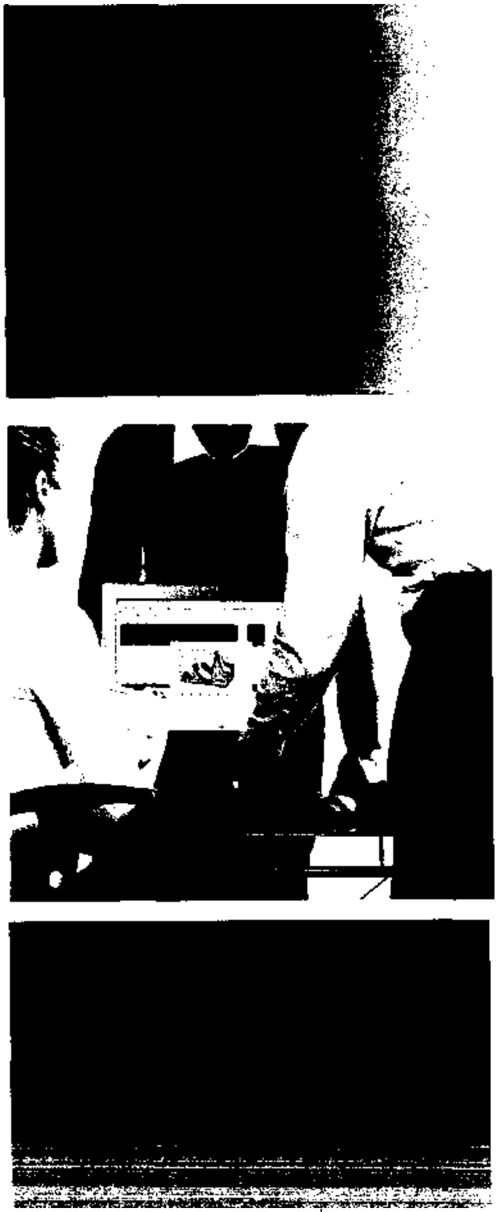


BuikrlLACCD

Student Guide

Business Applications

Legend

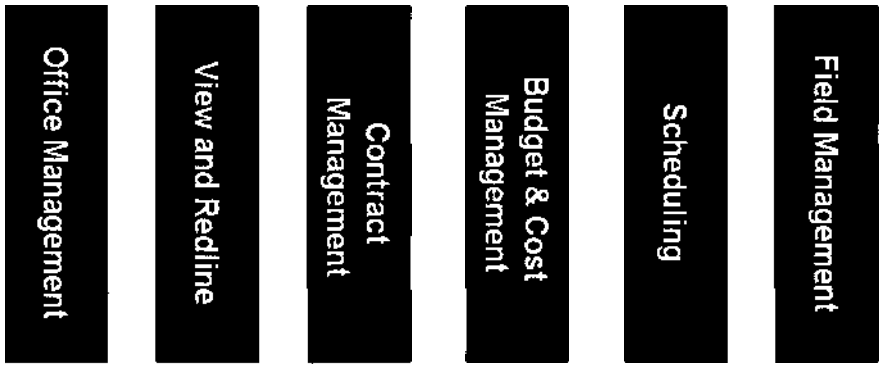
The following symbols are used in this training.

fc	**Important** Indicates an important concept, step, or caution.
●	**Tip** A shortcut or time-saving tip.
S	**Note** Additional information or situation users may encounter.

Table of Contents

Proliance Business Applications

Business Applications Overview



Platform Services

Proliance Business Applications

Notes:

1 Proliance Business Applications

All of the functions in Proliance that you'll use for **managing day-to-day documents and processes** are organized into the Proliance Business Applications.

All Available Proliance Business Applications

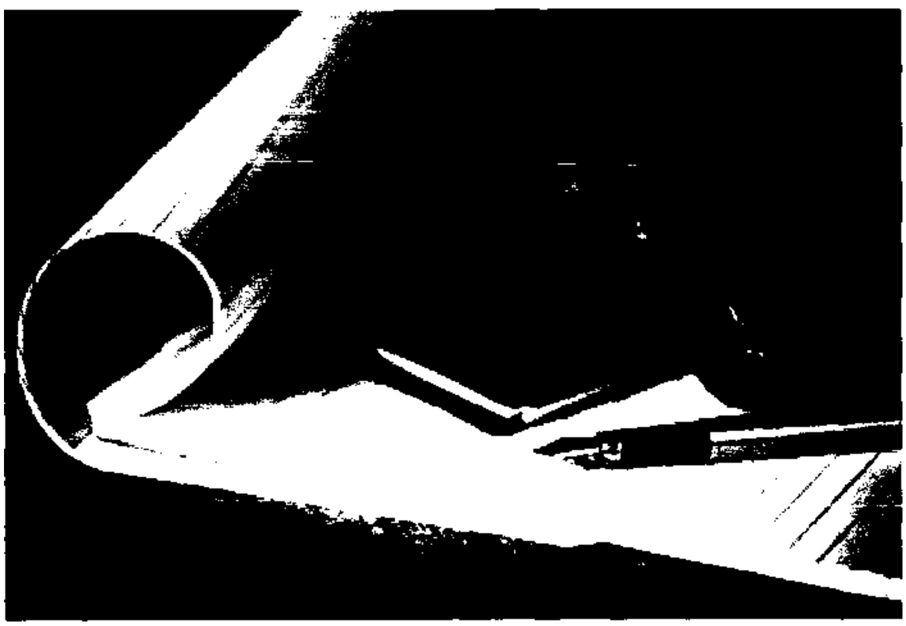
The complete suite of applications available for Proliance Version 2.x is listed below. Not every organization chooses to use all applications listed here.

- Office Management
- View & Redline
- Contract Management
- Budget &. Cost Management
- Scheduling
- Field Management
- Analytics

With Version 3.0 the Facilities Management application will be added as well.

0
<&

Office Management



B Office Management

- Correspondence
- Drawings
- Drawing Packages

E Management Plans

- Meeting Minutes
- RFIs
- RFI Issues
- Submittals
- Submittal Packages
- Transmittals
- Transmittal Package

Office Management Menu

Notes:

2 Office Management Application

The Office Management application provides the following functionality:

Correspondence

Correspondence documents are used to track correspondence such as verbal conversations, emails, faxes, and letters. They provide an audit trail of information and the ability to have an archived copy of information that was recorded.

Drawings and Drawing Packages

Drawing documents are a record of an actual drawing. They are used to track the review, editing, and approval of drawings. The drawing is attached to the Drawing document. Drawing packages are used to group drawings to send for review.

View and Redline

The View and Redline Management function using the Brava! application, is available in the Drawings application. This allows you to markup, revise, and track drawing revisions and changes within Proliance.

Management Plans

Used to document processes that are not already included in Proliance.

Meeting Minutes

You can use Meeting Minutes to record meeting details such as attendees, topics, action items, and status. You can also create Meeting Sets to save time entering recurring meetings, and carry over unfinished business from previous meetings in a set.

RFIs and RFI Issues

RFIs and RFI Issues provide a written record of questions and answers in a project. It is a formal process of recording the questions, responses, and any additional information required or obtained from the question. RFI Issues can be used to group similar RFIs for easy retrieval.

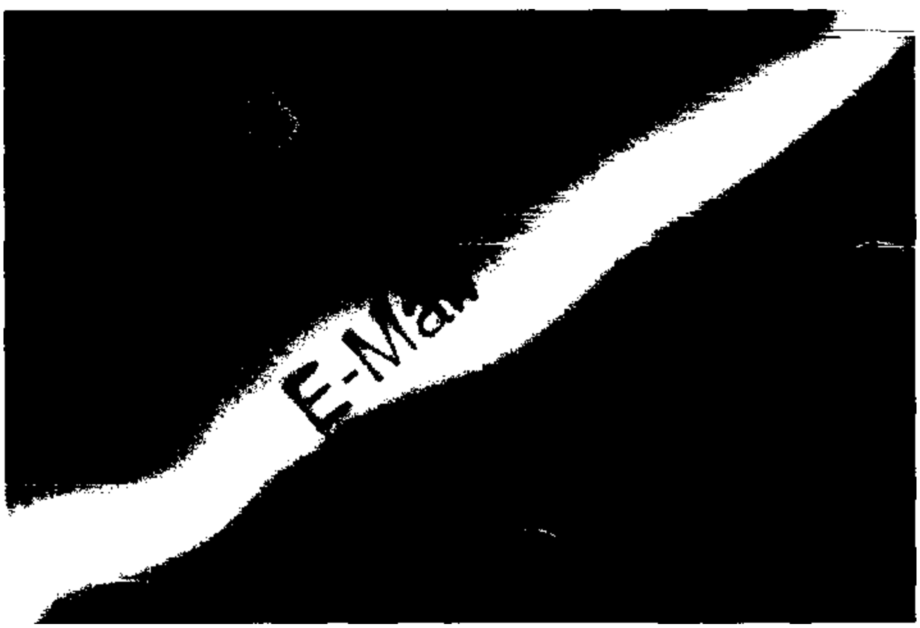
Submittals and Submittal Packages

Submittals are used to submit physical items for review, such as carpet samples. They can be grouped into a package to send for review to avoid multiple submissions. In Proliance - they are a special type of Catalog Card.

Transmittals and Transmittal Packages

Transmittals are used to manage and track drawings, including version information and recipients.

Correspondence



Notes:

oral ^v^fe^l^II^).l^I^Ji.B'l|K·fe^TCm!lBm,-,'i*!T!!W^).

CORRESPONDENCE: Pricing Discussion (TEUOI)

Main | Properties

B GENERAL *

Current State :	
Number :	
Subject :	Pricing Discussion
	In a telephone conversation on 12/01/04, Peter Painter indicated that the labor costs described on the contract did not match his expectations, Our earlier records indicate the price is accurate. Peter is going to check on whether he has a record regarding payments at the rate he expected,

El MORE DETAILS

Objective Summary :	(Different understanding between Acme and Peter Painter regarding agreed-upon pricing for painting labor.
Subjective Summary :	This is the third contract on which Peter has challenged contract payment schedule after earlier agreement. Need to find a way to stop this pattern or discontinue using him. His work is very Qood - good quality and on-time, so this is a difficult situation.
Correspondence Date :	G9,
	NORMAL / Normal
Correspondence Type :	EO : Email

Correspondence Document

3 What are Proliance Correspondence Documents?

Correspondence documents are a general purpose Proliance document for recording any miscellaneous communication. Whether you work for an owner, GC, vendor or another company, your organization undoubtedly values tracking communication both for historical reference and as backup in case of litigation.

When communication does not fit neatly into another Proliance document such as an RFI, Quote, Transmittal, etc., use the Correspondence document.

Examples of Communication You Could Track

- Emails
- Faxes & Letters
- Conversations (phone or in-person)

How do I access Correspondence?

You can access Correspondence from the Office Management menu.

Notes:

4 Working with Correspondence

Step-by-Step

Create a New Correspondence Document

Navigate To: Office Management > Correspondence

1. Click **New** button to create a new Correspondence document.
2. Enter **Subject & Message** (cut & paste email, etc.).
3. Add **Objective & Subjective Notes.**
4. Click **Save.**
5. **Execute Workflow:** Click on yellow Workflow button or click on Workflow dropdown to execute the appropriate workflow action.

Reply to Correspondence

If a significant amount of review or approval is needed, an RFI may be better suited for your needs. However, if you simply want to be able to create a new record showing both the original Correspondence and your additions, follow these steps:

Navigate To: Office Management > Correspondence

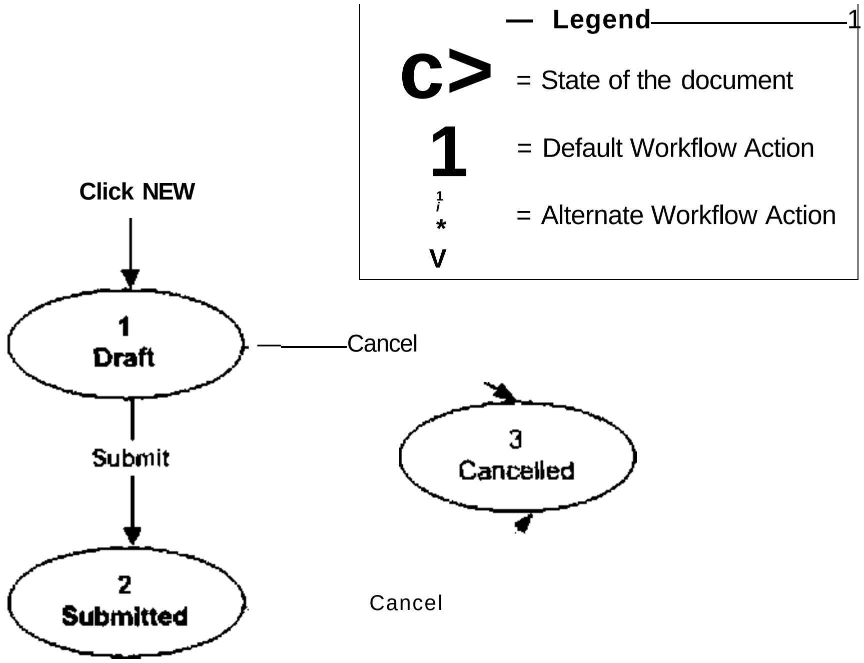
1. Click on the desired Correspondence record in the register
2. Click **Options.**
3. Click **Reply.** A new Correspondence document will be created with the originating document's date, time and entry in the Message field.
4. Enter the *Subject.*
5. Enter any other *Message* information or Notes.
6. Click **Save.**
7. **Execute Workflow:** Click on yellow Workflow button or click on Workflow dropdown to execute the appropriate workflow action.

Tip

S Use the **Apply to New Document** feature under Options to quickly create another document (i.e. Instruction or Quote) that is linked to this Correspondence as the Initiating Document.

● **Tip**

To **attach a file** such as a scanned image of a letter or a Fax image file, create a Catalog Card and then link to it from the Other tab.



Correspondence Workflow

Notes:

5 Correspondence Workflow

Correspondence documents are generally used for simple recordkeeping and so do not need a review or approval process.

Exercise: Fill in the Workflow States in the Table

State	Description
	The correspondence has not been distributed to the recipients.
	The correspondence is complete and is distributed to the recipients. The document number, subject and message cannot be edited.
	The correspondence is not valid. You cannot perform an action on a correspondence with a cancelled state.

X*

Meeting Minutes

Notes:

I^fflW

Main 1 Attendee* a rCi 1 TuDi-rs i Meetma items 1 Propertis*

ij SUMMAP;

[umml State :	Approved	Managing Company :	ElACME Curpu^yri
Meeting Set i	Deayi Meeting	fleeting Date i	11/11/2004
Hooting Numboe!	DM3500C1	Item* Mot Dlccuceod :	0 / 0
Title t	PreUrmary Desgn fof Stare 350 Sign	Items Not Completed t	0 / 0
Drdar Intel:	I of t	Lotos t Mooting:	This is the Latest Meeting

3 DETAILS

Current State ;	**Acprove:**
Title:	P'e'imi-arr Des on for- sto^e 50 s **:r,**
Meeting Set :	Desman >I^5tirn]
Meeting Number :	DM35:001

Managing CofTipan-y/Cofttace	Company	**Contact**
Prepared By Company/Contact'	Company 3 Eleiian- I^iia"	Contact

• MEETJK'SS DETAIL

Location :	»vestBu Idrc. POOT 545

Meeting Minutes Document

6 What are Meeting Minutes?

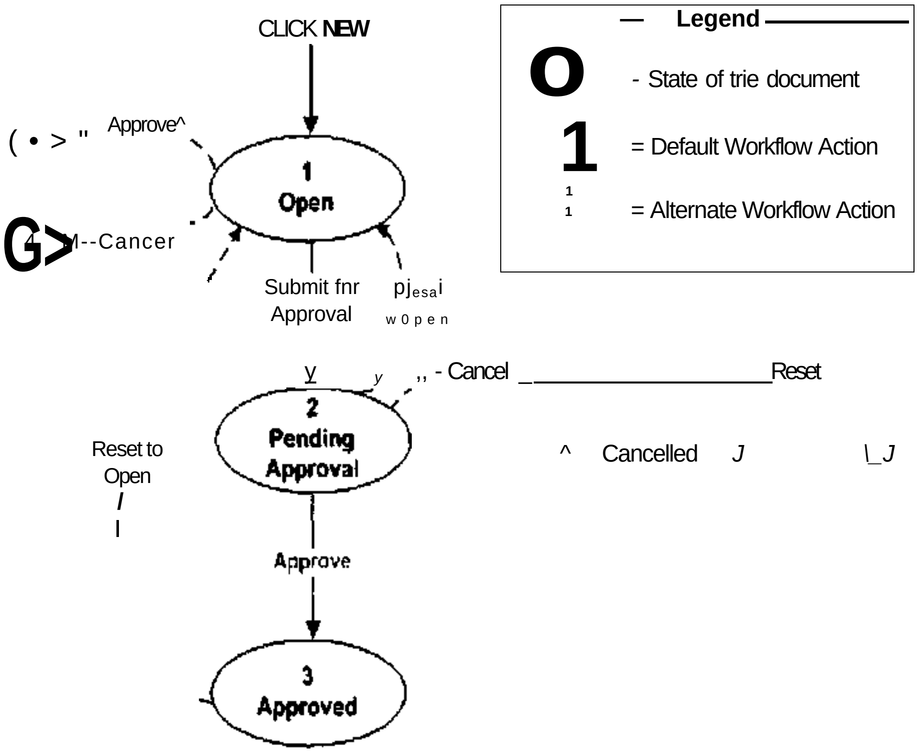
Meeting Minutes are used both to create and distribute agendas and topics for planned meetings as well as to record and distribute meeting minutes, action items and responsible parties.

Information Tracked in Meeting Minutes

- Basic Information: Meeting Purpose, Managing Company, Data
- Attendees and those to be CC-ed on updates
- Topics for discussion
- Action Items

Carrying Forward Information to New Meetings

When used with Meeting Sets, the next meeting in a set is easy to create with all pertinent topics, open action items, and attendance information carried forward to the newest meeting.



Meeting Minutes Workflow

Notes:

7 Meeting Minutes Workflow

Exercise: Fill in the Workflow States in the Table

State	Description
	Indicates that the meeting has not been finalized. This state is used for new meetings and meetings in progress.
	Indicates that the meeting has occurred and the content needs to be approved. Updates can still take place in this state.
	Indicates that the meeting has occurred and the contents have been approved. Edits to Topics or Meeting Items can no longer be made. A meeting can move directly from Open to Approved if you have the permissions to approve meetings.
	Indicates that the meeting has been cancelled.

3 Proliance - Microsoft Internet Explorer L tilX

Notes:

Lookup Editor

Lookup Version Title	[MeetingMinutesSetNeme	Lookup Type	[Meeting Set
Description	Meeting Set Name	System Lookup Type	|MeetingMinutesSetName
		Hierarchical Item Code	D

Itams I Laval Definition I Attribute Oaflnltlon I Affedatad Doojmants and Flalds I

| Add []~Add Top Level]| Delete | | Cut || Copy~|| i i || . |

- |CS: Consultant Meeting
- DM i Design Meeting
- PM i Project Meeting

Q PSTC : Project Steering Committee
D SUB : Sub Trade Coordination Meeting
G CM i Copied Meetings

Full Code |cs"
Code
Description Consultant Meeting
Sort Value

Sawe 11 Save end Close j | Help }| Cencel |

*IDone 3 S Local Intranet

Lookup Editor: Meeting Set

8 What are Meeting Sets?

For efficient and accurate creation of recurring meetings, you can make meetings part of a set.

A Meeting Set is not actually a Proliance document but is instead a list of defined Meeting Set names that are setup using the Proliance Lookup Editor.

Meeting Minute Set Functions

- Method for grouping meetings that have:
  - Same group of attendees in ongoing meetings
  - Same types of topics discussed
- Key information carried forward when new meeting in set is created:
  - Meeting Title
  - Company Information
  - Location
  - Date and Time
  - Purpose
  - Attendees
  - Topics
  - Open Action Items

Notes:

9 Working with Meeting Minutes

Meeting Minutes provide you with many tools to plan your meetings as well as to record meeting results, distribute information, and easily move open items to the next meeting in a set of recurring meetings.

Steps for Successful Meeting Management

1. **Decide if meeting should be part of a set**
   Any meeting that is recurring where the same attendees, cc's, and types of topics will be covered is a good candidate for being part of a set.
2. **Create Meeting Set (if needed)**
3. **Define the Meeting Topics**
   Meeting topics are the topics for discussion - they could be items that are standard and will be in every meeting (i.e. weekly updates in a departmental meeting) or one-time items
4. **Decide on the Attendees and CC's**
   Attendees, as you can guess, are people actually attending the meeting. CC's are people who may not attend but need to be included in any notices or updates on the meeting
5. **Create a New Meeting Minutes Document**
   a. Associate it with a Set, if needed
   b. Enter Meeting Name, Purpose, Date, Topics, Attendees/CC's
      Note: You may also want to enter more detailed "Meeting Items" at this time or you can wait until after the meeting to enter them.
   c. Save the document - it will now be in the *Open* state
   d. Print the Meeting Minutes document to use as a meeting agenda
6. **Hold your Meeting!**
   Note: You could wait to create the Meeting Minutes document until after the meeting; the advantage to creating it before is to be able to use it as the agenda for the meeting.
7. **Update the Meeting Minutes Document**
   a. Enter Meeting Items: these are specific notes from the meeting, including which items need action, responsible parties, due dates, etc.
   b. Execute Workflow to Pending Approval or Approved States. When the document is Approved, the minutes will be distributed to the people on the Attendee and CC: list.

Note

Once a Meeting is *Approved,* no further edits can be made to Meeting Items so be sure to make your updates while it's *Open* or *Pending Approval.*

3 Picklist -- Web Page Dialog

Notes:

P Meeting Set **0 0**

Search : Code v For: \~ =D

Results 7 of 7

	Code	Description
Add	CS	Consultant Meeting
Odd	DM	Design Meeting
Add	PM	Project Meeting
Add	PSTC	Project Steering Committee
Add	SUB	Sub Trade Coordination Meeting
Add	CM	Copied Meetings
Add	GM	General Meetings

Selected (Single) :

Code Description

Manage Lookup... OK I Cancel Help |

Meeting Set Picklist with Manage Lookup Function

SPioliance - Microsoft Internet Explorer

Lookup Editor

Lookup Version Title	iMeetingMinutesSetNeme	Lookup Type	[Meeting Set
Description	Masting Set Name	System Lookup Type	|MeetmgMinutesSetName
		Hierarchical Item Code	

I Laval Definition J Oaftnttfon I At«odatad Document* and Field* I

[Add || Add Top Level || Delate | | Cut

- CS : Consultant Meeting
- DM : Design Meeting
- PM : Project Meeting
- D PSTC : Project Steering Committee
- G SUB : Sub Trade Coordination Meeting
- CM : Copied Meetings

FuR Cod*	jcs
Code	CS
Description	Consultant Meeting
Sort Value	1

£lDone iH **i Local intranet

Lookup Editor: Meeting Set

10 Creating Meeting Sets

A Meeting Set is not actually a Proliance document but is instead a list of defined Meeting Set names that are setup using the Proliance Lookup Editor.

In order to create a Meeting Set you need to have the appropriate Security settings to allow you to use the Proliance Lookup Editor.

Two Ways to Create Meeting Sets

- From the **Lookup Lists** register in the Configuration section of Proliance

- or -

- By clicking on **Manage Lookups** from the dialog box that appears when you are selecting a Meeting Set to associate with a Meeting Minutes document

Creating from Lookup Lists

Open Program Workspace for managed projects; Project Workspace for stand-alone projects

Navigate To: Administration > Configuration > Lookup Lists

1. Scroll down and find **Meeting Set** in list.
2. Click on **Meeting Set.**
3. Click **Add Top Level,**
4. Enter *Code.*
5. Enter *Description.* Will display in Lookup Lists as "code:description".
6. Click **Save and Close.**

Creating from Meeting Set Selection Dialog

Navigate To: Office Management > Meeting Minutes

1. Click **New.** Select a Meeting Set dialog box opens.
2. Select **Create New Meeting in a Set.**
3. **Click on E3**
4. Click on **Manage Lookup.**
5. Click **Add Top Level.**
6. Enter *Code.*
7. Enter *Description.* Will display in Lookup Lists as "code:description".
8. Click **Save and Close.**

Main | **Attendees & CCs** | **Tapics** | **Meeting items** | **Properties**

Q SUMHAP'f

Cufv*nt Statia !	Approved	Managing Cnmpany *i*	
Meeting Set i	Des^i Meeting	r*teeting f>ate i	11/11/2004
MaeUng Number:	DM350001	Items Not Diccucsad *i*	0 / 0
Title s	Pfehrtnwf Design tor Store 350 Son	Items Not Completed ;	0 / 0
Order In 5«t:	I of t	Latect Heating. :	This is the Latest Meeting

B DETAILS

Current State :	Approve 3	
	P'8<imi^arf Design fo'' Stce 350 Sign	
Meeting Set:	Design *i<?5tmg	
Meeting Number :	DM350001	
Managing Company/Contact:	Company	Contact
Prcpared By CwnpaBf/Csntad:	Company g & , M m :,s;|il,	Contact

Q KEET:NSS DETAILS

Location :	w»stBu-ldrg. Poo[m] 345

Meeting Minutes

Notes:

lp
^^

11 Creating Meeting Minutes

Navigate To: Office Management > Meeting Minutes

1. Click **New** button. The ***Select a Meeting Set*** dialog box opens.
2. Select to create meeting in a set or create stand-alone (outside of set). To Create in Set, click on this icon: Q If created in a set, several fields will be pre-filled. For more on Meeting Sets & how to create them, see next section.
3. On the **Main Page:** Enter any **required fields** (marked with *)
   - Tips on Key Fields:
     a. Managing Company indicates who manages or "owns" this meeting
     b. Meeting Details / Next Meeting Details: Be sure to enter location, date and time. If this meeting is part of a set, Next Meeting info will carry forward when the next sequential meeting is created.
     c. Settings: To ensure that those responsible for action items are notified of items assigned to them (even if they didn't attend the meeting), be sure to check the box next to *Send Meeting Item Notices.*
4. Enter Attendees and CC's:
   - **Click Add Contact** to add people who will be attending the meeting or should be copied on notices regarding the meeting
   - **Click Attendee or CC** field to indicate which type of contact this is
   - **Notify on Approval:** will receive a notice when state is Approved
5. On the **Topics Page: Click Add** to enter the planned topics for discussion. These are the types of items you would normally list on an agenda.
   - Meeting Items: **Click Add** to enter detailed items to be discussed during the meeting.
   - Enter *Title.*
   - **Click in Topic field** to associate this item with a Topic.
   - Other fields are often entered after the meeting has occurred.
6. Click **Save.**

Tip: Reporting

^r To control the sequence in which information will appear in reports, use the "Order" field on the Attendees/CC's, Topics & Meeting Items pages to enter order numbers.

S **Tip: Meeting Item Details**

V To see details about a Meeting Item, click this icon: 0

Tip: Creating Agendas

Click Print e to create an agenda document based on your entries.

Note on Topics Page

The "In Use" column indicates whether that Topic is referenced by an existing Meeting Item in that Meeting Minutes document.

To: Andrea Chase; Ann Foley; Ann Foley

Subject: Meeting: Implementation Planning (#P1ᵞll), Read and Review

A

Document	**Meeting: Implementation Planning;** (#PM1)
Project:	PROJECT: Box Store 350 - Ann Arbor (#0148104AA)
From:	Proliance Notification
Date Sent	12/01/2004 10: 46 AM
Action by:	Administrator (ACME)
Action taken:	Transitioned from - Open
Current state:	**Approved**
Priority:	Normal
Expected Action:	Read and Review
Due Date:	~ 12/12/2004
Message:	You have meeting items to address. =

People receiving this notice:

Name	**Department**	**Expected Action**
Andrea C	Superior Construction Management	none
Ann Foley	ACME	none
Art Architect	ACME Corporation	none
Cameron Contract	RetaiKing, Inc.	none
Carl Controller	RetaiKing, Inc.	none
Debbie Designer	Elegant Design	none
Elie Engineer	RetailKing, Inc.	none
Pat Project Manager	ACME Corporation	Read and Review

Please do not reply to this email, as it was sent by an automated system.

Meeting Minutes Notice

Notes:

12 Notices for Meeting Minutes

Notices are sent for Meeting Minutes under three circumstances:

Standard Workflow Notice

When a Meeting Minutes document is Submitted for Approval or Approved, a notice will be sent to the appropriate people based on the workflow configured for that document.

Meeting Minutes Notice

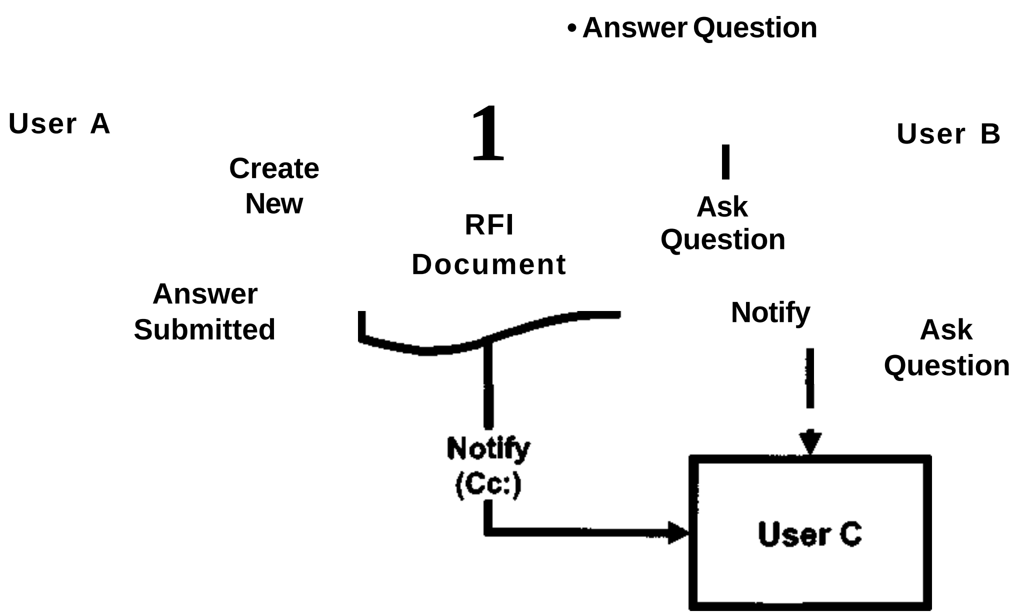
When a Meeting Minutes document reaches the Approved state, a notice will be sent to anyone who is on the Attendees and CC's page AND has the "Notify" box checked on that page.

Meeting Items Notice

When a Meeting Minutes document reaches the Approved state, a notice will be sent to anyone who is marked as a Responsible Party on the Meeting Items page IF the *Send Meeting Items Notices* box is checked on the Main page.

Requests for Information (RFIs)

RFI and RFI Issues Options from Office Management Menu



Collaboration using RFIs

13 What is a Request for Information?

What are RFI Documents?

RFI documents are used to send and follow up on questions about your project. The RFI document can be distributed between all involved parties including subcontractors, the GC, the owner and the architect. Each RFI contains a question, answer, and cost and/or schedule impacts. You can also attach documents, such as a drawing or sketch, to an RFI.

You can send a single RFI or group similar RFIs together and link them to an RFI Issue.

What is an RFI Issue?

An RFI Issue allows you to link RFIs with similar topics, thereby organizing the information more efficiently. The RFI Issue describes the topics in greater detail. When you open an RFI Issue, you can view all the questions and answers that pertain to that issue.

14 How do I access RFIs and RFI Issues?

You can access RFIs and RFI Issues from the Office Management menu.

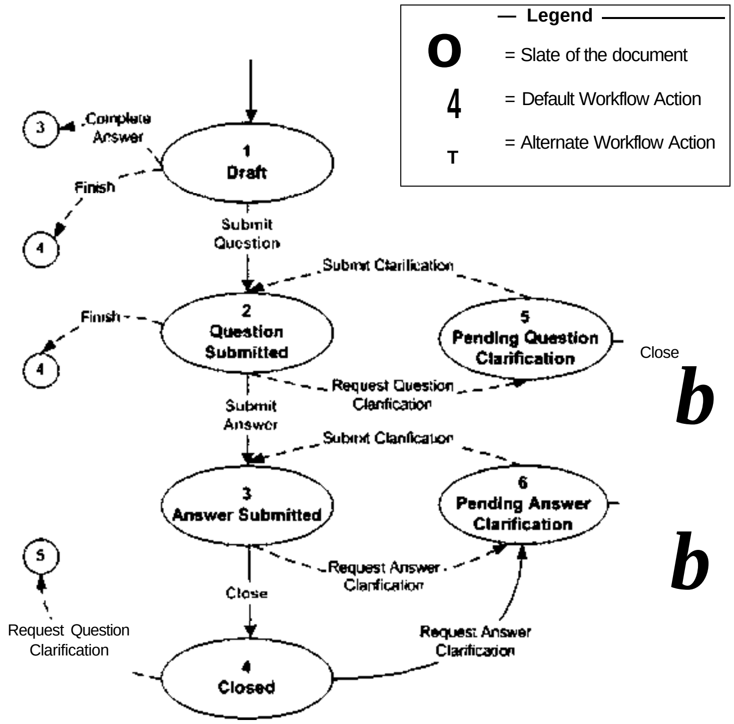
15 Collaborate Using RFIs

Use RFI collaborating features in Proliance to help you send and receive information quickly and efficiently.

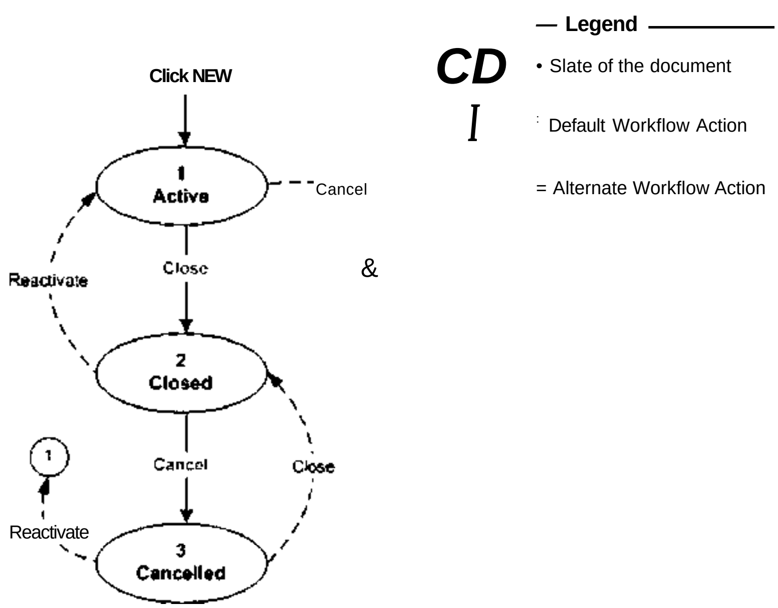
When collaborating with RFIs, you can send questions, answers, notices and even forward documents to interested parties.

The diagram to the left illustrates an example of how three users collaborate to obtain an answer to a question.

Notes:



RFI Workflow



RFI Issues Workflow

16 Workflow States

Exercise: Fill in the Workflow States in the Table

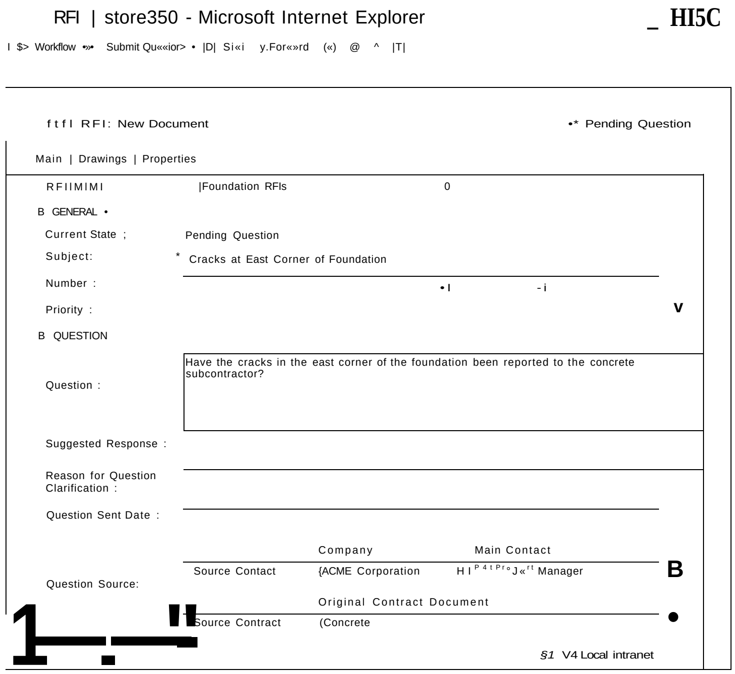
RFI

State	Description
	The RFI question has not been sent. This state usually indicates a newly created RFI
	Indicates the RFI question has been sent and the sender is now waiting for an answer. In most configurations, the Question field and its date field will now be locked and not available for editing.
	Indicates the RFI answer has been sent in response to the question. In most configurations, the Answer field and its date field will now be locked and not available for editing.
	Indicates the sender of the question has accepted the RFI answer.
	Indicates the RFI question was returned to the original sender for clarification of the question.
	Indicates the RFI answer was returned to the answer source for clarification of the answer,

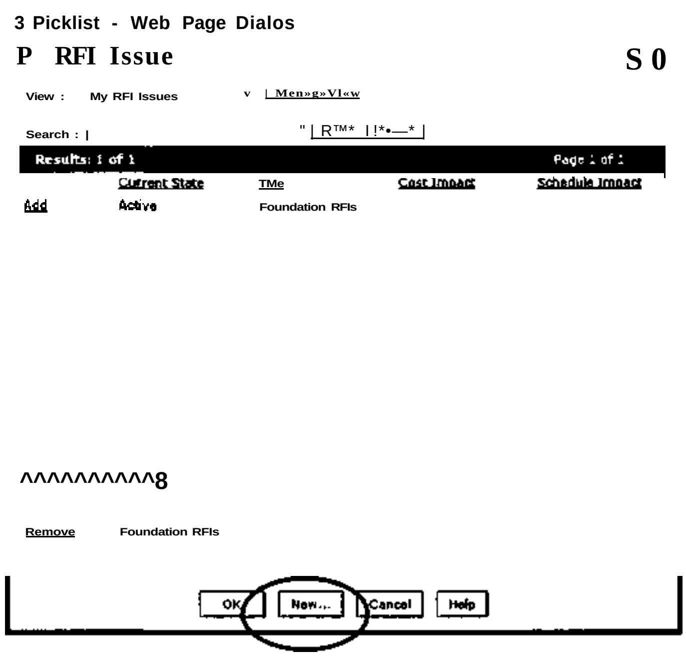
RFIIssue

State	Description
	Indicates that the RFI Issue is open and can have RFI documents linked to it.
	Indicates that the RFI Issue is closed and cannot have RFI documents based on it or linked to it.
	Indicates that a user cancelled the RFI Issue.

Notes:



RFI Document



RFI Issue Dialog

17 Working with RFIs and RFI Issues

Creating an RFI Issue

Navigate To: Office Management > RFI Issues

1. Click **New** button.
2. On the Main Page, enter *Title* and any other required or desired fields.
3. Click **Save.** RFI Issue is now **Active** (no workflow to execute).

Note

- After RFIs have been associated, may wish to updated Cost and Schedule Impact fields

  Calculated Cost and Schedule Impact fields are updated from associated RFIs.

  You can also create an RFI Issue when associating an Issue with an RFI. Just click New on the RFI Issue Picklist dialog box (see picture at left).

- **Tip: Quickly Deleting Groups of RFIs**

  To quickly delete RFIs that are tied to an issue, delete the RFI Issue and you'll see an option to either delete just the Issue or all of its related RFI Discussions.

Creating an RFI

Navigate To: Office Management > RFIs

1. Click **New** button.
2. On the **Main Page** select the RFI Issue, if needed.
3. Enter *Subject.*
4. Enter *Question* and *Question Source* (Sent Date is system-generated).
5. On the **Drawings Page** link to any relevant Drawing Documents.
6. Click **Save.**
7. On the **Other Tab** link to any other relevant Proliance Documents.
8. Execute Workflow of **Submit Question.**

mil in i—iiimwinwj nl KCTga
New ! • Delete Views • V' Refresh Print ? Help

Notes:

RFI Issue Default Template ;ylts

Q	Number	Title	Current State	Prio

RFI New Document Drop-down

JeV.W'.'i.H'.'aV

RFI ISSUE: New Document

Main | Properties

S GENERAL "

Current State :

Number :

Title : - CIP Wall Issues

CIP wall was added at the entry in drawings revised in June.

Priority :

B THREADED RFU

H COST IMPACT

S SCHEDULE IMPACT

B AREAS

Add Une Remove Line(s)

Coda	Description
	First Floor

B CATEGORIES

Add Line Remove Line(s)

	Category Code	Category Description
•	DRD	Drawing Discrepancies

RFI Issue New Document

18 Exercises

Exercise: Creating an RFI Issue

There have been several RFIs regarding the CIP wall at the building entry. An RFI Issue will be created so that all related RFIs can be linked.

Navigate To: Office Management > RFI Issues

1. Click **New** button to create a new RFI Issue.
2. On the **Main** Page, enter the following information:
    a. *Title:* CIP Wall Issues
    b. *Notes:* CIP wall was added at the entry in drawings revised in June.
    c. *Areas:* Add line and select Fl (First Floor)
    d. *Category:* Add line and select DRD (Drawing Discrepancies)
3. Click **Save.**

New i • Delete Views • '* Refresh e Print ? Help

RFI Default Template 0 results

|~j Number Subject Current State Priority

Notes:

RFI Document New Dropdown

RFI Issue: |CIP Wall Issues

RFI Issue Dropdown on RFI Document

• ^W.'..H'."k

IM [RFI: New Document

Main Drawings | Propetics

RFI Is»u* t |CIP Wall Issues

B GENERAL '

Current Stale: Pending Question

Subject i - CIP Wall at entry

Number : 1 -1

Priority : Normal

B QUESTION

Question i At the ground floor, is a CIP wa required in the exterior entry room wall between lines E and F?

Suggested Response :

Reason far Question Clarification :

C9.

Question Sent Date : Company Main Contact

Source Contact SC Subcontractors Q Shawn Coverson

Original Contract Document

Question Source: Source Contract

RFI New Document

Drawings Section of Drawings Page

0 Confirmation

ACTION COMPLETE

DISTRIBUTION RESULTS

The document CIP Wall at entry has been successfully changed to the workflow state ' Question Submitted' and has been sent to the following people:

Return To Document Return To Register I

Confirmation Dialog

^
-^^

Exercise: Creating an RFI

Scenario:

The subcontractor has a Request for Information. The RFI will be first sent to the GC, and then forwarded to the Architect for an answer.

Navigate To: Office Management > RFIs

1. Click New button to create a new RFI Document.
2. In the *RFI Issue* field, select Issue 1 - CIP Wall Issues
3. On the **Main** Page, enter the following information:
   - *Subject:* CIP wall at entry
   - *Priority:* Normal
   - *Question:* At the ground floor, is a CIP wall required in the exterior entry room wall between lines E and F?
   - *Question Source:* Select the Subcontractor that submitted the question.
4. Click **Drawings** page.
   - Click Add Line.
   - Select the drawings that pertain to the RFI.
5. Click the **Submit Question** button.
   - In the *To* field, click the magnifying glass icon H and select The General Contractor's contact
6. Click **Execute.** The Confirmation dialog box opens indicating the Action Complete. The RFI Document transitions to the 'Question Submitted' state.
7. Click Return to Register.

Exit Edit Mode Workflow Submit Answer Save Options Forward

General Workflow Activity Log Other

RFI: CIP Wall at entry (1) • Question Submitted

Main | Drawings | Properties

RFI I W M i |CIP Wall Issues

Q GENERAL"

Current State : Question Submitted

Subject: " |CIP Wall at entry

•1 -|i

Priority: Normal

E QUESTION

S ANSWER

a COST IMPACT

S SCHEDULE IMPACT

S AREAS

S CATEGORIES

E DISCIPLINES

R*cip*ant Action t
Submit Amotr

Sent By:
Danit* Haas

To!

06/IS/20O4

M — , . . ,

7

Notes:

RFI Document

B CATEGORIES

Add Line **Remove Linc(s)**

	Category Code	Category Description
•	DRD	Drawing Discrepancies

Categories Section of RFI Document

WBI) Pdl;e Didlw,

Q Forward

To forward this document, please selact recipients below and dick "OK".
**Any unsaved changes to the document viill be automatically saved.

To: * Joe Architect D

From: ulie GC

Cc: D

Recipient Action:

Custom Message:

Priority: Normal v

Due Date: E^

1 OK_I Cancel |

Forward Dialog

Exercise: Reviewing and Forwarding an RFI Document

Scenario:

The General Contractor has received the RFI. The Project Manager will categorize the RFI, and then forward it to the Architect for an answer.

Navigate To: Office Management > RFIs

1. Open Document.
2. Click Edit. Review Sticky Note and Details.
3. In the Categories section, add line and select DRD (Drawing Discrepancies).
4. Click Save.
5. Click the Forward button.
6. In the To field, click the magnifying glass icon H and add Joe Architect.
7. Change Recipient Action to: Submit Answer.
8. Click OK. The Confirmation dialog box opens indicating the Forward was successfully completed.
9. Click OK.

CtP wall is required as backup to stone veneer. Refer to revised drawings for updated detail.

Notes:

RFI Answer Section

ItEdItMod* C> Workflow • Submit Anr,v«r , £j] s»vi p Option! T ^v Fon.v.rd § § § X [()

jatUW.'.A'J.'l 12

Execute Workflow

To comptata the workflow action and notify people, select recipients and click "Execute". If you don't wUh to notify people, dick "Execute" wttti no recipient* selected (Notet 'HCC' red plants cannot be removed).

RFI Issue I

Q GENERAL -

Current State :

Subject:

Number:

Priority !

;Shawn Coverson

E QUESTION

H ANSWER

Recipient Action: jH

Message:

Due Oate:

Priority:

Answer Sent Date :

Due Date: 69.

Answer So urea:

Execute | Clear Fields Cancel

Submit Answer Execute Workflow Dialog

Exercise: Answering an RFI

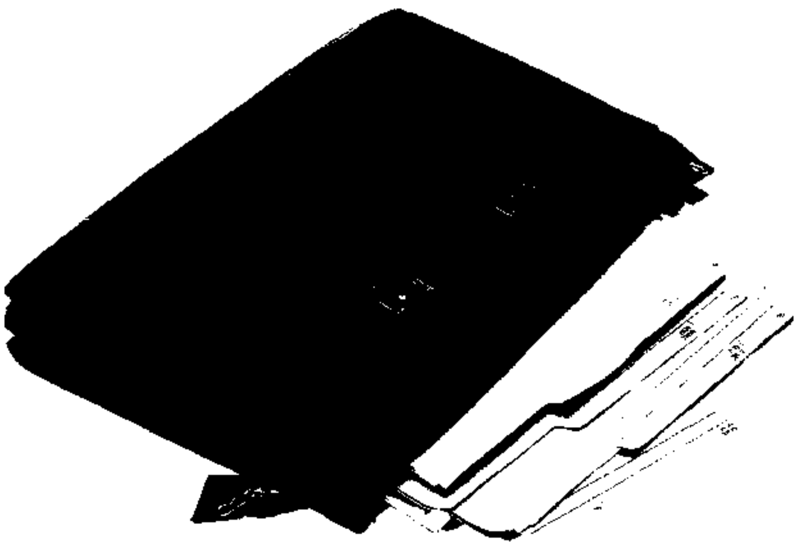
Scenario:

The Architect has received the RFI and will now review and answer it.

Navigate To: Office Management > RFIs

1. Open Document.
2. Click **Edit.**
   - In the *Answer* field, type: CIP wall is required as backup to stone veneer. Refer to revised drawings for updated detail.
   - Click Submit Answer.
   - In the *To* field, click the magnifying glass icon H and add Julie GC.
   - In the *Cc* field, click the magnifying glass icon IB and add the subcontractor that originated the RFI.
   - Change *Recipient Action* to: Close.
3. Click **Execute.**
4. Click Return to Register.

Submittals



Notes:

19 What are Submittal Documents?

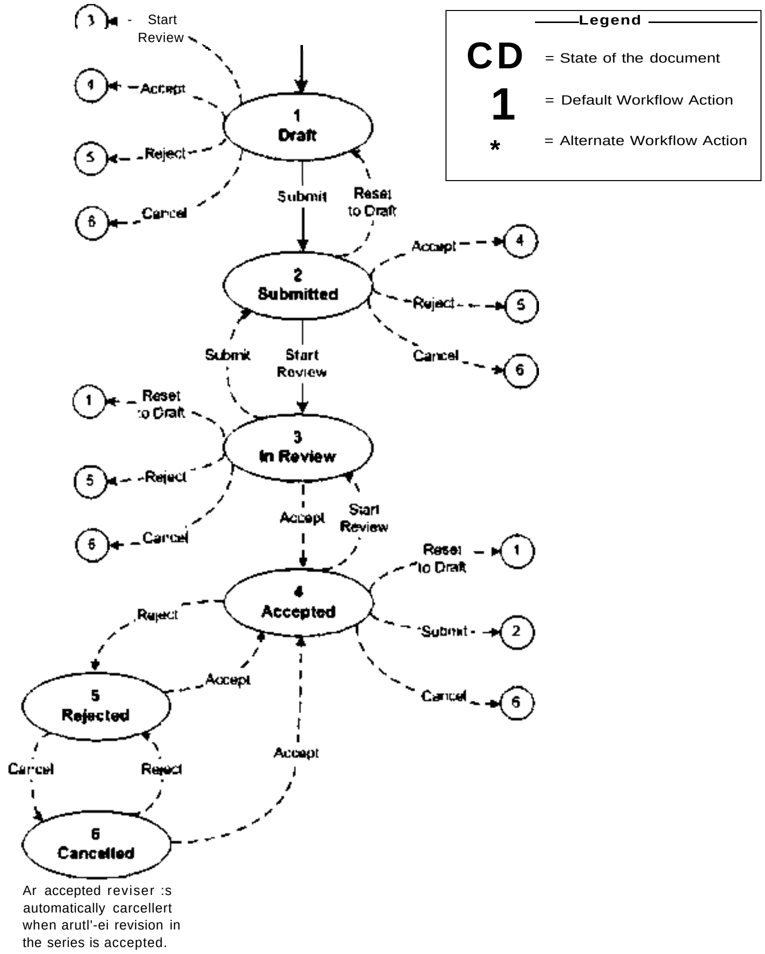
Submittals represent documents and items that contractually require approval by stakeholders. Submittals can include electronic documents, such as schedules, or they can represent physical items such as floor samples.

What are Submittal Packages?

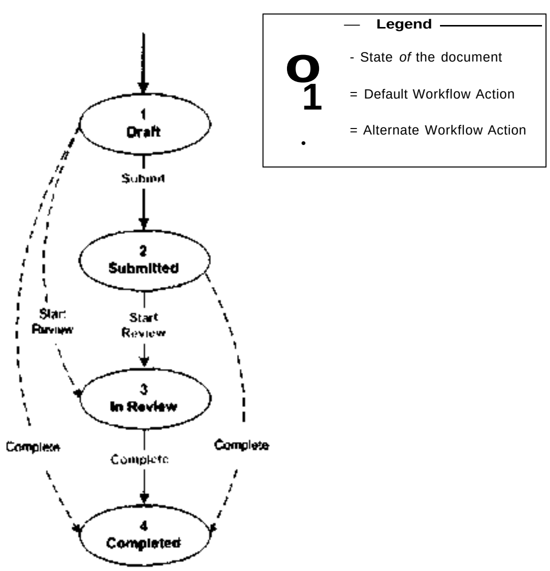
A submittal package represents a collection of submittals that will be sent to a series of reviewers for feedback. The managing contact then reviews this feedback and makes a final determination on each item in the package when he or she completes the package.

20 How do I access Submittals?

You can access Submittals from the Office Management menu. There are separate options for Submittals and Submittal Packages



Submittal Document Workflow

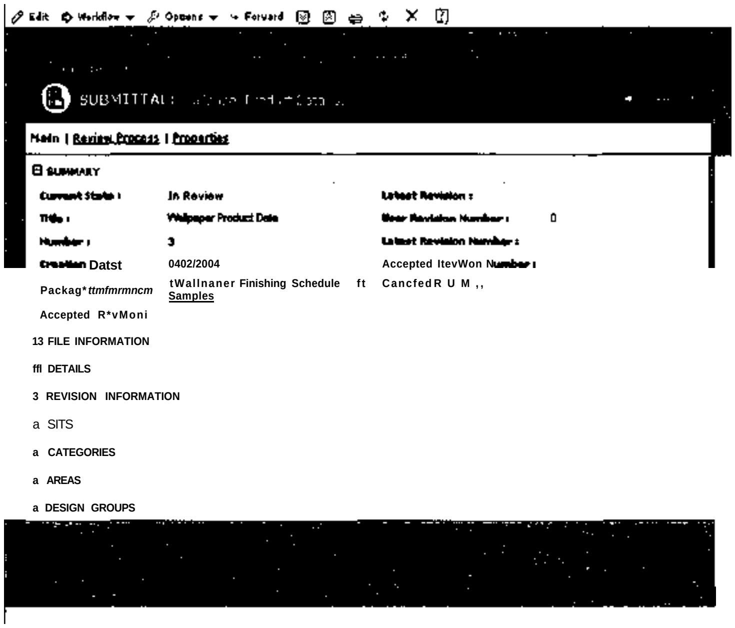


Package Workflow

21 Workflow: Submittal Documents

Exercise: Fill in the Workflow States in the Table

State	Description
	A new document revision is still in progress. It is not yet complete or ready for activation.
	A new document revision has been submitted for activation, but has not yet been accepted.
	A document revision is currently being reviewed, but has not been accepted or rejected. The Finish Review button cannot be used unless the document is in this State.
	The responsible person has accepted the document revision. This revision will be used for construction. **Note** ● Only one document in any given series can be in the Accepted state. If another document revision in the series is accepted, Proliance automatically changes the previously accepted document revision to the Cancelled state and assigns it a cancelled reason of 'Superseded.'
	An accepted revision has been rejected by somebody. Once a revision is rejected, you cannot accept or cancel it, but you can create a new revision if you want to continue a particular document series.
	The document revision has been cancelled. Either someone manually cancelled the revision for whatever reason, or Proliance cancelled the revision because someone accepted another revision in the same series. Proliance may provide more information about the cancellation by its Cancelled Reason: 'Obsolete' indicates that someone manually cancelled a revision in the Accepted state. 'Superseded' indicates that Proliance cancelled the accepted revision because someone has accepted another revision in the same series. **Note** ● No cancellation reason is shown if the revision being cancelled is not in the Accepted state.



Submittal Document

Notes:

22 Creating a Submittal

Three Ways to Create Submittals

- **One-by-one,** by clicking **New** in the Submittal register
- In a **batch,** using the **Creation Wizard** from the **Tools** button in the register
- From a **Submittal Package**

Creating a Single Submittal

Navigate To: Office Management > Submittals

1. Click **New** button.
2. On the **Main Page:**
   a. Click on **Upload** icon *@ to attach any relevant external files.
   b. Enter *Name:* this will be used as the first part of the Title for all documents in that series and will be followed by the Proliance-generated revision number.
   c. Enter *Revision Number.* This is your own numbering system, which the system will attempt to increment.
   d. In **Parties** section: Be sure to enter the *Manager* information.
   e. Enter any other fields required/desired by your organization.
3. On the Review Process page:
   a. Click **Add** to enter *Review Steps.* Note: You may want to review in package instead of individual documents.
   b. Pick *Reviewing Contact, Reviewing Company, Sent for Reason* and, if needed, *Reviewing Contract.*
   c. Enter appropriate *Start or Finish Date* and *Review Days.*
   d. Most other fields will be calculated or completed by reviewers.
   e. Click appropriate **Calculate** button.
4. Click **Save.**
5. **On** the **Other Tab** attach any relevant Proliance documents.
6. Execute Workflow: **Submit** or **Start Review.**

Note

^^ The Manager of a Submittal will receive Proliance Notices when the review process is completed.

S **Tip: Resequencing Review Steps**

To change the order of steps after you've entered them, simply change the numbering in the Step Number field.

Tip: Assigning Concurrent Reviewers

•/ If you'd like some people to review the document at the same time, give them the same Step Number. For instance, if John and Sally can both review the Tile Submittal at the same time, give them each a Step Number of 1.

Notes:

Transmittals Creation Wizard

2 Please fill in the fields below in order to create Transmittals.

Title	Series Identifier *	User Revision Number	Actual Revision Date
-Protection - Product Data	,7MPS1		
jturs Protection-Samples	."1.IPS2		
••otsction-Sticp DrawinBa	•'H.IPS;		

J I Help

Creation Wizard Step 2

Web Paee Dialog

Transmittals Creation Wizard

3 The following Transmittals have been created.

Title	Series Identifier	User Revision	Actual Revision Date	Discipline
^Thermal and Moisture Protection - Product Data				
BTThermal and Moistu-c Froteraor - jgamoles				

Previous | | | | Close | | | | Help

Creation Wizard Step 3

Using Creation Wizard for a Batch of Submittals

Navigate To: Office Management > Submittals

1. Click Tools button
2. Click on Creation Wizard
3. Select Template
4. Enter information in displayed fields
5. Click on Finish
6. Documents will now appear in register in Draft state and can be opened individually for more detailed editing

23 Creating a Submittal Package

Navigate To: Office Management > Submittal Packages

1. Click **New** button.
2. On the **Main Page:**
   a. Enter *Title:* This is the descriptive title for the package
   b. Enter *Name:* This will be used to track revisions - enter a brief name with no spaces or unusual characters.
   c. Enter *Revision Number.* This is your own numbering system, which the system will attempt to increment.
   d. In **Parties** section: Be sure to enter the *Manager* information.
   e. Enter any other fields required/desired by your organization.

3= On the **Submittals** Page:
   a. Click **Add Existing** to attach documents you've already created.
   b. Click **Add New** to create a new document to attach. The wizard that opens is like the batch Creation Wizard.

4. On the **Review Steps Page:** Click **Add** to enter Review Steps. Note: You may choose to set review steps in individual documents instead
   a. Pick Reviewing Contact, Reviewing Company, Sent for Reason and, if needed, Reviewing Contract.
   b. Enter appropriate Start or Finish Date and Review Days.
   c. Most other fields will be calculated or completed by reviewers.
   d. Click appropriate **Calculate** button.

3Tile Submittal for Entry Way - Rev: 0 | Submittal | store350 - Microsoft Internet Explorer - IPI5?

n?EdK ($ Workflow w ft Option* • ' '-. Forward \jg} £§ Q •£ X {J}

Mfm^KK^^KKKKKKKK^^^^M

r^H Main 1 Review Process 1 ProDerties

•Br-ev BWBT | Andrea C v

*Step	^Reviewing Contact	*Ravi«tfing Company	9 Sent For Reason	Original Planned Start Data	Original Planned Finish Data	Original Planned Review Day*
i	Bimksi£	Mjiaim.'nt'"''"''''''"	F<"R. . . .	.os/oi/2005	03/02/2005 (original Planned Finish Data]	i
2	BAnnialftonsr	BlACME	F«rR««l.»	03/02/2005	03/03/2005	1
3	ICid Controller	BRottilKino. Inc.	For Information	03/03/2005	03/04/2003	1
.	Baatfiiflmaii	^ySXi*™*™*"	"•'''•'"	wo,/2oo5	03/05/2003	1

H< >

lit i§ S Local intranet

Review Process

Notes:

24 Calculating Review Process Dates

Continue in: Office Management > Submittals > Review Process page

Note: These steps apply to ***individual documents*** *and to* ***packages***

1. Enter your Review Steps and the following related information:
   - *Step Numbers*
   - *Reviewing Contact & Reviewing Company*
   - *Sent for Reason*
   - *Original Planned Review Days* (how long it will take them to review)
2. Decide whether you need to calculate ***back*** from the desired ***finish date*** or ***forward*** from the planned ***start date.***
3. To Calculate Back from Desired Finish Date:
   - Enter desired finish date in *Original Planned Completion Date* field for the ***last*** reviewer
   - Click **Calculate Backward.**
   - *Start Date* for that reviewer and both *Start* and *Finish Dates* for other reviewers will be automatically filled in.
4. To Calculate Forward from Planned Start Date:
   - Enter planned start date in *Original Planned Start Date* field for the ***first*** reviewer
   - Click **Calculate Forward.**
   - *Finish Date* for that reviewer and both *Start* and *Finish Dates* for other reviewers will be automatically filled in

Notes:

25 Reviewing Submittals

In a Submittal Document

Navigate To: Office Management > Submittals

1. Click on the Register record for the appropriate document (or Follow the link from the Notice/Email).
2. Review the relevant data on the Main page.
3. Review Attached File from Main page:
   - Click on the Proliance Viewer icon ª<5 or
   - Click on the Download File icon *&:
4. Click on **Review Process Page.**
5. Select your name from the *Reviewer* drop-down list.
6. Enter *Recommendation* (scroll to right to see).
7. If desired, enter *Review Comments* &. *Stamped Date.*
8. Click on **Finish Review** button.
9. Click **Save.**

In a Submittal Package

Navigate To:
Office Management > Submittal Packages

1. Click on the Register record for the appropriate document (or Follow the link from the Notice/Email).
2. Review the relevant data on the **Main** page.
3. Click on the **Submittals** page.
4. Click on links to view individual Submittal documents.
5. Click on **Reviewer Feedback** Page.
6. Select your name from the *Reviewer* drop-down list.
7. Enter *Recommendation* or click **Recommend Accept All** or **Recommend Reject All.**
8. If desired, enter *Review Comments* &. *Stamped Date.*
9. Click on **Finish Review** button.
10. Click **Save.**

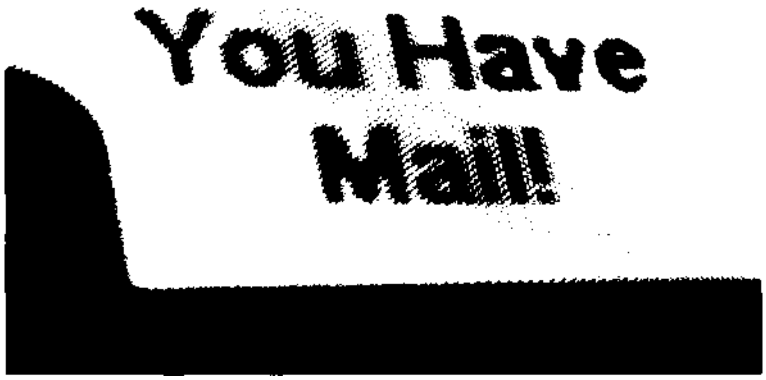
Note

The document must be in the ***In Review*** state in order for the **Finish Review** button to be available.

Note

A user can only enter information for his/her own review step and once a user has clicked Finish Review on a step, that step cannot be edited.

Notes:



26 Notices for Submittals

Notices are sent for these documents under two circumstances:

Standard Workflow Notice

When the document moves to another workflow state, a notice will be sent to the appropriate people based on the workflow configured for that document.

Review Process Notice

When a review step has been completed, the next person in the Review Process will receive a notice. When all steps have been completed, the person assigned as the Manager of the document (on the Main page, under Parties) will receive a notice.

3 https://www.proliance.net - 21 | Submittal | store350 -Microsoft Internet... _ !|D (X

0 Edit & Options • ' |») ; (§) ; ^ ; * i X ; CL

SUBMITTAL Submittal for Entr

Revisions

New I • Delete

View: (All) 1 of 1 results | I FINP I Page 1 of 1

I rj	Number	Title	Revision Number"	Creation Date	Current State
		Tile Submittal for Entry Way - 0	0	Z/II/2005 8:56 PM	In Review

iQDone dj 9 Internet

Revisions, on References Tab

Notes:

27 Creating Submittal Revisions

Navigate To: Office Management > Submittals

1. Click on the Register record for the appropriate document (or Follow the link from the Notice/Email).
2. Click on the **References** Tab.
3. Click New.
4. Proliance creates a new revision document. This revision is identical to the previous revision, except for the following:
   - The **System Revision Number** is incremented by 1.
   - The **Revision Number** is automatically incremented based on the previous revision number.
   - The **File Information** section is blank until you save the new revision.
5. Make changes to the appropriate information on the Main page, including uploading any file attachments if necessary.
6. Click **Save.**
7. Execute **Workflow** as appropriate.

Notes:

CurrttfSUM :
trjtnb*'-

E*n** \tonbf<*f :
Sy*tW" **flj»«
Mumfc*r:
Wdir *«w»i<w Number ;

Actual a«v*o« Dm •

Submittal New Document

i^> Exit Eflit Mode O Workflow • Submit [CJ] Sava <£* Options • '+ Forward dD (HJ Q X [Q

Submit Button on Submittal Document

*** Execute Workflow**

resubmit
To complata tha wc rkflow action and notify paopla. lalact radplants and click "Exacuta". tf you don't wish to n Dtify people, dick "Execute" with no radpients selected (Note; 'HCC ratipiants cannot ba ramoved).

To:	Julie GC
Cc:	
Hcc:	
Recipient Action:	Start Review
Custom Message;	
Priority:	Normal
Due Date:	06/29/200.1

| Execute 11 Clear Fields 11 Cancel |

Execute Workflow Dialog

28 Exercises

Exercise: Creating a Submittal

Scenario:

The Thermal and Moisture Protection submittal needs to be reviewed by the architect. The subcontractor will enter the submittal documents and submit them to the General Contractor.

There are three items that need to be submitted for Thermal and Moisture Protection: Product Data, Samples and Associated Shop Drawings.

Navigate To: Office Management > Submittals > Submittal Documents

1. Click **New** button to create a new Submittal Document.
2. On the **Main** Page, enter the following information:
   - *Title:* Thermal and Moisture Protection - Product Data
   - *Series Identifier:* TMP1
   - *Discipline:* Select the proper discipline from the drop-down list
3. Click **Save.**
4. Click **Submit.**
5. Click the magnifying glass H in the *To* field and select the General Contractor.
6. Press **Execute.**
7. On the Action Complete dialog box, click Return to Register.

SUDMITTAL PACKAGE: Itemu- and Mokture PraMcbon (i)

Notes:

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Current Suta;

Uter Revifton Number :
Q-wrEr*:.'.

Submittal Package Document

-•CHEL^-V ^EETETW ^S3ak...

gl SUBMITTAL PACKAGE: Thai and Moisture Protection (1)

Main | Submittals | Review Stept | Reviewer Feedback | Properties

Add New | Add Existing j Remove | Transfer T | Opti

Accepted CouJReJected CouiComments Cdw Workflow Status Ichange Status On Completion

- | OH..VW •

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Submittals Page in Submittal Package Document

(^ SUBMITTAL PACKAGE: Thennal and Moisture Protection £1)

BliP I Submittals | Review Steps | Raviawer Feedback | Properties

Add j Remove j Calculate Backward | Calculate Forwarri[

"Step Numb| Reviewing Contact | Reviewing Company j Rev laving Contract I Sent For Ree«or| Original Planned Stj

I Joe Architect I ABC Architecture For Review 07/13/2004

Submittal Package Review Steps Page

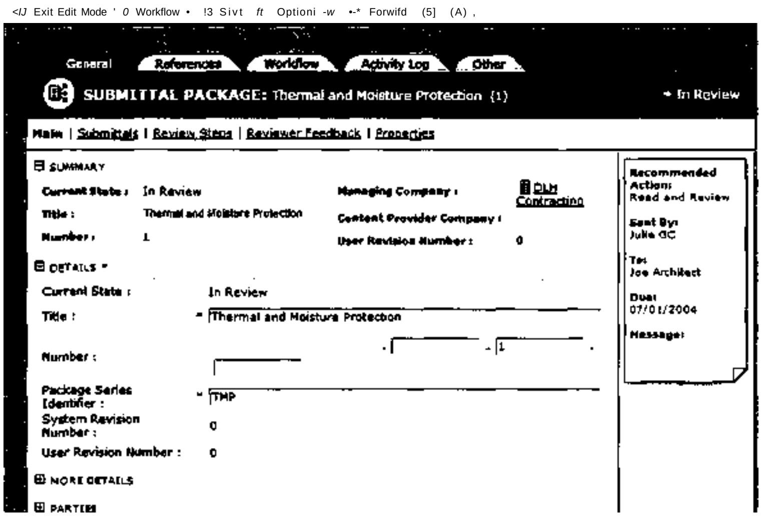
Exercise: Creating a Submittal Package

Scenario:

The subcontractor has submitted the Thermal and Moisture Protection requirements. The General Contractor will link them to a Submittal Package to be forwarded to the architect.

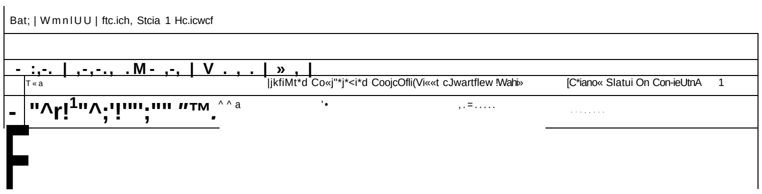
Navigate To: Office Management > Submittals > Submittal Packages

1. Click **New** button to create a new Submittal Package.
2. On the **Main** page, enter the following information:
   - *Title:* Thermal and Moisture Protection
   - *Package Series Identifier.* TMP
3. Click **Submittals** page.
4. Click **Add Existing** three (3) times.
5. Click the magnifying glass H on each line and select each of the three Submittal Documents created in the previous exercises.
6. Click **Review Steps** page.
7. Click **Add.**
8. Enter the following information:
   - *Reviewing Contact:* Enter the name of the Architect
   - *Sent for Reason:* For Review
   - *Original Planned Start Date:* Enter today's date
   - *Original Planned Review Days:* 14
9. Click **Calculate Forward.**
10. Click **Save.**
11. Select **Start Review** from the **Workflow** dropdown.
12. On the **Execute Workflow** page, leave the *To* field blank. The Review Steps page will determine who will be notified.
13. Click **Execute.** The Confirmation dialog box opens indicating the Action Complete. The Submittal Package transitions to the 'In Review' state.
14. Click **Return to Register.**

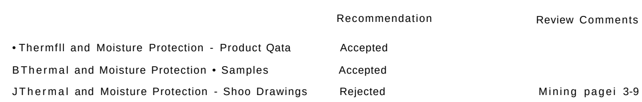


Notes:

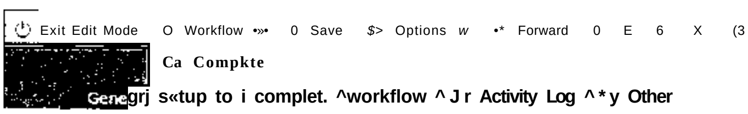
Submittal Package Document



Submittal Package Submittals Page



Submittal Package Reviewer Feedback Page



Submittal Package Workflow Dropdown

Exercise: Reviewing the Submittal Package

Scenario:

The Architect has received the Submittal Package. The Architect will now review the items and determine which are approved and which are rejected.

Navigate To: Office Management ® Submittals ® Submittal Packages

1. Open Document.
2. Click **Edit.**
3. Review Sticky Note and Details.
4. Click on the **Submittals** page to review the submittals that have been sent.
5. In the *Change Status on Completion* field, enter the following information for each line:
   - Thermal and Moisture Protection - Product Date: Accepted
   - Thermal and Moisture Protection - Samples: Accepted
   - Thermal and Moisture Protection - Shop Drawings: Rejected
6. Click on the **Reviewer Feedback** page.
7. In the *Recommendation* field, enter the following information for each line:
   - Thermal and Moisture Protection - Product Date: Accepted
   - Thermal and Moisture Protection - Samples: Accepted
   - Thermal and Moisture Protection - Shop Drawings: Rejected
8. In the *Review Comments* field for Thermal and Moisture Protection - Shop Drawings, type Missing Pages 3-5
9. Click the **Workflow** menu and select **Complete.**
10. In the *To* field, click the magnifying glass icon H and add: Julie GC.
11. Click **Execute.**

Continued Next Page....

Web Page Dialog

Notes:

[7] **Confirmation**

ACTION COMPLETE

DISTRIBUTION RESULTS

The document **Thermal and Moisture Protection** has been successfully changed to the worlcflow state ' Complete' and has been sent to the following people:

Julie GC

Return To Document Return To Register I

Confirmation Dialog

New . • 1 Delete 1 Views -r- 1 t Refresh g§ Print Help

View: (Standard) 2 of 2 results 1 1 «*«* 1

Q	Packaae Series...	Title	Current State	User Revision...	Purpose
Q	B TMP	Thermal and Moisture Protection	Complete	0	
Q	ft TMP	Thermal and Moisture Protection	Draft	I	

Submittal Package Documents Register with New Package

SUBMITTAL PACKAGE: Thermal and Moisture Protection ( ) Draft

MJJD I Submittal* | Review Steps | Reviewer feerthack | Properties

Acoaptad* CoulRajectad CouiCom •ants Cd Workflow Status

ffiThermal anri Moisture Protection - Shco Drawings

Submittal Package

New • | Delete Views | Tool* * 1 t Kafnuh S Print ? Hajlu

. ^ , : iS.=.r-U=irJ. 4 of 4 results Open As:. Document - 1 | FIND Page 1 of 1

D	SertCI Menttfl	Title	Current Statu	U«*r Heviaia...	PiM-Dtpse,
n	ITM=I	Thermal and Moisture Protection - Product Data	Accepted	0	
•	1TMP2	Thermal and Moisture Protection - Simpits	Accepted	0	
[-J	a TMP3	Thermal and Moisture Protection - Shop Drawings	Rejected	0	
•	&TMP3	Thermal and Moisture Protection - Shop Drawings	Draft	1	

Submittal Documents Register

12. The Confirmation dialog box opens indicating the Action was successfully completed.
13. Click **Return to Register.** Note that a new Submittal Package (Thermal and Moisture Protection - Revision 1) has been automatically created.
14. Open the Thermal and Moisture Protection - Revision 1 Submittal Package.
15. Click the **Submittals** page. Note that only Thermal and Moisture Protection - Shop Drawings, which was previously rejected, has been forwarded to the revised package.
16. **Click Close.**
17. Navigate to: Office Management > Submittals > Submittal Documents. Note that Thermal and Moisture Protection - Shop Drawings - Revision 0 now has a Current State of Rejected and that Thermal and Moisture Protection - Shop Drawings - Revision 1 has been automatically created.

Field Management

Notes:

29 What is Field Management?

Field Management ties together the original project plan with what is actually happening onsite each day, providing knowledge and accountability of all daily activities in one, comprehensive solution. This knowledge and project visibility allows managers at every organizational level to make the rapid, accurate decisions needed to keep projects on track and meet corporate expectations.

What are Daily Work Journals & Daily Work Journal Sets?

The Daily Work Journal module let you maintain records of daily site conditions and site-related events and activities. You can print a report containing this information.

The two key concepts of this module are daily work journal documents and daily work journal sets.

- The daily work journal document records the actual details of the daily records, such as weather conditions and equipment usage.
- The daily work journal set is a collection of related documents. You can group any number of documents into any number of sets.

There are separate registers for both the daily work journal documents and sets.

What are Deficiency Lists?

Deficiency Lists, like punch lists, track information about items in your project that need to be finished, fixed or redone to complete the project. The Deficiency document organizes information on the work needed to resolve the defect, who is responsible for the work, and when it needs to be done.

30 How do I access Daily Work Journals?

You can access them from the Field Management menu.

Workflow 'W Activity Log

7*3 DAILY WORK JOURNAL: October 1, 2004 Wark Journal (io_pi_2004_l)

Main | Journal | Weather | Equipment | Activities & Tasks | Events | Visitors | Labor | Properties

B JOURNAL ENTRIES *

Add Line Remove Line(s)

Journal Entry

I~I Enter information here|

Daily Work Journal - Journal page

General **^^^JEEH!^. ^GZDISI^KL. ^ E f f I ^**

^Q DAILY WORK JOURNAL: October 1, 2004 Work Journal <IOK_OI_20C4_1) * Active

Main 1 Journal 1 Weather 1 Eouioment 1 Activities & Tasks 1 Events 1 Visitors 1 Labor 1 Properties

ACTIVITIES & TASKS Rows:[4 | Columns:|io |

Add | Remove Copy | Paste | + Row Height | - Row Height |

• i	Worked On	Task ID	Task Title	: Description	Percent C...	Actual Start Date
•	O	S0001	General Site Excavation	Excavation - South Area	IS.00	10/01/2004
•	O	N0001	General Site Excavation	Excavation - North Area	20.00	10/01/2004
•	O	EOuOl	General Site Excavation	Excavation - East Area	10.00	10/01/2004
•	O	W0001	General Site Excavation	Excavation - West Area	3S.00	10/01/2004

Daily Work Journal - Activities and Tasks page

Notes:

31 Daily Work Journals

The daily work journal document records detailed information about work at a site. You can enter the following information in this document:

- Journal entries
- Weather conditions
- Equipment details
- Activities & tasks being performed
- Events at the site that have occurred or will occur
- Visitors coming to the site
- Subcontractor information

All daily work journal documents must belong to a daily work journal set.

Information about a daily work journal document is organized over the following pages:

Main: Contains detailed information about the daily work journal document, including site details.

Journal: Used to enter journal entries about the site.

Weather: Used to enter detailed information about the weather at the site.

Equipment: Used to enter detailed information about the equipment used at the site.

Activities & Tasks: Used to record a list of the activities occurring at the site.

Events: Used to note the events occurring at the site.

Visitors: Used to record detaiis about the visitors at the site.

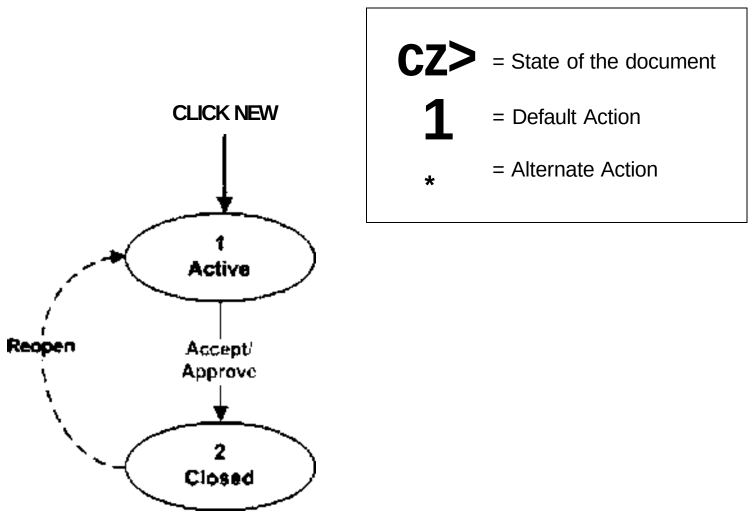
Subcontractor: Used to record information about the subcontractors working at the site.

Properties: Contains information about the daily work journal document itself, such as who created the document, and the project in which the document was created.

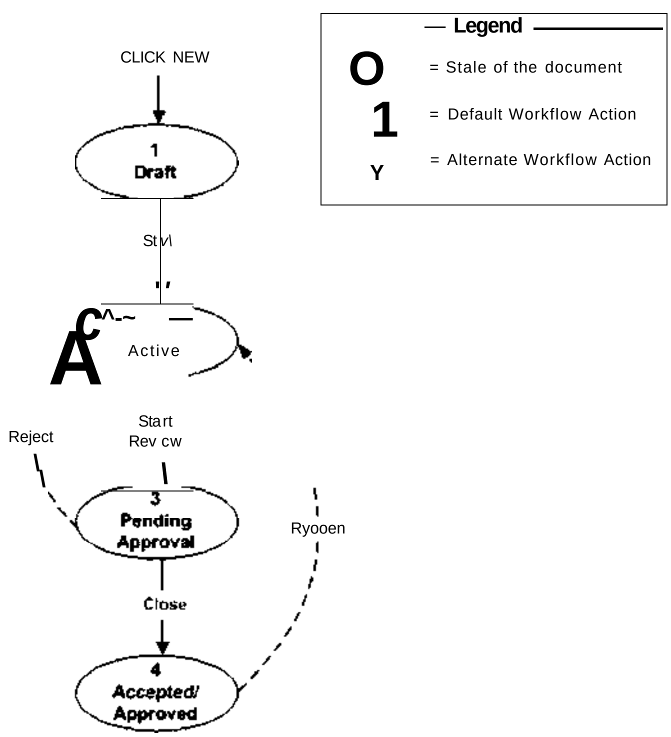
Additional daily work journal set information is available on the following tabs:

- **Workflow:** Enables you to see and specify intended actions and recipients for the document as it moves forward through its lifecycle. You can also see and specify the people who will receive notification when the document changes to a specific status.
- **Activity Log:** Records all the activities of the document, such as when it was saved, imported, exported, forwarded, or received.
- **Other:** Contains a list of other documents related to this daily work journal document.

Notes:



Daily Work Journal Set Workflow



Daily Work Journal Workflow

32 Workflow States

Exercise: Fill in the Workflow States in the Table

Daily Work Journal Set

State	Description
	The daily work journal set is in active use. You can add or remove daily work journal documents within the set. The daily work journal set is in the Active state the moment you create it.
	The daily work journal set has been approved and closed off. In this state, you cannot add, remove, or modify any of the daily work journal documents within the set.

Daily Work Journal

State	Description
	The daily work journal document has been created and information is being entered.
	The daily work journal document has been saved but is still undergoing work. The document is not yet ready for review.
	The daily work journal document is substantially complete and is being reviewed for approval. The document can still be edited.
	j The daily work journal document has been approved and is closed for editing. To edit the document, perform the Reopen action to return the document to the Active state

? Edit c> Workflow -r •» Forw»rd @ @ Q } X 0

Notes:

DAILY WORK JOURNAL:

Main 1 Journal t Weather t Foninment 1 Activities & Tasks 1 Events 1 Visitors 1 Labor 1 Prooerties

B SUMMARY

Currant Stats i	Active	Journal D*t. •	09/03/2004
ScthtarrMi	B Sortombflr 2 Q M	nr-p-r-d By •	£, Adminirtrator
Numbwi	i		

B DETAILS

Current State :	Active	
Title ;	9/3/04 Foundation Notes	
Number :	1	
Journal Date :	09/03/2004	
Set Name :	B September 2004	
Prepared By :	Company	Contact
	IftDHF	(ft Administrator
Reason :	Final	

B SITE DETAILS

Site Location :	Ann Arbor, 1132 Washtenaw elvcS
Site Notes ;	

Daily Work Journal Main page

33 Creating Daily Work Journals

Here are the basic steps for creating a Daily Work Journal.

1. Open the Daily Work Journal register.

   —or—

   Open the **References** tab for a daily work journal set.

2. Click **New** to create a daily work journal document using the default template.

   —or—

   Click the arrow next to **New** to select the template to use.

3. Click and select the daily work journal set that this document belongs to. All daily work journal documents must belong to a set. A blank daily work journal document opens. Some information may already be filled in, depending on the template used. (Note: This is different from the auto-filled information specified in the daily work journal set.)

4. In the *Title* field, type the title of the daily work journal document.

5. If you are performing a workflow action on the daily work journal document, complete the information required for this action.

6. Complete any additional required information. Headings marked with an asterisk (*) or highlighted fields are required.

7. Click **Save.**

Note

If auto-fill options have been defined in the daily work journal set, Proliance
^ automatically copies the specified information from the most recent daily
^P^ >A/nrl/ imirnal Hnrnmonh in t-ho eoh)-n)-hic noVv/ rjorumpnt" Tf thic. !c. thp firc.t"
document in the set, nothing will be copied. Rather, the information you enter into this new document will provide the material that will be copied to the next document created for the set.

Notes:

••MJ-l.'l.l.l-'-t^ »',TTi5JrWK.-A|.l.L'l,l'WlW •^•i..ljlfcL

Ki] DAILY WORK JOURNAL SET: Contractor A (ContractorAl) * Active

Main | Properties

BSUMMARY

Cun-wit State i Active Craatad Date t 10/12/2004
nfei Contractor A
Numhi i ContractorAl

0 DETAILS *

Current State : Active
Title : ● Contractor A
Number: - jContractorA . |l - |
Description : Contractor A Daily Work Journal
Shift: v
Prepared By : Company Contact
Contractor A H| **B**

B AUTO-FILL OPTIONS

Auto-fill new documents en ated in this set with content from the most recent document.

Weather : **0**
Event: **0**
Visitor's Name : **0**
Journal : **0**
Equipment: **s**
Labor : **a**
Activity Task : **0**
Default To Next Work Day : **0**

Daily Work Journal Set

34 Creating Daily Work Journal Sets

You can create any number of daily work journal (DWJ) sets for a project. Each set represents a collection of daily work journal documents.

You can use DWJ sets to organize DWJ documents in a number of different ways:

- In some projects, you may choose to use a DWJ set to organize DWJ documents from each shift.
- In other projects, you may choose to use different DWJ sets for public and private use. Projects with multiple sites may have a different DWJ set for each site.

Here are the basic steps for creating a Daily Work Journal Set.

1. Open the Daily Work Journal Sets register
2. Click **New** to create a daily work journal set using the default template.

   —or—

   Click the arrow next to **New** to select the template to use.

   A blank daily work journal set opens. Some information may already be filled in, depending on the template used.
3. In the *Title* field, type the title of the daily work journal set.
4. If you are performing a workflow action on the daily work journal set, complete the information required for this action.
5. Complete any additional required information. Headings marked with an asterisk (*) or highlighted fields are required.
6. Click **Save** when done.

Budget & Cost Management

H Budget & Cost

- Cashflow

D Cost Accounts

- Scope
- Transfers

Budget & Cost Management Menu

35 What is Budget & Cost Management?

Budget & Cost Management is one of the business applications within Proliance. You can think of Budget & Cost Management as the **Financial Health Center.** It is in this application that you will define cash flow (cost accounts) and monitor budgeting and spending.

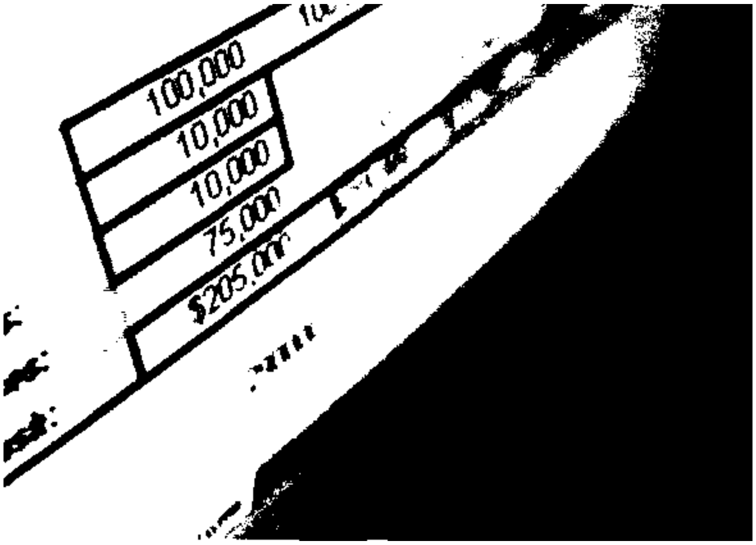
Budget & Cost Documents:

- **Cashflow**
- **Cost Accounts**
- **Scope**
- **Transfers**

In addition, the Budget & Cost Management application includes a powerful reporting and forecasting tool in the shape of the **Anticipated Cost Report (ACR).**

Ways in Which You'll Use Budget & Cost Management

- **Establish project budget**
  - Scope Documents
  - Fund Cost Accounts
- **Allocate expenses**
  - Cost Accounts
  - Usually align with accounting system accounts
- **Manage allocations**
  - Transfer Documents
  - Move money between Cost Accounts
- **Plan spending by time period**
  - Cashflow Series
  - Define expected costs
  - Review to check alignment with budget
- **Review overall project financial health**
  - Anticipated Cost Report (ACR)
  - Compilation of budget, cost and invoicing data
  - Variety of grouping, filtering and viewing options
  - Drill down into controlling document or Cost Account



Notes:

36 What are Cost Accounts?

What is a Cost Account?

A Cost Account is a tool in Proliance that helps you group, sort, and filter costs in your project. You can create as many cost accounts as you need to manage your budget and costs. The number of each cost account is based on the Advanced Code Lookup group descriptions and numbers that you create. Some common examples of these descriptions are Phase, Division, CSI Code and Type.

At any time, a user can open a cost account document and review the BCM line item details from the line items page of that document. The line items typically derive from a committing document in Proliance, whose source you will be able to view from the line item details. However, a user may also add line items to the cost account directly in the cost accounts line item's page. The BCM line items page only gives the user the details for that one cost account. If a user wants a project overview of the costs and revenues, they will need to run the Anticipated Cost Report.

37 What is a Transfer Document?

A *transfer* document enables you to move money between cost accounts according to a standard approval process. A transfer document can hold any number of allocations to be transferred. Proliance records transfers for future reference. You can use the *Line Item Detail Viewer* to view the history of any allocation that was transferred.

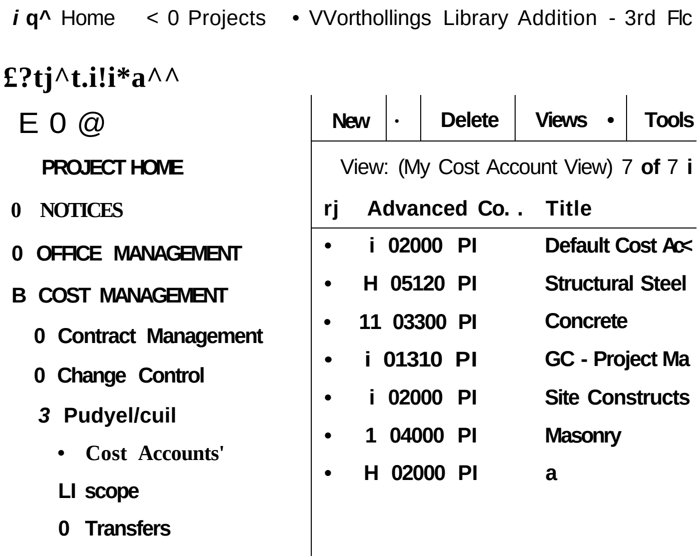
Budget Transfers

- A budget transfer involves moving budget funding from one or more cost accounts to one or more other cost accounts.
- You create two or more budget allocations to handle each budget transfer. The transfer document controls these budget allocations.
- All of the budget allocations in the transfer have the same ACR column. This is because a transfer should always result in a net balance of zero. Using the same ACR column ensures that the Anticipated Cost Report is accurate.

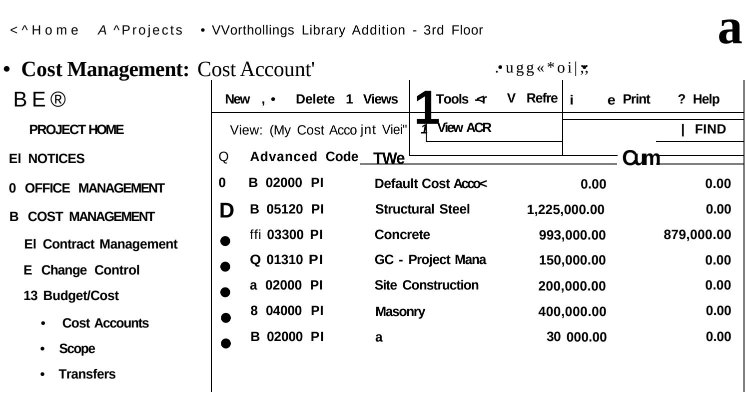
Cost Transfers

- A cost transfer involves moving forecast costs from one or more cost accounts to one or more other cost accounts.
- You transfer costs by adjusting the values of cost allocations that already exist in the cost accounts. You decrease the values of some of the cost allocations and increase the values of others by the same amount.
- The ACR column for each of these cost allocations is specified from the cost accounts which control them. It does not matter if each cost allocation has a different ACR column. All of the forecast costs will eventually become committed costs on contracts or change orders.

Notes:



Cost Account Menu Option



View ACR Option from Tools Menu

38 Benefits of Proliance Cost Accounts

Proliance includes a default template for Cost Accounts. During installation and configuration, you can create custom Cost Account templates to suit how you manage your costs and budget. Cost Accounts are a key component of the Proliance Budget Cost Management (BCM) tool, which helps you manage project budget and costs.

39 Relationship to other Documents

- **Scope:** Once a scope document defines what needs to be done, cost accounts are created to allocate budget monies for the work.
- **Contracts:** Monies are allocated to corresponding Cost Accounts based on the contract Schedule of Values line items.
- **Change Order:** Monies are allocated to corresponding Cost Accounts based on the Change Order Schedule of Values line items.
- **Transfer:** Monies are transferred from one Cost Account to another using a Transfer Document.
- **Cashflow:** Include Cost Accounts to forecast project cash flow.

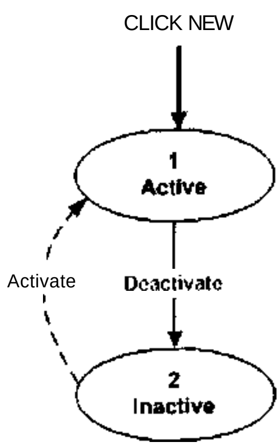
— Legend —

CD = Stale of the document

/ = Default Action

+ = Alternate Action

Notes:



Cost Account Workflow

40 Cost Accounts Workflow

This chapter covers how Cost Accounts are used in Proliance, how each document is structured, how to create Cost Account documents.

Workflow States

Exercise: Fill in the Workflow States in the table

State	Description
	The allocations in the cost account can serve as funding sources for drawdowns. You can allocate line items from contracts and contract-related documents to the cost account.
	You cannot view or select the cost account from anywhere in your project other than the Cost Accounts register. The cost account does not contain any allocations.

41 Creating and Using Cost Accounts

Cost Accounts are created in the Project Workspace, Cost Management application. When a Cost Account is created,

Here are the basic steps for creating a Cost Account:

1. Select the project.
2. Open the Cost Accounts Register.
3. Click New on the dropdown and select a Cost Account Template.
4. Enter the details on the **Main** page.

   Title

   Number

   Notes

   Enter line items on the Line Items page.

   Budget Items

   Cost Items

   BCM Columns

   Amount

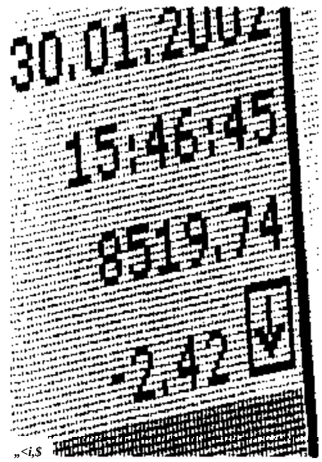
   Modify the Settings.

   Default Budget/Cost Columns

   Book Type

7. View the Financial Summary page.
8. Click Save.

. . * '



Notes:

Getting Around in Cost Accounts

Cost Account documents contain General, Workflow, Activity Log and Other tabs. The **General** tab contains five pages:

Page/Section	Description
Main	
Summary	Creation date, budget summary and forecast amounts.
Details	Title, Number, and Note
Advanced Code	Grouping codes
Financial Summary	
Budget/Cost Variance	Budget and cost variances for the project
Budget Summary	Approved, current, pending and projected budget costs
Cost Summary	All costs, commitments, estimates and invoiced amounts
Line Items	
Provides access to view and manage all allocations to this account - both budget and cost Hne items	
Settings	
Settings	Used to display the options selected for this cost account Business rules can be specified from this page
; Book Type j Settings	Displays the book type available for this cost account
Properties	
General	j Date the Cost Account was created and specific document j information.
Author Information	Contact name and company of the individual who created this cost account
Document Settings	! Provides the ability to classify the document to search and I organize documents

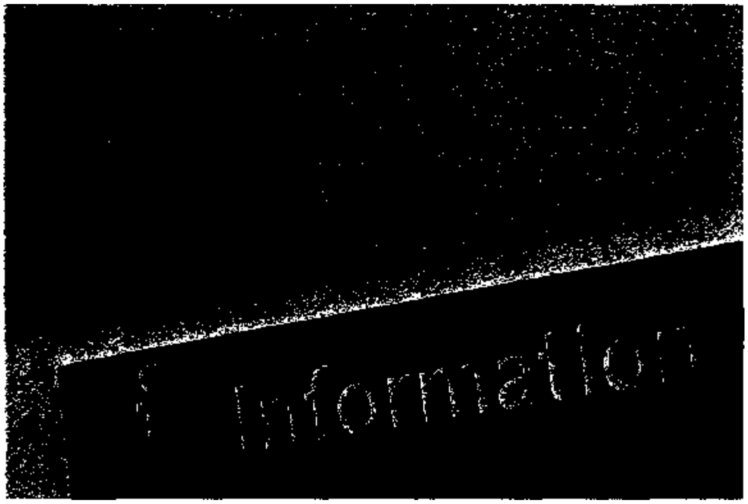
The **Workflow, Activity Log** and **Other** tabs contain the standard information contained in these tabs in all documents.

Notes:

42 Important Terms and Definitions

Terms you need to know

Term	Definition
ACR (Anticipated Cost Report)	The central feature of the Budget/Cost Management module. This report summarizes a project's budget, costs, billings, & invoice information. It also allows you to group, filter, sort, print, and view this information.
Allocations	Used to assign project revenues and expenses to cost accounts. There are two types of allocations: budget and cost.
Budget Cost Management	A module in Proliance used to track financial information on a project and to manage the budget and cost items. Also referred to as BCM.
Cashflow Worksheet	A cashflow worksheet depicts the flow of cash in and out of a project. Invoice expense and revenue amounts are prorated over a forecasted cost period to outline what amounts will be collected and spent over the course of a project and allow for contingencies to avoid extended cash shortages.
Contract	The means by which you record the terms and conditions of your company's project commitments. A contract that represents money leaving the project is known as an expense contract. A contract that represents money entering the project is known as a revenue contract.
Controlling Document	A document from which you can edit a cost allocation. This is typically the document where the allocation was originally created.
Cost Account	An account where expense or revenue amounts from a committing document such as a contract, change order, auto-commit invoice, or cost event are allocated. Each cost account includes actual and forecasted expense and revenue invoices.
Cost Event	Describes an item that needs to be bought or sold. Typically consist of work or materials that have an impact on a project's revenue or expenses.
Scope	A broad overview of the type and amount of work to perform for a contract or change order.
Transfer	The process of moving money from one cost account to another. Proliance supports budget transfers and cost transfers. The budget transfer involves moving funding from one cost account to one or more other cost accounts. A cost transfer involves moving forecast costs from one cost account to one or more other cost accounts.



Notes:

43 Beyond the Basics

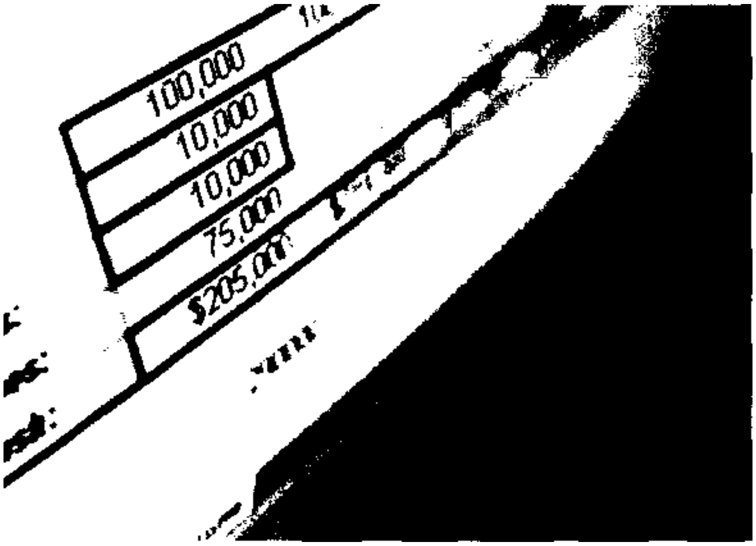
Helpful Hints for Cost Accounts

When creating a large number of cost accounts, check these two items to facilitate the process of adding and deleting cost account line items.

- **Auto-Create Offsetting Cost Lines** - Select this check box to have Proliance automatically add an offsetting cost allocation when you add a new budget allocation to the document.
- **Delete Offset Items** - Select this check box to have Proliance automatically delete offsetting cost allocations when you delete a budget allocation. Clear this check box if you do not want Proliance to automatically delete offsetting cost allocations.

In the Budget Summary and Cost Summary sections you can click on any dollar value to quickly see the controlling documents that have applied a monetary value to the cost account you are currently viewing.

Anticipated Cost Report (ACR)



Notes:

44 What is the ACR?

The Anticipated Cost Report (ACR) is the central report that allows you to view a summary of your project's cost accounts. The columns of the ACR show the total of Cost, Budget, and Invoicing information for each active cost account. You can run the ACR from the tools menu of the Cost Account register. The report can also be accessed from other Budget/Cost Management registers, including Scope, and Transfer.

The Anticipated Cost Report (ACR) is a summary of all project Cost Accounts. It details all budget, cost and invoicing for the project, gathered from the Contract Management and Cost Management documents. The ACR can be user-defined to group, sort, and filter project budget information. You can group, sort, filter, view, and print the ACR.

45 Using the ACR

The ACR is a summary of all of a project's costs, budget, and invoicing information drawn from the Budget &. Cost Management and Contract Management applications.

You can define how the ACR groups, filters, and subtotals Cost Account amounts. You can view the ACR from the Cost Accounts, Scope, Transfers, and Cashflow registers.

The ACR that is created from the Programs workspace shows all projects ACRs within the program group. However, you will only see information from Projects to which you have "Read" access.

Here are the basic steps for modifying the ACR:

In Budget/Cost Management, open the Cost Account, Scope, Transfer, or Cashflow Register.

1. Click the Tools button and select View ACR.
2. Click the Views button and select Manage Views.
3. In the window that opens, click Copy.
4. Enter a Name for the ACR.
5. Select a Type Options.
6. Click OK.
7. Click Edit.
8. Click the Columns tab.
9. Select the desired columns from the list and click the Add/Remove arrow button.
10. Click the Filters tab and select filters if desired.
11. Click the Groupings tab and select columns as desired.
12. Click Save and **Apply.**

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B Anticipated Costs: acmelibOOl

Views • $ Refresh & Print ? Help

View: Austin **Total Rows:** 6 **Lart Updated:** 07/20/2004 5:27 PM

	Cost Account	Approved Original **Budget**	Approved Changes Budget	APP"»u«d Transfers	Proceed Budget	Current Budget	Pending Budget;
	Concrete ;	**392.**000.Od	0.00	0.00	0.00	892,000.00	6,000.00
	GC - Project Management & Coordination	15°,°°n,po	0.00	0.00	0.00	130,000.00	0.00,
	Misonrv	400.000,00	0.00	0.00	0.00	400,000.00	0.00
=	Site Construction	200.000.00	0.00	0.00	0.00	200,000.00	0.00
	Structural Steal	0.00	0.00	0.00	0.00	0.00	1,200,000.00
t	**Grand** Total	**I,M2,iM.M**	**I.ii**	**I.M**	**a.M**	**1,B42,IM.0J**	**I,20I,eet.ee**

ACR Register

Notes:

46 ACR Columns - Budget

You can assign budget allocations to any of the following BCM columns.

Column	Description
Approved Original Budget	The approved budget for the project. This amount may correspond to a portion of the Scheduled Amount values from your Approved revenue contracts, or the approved budget source.
Approved Changes Budget	Approved change amounts, typically from Approved revenue change orders or approved budget revisions to the project.
Approved Transfers Budget	The total of approved transfers to or from a cost account.
Proceed Budget	The budget amount that is not final, even though the work that it applies to has already begun. This amount typically corresponds to Scheduled Amt values from line items on Pending contracts or change orders, or other Pending budget sources.
Pending Original Budget	The original budget amount for a cost account. This amount typically corresponds to a portion of the Scheduled Amt values from your Pending revenue contracts.
Pending Changes Budget	Pending or unapproved change amounts, typically from Pending revenue change orders.
Pending Transfers Budget	The total of proposed but unapproved transfers to or from a cost account.
Current Budget	The total current budget, calculated as follows: Approved Original Budget + Approved Changes Budget + Approved Transfers + Proceed Budget
Pending Budget	The total pending budget, calculated as follows: Pending Original Budget + Pending Changes Budget + Pending Transfers Budget
Projected Budget	The projected budget amount, calculated as the sum of the Current Budget and Pending Budget.

3 ACR | acmelibOOl Microsoft Internet Fxplorer Mfnlffl

psl Anticipated Costs: acmelibOOl

Views •»• 1 'J' Refresh Print ? Help

View: Project ACR **Total Rows:** 2 **Last Updated:** 06/03/2004 12:22 AM

Advanced Code	Approved Original Budget	Approved Changes	Approved Transf6rs
05120-PI	Q.QO	O.QQ	Q.QO
Grand Total	**0.00**	0.00	o.oo

4i 0 Internet

ACR Register

Notes:

47 ACR Columns - Cost

You can assign cost allocations to any of the following BCM columns. * Applicable only to invoices

Column	Description
Original Costs	Work for the project that has been purchased or agreed to in contracts. Typically corresponds to a portion of the Scheduled Amt values from Pending expense contracts. Also known as "Bought Original Scope" or "Orders Placed".
Approved Changes Cost	Approved change amounts, typically from Approved expense change orders.
Setoff Orders	Work performed under one expense contract, but charged to another.
Proceed Costs	The total of contract and change order line items that have been authorized to proceed, but not yet approved.
Pending Costs	Commitments from unapproved expense contracts, change orders, and auto-commit invoices.
Estimated Costs	An early estimate of the cost of the work that the cost account is paying for. This information typically comes from quotes linked to cost events, where the quote has not yet entered the Reviewed state.
Orders to Place	The amount waiting to be purchased for the cost account.
Assigned Reserves	Money set aside for identified but not certain contingencies.
Unassigned Reserves	Money set aside for unanticipated costs.
Internal Adjustments	Cost adjustments that the project management team has identified as necessarv and appropriate.
Pending Invoiced *	Amount of expense invoices not yet in the following states: Approved - Pending Release for Payment (RFP) or Closed - Released for Payment.
Certified Invoiced *	Money from expense invoices in the following states: Approved - Pending Release for Payment (RFP) or Closed - Released for Payment.
Current Commitments	The total current commitments, calculated as: Setoff Orders + Proceed Costs + Original Costs + Approved Changes Cost
Retainage Invoiced	The value of retainage from invoices against a line item. Obtained from the This Invoice Retainage Total Amt column for an invoice line item.
Sum of Invoiced	The sum of Pending Invoiced and Certified Invoiced.
Estimate to Complete (ETC)	The estimated amount required to complete, calculated as: Pending Cost + Estimated Cost + Orders to Place + Assigned Reserves + Unassigned Reserves
Estimate at Completion (EAC)	The estimated amount at completion, calculated as the sum of Current Commitments and Estimate to Complete (ETC).
Internal + Estimate at Completion	This is the EAC with internal adjustments, calculated as sum of Estimate at Completion (EAC) and Internal Adjustments.

Notes:

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48 Exercise: Modifying ACR Views

Navigate to: Applications > Budget & Cost > Cost Accounts

1. Click the Tools button and select View ACR.
2. Click the Views button and select Manage Views.
3. In the window that opens, click Copy.
4. In the Name field, enter Project ACR.
5. In the Type Options dropdown list, select Shared.
6. Click OK.
7. Click Edit.
8. Click the Grouping tab.
9. Select Cost Account (Advanced Code) from the list and click the add arrow button.
10. Click Save and **Apply.**

49 Proliance Resources

If you're looking for...	...please go to:
How to use specific Proliance functions...	...Proliance Online Help
[Technical Support...	...our SupportLink at http://support.meridiansystems.com/ or email us at proliancesupport@meridiansvstems.com