click “Print”.

## **Spec Section**

In the RSLU the term “Spec Section” refers to the design Technical Specification sections.

As of 2007 the Dormitory Authority adopted CSI Masterspec 2005 for all project design documents, and consequently the RSLU provides CSI Masterspec 2005 values for specification sections in the Spec Section field pick list.

Often the design will include custom specification sections. If so, the RSLU provides a feature that allows custom Spec Section values and titles to be added to the Spec Section drop down pick list.

### **To add a custom Spec Section value to the Spec Section drop down pick list:**

- Step 1: In the Submittal Definition page, click the “add new” hotspot.
- Step 2: An “Add New Spec Section” dialogue box will appear. Enter the custom Spec Section number and the Title. Click “Save”.

The custom Spec Section will be added to the Spec Section field drop down pick list and be available until the project submission requirements have been written to Contract Management.



Once the “Commit and Close” has been initiated, the custom Spec Section values added will be deleted from the Spec Section field drop down pick list.

## Reviewer

The “Reviewer” is the firm who will be responsible for reviewing a given Spec Section.

The firms displayed in the “Reviewer” field drop down pick list originate in Contract Management. When a Future Commitment is created to procure design services and a “To Vendor” is selected, the system will create a Company having a “Role” equal to “Design Professional” (reference the DASNY Contract Management User Guide for more information).

Often a design subconsultant will be involved in the design who will be involved with reviewing one or more Spec Sections.

Should this be the case, and if that firm is not displayed on the RSLU “Reviewer” drop down pick list, that company must be added to the Contract Management project.

Contact your DASNY Project Manager and request that the design subconsultant be added to the Contract Management project. The Contract Management company must have a “Role” equal to “Design Professional” in order to be displayed in the RSLU “Reviewer” field drop down pick list (reference the DASNY Contract Management User Guide for more information).

## Contract Placeholders

The term Contract Placeholders refers to future contractors who will be selected to perform work on the project.

The Contract Placeholders that are associated with a project and appear on the [Submittal Assignment](#) page in the “Contractor” fields originate in Contract Management. When a Future Commitment is created to procure construction Work and a “To Vendor” selected, the system will create a Company having a “Role” equal to “Contractor” (reference the DASNY Contract Management User Guide for more information).

If when attempting to assign submittals in the RSLU the desired Contractor Placeholder is not available, contact the DASNY Project Manager to have the

necessary Future Commitment documents created in Contract Management.

### Close Out Submissions

While defining project technical submission requirements, all special close out requirements also need to be added. These close out requirements are to be added individually, and in the Spec Section to which they apply.

Examples of close out requirements:

- Operation and Maintenance Manuals
- Material quantities for turnover
- As-built drawings
- Warranties
- Instructional sessions for owner
- Special Tools
- Systems performance test reporting
- Certifications

### Printing from the RSLU

The RSLU provides functionality to print tabular reports of the data entered.

A “Print” button is located at the bottom of both the Submittal Definition and Submittal Assignment pages.

The Submittal Definition print function displays a listing of submittal requirements entered for each Spec Section.

The Submittal Assignment print function displays a listing of the Spec Sections that have been identified as requiring submittals, along with the placeholder Contracts each Spec Section has been assigned to.

#### **To print tabular reports from the RSLU:**

Step 1: With either the Submittal Definition or Submittal Assignment page open, click the “Print” button. The corresponding tabular report will display.

Step 2: In the tool bar of the dialogue box that appears, select Tools>Print.





