

**STATE OF CONNECTICUT
DEPARTMENT OF ADMINISTRATIVE SERVICES
REAL ESTATE AND CONSTRUCTION SERVICES**

**Building Design and Construction
450 Columbus Boulevard
Hartford, Connecticut 06103**

**eBuilder Guidance Manual
Volume II**



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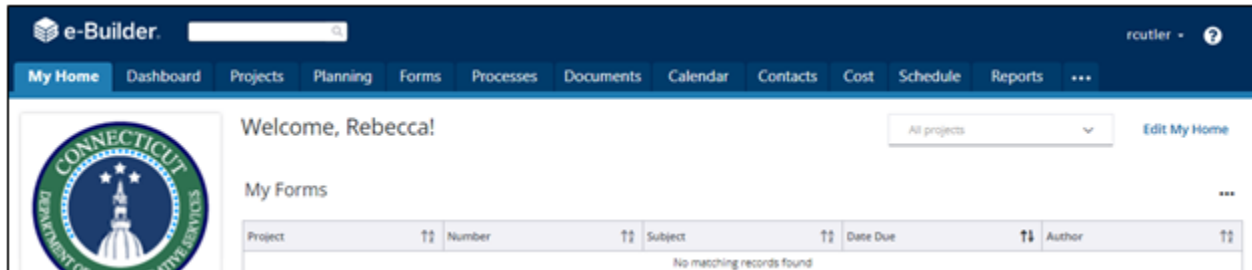
PART I: PROJECT SET UP



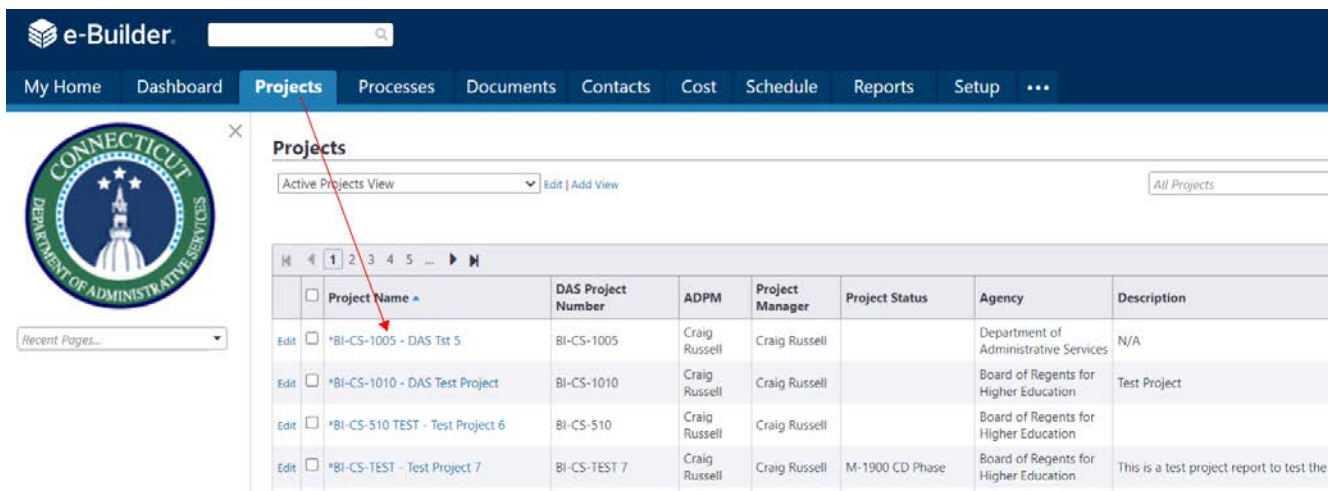
Section 1: Basic User Navigation

1.01 Accessing the project

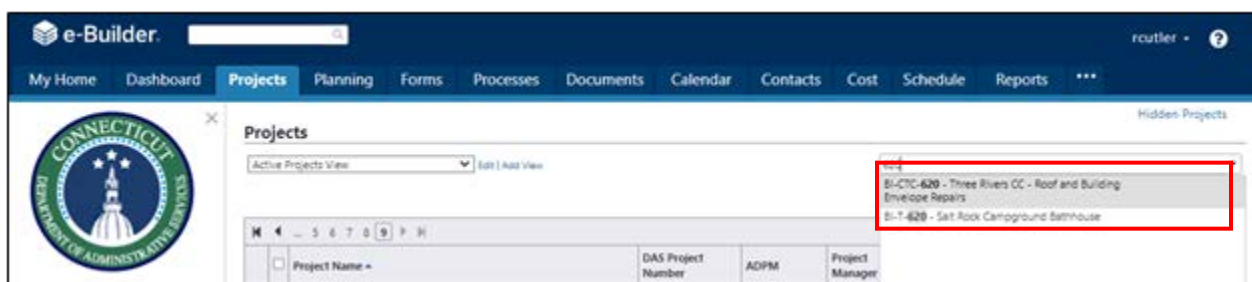
Log in to e-Builder: <https://gov.e-builder.net>.



Find the project you wish to access in the list, as shown below, and click on the Project Name to open the project;



or you can search for your project by entering the project number into the “All projects” dropdown list, or by looking for it under the list by clicking dropdown arrow from the “All projects” dropdown list.





Either option will bring up the “Project Details” page. The “Project Details” page has a Project Menu with links for the modules related to that specific project.

Project Details	
Project Name	BI-3B-123 - This is a test
e-Builder Project Administrator	O'Brien, Timothy
Project Status	Active
(view map) Address	
Country	USA
Start Date	09.11.2023
Target Date	09.11.2023
Description	fqwrefqwrqwrfg wrqfwer gweg wegweg wrgherfhnrnt hntyhrnt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrqwrfg wrqfwer gweg v
Project Webcam	
Last Modified By	O'Brien, Timothy
Date Last Modified	12.06.2023

Custom Fields (85)	
DAS Project Number:	
Project Name:	BI-3B-123 - This is a test
DAS Project Status:	M-2910 Claim Phase
Project Delivery Method:	
Project Type:	
Is this a CHEFA project:	
Date Project Initiated:	
1105 Submission:	
1105 Reviewed:	
Agency Request for Project	



Section 2: Project User Access

2.01 For DAS Project Managers:

When a DAS Project Manager is assigned to a project in e-Builder, the Project Manager may contact Construction Support Services (Tim O'Brien in Teams or at timothy.o'brien@ct.gov) to gain access to the project in e-Builder.

2.02 For Agency Users:

Agency PMs may contact Construction Support Services (Tim O'Brien in Teams or at timothy.o'brien@ct.gov) to gain access to a project in e-Builder for themselves, or for other agency staff. For each user, please provide the following information:

1. Name
2. Department
3. Email address
4. Project numbers, if only certain projects, or all in a department prefix.
5. Role: Agency PM, Agency Signatory or review only.

2.03 For Consultants and Contractors

Requests for user access to a project for consultant staff, contractors or any other outside user should come from the DAS Project Manager or from the CA assigned to the project, if the DAS Project Manager has delegated the CA with that responsibility. These requests for access may be made to Construction Support Services (Tim O'Brien in Teams or at timothy.o'brien@ct.gov). Please provide the following information for each user:

1. Name
2. Company
3. Email address
4. Project number or numbers
5. Role on project, such as A/E, A/E subconsultant, CA, GC, CMR or other.

Please specify if the users will only need access to submit invoicing/Payment Applications, otherwise the user will be in workflows and get workflow notifications.



Section 3: (Reserved for future use)

3.01 Coming Soon



Section 4: Add Funding Sources

4.01 Accessing the Project

Follow the instructions provided in [Section 1](#) to Access the Project.

Under the “Project Menu”, click “Cost” and then click “Commitment” to navigate to the Commitment record. Click “Edit” after opening the “Commitment Details” page.

Commitment Details

Cost Summary | Items Pending Approval | Unfinished Drafts | Data Entry | Account Level Cost

Commitment Overview | Other Details | Financial Summary

Mail Merge | Request Approval | Approve | Make Pending | Delete | **Edit**

Project: *Testing0723a Project Name
 Commitment Type: CA Contract
 Commitment Number: 011
 Unit Cost Options: Lump Sum Amount
 Description: test 5
 Commitment Control: Controlled By Line Item
 Created: 12.19.2023 (Timothy O'Brien)

Status: Draft
 Company: zzzzz-not real company
 Company Number: zzzzz-testingonly
 Contact:

Commitment Items (2) | Custom Fields (13) | Notes (0) | Documents (0) | Forms (0) | Processes (0)

Show Filter | Export | View Funding

Item #	Budget Line Item	Description	Current Budget	Funding Rule	Original Commitment Amount	Retainage Percent	Custom Field(s)
Delete 001	10.130	On-Call (CA, CAM, CX)	0.00		1.00	0.00	
Delete 002	10.130	On-Call (CA, CAM, CX) 2	0.00		1.00	0.00	
Total			0.00		2.00		

Click on the pull down menu in the “Funding Rule” column and then select the most appropriate funding source.

Commitment Items

Update Retainage % | Manage Funding

Item Number	Line Item	Description	Current Budget	Funding Rule	Retainage Percent	Amount	Allowance	Custom Field(s)
001	10.130	On-Call (CA, CAM, CX)	0.00	Agency Funds	1.00			
002	10.130	On-Call (CA, CAM, CX) 2	0.00	Agency Funds	1.00			
Total			0.00		2.00			

Add New Commitment Item

Item Number: 003

Funding Rule dropdown options:
 Agency Funds
 ARPA Funds
 CHEFA Funds
 DAS Minor Capital Project Funds
 Energy Funds
 Federal Funds
 HazzMat Funds
 Other Funds (Special Legislation, etc.)
 School Construction Grant Funds
 State Bond Funds



After selecting the appropriate funding source, click “Save.”

Funding Source	Percentage	Amount
Agency Transfer of Funds		0.00
ARPA Funds		0.00
CHEFA Funds		0.00
DAS Minor Capital Project Funds		0.00
Energy Funds		0.00
Federal Funds		0.00
HazMat Funds		0.00
Other Funds (Special Legislation, etc.)		0.00
School Construction Grant Funds		0.00
State Bond Funds	100.00	0.00
Total	100.00	

Note that the “Funding Rule” has been changed for all of the lines. Click “Save” to complete.

Commitment Overview

Project: *Testing6723a Project Name
Master Commitment: Please select a master commitment...
* Commitment Type: CA Contract
* Commitment Number: 011
Unit Cost Options: Lump Sum Amount
* Description: test 5
* Commitment Control: Controlled By Line Item
Created: 12.19.2023 (Timothy O'Brien)

Status: Draft
* Company: zzzzz-not real company
Company Number: zzzzz-testingonly
Contact: Select a contact...

Other Details

Commitment Date: [Calendar]
Scope of work: [Text Area]
* Default Retainage Percent: 0.00

Notice to Proceed Date: [Calendar]
Retainage amount: [Input] Support manual entry

Commitment Items

Item Number	Line Item	Description	Current Budget	Funding Rule	Retainage Percent	Amount	Allowance	Custom Field(s)
001	10.130	On-Call (CA, CAm, CX)		State Bond Funds	0.00	1.00	<input type="checkbox"/>	Delete
002	10.130	On-Call (CA, CAm, CX) 2		State Bond Funds	0.00	1.00	<input type="checkbox"/>	Delete
Total			0.00			2.00		



Section 5: Edit Budget Details

The Budget tool in e-Builder is used to track money that has been allocated or otherwise made available for commitment and expenditure on a project. The Budget tool is not for the entry of the whole 1105 project budget unless funding has been allocated for the entire project. The following instructions concern making changes to the Budget in e-Builder so that it reflects the money that has actually been allocated to a project.

5.01 Accessing the project

Follow the instructions provided in [Section 1](#) to Access the Project.

5.02 Creating a new Budget Change entry

After accessing the project, under the Project Menu:

1. Click the arrow next to "Cost" to open the Cost options.
2. Then click on "Budget Details". That will open show the current project allocated Budget.
3. Then Click on the "Budget Changes" tab. Previously entered budget changes will be listed.
4. To start a new Budget Change entry, click "Add."

Budget Details For BI-38-127 - This is a test

Project: BI-38-127 - This is a test
 Created: 09.12.2023 (e-builder implementation)
 Approved: 09.12.2023 (e-builder implementation)
 Description:

Status: Approved
 Budget Control: Controlled Total

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
10.00	0.00	0.00	0.00	(10.00)

Budget Line Items (0) **Budget Changes (1)** Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0)

Show: All show filter Export Mail Merge Add

#	Description	Reason For Change	Applies To	Status	Date Of Change	Change Amount
001	First test entry	Original Budget	Original Amount	Approved	12.18.2023	10.00
Totals						10.00

Mail Merge Add



A new screen will open entitled “Add Change Details”. Complete the following:

1. Select a reason code, such as “Original Budget”. “(Original)” at the end of it means that the reason code will make this change show up in the budget as original costs.
2. Enter a Description.
3. Select “Save and Add All Line Items”.

Add Change Details

Project Name: BI-38-127 - This is a test		Save and Add All Line Items		Save and Add Items One at a Time	Cancel
* Budget Change Number: 002	Status: Draft	* Date Of Change: 12.18.2023			
* Reason Code: Original Budget (Original)					
* Description: Completing the budget for the test project					
Custom Fields					
There are no budget change custom fields.					
		Save and Add All Line Items		Save and Add Items One at a Time	Cancel

On the next screen, click, “Continue.”

Add Change Details

Confirm Add All Budget Items

Are you sure you want to add all budget line items to the change?

Continue Go Back



The "Edit Change Details" screen will open. Then enter the changes:

- A This column has the Cost Codes for each line in the Budget.
- B This column has the current Budget amount for each Cost Code.
- C This is the column where the changes being made are entered. Click on the "0.00" or the "pencil" button in the line item you want to edit. Enter the change amount for that Cost Code, which can be either a positive number, for an addition, or a negative number, for a reduction.
- D The Net Budget Amount for each Cost Code will calculate automatically. The Net Budget Amount is equal to the Current Budget Amount (B), plus (or minus for negative numbers) the Change Amount (C).
- E The value at the bottom of the Net Budget Amount column should reflect the total amount currently allocated to the project.
- F When the entry is complete, click "Save."

Edit Change Details

Project Name: BI-3B-127 - This is a test
 * Budget Change Number: 002
 * Reason Code: Original Budget (Original)
 * Description: Completing the budget for the test project

Status: Draft
 * Date Of Change: 12.18.2023

F Save Cancel

Budget Change Items

		A	B			C	D	
	Description	Budget Line Item	Current Budget Amount	Projected Commitments	Formula	Change Amount	Net Budget Amount	
1	Total Acquisition (Land / Building)	01.000	0.00	0.00	Add	0.00	0.00	
2	Total Environmental Remediation ...	02.000	0.00	0.00	Add	0.00	0.00	
3	On-Call (ENV, HAZ)	02.130	0.00	0.00	Add	0.00	0.00	
4	Total CMR Construction Phase (W...	03.100	10.00	0.00	Add	0.00	10.00	
5	Total DBB Construction Phase	03.200	0.00	0.00	Add	0.00	0.00	
6	Total DAS/CS Contingency (Non-C...	04.000	0.00	0.00	Add	0.00	0.00	
7	Total Equipment	05.000	0.00	0.00	Add	0.00	0.00	
8	Total Telecommunications	06.000	0.00	0.00	Add	0.00	0.00	
9	Total Studies (Pre-Design, Environ...	07.000	0.00	0.00	Add	0.00	0.00	
0	Total A/E (Design Phase, Bidding P...	08.000	0.00	0.00	Add	0.00	0.00	
1	On-Call (ARC, CIV-SUR-LA, ENGY, ...	08.130	0.00	0.00	Add	0.00	0.00	
2	Total Other (including CMR Precon...	09.000	0.00	0.00	Add	0.00	0.00	
3	Total CA (Design Phase, Bidding P...	10.000	0.00	0.00	Add	0.00	0.00	
total			10.00	0.00		0.00	10.00	E



5.03 Navigating back to a draft budget change

To access a previously saved budget change entry:

1. Follow the instructions in 5.1 & 5.2, steps 1-3 to navigate to the Budget Details/Budget Changes tab.
2. Click on the item # of the draft change to reopen the draft.

Budget Details For BI-38-127 - This is a test

Project: BI-38-127 - This is a test
 Created: 09.12.2023 (e-builder implementation)
 Approved: 09.12.2023 (e-builder implementation)
 Description:

Status: Approved
 Budget Control: Controlled Total

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
10.00	0.00	0.00	0.00	(10.00)

Budget Line Items (2) | Budget Changes (2) | Custom Fields (0) | Notes (0) | Documents (0) | Forms (0) | Processes (0)

Show: All | Show Filter | Export | Mail Merge | Add

#	Description	Reason For Change	Applies To	Status	Date Of Change	Change Amount
001	First test entry	Original Budget	Original Amount	Approved	12.18.2023	10.00
002	Completing the budget for the test project	Original Budget	Original Amount	Draft	12.18.2023	0.00
Totals						10.00

Mail Merge | Add

5.04 Approving a budget change

A budget change can be approved by clicking "Approve". Alternatively, the "Edit" button can be clicked to re-open the draft for further changes.

Budget Change Details

Mail Merge | Make Pending | Make Projected | Request Approval | **Approve** | Edit | Delete

Project: BI-38-127 - This is a test
 Change Number: 002
 Reason Code: Original Budget
 Applies To: Original Budget Amount
 Description: Completing the budget for the test project

Status: Draft
 Date of Change: 12.18.2023
 Created: 12.18.2023 (Timothy O'Brien)

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
10.00	0.00	0.00	0.00	(10.00)

If "Approve" was selected, the approval confirmation screen will appear. Click or enter the approval date. Comments may be entered under "Note," but are not required. Click "Approve".

Confirm approval

Are you sure you want to approve the budget change 002 - Completing the budget for the test project for 0.00?

Approval date: 12.19.2023

Note:

Click approve to change the status to 'Approved'. All change items with 0.00 amount will be removed.

Check spelling | **Approve** | Cancel



5.05 Budget should reflect all approved changes.

The project budget should now appear updated, based on the sum of the initial budget and all of the Budget Change entries. The budget is broken down by cost code in the "Line Item" column and the "Current Budget" column should reflect the updated current project budget. The number at the bottom of the "Current Budget" column should be the total money allocated to the project, as updated by the Budget Changes made.



- Recent Pages...
- Project Menu
 - Details
 - Planning
 - Forms
 - Issues
 - Processes
 - Documents
 - Schedule
 - Cost
 - Cost Summary
 - Funding Sources
 - Budget Details**
 - Commitments
 - Actual Costs
 - Cash Flow
 - Other Cost Columns
 - Contacts
 - Calendar
 - Submittals

Budget Details For BI-3B-127 - This is a test

Project: BI-3B-127 - This is a test
 Created: 09.12.2023 (e-builder implementation)
 Approved: 09.12.2023 (e-builder implementation)
 Description:

Status: Approved
 Budget Control: Controlled Total

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
10.00	0.00	0.00	0.00	(10.00)

Budget Line Items (18)

Line Item	Description	Assumption	Allow Charges	Approval Required For Change	Original Budget	Approved Changes	Current Budget	Pending Changes	Projected Changes	Projected Budget
01.000	Total Acquisition Land / Building		✓		0.00	0.00	0.00	0.00	0.00	0.00
02.000	Total Environmental Remediation & Hazard Abatement By Owner		✓		0.00	0.00	0.00	0.00	0.00	0.00
02.130	On-Call (ENV, HAZ)		✓		0.00	0.00	0.00	0.00	0.00	0.00
03.100	Total CMR Construction Phase WAOs, Cost of the		✓		10.00	0.00	10.00	0.00	0.00	10.00
Totals					10.00	0.00	10.00	0.00	0.00	10.00



Section 5A: Tracking DAS Fees

5A.01 Accessing the project

Follow the instructions provided in [Section 1](#) to Access the Project.

5A.02 Creating a Commitment Record for DAS Fees

The following applies if the project does not already have a Commitment record for DAS fees.

1. After opening the project record, select "Commitments" under the "Project Menu" and then click on "Commitments". If no commitment appears for DAS fees, click, "Add."

The screenshot shows the 'Commitments For' page for project BI-3B-126. The 'Project Menu' on the left has 'Commitments' highlighted. The main area displays a 'Commitment Summary' table with the following data:

Project:	BI-3B-126 - This is a test		
Original Commitments:	0.00	Pending Commitment Changes:	0.00
Approved Commitment Changes:	0.00	Projected Commitment Changes:	0.00
Non-commitment Costs:	0.00	Projected Commitments Value:	0.00
Current Commitments Value:	0.00		

Below this is a 'Quick Cost Summary' table:

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
0.00	0.00	0.00	0.00	0.00

At the bottom, there is a table with columns: #, Description, Company, Date, Status, Commitment Type, Commitment Amount, Current Commitment, Projected Commitment, Actuals Approved, and Remaining Balance. The table is empty with the message 'There are no commitments for the selection.' An 'Add' button is circled in red.

2. That brings up the draft Commitment form. This description will concern three different parts of that form (labeled A, B and C, below):

The screenshot shows the 'Add Commitment' form. Three red boxes highlight specific sections:

- A:** The 'Commitment Overview' section, which includes fields for Project, Master Commitment, Commitment Type, Commitment Number, Unit Cost Options, Description, and Commitment Control.
- B:** The 'Add New Commitment Item' section, which includes fields for Item Number, Budget Line Item, Current Budget, Description, Retainage Percent, Amount, Allowance Item?, and Custom Field(s).
- C:** The 'Commitment Items' section, which currently displays 'There are no Commitment Items.'



A. Add Commitment

A.1. In the “Commitment Type” field, select, “DAS Fees.”

Commitment Overview Save

Project:	BI-3B-126 - This is a test	Status:	Draft
Master Commitment:	Please select a master commitment...	* Company:	Department of Administrative Services
* Commitment Type:	DAS Fees	Company Number:	DAS001
* Commitment Number:	DAS001-3B126	Contact:	Select a contact...
* Unit Cost Options:	Lump Sum Amount		
* Description:			
* Commitment Control:	Controlled By Commitment Item		

A.2. In the “Company” field, type “Department of Administrative Services”. Note that the Company Number will populate automatically as “DAS001”.

A.3. Enter the Commitment Number, using the following format. Starting with “DAS001” (the “company number”), then type one dash. Then, excluding the “BI”, “CF”, etc. and all other dashes, enter the project number as shown.

Project:	BI-3B-126 - This is a test
Master Commitment:	Please select a master commitment...
* Commitment Type:	DAS Fees
* Commitment Number:	DAS001-3B126
* Unit Cost Options:	Lump Sum Amount

A.4. In the “Description” field, type a prose description, such as, “DAS Fees on project 3B-126.” The “Unit Cost Options” field should not be changed.

B. Add New Commitment Item

Under the “Add New Commitment Item” section:

B.1. Click on “Please Select a Line Item”. This is where the Cost Code is selected.

Add New Commitment Item

Item Number	001
Budget Line Item	Please Select a Line Item
Current Budget	
Description	
Retainage Percent	0.00
Amount	0.00
Allowance Item?	<input type="checkbox"/>
Custom Field(s)	

Add



B.2. Click on Cost Code 12.000.

Account Code	Description
01.000	Total Acquisition (Land / Building)
02.000	Total Environmental Remediation & Haz-Mat Abatement By Owner
02.130	On-Call (ENV, HAZ)
03.100	Total CMR Construction Phase (WAOs, Cost of the Work, Allowances, CMR Fee, & Contingency)
03.200	Total DBB Construction Phase
04.000	Total DAS/CS Contingency [Non-Commitment Cost]
05.000	Total Equipment
06.000	Total Telecommunications
07.000	Total Studies (Pre-Design, Environmental Impact Evaluation, & Other)
08.000	Total A/E (Design Phase, Bidding Phase, & Construction Phase)
08.130	On-Call (ARC, CIV-SUR-LA, ENGY, EPA, EST, MBE-ARC, MBE-CIV, MDE, MEP, ROOF, SCH, STR, VEH)
09.000	Total Other (including CMR Preconstruction Phase)
10.000	Total CA (Design Phase, Bidding Phase, & Construction Phase)
10.130	On-Call (CA, CAm, CX)
11.000	Total Art
12.000	Total DAS/CS Fee [Non-Commitment Cost]
13.000	Total Claims Fee
13.130	On-Call (ANLY-AUD)

Clear Selection Close

B.3. Enter the Amount to be committed to DAS fees, at least initially, and then click “Add”.

Item Number	001
Budget Line Item	12.000
Current Budget	0.00
Description	Total DAS/CS Fee [Non-Commitment Cost]
Retainage Percent	0.00
Amount	10.00
Allowance Item?	<input type="checkbox"/>
Custom Field(s)	

Add



C. Commitment Items

Under the “Commitment Items” section, confirm that the information is correct. Any fields with a pencil next to them can be opened for editing by clicking on the “pencil”. For example, to edit the Amount, click on the pencil next to that number, change the number and click in any blank area of the form to allow it to update.

Commitment Items

Item Number	Line Item	Description	Current Budget	Retainage	Amount	Allowance
001	12.000	Total DAS/CS Fee [Non-Commitment Cost]	0.00	0.00	10.00	
Total			0.00		10.00	

C.1. If the information is correct, click “Save.”

Add Commitment

Commitment Overview

Project: BI-38-126 - This is a test

Master Commitment: Please select a master commitment...

Commitment Type: DAS Fees

Commitment Number: DAS001-38126

Unit Cost Options: Lump Sum Amount

Description:

Commitment Control: Controlled By Commitment Item

Status: Draft

Company: Department of Administrative Services

Company Number: DAS001

Contact: Select a contact...

Save Cancel

C.2. Saving the draft commitment leads to a pre-approval summary screen. Before the commitment can be used, it must be approved, which Project Managers can do.
a. To approve the DAS fees commitment, click, “Approve.”

Commitment Details

Commitment Overview Other Details Financial Summary

Mail Merge Request Approval Approve Make Pending Delete Edit

Project: BI-38-126 - This is a test

Commitment Type: DAS Fees

Commitment Number: DAS001-38126

Unit Cost Options: Lump Sum Amount

Description: DAS Fees on project 38-126

Commitment Control: Controlled By Line Item

Created: 12.12.2023 (Timothy O'Brien)

Status: Draft

Company: Department of Administrative Services

Company Number: DAS001

Contact:

Commitment Items (1) Custom Fields (13) Notes (0) Documents (0) Forms (0) Processes (0)

Show Filter Export

Item #	Budget Line Item	Description	Current Budget	Original Commitment Amount	Retainage Percent	Custom Field(s)
001	12.000	Total DAS/CS Fee [Non-Commitment Cost]	0.00	10.00	0.00	
Total			0.00	10.00		

b. In the next screen, click on the date hyperlink to populate an approval date or enter an “Approval Date.” Enter a note, if applicable.



Then either click “Yes, Approve the Commitment” to approve or “No, Cancel” to return back to the screen with the commitment as a draft.

Commitment Details

Confirm Approval

Are you sure you want to approve the commitment?

Approval Date [12.12.2023]

Add a note:

5A.03 Entering DAS Fees Actual Costs

1. Under Costs > Commitments, click on the commitment number of the DAS fees commitment.

The screenshot shows the e-Builder interface with the 'Cost' tab selected. The 'Commitments' menu item is highlighted in red. A table lists commitments for project 'BI-38-126 - This is a test'. The table has columns for #, Description, Company, Date, Status, Commitment Type, Commitment Amount, Current Commitment, Projected Commitment, Actuals Approved, and Remaining Balance. A red circle highlights the row for 'DAS Fees on project 38-126' with a commitment amount of 10.00.

#	Description	Company	Date	Status	Commitment Type	Commitment Amount	Current Commitment	Projected Commitment	Actuals Approved	Remaining Balance
DAS001-38126	DAS Fees on project 38-126	Department of Administrative Services	12.12.2023	Approved	DAS Fees	10.00	10.00	10.00	0.00	10.00
Total						10.00	10.00	10.00	0.00	10.00



- Click on the "Actual Costs" tab and then click on the "Add" button.

The screenshot shows the 'Commitment Details' page in the e-Builder system. The 'Actual Costs (0)' tab is highlighted with a red cloud. A red arrow points from this tab to an 'Add' button in the table below, which is also circled with a red cloud.

- Enter a description of the actuals record in the "Description" field. Under "Invoice Amount," enter the amount of new DAS fees to record, then toggle "Status" to "Approved" and then click "Save".

The screenshot shows the 'Add Invoice' page. Red clouds highlight the 'Description' field containing 'DAS fees from ___ to ___', the 'Status' dropdown set to 'Approved', and the 'Invoice Amount' field set to '1.00'. A red arrow points from the 'Add Invoice' button to the 'Save and Add New' button.

Commitment Item #	Description	Budget Line Item	Current Commitment	Invoiced To Date	Retained To Date	Remaining to be Invoiced	Invoice Amount	Retainage %
001	Total DAS/CS Fee [Non-Commitment Cost]	12.000	10.00	0.00	0.00	0.00	1.00	0.00 %
Total			10.00	0.00	0.00	10.00	1.00	0.00 %

- In the next screen, click on the date hyperlink to populate an "Approval Date" or enter an "Approval Date." Then click "Yes, Approve the Invoice" to approve or click "No, Cancel" to return to the draft screen.

Add Invoice

The screenshot shows the 'Are you sure you want to approve the invoice?' dialog box. A red cloud highlights the 'Approval Date' field with the date '12.12.2023'. Another red cloud highlights the 'Yes, Approve the Invoice' button.



- If approved, the "Invoice Details" page will open to display the actual cost. Click "Mark Paid" to approve (which includes approval under another approve screen). Click the link next to "Commitment" to return to the record for the commitment.

Invoice Details

Invoice Overview | Other Details

Mail Merge | View | **Mark Paid** | Edit

Project:	BI-38-126 - This is a test	Status:	Approved
Commitment:	DAS001-38126 - DAS Fees on project 38-126	Company:	Department of Administrative Services
Current Commitment Amount:	10.00	Company Number:	DAS001
Invoice Number:	001	Contact:	
Description:	DAS fees from ___ to ___	Date Received:	12.12.2023
Invoice Amount:	1.00	Approved:	12.12.2023 (Timothy O'Brien)
Retained This Invoice:	0.00		

Invoice Items (1) | Custom Fields (4) | Notes (0) | Documents (0) | Forms (0) | Processes (0)

Show Approved Commitment Items | Show Filter | Export

Commitment Item #	Description	Budget Line Item	Current Commitment	Invoiced To Date	Retained To Date	Remaining To Be Invoiced	Amount This Invoice	Retained This Invoice	Custom Field(s)
001	Total DAS/CS Fee (Non-Commitment Cost)	12.000	10.00	1.00	0.00	9.00	1.00	0.00	
Total			10.00	1.00	0.00	9.00	1.00	0.00	

- The Commitment Details page shows information about the commitment record, including the Current Commitment amount, the Actuals Approved and has a tab to show the Actual Costs entries against that commitment.

e-Builder | tobrien3

My Home | Dashboard | Projects | Processes | Documents | Contacts | **Cost** | Schedule | Reports | Setup | ...

Commitment Details | Cost Summary | Items Pending Approval | Unfinished Drafts | Data Entry | Account Log

Commitment Overview | Other Details | Financial Summary

Mail Merge | Close

Project:	BI-38-126 - This is a test	Status:	Approved
Commitment Type:	DAS Fees	Company:	Department of Administrative Services
Commitment Number:	DAS001-38126	Company Number:	DAS001
Unit Cost Options:	Lump Sum Amount	Contact:	
Description:	DAS Fees on project 38-126	Date Received:	12.12.2023
Commitment Control:	Controlled By Line Item	Approved:	12.12.2023 (Timothy O'Brien)
Created:	12.12.2023 (Timothy O'Brien)		

Commitment Items (1) | Commitment Changes (0) | **Actual Costs (1)** | Custom Fields (12) | Notes (0) | Documents (0) | Forms (0) | Processes (0)

Show Filter

Item #	Budget Line Item	Description	Current Budget	Original Commitment Amount	Current Commitment	Projected Commitment	Retainage Percent	Current Retainage Held	Actuals Approved	Custom
001	12.000	Total DAS/CS Fee (Non-Commitment Cost)	10.00	10.00	10.00	10.00	10.00	0.00	1.00	
Total			10.00	10.00	10.00	10.00	10.00	0.00	1.00	



5A.04 Manually Entering a Commitment Change

To manually change a commitment amount for the DAS fees commitment on a project, proceed as follows:

1. Under Costs > Commitments, click on the commitment number of the DAS fees commitment.

Commitment Summary

Original Commitments:	10.00	Pending Commitment Changes:	0.00
Approved Commitment Changes:	0.00	Projected Commitment Changes:	0.00
Main Commitment Costs:	0.00		
Current Commitments Value:	10.00	Projected Commitments Value:	10.00

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
240.00	10.00	0.00	10.00	(230.00)

#	Description	Company	Date	Status	Commitment Type	Commitment Amount	Current Commitment	Projected Commitment	Actuals Approved	Remaining Balance
DAS001-38126	DAS Fees on project 38-126	Department of Administrative Services	12.12.2023	Approved	DAS Fees	10.00	10.00	10.00	0.00	10.00
Totals						10.00	10.00	10.00	0.00	10.00

2. That leads to the "Commitment Details" screen. On that screen, under the "Commitment Changes" tab, click "Add."

Commitment Details

Commitment Overview | Other Details | Financial Summary

Project: BI-38-126 - This is a test
 Commitment Type: DAS Fees
 Commitment Number: DAS001-38126
 Unit Cost Options: Lump Sum Amount
 Description: DAS Fees on project 38-126
 Commitment Control: Controlled By Line Item
 Created: 12.12.2023 (Timothy O'Brien)

Status: Approved
 Company: Department of Administrative Services
 Company Number: DAS001
 Contact:
 Approved: 12.12.2023 (Timothy O'Brien)

Commitment Item (1) | **Commitment Changes (0)** | Actual Costs (1) | Custom Fields (13) | Notes (0) | Documents (0) | Forms (0) | Processes (0)

Show: All | Add

#	Description	Reason For Change	Applies To	Status	Date Of Change	Change Amount
There are no commitment changes.						

Add

3. On the "Add Change Details" page, enter a Description, select the correct change "Reason Code" and click "Save and Add All Items."

Add Change Details

Project Name: BI-38-126 - This is a test
 Commitment: DAS001-38126 - DAS Fees on project 38-126
 * Commitment Change Number: 001
 Date Of Change: 12.12.2023
 Description: This DAS fees change

Status: Draft
 Reason Code: Admin Correction (Original)

Save and Add All Items | Save and Add Items One at a Time | Cancel



- 4. On the next screen, click "Continue."

Add Change Details

Confirm Add

Are you sure you want to add all commitment items to the change?

Continue **Go Back**

- 5. Under "Change Amount," enter a positive or negative number for the "Change Amount" and click "Save."

Edit Change Details

Project Name: BI-38-126 - This is a test
 Commitment: DAS001-38126 - DAS Fees on project 38-126
 Commitment Change Number: 001
 Date Of Change: 12.12.2023
 Description: This DAS fees change

Status: Draft
 Reason Code: Admin Correction (Original)

Save **Cancel**

#	Commitment Item	Description	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount	Custom Field(s)
001	001	Total DAS/CS Fee [Non-Commit...	0.00	10.00	0.00	10.00	

- 6. To approve the commitment change, click "Approve." Click "Edit" to return to the draft commitment change for further editing.

Commitment Change Details

Project: BI-38-126 - This is a test
 Commitment: DAS001-38126 - DAS Fees on project 38-126
 Change Number: 001
 Reason Code: Admin Correction
 Applies To: Original Commitments
 Description: This DAS fees change

Status: Draft
 Company: Department of Administrative Services
 Date of Change: 12.12.2023
 Created: 12.12.2023 (Timothy O'Brien)

Mail Merge **Make Pending** **Make Projected** **Request Approval** **Approve** **Edit** **Delete**

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
240.00	10.00	1.00	9.00	(230.00)

Commitment Change Items (1) Custom Fields (7) Notes (0) Documents (0) Forms (0) Processes (0)

Show Filter **Export** **Add All Line Items** **Add Item**

#	Commitment Item	Description	Budget Line Item	Current Commitment Amount	Change Amount
001	001	Total DAS/CS Fee [Non-Commitment Cost]	12.000	10.00	1.00
Totals				10.00	1.00



- 7. If approved, click on the date hyperlink to populate an "Approval Date" or enter an "Approval Date." Enter a note, if applicable, and click "Continue" to approve, or "No, Cancel" to return to the commitment change as a draft.

Commitment Change Details

Approve Commitment Item(s)

Are you sure you want to approve the commitment change 001 - 1.00?

Please review the following \$0 change line items that will be included in the change upon approval. Note: Line items less than, or greater than, \$0 are not displayed in the below grid.

Approval Date: [12.12.2023]

Add a note:

Click continue to change the status to Approved.

Check Spelling Continue No, Cancel

- 8. If "Continue", the Commitment Change Details page will open, which is the record of that commitment change. To return to the commitment, itself, click on the commitment number next to label for "Commitment."

Commitment Change Details

Mail Merge Void Edit

Project: 38-126 - This is a test	Status: Approved
Commitment: DAS001-38126 - DAS Fees on project 38-126	Company: Department of Administrative Services
Change Number: 001	Date of Change: 12.12.2023
Reason Code: Admin Correction	Created: 12.12.2023 (Timothy O'Brien)
Applies To: Original Commitments	Approved: 12.12.2023 (Timothy O'Brien)
Description: This DAS fees change	

Quick Cost Summary

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
240.00	11.00	1.00	10.00	(229.00)

Commitment Change Items (1) Custom Fields (7) Notes (0) Documents (0) Forms (0) Processes (0)

Show Filter Export

#	Commitment Item	Description	Budget Line Item	Current Commitment Amount	Change Amount
001	001	Total DAS/CS Fee [Non-Commitment Cost]	12.000	11.00	1.00
Totals				11.00	1.00



Section 5B: PM Creation of Other Commitments

Generally, commitments are entered by Construction Support Services as part of established procedures. There are some circumstances, generally when the commitment was approved prior to the migration into e-Builder, when a commitment record may need to be entered manually. PM's are encouraged to contact Construction Support Services before doing this in order to avoid the creation of conflicting records. Additionally, Construction Support Services is available to assist project managers in performing this function, should the need arise. The below are instructions for how to create a commitment.

5B.01 Accessing the project

Follow the instructions provided in [Section 1](#) to Access the Project.

5B.02 Creating a Commitment Record

1. After opening the project record, click "Cost", under the "Project Menu", then click "Commitments". To add a new commitment, click, "Add."

The screenshot shows the 'Commitments' page for project BI-38-126. The 'Project Menu' on the left has 'Commitments' highlighted. The main area shows a 'Commitment Summary' table and a 'Quick Cost Summary' table. A red circle highlights the 'Add' button in the top right of the table area.

Category	Value	Category	Value
Original Commitments:	0.00	Pending Commitment Changes:	0.00
Approved Commitment Changes:	0.00	Projected Commitment Changes:	0.00
Non-commitment Costs:	0.00	Projected Commitments Value:	0.00
Current Commitments Value:	0.00		

Current Budget	Current Commitments	Actuals Approved	Actual Cost To Complete	Projected Over/(Under)
0.00	0.00	0.00	0.00	0.00

2. That brings up the draft Commitment form. This description will concern three different parts of that form (labeled A, B and C, below):

The screenshot shows the 'Add Commitment' form. Three red boxes labeled A, B, and C highlight specific sections: A (Commitment Overview), B (Add New Commitment Item), and C (Commitment Items).



A. Add Commitment

A.1. Enter the “Commitment Type” field. Ensure that “CMR GMP” is selected for CMR GMP commitments, and that “Prime Contractor Contract” is selected for DBB GC commitments. The other options are for consultants and other commitments.

Commitment Overview Save

Project:	BI-3B-126 - This is a test	Status:	Draft
Master Commitment:	Please select a master commitment...	* Company:	Department of Administrative Servio
* Commitment Type:	DAS Fees	Company Number:	DAS001
* Commitment Number:	DAS001-3B126	Contact:	Select a contact...
* Unit Cost Options:	Lump Sum Amount		
* Description:			
* Commitment Control:	Controlled By Commitment Item		

- A.2. In the “Company” field, type “Department of Administrative Services”. Note that the Company Number will populate automatically as “DAS001”.
- A.3. Enter the Commitment Number, using the following format. Starting with “DAS001” (the “company number”), then type one dash. Then, excluding the “BI”, “CF”, etc. and all other dashes, enter the project number as shown.
- A.4. In the “Description” field, type a prose description, such as, “DAS Fees on project 3B-126.” The “Unit Cost Options” field should not be changed.

B. Add New Commitment Item

Under the “Add New Commitment Item” section:

B.1. Click on “Please Select a Line Item”. This is where the Cost Code is selected.

Add New Commitment Item

Item Number	001
Budget Line Item	Please Select a Line Item
Current Budget	
Description	
Retainage Percent	0.00
Amount	0.00
Allowance Item?	<input type="checkbox"/>
Custom Field(s)	

Add

B.2. Click on the applicable Cost Code.

Budget Line Items x

Account Code	Description
01.000	Total Acquisition (Land / Building)
02.000	Total Environmental Remediation & Haz-Mat Abatement By Owner
02.130	On-Call (ENV, HAZ)
03.100	Total CMR Construction Phase (WAOs, Cost of the Work, Allowances, CMR Fee, & Contingency)
03.200	Total DBB Construction Phase
04.000	Total DAS/CS Contingency [Non-Commitment Cost]
05.000	Total Equipment
06.000	Total Telecommunications
07.000	Total Studies (Pre-Design, Environmental Impact Evaluation, & Other)
08.000	Total A/E (Design Phase, Bidding Phase, & Construction Phase)
08.130	On-Call (ARC, CIV-SUR-LA, ENGY, EPA, EST, MBE-ARC, MBE-CIV, MDE, MEP, ROOF, SCH, STR, VEH)
09.000	Total Other (including CMR Preconstruction Phase)
10.000	Total CA (Design Phase, Bidding Phase, & Construction Phase)
10.130	On-Call (CA, CAm, CX)
11.000	Total Art
12.000	Total DAS/CS Fee [Non-Commitment Cost]
13.000	Total Claims Fee
13.130	On-Call (ANLY-AUD)



B.3. Enter the Amount to be committed and then click “Add”.

Add New Commitment Item

Item Number	001
Budget Line Item	12.000
Current Budget	0.00
Description	Total DAS/CS Fee [Non-Commitment Cost]
Retainage Percent	0.00
Amount	10.00
Allowance Item?	<input type="checkbox"/>
Custom Field(s)	

Add

C. Commitment Items

Under the “Commitment Items” section, confirm that the information is correct. Any fields with a pencil next to them can be opened for editing by clicking on the “pencil”. For example, to edit the Amount, click on the pencil next to that number, change the number and click in any blank area of the form to allow it to update.

Commitment Items

<input type="checkbox"/>	Item Number	Line Item	Description	Current Budget	Retainage	Amount	Allowance
<input type="checkbox"/>				0.00	0.00	10.00	<input type="checkbox"/>
Total				0.00		10.00	

C.1. If the information is correct, click “Save.”

Add Commitment

Commitment Overview

Project:	BI-38-126 - This is a test
Master Commitment:	Please select a master commitment...
Commitment Type:	DAS Fees
Commitment Number:	DAS001-38126
Unit Cost Options:	Lump Sum Amount
Description:	
Commitment Control:	Controlled By Commitment Item

Status:	Draft
Company:	Department of Administrative Services
Company Number:	DAS001
Contact:	Select a contact...

Save **Cancel**

C.2. Saving the draft commitment leads to a pre-approval summary screen. Before the commitment can be used, it must be approved, which Project Managers can do.

a. To approve the DAS fees commitment, click, “Approve.”

Commitment Details

Commitment Overview | Other Details | Financial Summary

Project:	BI-38-126 - This is a test	Status:	Draft
Commitment Type:	DAS Fees	Company:	Department of Administrative Services
Commitment Number:	DAS001-38126	Company Number:	DAS001
Unit Cost Options:	Lump Sum Amount	Contact:	
Description:	DAS Fees on project 38-126		
Commitment Control:	Controlled By Line Item		
Created:	12.12.2023 (Timothy O'Brien)		

Mail Merge **Request Approval** **Approve** **Make Pending** **Delete** **Edit**

Commitment Items (1) | Custom Fields (13) | Notes (0) | Documents (0) | Forms (0) | Processes (0)

Show Filter Export

	Item #	Budget Line Item	Description	Current Budget	Original Commitment Amount	Retainage Percent	Custom Field(s)
Delete				0.00	10.00	0.00	
Total				0.00	10.00		



- b. In the next screen, click on the date hyperlink to populate an approval date or enter an "Approval Date." Enter a note, if applicable. Then either click "Yes, Approve the Commitment" to approve or "No, Cancel" to return back to the screen with the commitment as a draft.

Commitment Details

Confirm Approval

Are you sure you want to approve the commitment?

Approval Date [\[12.12.2023 \]](#)

Add a note:

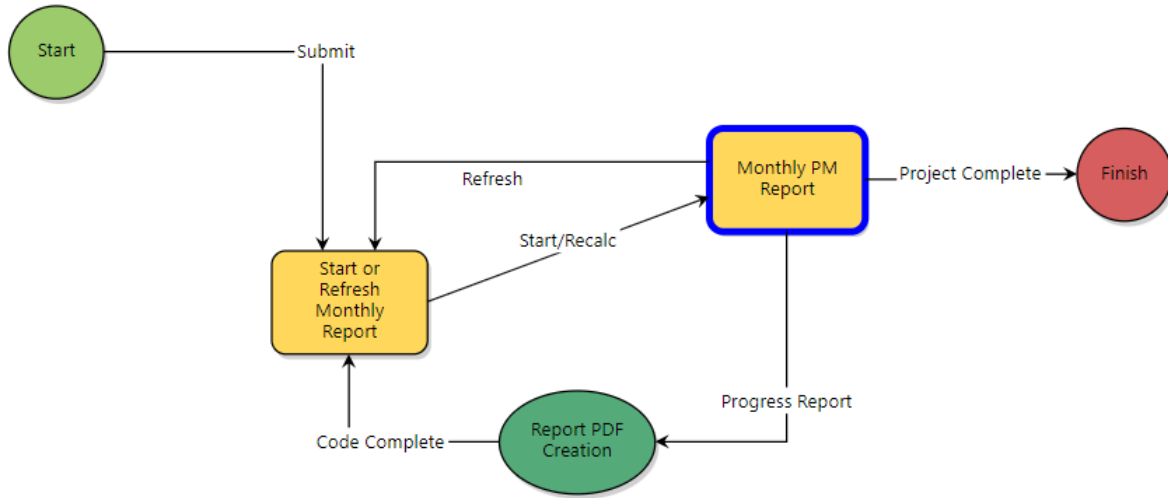


Section 5C: Cost To Date Report

5C.01 Coming Soon

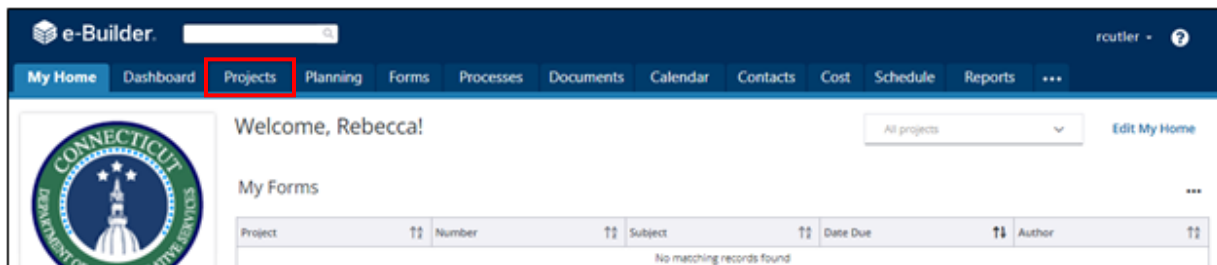


Section 6: Project Manager Monthly Reports



6.01 Accessing the project

Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the “Projects” tab:



Search for your project by entering the project number into the “All Projects” search box or by looking for it under the list that appears below on this screen, then click on your project to bring up the “Project Details” page.

Projects

Active Projects View Edit | Add View All Projects Bulk Edit Add

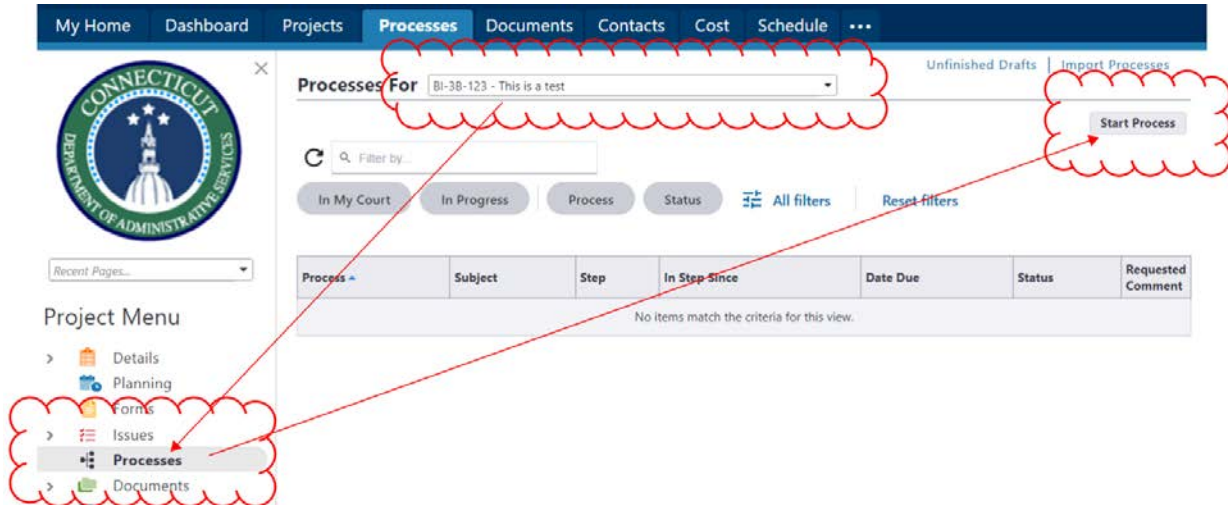
	<input type="checkbox"/>	Project Name	DAS Project Number	ADPM	Project Manager	DAS Project Status	Agency	Description	Agency Request for Project Administration
Edit	<input type="checkbox"/>	*BI-CS-1005 - DAS Tst 5	BI-CS-1005	Craig Russell	Craig Russell		Department of Administrative Services	N/A	Agency



Note: The Project Manager Monthly Status Report process only requires one process instance per project. Proceed to Section 6.02 for the first monthly report submission. For each subsequent report submission, begin at [Step 6.03](#).

6.02 Starting the Project Manager Monthly Status Report process (One time per project).

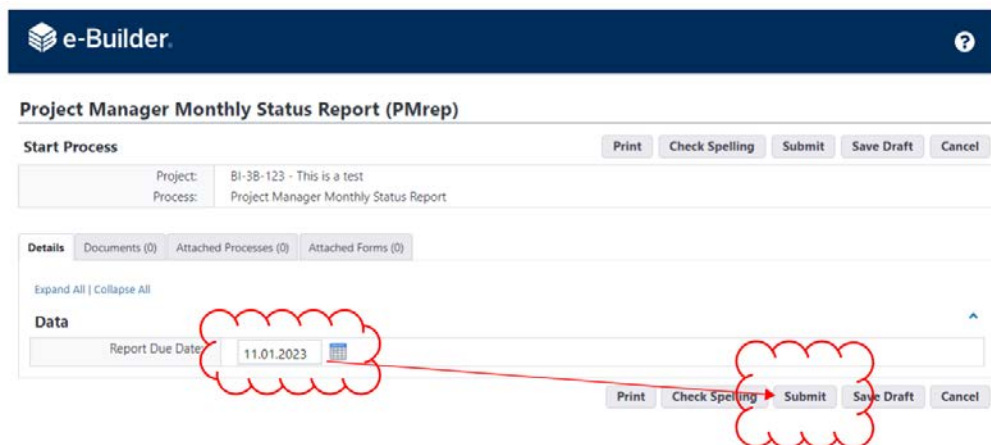
Within the project’s record, go to the Processes module in the Project Menu. Then click on the “Start Process” button.



Note: If you do not see all of your projects, contact Tim O’Brien to gain access to them in e-Builder. Click on the “Project Manager Monthly Status Report (PMrep)” process.



Enter the due date of the first project report on this project in e-Builder and then click Submit.





6.03 Starting a second or subsequent project status report.

Within the project’s record, go to the Processes module in the Project Menu, then click on the Process number (probably “PMrep - 1”) to re-open the process instance.

The screenshot shows the e-Builder interface. On the left is the Project Menu with options: Details, Planning, Forms, Issues, **Processes**, and Documents. The 'Processes' menu item is circled in red. The main area displays a list of processes for project BI-3B-123. A table with the following data is shown:

Process	Subject	Step	In Step Since	Date Due	Status	R	C
<input type="checkbox"/>	PMrep - 1	BI-3B-123 - This is a test - 11/01/2023	Start Monthly Report	11.27.2023		Pending	

The 'Processes For' dropdown at the top is also circled in red and contains the text 'BI-3B-123 - This is a test'.

Enter the due date of the current report and then click “Take Action”. Note that the only workflow action available will be to Start. (4/30/2024: The “Take Action” item now says “Start/Refresh” rather than “Start”).

The screenshot shows the details page for 'Project Manager Monthly Status Report (PMrep) - 1'. The page includes a 'Start' dropdown menu and a 'Take Action' button, both circled in red. Below this is a summary table:

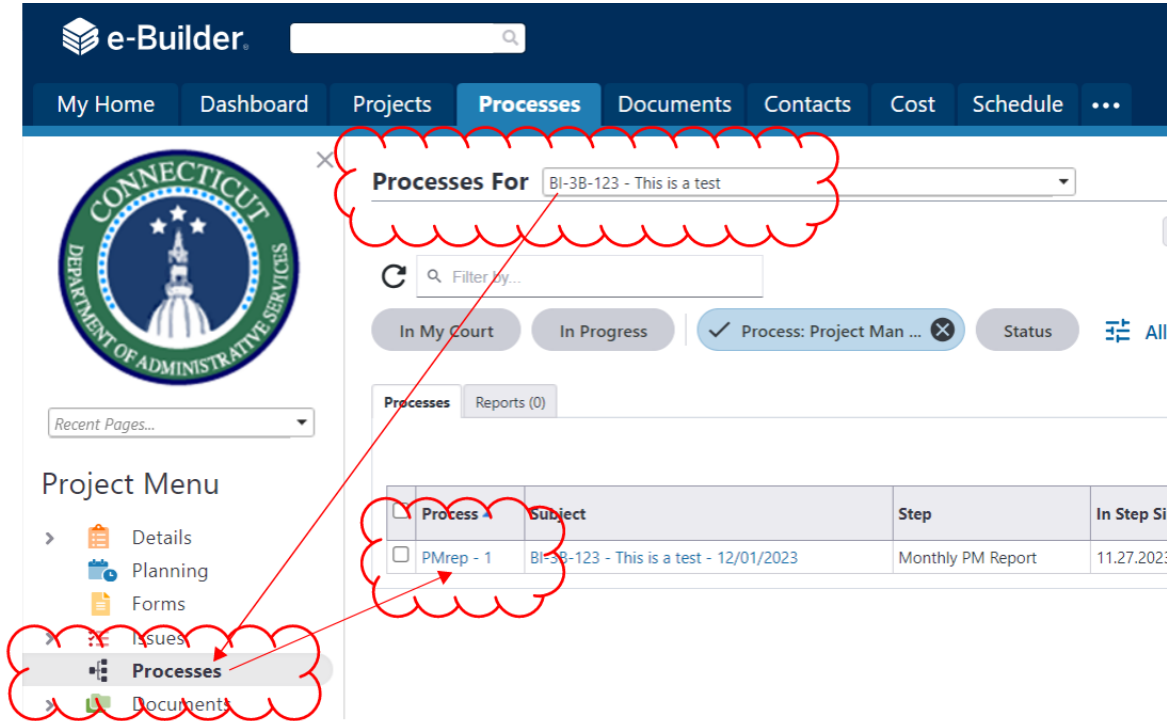
Project:	BI-3B-123 - This is a test	Overall Du
Process Document:	PMrep - 1	
Current Workflow Step:	Start Monthly Report Show Workflow Diagram	Step Du
Subject:	BI-3B-123 - This is a test - 11/01/2023	
Status:	Pending	

Below the summary table are tabs for Details, Comments (0), Documents (0), Attached Processes (0), Attached Forms (0), and Attached To (0). Under the 'Data' section, the 'Report Due Date' is set to 12.01.2023, which is also circled in red. At the bottom, there is another 'Start' dropdown and 'Take Action' button.



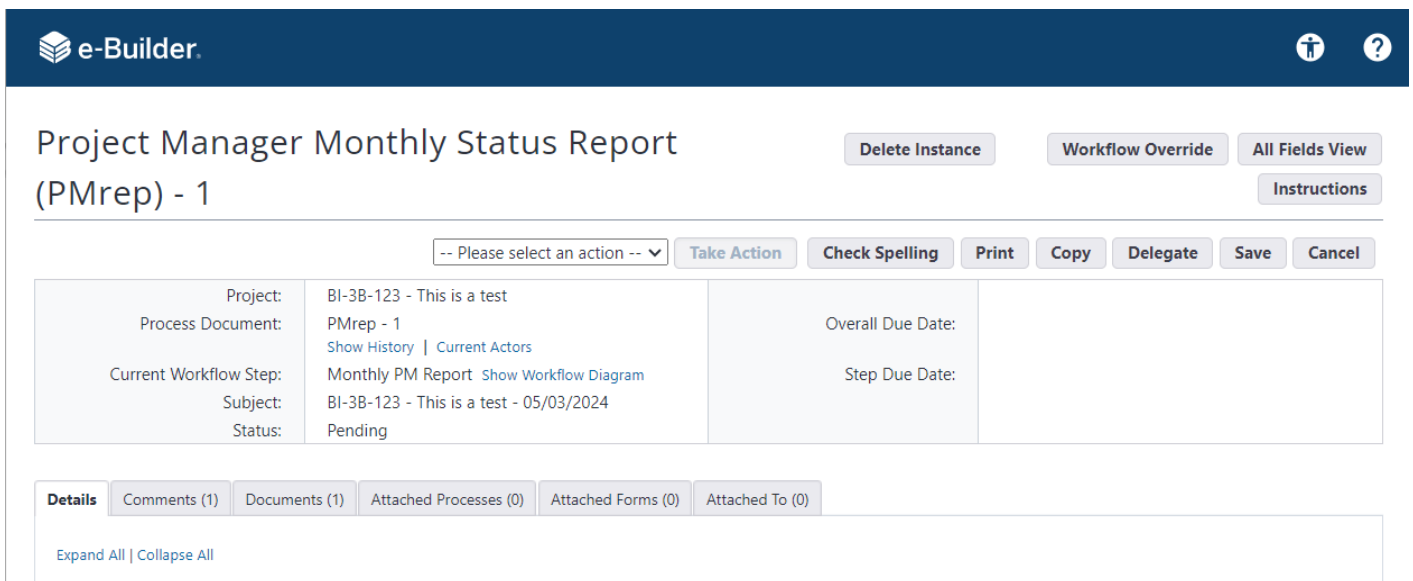
6.04 Completing the monthly report form

Access the process instance for what should be the one instance of the “Project Manager Monthly Status Report (PMrep)” process.



Complete the monthly update form.

Note: If a monthly report was completed in the previous month for the subject project, the information from that month’s report will still be included in the current report form, except that, if there were any manual updates to the project details during that month, i.e. project status or budget information updates, those updates should have refreshed and be included in the updated information.





In the “Project Team” section of the form:

- “Report Due Date” is the same field available for entry in the previous workflow step, but it can be corrected, here. It refers to the date the current report is due. It will also cause e-Builder to generate a PDF file that is saved separately from other months reports, with the date entered, here, appearing in the file name. For example 05/01/2024 will appear at the end of the filename as “05012024”.
- “DAS Project Manager 1” is the main DAS Project Manager for the project. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “DAS Project Manager 2” can be used to note an Associate or Assistant Project Manager working on the project or a second Project Manager, if two are assigned. This is kept in the Project Manager Monthly Report, but is not updated to the Project Details page.
- “Client Agency Name”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “Agency PM”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, and if changed to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “A/E - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will not update in the Project Details page for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.
- “CA - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will not update in the Project Details page for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.
- “CMR - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will not update in the Project Details page for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.
- “GC - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will not update in the Project Details page for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.



Project Team

Note: If the A/E or CA company that appears, below, are incorrect, you can manually correct, here, but also correct it in the project Details page.

Report Due Date:	05.03.2024
DAS Project Manager 1:	Timothy O'Brien
DAS Project Manager 2:	Please select...
Client Agency Name:	State Library
Agency PM:	Please select...
A/E - Firm:	Make sure to manually enter this in the project's Project Details page, as well as here. *Sample Company
CA - Firm:	Make sure to manually enter this in the project's Project Details page, as well as here. *Sample Company
CMR - Firm:	Make sure to manually enter this in the project's Project Details page, as well as here.
GC - Firm:	Make sure to manually enter this in the project's Project Details page, as well as here. *Sample Company

In the "Project Description" section:

- "DAS Project Status". This is a field that should automatically refresh when the PM starts each month's report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a "Progress" Action is taken.
- "Project Description". This is a field that should automatically refresh when the PM starts each month's report to what is in the Project Details page for the project (in this case, the "Description" field in the header of the Project Details page), and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a "Progress" Action is taken.
- "Most Recent Report" is the PDF of the most recently generated report from the Project Manager Monthly Report process for this project prior to the one currently being completed.

Project Description

Include location, brief scope, historic or emergency project, critical issue, etc. Please limit the description to 217 characters

DAS Project Status:	M-2910 Claim Phase
Project Description:	fqwrefqwrqwrfg wrqfwer gweg wegweg wrgherfhnrnt hntyrhnrnt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrqwrfg wrqfwer gweg wegwegddff
Most Recent Report:	PMrep-00001 - BI-3B-123 - This is a test - 05022024.pdf (version 2) Properties Download (84.3KB) Redline

In the "Financial" section:

- "Total Project Budget" is the total project budget on the most current approved 1105. This is manually updated by the PM. However, this is a field that should automatically refresh when the PM starts each month's report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a "Progress" Action is taken.
- "Total Project Expended" should automatically update, based on the total approved invoices (actuals) in the Cost module for the project.



- “Total Expended as % of Total Project Budget” will automatically calculate, based on the previous two values. If the PM makes changes to “Total Project Budget”, the PM can cause this to recalculate by using the “Refresh” Action in this workflow step and then the “Start/Refresh” in the following step.
- “Construction Budget” is the value for construction from the most recently approved 1105. This is manually input and updated by the PM. However, this is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “Construction Cost to Date” should automatically update, based on the total approved contractor Payment Applications. However, the PM should check to ensure that it is correct, and may change this value, if it is incorrect. Note that this is the approved invoice amount, after retainage.
- “Construction Expended as % of Construction Budget” will automatically calculate, based on the previous two values. If the PM makes changes to either of those two values, the PM can cause this to recalculate by using the “Refresh” Action in this workflow step and then the “Start/Refresh” in the following step. That will cause the workflow to return to this step, with this percentage recalculated.
- “DAS-RECS Fees Budget” is the amount of cost code 12 on the current approved 1105. This is manually updated by the PM. However, this is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “DAS RECS Fees Expended” is the current total amount of cost code 12 fees charged against the project and is manually updated by the PM.
- “DAS RECS Fees Expended as % of Fees Budget” will automatically calculate, based on the previous two values. If the PM makes changes to either of those two values, the PM can cause this to recalculate by using the “Refresh” Action in this workflow step and then the “Start/Refresh” in the following step. That will cause the workflow to return to this step, with this percentage recalculated.
- “Contingency” is the current unexpended 04 Contingency, and is manually updated by the PM.
- “Committed CO Total” should automatically update, based on the net of approved Change Orders. However, the PM should check to ensure that it is correct, and may change this value, if it is incorrect.
- “Proposed COPs Total” is manually updated by the PM.
- “Commentary / Risks to Budget” is manually updated by the PM.



Financial - Total Project

Most recent 1105 date.	
Total Project Budget:	<input type="text" value="40"/>
Total Project Expended:	<input type="text" value="35"/>
Total Expended as % of Total Project Budget:	87

Financial - Construction

Construction Budget:	<input type="text" value="30"/>
Construction Cost to Date:	<input type="text" value="18.1"/>
Construction Expended as % of Construction Budget:	60

Financial - DAS/RECS Fees

DAS-RECS Fees Budget:	<input type="text" value="10"/>
DAS RECS Fees Expended:	<input type="text" value="1.00"/>
DAS RECS Fees Expended as % of Fees Budget:	10

Financial - Other

Contingency:	<input type="text" value="10"/>
Committed CO Total:	<input type="text" value="1"/>
Proposed COPs Total:	<input type="text" value="2"/>

Commentary / Risks to Budget

Commentary / Risks to Budget:	<p>fqwrefqwrqwrfg wrqfwer gweg wegweg wrgherfhnt hntyrhnt hn rthn rthn thn trhn thn thart hrthn rthnt hnfqwrefqwrqwrfg wrqfwer gweg wegweg wrgherfhnt hntyrhnt hn rthn rthn thn trhn thn thart hrthn rthnt hnfqwrefqwrqwrfg wrqfwer gweg wegwegddffqwrefqwrqwrfg wrqfwer gweg wegweg wrgherfhnt hntyrhnt hn rthn rthn thn trhn thn thart hrthn rthnt hnfqwrefqwrqwrfg wrqfwer gweg wegwegddff</p>
-------------------------------	---

In the "Schedule Status" sections:

- For the fields with dates, enter the current planned dates and check the circle indicating whether that the milestone is planned, completed or N/A.
- "Selections complete" is when selections are to be completed.
- "Study complete" is when any study included in the project is to be completed.
- "Design complete" is when all design phases are to be completed.
- "Bidding Complete" is when bidding is to be completed.
- "Scheduled Substantial Completion date" is when substantial completion is planned.
- "Closeout complete" is when the 7990 project closeout is to be completed.
- "Commentary / Risk to schedule" is manually updated by the PM.



Schedule Status - Design

Selections complete:	<input type="text" value="05.03.2024"/>
Selections complete status:	<input type="radio"/> Planned <input checked="" type="radio"/> Completed <input type="radio"/> N/A
Study complete:	<input type="text" value="06.07.2024"/>
Study complete status:	<input checked="" type="radio"/> Planned <input type="radio"/> Completed <input type="radio"/> N/A
Design complete:	<input type="text" value="07.05.2024"/>
Design complete status:	<input checked="" type="radio"/> Planned <input type="radio"/> Completed <input type="radio"/> N/A
Bidding Complete:	<input type="text" value="08.02.2024"/>
Bid Complete status:	<input checked="" type="radio"/> Planned <input type="radio"/> Completed <input type="radio"/> N/A

Schedule Status - Construction

Scheduled Substantial Completion date:	<input type="text" value="09.06.2024"/>
Substantial Completion status:	<input checked="" type="radio"/> Planned <input type="radio"/> Completed <input type="radio"/> N/A
Closeout complete:	<input type="text" value="10.04.2024"/>
Closeout complete status:	<input checked="" type="radio"/> Planned <input type="radio"/> Completed <input type="radio"/> N/A

Commentary / Risk to schedule

Commentary / Risk to schedule:	<p> fqwrefqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegwegddffqwrefqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegwegddffqwrefqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegwegddffqwrefqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegwegddffqwrefqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt </p>
--------------------------------	---

Notes

Notes:	<p> fqwrefqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegwegddffqwrefqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegwegddffqwrefqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegweg wrgherfhnt hntyrhnrt hn rthn rthn thn trhn thn thnt hnrthn rthnt hnfqwrqwrqwrfg wrgfwer gweg wegwegddff </p>
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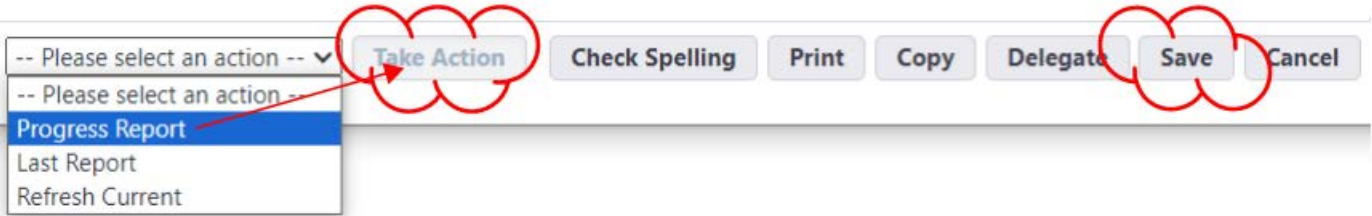
- Please select an action --
- Take Action
- Check Spelling
- Print
- Copy
- Delegate
- Save
- Cancel

"Notes" are manually updated by the PM.

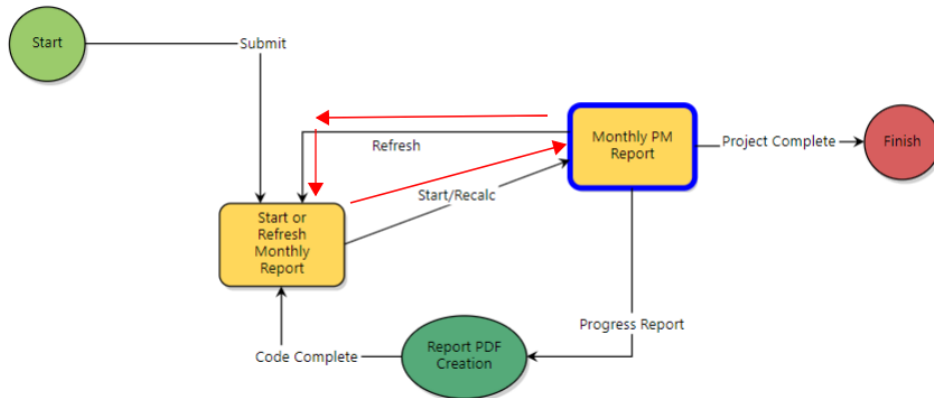
If the PM is unable to complete the report in one sitting, the PM can click the "Save" button to save a draft of the report. The PM can regain access to complete the draft report by returning to, and re-opening, the process instance.



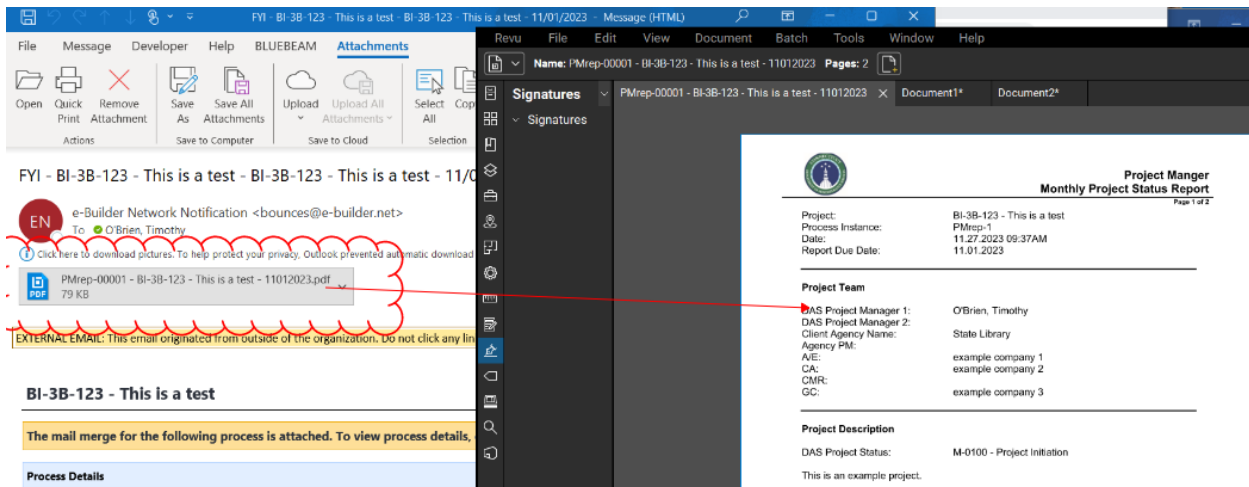
Upon completion of the monthly report, the PM should scroll down to the bottom of the page and select "Progress Report" (project is in process), "Last Report" (final monthly report at project closeout) or "Refresh Current" from the dropdown list next to the "Take Action" button and click the "Take Action" button.



The "Refresh Current" option has the effect of sending the workflow back a step, from the "Monthly PM Report" step, where the PM report form is filled out, to the "Start or Refresh Monthly Report" step. The process instance will then close. When the PM re-opens it from the Processes module in the project, it will be in the "Start or Refresh Monthly Report" step, which only allows editing of the report date. However when the PM takes the "Start/Recalculate" Action, the workflow will recalculate calculated fields and refresh certain other fields. The process instance will close again. When the PM re-opens it in the Processes module for the project, the instance will be in the "Monthly PM Report" step, with all of the report fields updated. This "Refresh" option can be taken as many times as the PM requires.



When the "Progress Report" or "Last Report" Action is taken, the ADPM and PM on the project should receive an email notification with a PDF of the report attached.





This file should also appear in the project's Documents module in e-Builder, in the 01 Project Planning > Progress Reports folder. Note that the number at the end of the file name indicates the due date of this report.

The screenshot shows the 'Documents For' interface for project 'BI-3B-123 - This is a test'. The left sidebar contains a 'Project Menu' with 'Documents' highlighted. The main area shows a folder tree with '01 Project Planning[1]' expanded to 'Progress Reports[1]'. A file 'PMrep-00001 - BI-3B-123 - This is a test - 11012023.pdf' is highlighted in a red cloud. Another red cloud highlights the 'Documents' menu item.

In the project's Details page, certain, but not all, fields will be updated from what was entered into the monthly report, such as DAS Project Status, Total Project Cost and Construction Budget.

The screenshot shows the 'Project Details For' page for project 'BI-3B-123 - This is a test'. The 'Project Menu' on the left has 'Details' highlighted. The 'Details' section shows project information. The 'Custom Fields (75)' section is visible, with 'DAS Project Status' set to 'M-0100 - Project Initiation'. A summary box on the right shows 'Total Project Cost: 11.25' and 'Construction Budget: 9.83'. Red circles highlight the 'Details' menu item, the 'DAS Project Status' field, and the summary box.

Field	Value
Project Name	BI-3B-123 - This is a test
e-Builder Project Administrator	O'Brien, Timothy
Project Status	Active
Country	USA
Start Date	09.11.2023
Target Date	09.11.2023
Description	This is an example project.
Project Webcam	
Last Modified By	O'Brien, Timothy
Date Last Modified	11.27.2023
DAS Project Status	M-0100 - Project Initiation
Total Project Cost	11.25
Construction Budget	9.83
DCS Fee	



PART II: PROCESSES



Section 7: Process Filter

“Filter Processes” can be found under the “Processes” tab in eBuilder. “Filter Processes” allows the user to locate and list certain process instances, including whether process instances are in the user’s court, the type of process, and the status and step of the process instance.

1. Change the Process filter settings to find the process instances you are looking for. For example, users may filter for process instances of a specific Type of Process. Selecting All Processes will show all instances, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list appears here. Click on the instance you wish to open. A pop-up will open. That is the process instance.

Processes For

Start Selected Process Type Start Process

Filter by

In My Court In Progress Process: 7390 Applic... Status

All filters Reset filters

Processes Reports (0)

Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
<input type="checkbox"/> 7390A	testing-TEST-6723a - Application for Payment -				NotAssigned	
<input type="checkbox"/> 7390A	testing-TEST-6723a - Application for Payment -				NotAssigned	
<input type="checkbox"/> 7390A	testing-TEST-6723a - Application for Payment -				NotAssigned	
<input type="checkbox"/> 7390A - aaa - 2	testing-TEST-6723a - Application for Payment -	Finish	08.01.2023		Paid	

Print Log

Search processes

- 0-X1 Test 1105 Project Intake ... (0-X
- 1105R Project Revision Request (110
- 7055 Construction Phase Agency ...
- 7310 Request For Information (7310
- 7360 Change Order (7360)
- 7390 Application and Certifica ...
- A/E Invoice (InvAE)
- A/E Invoice - deprecated - do ... (In
- Potential Change Order (PCO)



Section 8: 1105 Project Intake Request

8.01 Accessing the Process

Log in to [e-Builder](#). On your homepage, Go to the “Processes” tab and select the “*Project Creation Project” from the “All Projects” dropdown list.

8.02 Capital Project Initiation Submission (Process Initiator)

Click the “Start Process” button.

ms **Processes** Documents Contacts Cost Schedule Reports ...

Unfinished Drafts | Import Processes

Processes For *Project Creation Project

Filter Processes Start Process

Search In Processes Initiated By Me Processes In My Court All Processes

Type of Process All Processes Draft Open Finished

Status All Statuses

Containing Text

Click on the link entitled “1105 Project Intake Request (1105)”.

Start a process on *Project Creation Project

Process Name	Description
1105 Project Intake Request (1105)	Run out of the Project Creation project, this process includes a code step to create a new project in e-Builder and apply templates to the new project. It incorporates data that appears on the 1105 form.

Cancel

Provide the “Project Name” and select from the “Agency Request for Project Administration” dropdown list whether the project will be administered by “DAS/CS” or “Agency Administered”. Upon completion, click the “Submit” button to start the process.

Capital Project Initiation Request

Provide the “Project Name” and select whether the Capital Project Initiation Request is for an “Agency Administered” project or a “DAS Administered” project.

* Project Name:

* Agency Request for Project Administration: -- Please select an option --

Print Check Spelling Submit Save Draft Cancel

Depending upon how the project administration question was answered, the Process Initiator will be directed to fill out the required portion of Form 1105 – Capital Project Initiation Request.

To access the newly created Form 1105, click on the “Processes” tab again to reset the landing page.



Select “1105 Project Intake Request” from the view dropdown list, and click on the link in the “Process” column for the subject project.

Forms **Processes** Documents Contacts Cost Schedule

Processes

1105 Project Intake Request

Project Name	Process	Current Actors	Current Step
*BI-CS-TEST - Test Project 5	1105 - 8	Craig Russell	Project Info - DAS Administered

Review the “General Instructions” and complete Form 1105 in its entirety.

Details Comments (0) Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

General Instructions

Please note for any question in this form, you can hover your cursor over the “?” next to the specific question for additional detail on the question being asked.

Please also note that additional instructions may be provided relative to the data you are required to input as part of the Capital Project Initiation Request Workflow. If additional instructions are available, they can be viewed by selecting the “Instructions” button at the top of the page.

Upon completion of all of the necessary data input, scroll down to the bottom of the page and select the appropriate action from the dropdown list, i.e. “Submit”, “Revise”, “Approve”, etc. and press the “Take Action” button.

Helpful Hints for completing Form 1105

The “Agency PM” is to be selected from a dropdown list of Agency PM’s. If the Agency PM is not listed, please contact Craig Russell by email at craig.russell@ct.gov and request that the name be added.

State/Federal/Other Funding - When completing these sections, be sure to hover over the “?” next to the respective field for an explanation of what is to be provided in that field. For each line item, you will need to provide a “Description”, amount “Awarded/Authorized”, and amount “Received/Allocated”. For State Bond Funds, you will need to provide “Encumbrance”, the amount specifically authorized and/or allocated for the project with which the 1105 is being submitted, if the funding authorization is for more than one project. “Funding Source” will need to be provided if the source is not State Bond Funds. After filling in the required fields, click the “Add” button. This step will need to be repeated for each line item.

State Funding Row Height: 1X

To add a funding line item, fill in the relevant funding detail below and click the “Add” button. Continue this process for each respective line item.

#	Description	Authorized	Allocated	Encumbrance
Grand Totals (0 items)		0.00	0.00	0.00

Federal Funding Row Height: 1X

To add a funding line item, fill in the relevant funding detail below and click the “Add” button. Continue this process for each respective line item.

#	Funding Source	Description	Awarded/Authorized	Received/Allocated
---	----------------	-------------	--------------------	--------------------



Project Budget Detail – The 1105 Project Budget Detail spreadsheet will need to be downloaded from the DAS/CS Portal and filled out separately from the eBuilder 1105 Project Intake Process. Upon completion, the project budget should be saved, dragged and dropped into the “1105 Project Budget” field.

Project Budget Detail

Upload 1105 Project Budget Detail spreadsheet for the subject project.

* 1105 Project Budget: ? Drag and drop file here or Browse Computer Browse e-Builder

Upon completion of the draft Form 1105, scroll down to the bottom of the page, read the instructions for the section entitled “Interagency Review”, and then select either “Interagency” or “Submit” from the dropdown list next to the “Take Action” button. “Interagency” would be selected if there are any individuals within your Agency that need to review or provide data input into the subject 1105 prior to submitting the 1105 to DAS/RECS. Otherwise select “Submit” and click the “Take Action” button.

After clicking “Take Action”, you will receive a prompt to provide a comment. If “Interagency” was selected, use the “Comment” section to provide the reviewer with direction to help them complete their review of the subject 1105 submission. If “Submit” was selected you have the option to provide a comment, but it is not required.

Interagency ▼ Take Action Check Spelling Print Copy Delegate Save Cancel

Add Comment

Private

If you selected “Interagency”, you will also be required to either select an individual with an active eBuilder account from the list of “Available Users” to send the 1105 submission to for review, or input the email address of an outside user that does not have an account in eBuilder to allow them the ability to review and comment on the 1105 submission.

- * Please note that only one (1) user at a time can be selected to review, comment, and if applicable, edit the revised submission. Repeat this process for each individual reviewer until all revisions are complete.
- * Please also note that only those individuals with eBuilder accounts will have the ability to edit the draft 1105 submission in eBuilder. Individuals without eBuilder accounts will only have the ability to view the 1105 submission and provide comments, under the “Comments” tab, regarding the submission. Any proposed revisions recommended by the outside user would have to be input by the individual that initiated the 1105 process.

To add an actor to the next step in the process, find the name of the actor from the list of “Available Users”, click on their name to select the person, then click on the “>” to move that person into the “Selected Users” column.



To add an outside user, enter the outside users email address to the “To” field under “Request External Comment”. When entering the email address, the word “Add” will appear to the left of the email you are typing in. Click “Add” after you have entered the complete address.

Complete the remainder of the questions under the “Request External Comment” section. Upon completion, click the applicable button to proceed to the next step in the process, which will either be “Submit” (no interagency review) or “Interagency” (interagency review).

Add actors to the next step

Request External Comment

If there is an individual from your agency that should be granted access to Interagency Review and is not included in the list of actors, please contact Tim O’Brien by email at Timothy.O’Brien@ct.gov and request that the name be added.

8.03 Interagency Review (Interagency Reviewer)

The Interagency Reviewer will receive an email from eBuilder as notification that the Capital Project Initiation Request is ready for them to review.

To access the Capital Project Initiation Request for revision, either click on the email link or log into [eBuilder](#), if you have an active eBuilder account, select the “My Home” tab and **click on the “Instance” column link** for the subject project **under “My Processes”**.

***BI-CS-1010 - DAS Test Project**

Process instance is in your court. To view details or take action, [click here.](#)



My Home Projects Forms Processes Documents Contacts Cost Schedule



Welcome, Craig!

All pr

My Processes

Project	Instance	Subject	Step
*BI-CS-1005 - DAS Tst 5	1 05R - 13	1105R BI-CS-1005	Interagency Review

After opening the project instance, click on the “Comments” tab to review comments provided by previous actors and to get direction related to the 1105 review, return to the “Details” tab to review, and if applicable edit the submission.

Details **Comments (1)** Documents (1) Attached Processes (0) Attached Forms (0) Attached To (0)

Private	Comment
Make Private	Craig Russell, Department of Administrative Services - Construction Services Please review and revise.

Return **Take Action**

If the 1105 Project Budget Detail requires revision, click the “Documents” tab, and then click the “Download” link beneath the project budget to download the project budget to an accessible file to upload back into eBuilder.

Details Comments (1) **Documents (2)** Attached Processes (0) Attached Forms (0)

File Name
<input type="checkbox"/> 1105 Project Budget ebldr.xls (version 5) Properties Download (39.4KB) Redline Most Recent

After completing edits to the project budget detail, save your changes, and then drag and drop the edited document back into the “Documents” tab in eBuilder. The latest version of the project budget edits will have the highest version number.

Upon completion of the review, scroll down to the bottom of the page and click “Take Action” to return the 1105 to the process initiator.



8.04 ADPM Assignment (CSS)

CSS will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for ADPM Assignment.

After accessing the 1105 submission, CSS will scroll down to the bottom of the page and complete the Section entitled "Project Assignment". Upon completion, click "Submit". After clicking submit, a prompt will open for CSS to select the appropriate ADPM for review. Once selected, click "Submit".

8.05 Capital Project Initiation Request Review (ADPM)

The ADPM assigned to the Agency will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

To access Form 1105 for review and approval, the ADPM can either click on the link provided in the email or log into [eBuilder](#), click on the "Processes" tab, select the "1105 Project Intake Request" view from the dropdown list, and click on the link in the "Process" column for the subject project.

*Project Creation Project

Process instance is in your court. To view details or take action, [click here.](#)

ns **Processes** Documents Contacts Cost Schedule Reports ...

Unfinished Drafts | Import Processes

Processes

1105 Project Intake Request Edit | Add View All Projects

Export

Project Name	Process	Current Actors	Current Step	Date Submitted	Most Recent Comment
*BI-2B-TEST - Test Project	1105 - 8	Jennifer Vigneault, Peter Simmons, Craig Russell, Sarah Tierney, Amy Sowitcky	ADPM	10.25.2023	Form 1105 to acquire the sevicees of a CA for the Statewide Hazardous Abatement Program has been submitted for your review and approval.

The ADPM can review the 1105 submission in its entirety under the "Details" tab.

To see any comments provided by previous actors in the process regarding the Capital Project Initiation Request submission, the ADPM can click on the "Comments" tab to review those comments.

To see the "1105 Project Budget Details", the ADPM can click on the "Documents" tab and then double click the "1105 Project Budget.xlsx" to open the budget for review.

Details Comments (0) **Documents (1)** Attached Processes (0) Attached Forms (0) Attached To (0)

File Name
1105 Project Budget.xlsx (version 5) Properties Download (17.2KB) Redline Edit



Upon completion of the Capital Project Initiation Request review, scroll down to the bottom of the page and complete the section entitled "CT DAS Management Review and Approval".

CT DAS Management Review & Approval

If the proposed project is DAS Administered, then this section must be completed in its entirety by the ADPM assigned to the project.

If the proposed project is Agency Administered, then the ADPM assigned to the project must provide data input for the "AD Administrator", and the "Document Folder Template Project".

* Will structural and/or threshold engineering be required?:

Project Size (Construction Budget):

Consultant Selection Type(s):

Note: Please hold Ctrl to select multiple items from the list.

Project Delivery Method:

High Performance Building: Yes No

Construction Administration Contract Type:

* ADPM:

* Project Manager:

* Document Folder Template Project:

* e-Builder Project Administrator:

Then select one of the following from the dropdown list at the bottom of the page next to the "Take Action" button:

- "Revise" if the project requires the User Agency to revise the 1105 for resubmission.
- "Approve" if the content of the 1105 is approved and ready for the Agency Authorized Signatory and the Deputy Commissioner for review and approval.
- * Note: If the ADPM answered the "Consultant "Selection Type(s)" question as "Formal A/E Selection", then the 1105 will automatically be forwarded to the Chief Architect for review prior to being forwarded to the Agency Authorized Signatory and the Deputy Commissioner for review and approval.

Once you have made your selection from the dropdown list, click the "Take Action" button. After selecting the "Take Action" button, a comment prompt will appear, where you can provide a reason for your selection, if applicable. After providing a comment click the appropriate button (Revise or Approve) to move the 1105 to the next step in the process.

*** Add Comment**

Private



8.06 Capital Project Initiation Request Revision (Process Initiator)

If the Capital Project Initiation Request requires revision, the Process Initiator will receive an email notification from eBuilder that the Capital Project Initiation Request has been returned for revision.

To access Form 1105 for review and revision, the Process Initiator can either click on the link provided in the email or log into [eBuilder](#), click on the “Processes” tab, select the “1105 Project Intake Request” view from the dropdown list, and click on the link in the “Process” column for the subject project.

*Project Creation Project

Process instance is in your court. To view details or take action, [click here.](#)

ns **Processes** Documents Contacts Cost Schedule Reports ...

Unfinished Drafts | Import Processes

Processes

1105 Project Intake Request Edit | Add View All Projects

Export

Project Name	Process	Current Actors	Current Step	Date Submitted	Most Recent Comment
*BI-2B-TEST - Test Project	1105 - 8	Craig Russell	Project Info - DAS Administered	10.25.2023	Additional funds required.

Click on the “Comments” tab to review any comments provided regarding the Capital Project Initiation Request submission.

If the Capital Project Initiation Request itself requires revision, click on the “Details” tab and make the required revisions within the Capital Project Initiation Request for resubmission.

1105 Project Intake Request (1105) - 12

-- Please select an action --

Project: *Project Creation Project
 Process Document: 1105 - 12
[Show History](#) | [Current Actors](#)
 Current Workflow Step: Agency Signatory - Agency Administered [Show Workflow Diagram](#)
 * Subject: Test
 Status: Submitted

Details Comments (0) Documents (1) Attached Processes (0) Attached Forms (0) Attached To (0)

If the 1105 Project Budget Detail requires revision, click the “Documents” tab, and then click the “Download” link beneath the project budget to download the project budget to an accessible file to upload back into eBuilder.

Details Comments (1) **Documents (2)** Attached Processes (0) Attached Forms (0)

File Name
1105 Project Budget eblldr.xls (version 5) Properties Download (39.4KB) Redline Most Recent



After completing edits to the project budget detail, save your changes, and then drag and drop the edited document back into the “Documents” tab in eBuilder. The latest version of the project budget edits will have the highest version number.

Details Comments (2) **Documents (2)** Attached Processes (0) Attached Forms (0) Attached To (0)

<input type="checkbox"/>	File Name	Attached By
<input type="checkbox"/>	1105 Project Budget eblldr.xls (version 4) Properties Download (33.2KB) Redline Most Recent	Russell, Craig <i>(Department of Administrative Services - Construction Services)</i>
<input type="checkbox"/>	1105 Project Budget eblldr.xls version 5 Checked out by Craig Russell Properties Download (39.4KB) Redline Remove Edit Check In	Russell, Craig <i>(Department of Administrative Services - Construction Services)</i>

After all revisions have been made, scroll down to the bottom of the page, select “Submit” from the dropdown list next to the “Take Action” button and click “Take Action” to send the revised 1105 back to DAS/CS for further review and processing.

After clicking the “Take Action” button, the Process Initiator will receive a prompt to provide a comment to the ADPM regarding the revisions made. After providing a comment, the Process Initiator should select Craig Russell from the list under “Add actors to the next step” and click the “>” to add him to the “Available Users” column and click “Submit”.

Add Comment

Private

Add actors to the next step

Available Users	Selected Users
<ul style="list-style-type: none">O'Brien, Timothy (Department of Administrative Services - Construction Services)Russell, Craig (Department of Administrative Services - Construction Services)	

Repeat Steps 8.4 – 8.6 until such time that the ADPM approves the Capital Project Initiation Request submission.

8.07 Capital Project Initiation Request Review (Chief Architect)

If the ADPM answered the “Consultant Selection Type(s)” question as “Formal A/E Selection”, then the Chief Architect will receive an email from eBuilder as notification that the Capital Project Initiation Request has been “Approved” by the ADPM and is ready for the Chief Architect to review.



To access Form 1105 for review and revision, the Process Initiator can either click on the link provided in the email or log into [eBuilder](#), click on the “Processes” tab, select the “1105 Project Intake Request” view from the dropdown list, and click on the link in the “Process” column for the subject project.

*Project Creation Project

Process instance is in your court. To view details or take action, [click here.](#)

ns **Processes** Documents Contacts Cost Schedule Reports ...

Unfinished Drafts | Import Processes

Processes

1105 Project Intake Request Edit | Add View All Projects

Export

Project Name	Process	Current Actors	Current Step	Date Submitted	Most Recent Comment
*BI-2B-TEST - Test Project	1105 - 8	Craig Russell	Project Info - DAS Administered	10.25.2023	Additional funds required.

To review the 1105 submission in its entirety, click on the “Details” tab. To see any comments provided by previous actors in the process regarding the Capital Project Initiation Request submission, click on the “Comments” tab to review those comments. To see the “1105 Project Budget Details”, click on the “Documents” tab and then double click the “1105 Project Budget.xlsx” to open the budget for review.

Details Comments (0) Documents (1) Attached Processes (0) Attached Forms (0) Attached To (0)

File Name

1105 Project Budget.xlsx (version 5)

Properties | Download (17.2KB) | Redline | Edit

Upon completion of the Capital Project Initiation Request review, scroll down to the bottom of the page and either select “Return” from the dropdown list, next to the “Take Action” button, to return the submission to the ADPM, or select “Submit” to forward the submission for the selection of the Agency Authorized Signatory and then click “Take Action”. After clicking the "Take Action", you will be prompted to provide a comment, where you can provide detail regarding your review of the 1105 submission. Once you have added a comment, click the applicable button - “Return” or “Submit” button.

* Add Comment

Private

Submit

Check Spelling Cancel



8.08 Authorized Signatory Selection (Process Initiator)

The Process Initiator will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

To access the Capital Project Initiation Request for revision, either click on the email link or log into [eBuilder](#), select the “My Home” tab and click on the “Instance” column link for the subject project under “My Processes”.

After opening the link to the 1105 submission, scroll down to the bottom of the page and click the “Take Action” button.

After clicking the “Take Action” button, a prompt appear to add a comment, if applicable, for the Agency Authorized Signatory to review for sign off. After providing a comment, the Process Initiator should select their Agency Authorized Authority from the list of Authorized Signatories under “Add actors to the next step”. Click the “>” to add the signatory to the “Selected Users” column from the “Available Users” column and click “Submit” to send the revised 1105 to the Authorized Signatory for signature.

Add Comment

Private

Add actors to the next step

Available Users		Selected Users
Ballard, Willis (Department of Emergency Services and Public Protection)	<input type="button" value=">"/> <input type="button" value="<"/>	
Barkin, David (Department of Administrative Services - Construction Services)		
Carlos, Sharonda (Department of Corrections)		
Gibery-Schaab, Deanna (Connecticut State Colleges and Universities - WCSU)		
Cintrino, Sal (Connecticut State Colleges and Universities - CCSU)		
DiPietro, Stephen (Department of Mental Health and Addiction Services)		

If your Agency Authorized Signatory is not listed, please contact please contact Tim O’Brien by email at Timothy.O’Brien@ct.gov and request that the name be added.

8.09 Capital Project Initiation Sign Off (Agency Authorized Signatory)

The Agency Authorized Signatory (AAS) will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

To access Form 1105 for review and approval, the AAS can either click on the link provided in the email or log into [eBuilder](#), click on the “Processes” tab, select the “1105 Project Intake Request” view from the dropdown list, and click on the link in the “Process” column for the subject project.

*Project Creation Project

Process instance is in your court. To view details or take action [click here](#).



ns **Processes** Documents Contacts Cost Schedule Reports ...

Unfinished Drafts | Import Processes

Processes

1105 Project Intake Request

Project Name	Process	Current Actors	Current Step	Date Submitted	Most Recent Comment
*BI-2B-TEST - Test Project	1105 - 8	Jennifer Vigneault, Peter Simmons, Craig Russell, Sarah Tierney, Amy Sowitcky	ADPM	10.25.2023	Form 1105 to acquire the sevices of a CA for the Statewide Hazardous Abatement Program has been submitted for your review and approval.

The AAS can review the 1105 submission in its entirety under the “Details” tab.

To see any comments provided by previous actors in the process regarding the Capital Project Initiation Request submission, the AAS can click on the “Comments” tab to review those comments.

To see the “1105 Project Budget Details”, the AAS can click on the “Documents” tab and then double click the “1105 Project Budget.xlsx” to open the budget for review.

1105 Project Intake Request (1105) - 12

-- Please select an action --

Project:	*Project Creation Project
Process Document:	1105 - 12 Show History Current Actors
Current Workflow Step:	Agency Signatory - Agency Administered Show Workflow Diagram
* Subject:	<input type="text" value="Test"/>
Status:	Submitted

Details | Comments (0) | Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

File Name
1105 Project Budget.xlsx (version 5) Properties Download (17.2KB) Redline Edit



Upon completion of the Capital Project Initiation Request review, the AAS should return to the “Details” tab and scroll down to the bottom of the page to complete the section entitled “Capital Project – Agency Authorization”. The AAS will select either “Approve” or “Reject” the Capital Project Authorization, and provide his/her name and title as the Agency Authorized Authority. Upon completion, the AAS will either select “Approve” or “Reject” from the dropdown list next to the “Take Action” button and click “Take Action”.

Capital Project - Agency Authorization

The User Agency Authorized Representative certifies that to the best of my knowledge, information, and belief that the information provided herein regarding the Capital Construction Project Request is complete and accurate. The User Agency Authorized Representative further certifies that if the project/contract identified herein is designated as Agency Administered for design & construction that the User Agency: 1) shall conform to all guidelines and procedures established by the Department of Administrative Services for agency-administered projects; 2) shall be in substantial compliance with applicable State of CT building/fire codes & statutes; 3) will have funds in place prior to award of contracts; 4) shall remain within the User Agency's statutory budget limits for Design & Construction, and 5) certifies that the Agency project manager &/or code official identified in this Capital Construction Project Request are qualified and have the time available to provide such services.

* Capital Project Authorization:	<input type="checkbox"/> Approve <input type="checkbox"/> Reject
* Agency Authorized Representative:	<input type="text"/>
* Representative Title:	<input type="text"/>
1105 Submission:	06.16.2023

-- Please select an action -- **Take Action** Check Spelling Print Copy Delegate Save Cancel

- If “Reject” was selected, the AAS will be given a **prompt to provide a comment** to the Process Initiator regarding the reason for rejection and/or instructions for revision and resubmission. After providing a comment, click “Reject” to return the 1105 submission to the Process Initiator for revision and resubmission.

* Add Comment

Private

Check Spelling **Reject** Cancel

- If “Approve” was selected, the 1105 will be submitted to DAS/CS for submission to the DAS/CS Deputy Commissioner for review and approval.

8.10 Capital Project Initiation Request Review (CSS)

If the Agency Signatory chose “Approve”, CSS will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

No additional review is necessary at this point. Scroll down to the bottom of the page and select “Submit” from the dropdown list next to the “Take Action” button and click “Take Action” to send the 1105 submission to the Deputy Commissioner for review and signature.

After clicking the “Take Action” button, you will receive a prompt to provide a comment to the Deputy Commissioner. Click on the instructions tab at the top of the page for draft language to include as part of the comment to the Deputy Commissioner. Click “Submit” to forward the 1105 to the Deputy Commissioner for signature.



8.11 Capital Project Initiation Request Review (DC)

The Deputy Commissioner (DC) will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

To access Form 1105 for review and approval, the DC can either click on the link provided in the email or log into [eBuilder](#), click on the “Processes” tab, select the “1105 Project Intake Request” view from the dropdown list, and click on the link in the “Process” column for the subject project.

*Project Creation Project

Process instance is in your court. To view details or take **action**, [click here](#).

Project Name	Process	Current Actors	Current Step	Date Submitted	Most Recent Comment
*BI-2B-TEST Test Project	1105 - 8	Jennifer Vigneault, Peter Simmons, Craig Russell, Sarah Tierney, Amy Sowitcky	ADPM	10.25.2023	Form 1105 to acquire the sevicees of a CA for the Statewide Hazardous Abatement Program has been submitted for your review and approval.

The DC can review the 1105 submission in its entirety under the “Details” tab.

To review comments provided by previous actors regarding the Capital Project Initiation Request submission, click on the “Comments” tab.

To see the “1105 Project Budget Details”, the click on the “Documents” tab and then double click the “1105 Project Budget.xlsx” to open the budget to review.

1105 Project Intake Request (1105) - 12

Project: *Project Creation Project
 Process Document: 1105 - 12
 Show History | Current Actors
 Current Workflow Step: Agency Signatory - Agency Administered Show Workflow Diagram
 * Subject: Test
 Status: Submitted

Details | Comments (0) | Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

File Name
 1105 Project Budget.xlsx (version 5)
 Properties | Download (17.2KB) | Redline | Edit



Upon completion of the Capital Project Initiation Request review, scroll down to the bottom of the page and read the instructions for and complete the section entitled “Capital Construction Project – DAS Approval”, then select either “Approve” or “Reject” from the dropdown list at the bottom of the page next to the “Take Action” button and click “Take Action”.

Capital Construction Project - DAS Approval

Please check the applicable box as to whether you “Approve” or “Reject” the submission as either an Agency Administered or DAS Administered project.
If approved, sign the request, then select “Approve” from the dropdown list at the bottom of the page, next to the “Take Action” button, and press the “Take Action” button.
If rejected, sign the request, then select “Revise” from the dropdown list at the bottom of the page, next to the “Take Action” button, and press the “Take Action” button. When prompted to comment, provide a brief explanation for the rejection.

DAS Administered Project Authorization:	<input type="radio"/> Approved <input type="radio"/> Rejected
Agency Administered Project Authorization:	<input type="radio"/> Approved <input type="radio"/> Rejected
* Deputy Commissioner Authorization: ?	<input type="text"/>
1105 Reviewed: ?	<input type="text"/>

... Please select an action -- ▾ **Take Action** Check Spelling Print Delegate Save Cancel

- * If “Reject” was selected, you will receive a prompt to provide a comment to the ADPM to explain the reason for rejection and click “Reject” to return the submission to the ADPM. The ADPM will then contact the Client Agency to discuss proposed revisions.

* Add Comment

Private

Check Spelling **Reject** Cancel

8.12 Capital Project Initiation Request Project Number Assignment (CSS)

CSS will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

To access Form 1105 for review and approval, CSS can either click on the link provided in the email or log into [eBuilder](#), click on the “Processes” tab, select the “1105 Project Intake Request” view from the dropdown list, and click on the link in the “Process” column for the subject project.

CSS shall complete and submit Form 1115 – Capital Project Number Request to Financial Administrative Services (FAS) to assign a number to the project through normal means, outside of eBuilder.

Upon receipt of the project number assignment, CSS will log back into eBuilder, select the “My Home” tab and click on the “Instance” column link for *Project Creation Project under “My Processes”.

CSS will complete the sections entitled “Project Number” and “Project Budget Detail” and upload a copy of the executed Form 1115 to the respective field in eBuilder. CSS will then scroll down to the bottom of the page, select “Submit” from the dropdown list next to the “Take Action” button and click “Take Action”.



8.11 Capital Project Initiation Request CEPA Review (Environmental Services)

The Environmental Analyst (EA) will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for them to take action.

To access Form 1105 for review and approval, the EA can either click on the link provided in the email or log into [eBuilder](#), click on the “Processes” tab, select the “1105 Project Intake Request” view from the dropdown list, and click on the link in the “Process” column for the subject project.

*Project Creation Project

Process instance is in your court. To view details or take action, [click here.](#)

ns **Processes** Documents Contacts Cost Schedule Reports ...

Unfinished Drafts | Import Processes

Processes

1105 Project Intake Request Edit | Add View All Projects

Export

Project Name	Process	Current Actors	Current Step	Date Submitted	Most Recent Comment
*BI-28-TEST-Test Project	1105 - 8	Jennifer Vigneault, Peter Simmons, Craig Russell, Sarah Tierney, Amy Sowitky	ADPM	10.25.2023	Form 1105 to acquire the services of a CA for the Statewide Hazardous Abatement Program has been submitted for your review and approval.

The EA can review the 1105 submission in its entirety under the “Details” tab.

To see any comments provided by previous actors in the process regarding the Capital Project Initiation Request submission, the EA can click on the “Comments” tab to review those comments.

To see the “1105 Project Budget Details”, the EA can click on the “Documents” tab and then double click the “1105 Project Budget.xlsx” to open the budget for review.

1105 Project Intake Request (1105) - 12

-- Please select an action --

Project: *Project Creation Project
 Process Document: 1105 - 12
 Show History | Current Actors
 Current Workflow Step: Agency Signatory - Agency Administered Show Workflow Diagram
 * Subject: Test
 Status: Submitted

Details | Comments (0) | Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

File Name
1105 Project Budget.xlsx (version 5) Properties Download (17.2KB) Redline Edit



Upon completion of the Capital Project Initiation Request review, scroll down to the bottom of the page and complete the section entitled “DAS Environment Review” and upload a copy of the Initial Environmental Review to the respective field in eBuilder. Upon completion, select “Submit” from the dropdown list next to the “Take Action” button and click “Take Action”.

DAS Environmental Review

<p>* Is the proposed project an action as defined in Sec. 22a-1a-1(2) of the CEPA Regulations?:</p> <p>* Initial Environmental Review/CEPA:</p>	<p>-- Please select an option --</p>
	<p>Upload Initial Environmental Review/CEPA ERC for the subject project.</p> <p>Drag and drop file here or Browse Computer Browse e-Builder</p>
	<p>Submit Take Action Check Spelling</p>

The 1105 Project Intake Process is now complete. A copy of the executed Form 1105 will be distributed, via email through eBuilder, to all process participants and to the subject project file folder.

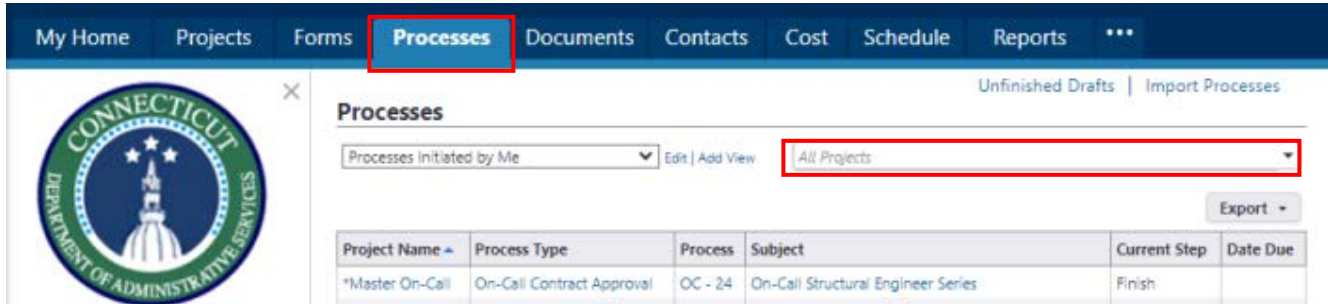


Section 9: 1105R Project Revision Request

9.01 Accessing the Process

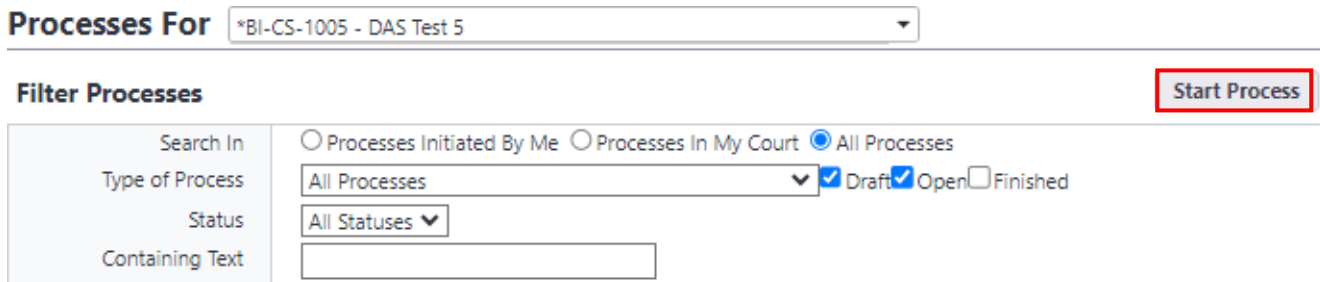
Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>

On your homepage, Go to the “Processes” tab and select the subject project for which you wish to submit a revised 1105 from the “All Projects” dropdown list.



9.02 Project Revision Request Submission (Process Initiator)

Click the “Start Process” button.



Click on the “1105R Project Revision Request” link to start the process.

Start a process on *BI-CS-1005 - DAS Test 5

Process Name	Description
1105R Project Import (SRPI)	For DAS USE ONLY. Import 1105 data from the 1105R report for Client Agency revision.
1105R Project Revision Request (1105R)	Process for the submission of a revised 1105 - Capital Project Initiation Request.

Answer the question under the header “Revised Capital Project Initiation Request”.

Revised Capital Project Initiation Request

Only answer “Yes” if the original 1105 submission for the subject project was completed by the Client Agency through eBuilder or if the first iteration of the revised 1105 submission was entered into eBuilder by the Client Agency. If the 1105 information for the subject project was entered into eBuilder by DAS prior to the implementation of the eBuilder program or if this is a revised 1105 submission for a project that has not yet been created in eBuilder, answer “No”.

Was an original or revised 1105 submitted by the Client Agency through eBuilder for this project?: -- Please select an option --

Only answer "Yes" if the original 1105 submission for the subject project was completed by the Client Agency through eBuilder or if the first iteration of the revised 1105 submission was entered into



eBuilder by the Client Agency using this process. This will notify DAS of the request, at which time DAS will import the original submission back into eBuilder and send it back to the Process Initiator for revision.

If the 1105 information for the subject project was not entered into eBuilder by the Client Agency, answer "No".

- * Please note that if future revisions are required to this 1105 submission, the Client Agency can answer "Yes" to having the first iteration of the revised 1105 submission as being entered into eBuilder and DAS can import that submission back into eBuilder for the Client Agency to edit.

Answer the question under the header "Agency Request for Project Administration" and click the "Take Action button.

Agency Request for Project Administration ^

If the Agency Request for Project Administration has changed, please update now.

Agency Request for Project Administration:

If the Agency answered "Yes" to the "Was an original or revised 1105 submitted by the Client Agency for this project," the submission will be forwarded to Construction Support Services to initiate the "1105R Project Import Process", at which time the original or revised 1105 that was entered into eBuilder will be imported back into eBuilder and forwarded to the Agency for revision and submission.

If the Agency answered "No" to the question, the request will be forwarded to the Process Initiator to complete the revised Capital Project Initiation Request.

9.03 Complete Revised Capital Project Initiation Request (Process Initiator)

The Process Initiator will receive an email from eBuilder as notification that the Capital Project Initiation Request is ready for them to prepare the revised 1105 for submission in eBuilder.

To access the Capital Project Initiation Request for revision, either click on the email link or log into [eBuilder](#), select the "My Home" tab and click on the "Instance" column link for the subject project under "My Processes".

*BI-CS-1010 - DAS Test Project

Process instance is in your court. To view details or take action, [click here.](#)

Process Details	
Project	*BI-CS-1010 - DAS Test Project
Process	5RPI - 3
Subject	1105R BI-CS-1010



My Home Projects Forms Processes Documents Contacts Cost Schedule Reports ...

Welcome, Craig! All projects Edit My Home

My Processes ...

Project	Instance	Subject	Step	Date Due	Requested Com...
*BI-CS-1010 - DAS Test Project	SRPI - 3	1105R BI-CS-1010	Project Info - DAS Administered		

If the Client Agency answered “No” to the question “Was an original or revised 1105 submitted by the Client Agency through eBuilder”, then either no data will be imported (the project does not exist in eBuilder), or if DAS/CS entered the data for the subject project into eBuilder prior to the release of the program to the Client Agency, then some data will be transferred into the revised 1105 submission, but that data will be primarily limited to Administrative information. The Client Agency will be responsible for completing the balance of the revised 1105 submission. To complete the revised 1105 submission, the Client Agency will follow the directions provided under “Section 8: 1105 Project Intake Request, Line 8.2 – Capital Project Initiation Submission” of this document, and scroll down to “[Helpful Hints for completing 1105](#)” to begin the process for completing the revised 1105.

If the Client Agency answered “Yes” to the question “Was an original or revised 1105 submitted by the Client Agency through eBuilder”, then the data import should be comprehensive. The Client Agency should review the data imported and revise the 1105 accordingly. At minimum, the Client Agency will be required to provide data input for the following fields and sections:

- a. Within the “Administrative Information” section, revise the “Project Description and Special Requirements” field, if applicable.

Administrative Information

This Capital Project Initiation Request provides details to the Connecticut Department of Administrative Services (DAS) / Construction Services (CS) that is necessary for project planning. State User Agency Representatives are REQUIRED to consult with the DAS/CS about their Budget formulation for any Capital Project prior to submission of a Capital Project Initiation Request (1105).

* Agency: Board of Regents for Higher Education

* Project Name: *BI-CS-1010 - DAS Test Project

* Project Address: 123 Boltz Dr.

* City: San Diego

Agency Request for Project Administration:

DAS/CS Building Number: 223457

Land Number: 23867

CAPEX Number: 23CSCU002

* Project Description and Special Requirements: Test Project

- b. Within the “Budget Details” section, upload a revised “1105 Project Budget”; and

Project Budget Detail

Upload 1105 Project Budget Detail spreadsheet for the subject project.

* 1105 Project Budget: or



- c. Complete the Financial Information section. Be sure to hover over the “?” next to the respective field for an explanation of what information is to be provided. For each line item, you will need to provide a “Description”, amount “Awarded/Authorized”, and amount “Received/Allocated”. For State Bond Funds, you will need to provide “Encumbrance”, the amount specifically authorized and/or allocated for the project with which the 1105 is being submitted, if the funding authorization is for more than one project. “Funding Source” will need to be provided if the source is not State Bond Funds. After filling in the required fields, click the “Add” button. This step will need to be repeated for each line item.

Upon completion of the draft Form 1105R, scroll down to the bottom of the page, read the instructions for the section entitled “Interagency Review”, and then select either “Interagency” or “Submit” from the dropdown list next to the “Take Action” button. Select “Interagency” if there are any individuals within your Agency that need to review or provide data input into the subject 1105 prior to submitting the 1105 to DAS/RECS; otherwise select “Submit” and click “Take Action”.

After selecting your option, you will receive a prompt to provide a comment for the next individual in the process slated to review the 1105 submission. If “Interagency” was selected, provide the reviewer with the required direction to help them complete their review in the comment section. If “Submit” was selected you have the option to provide a comment, but it is not required.

If you selected “Interagency”, you will also be required to either select an individual with an active eBuilder account from the list of “Available Users” to send the 1105 submission to for review.

- * Please note that only one (1) user at a time can be selected to review, comment, and if applicable, edit the revised submission. Repeat this process for each individual reviewer until all revisions are complete.

To add an actor to the next step in the process, find the name of the actor from the list of “Available Users”, click on their name to select the person, then click on the “>” to move that person into the “Selected Users” column.



Upon completion, click the applicable button to proceed to the next step in the process, which will either be “Submit” (no interagency review) or “Interagency” (interagency review).

Add actors to the next step

If there is an individual from your agency that should be granted access to Interagency Review and is not included in the list of actors, please contact Tim O’Brien by email at Timothy.O’Brien@ct.gov and request that the name be added.

9.04 Other Reviewers (Interagency/Outside Reviewer)

The balance of the “1105R Project Revision Request” process will be completed in the same format as the “1105 Project Intake Request” process, including [Steps 8.03](#) – 8.11, and 8.13.

- * Please note that process instances in the 1105 process begin with “1105” and process instances for the 1105R process begin with “1105R”.

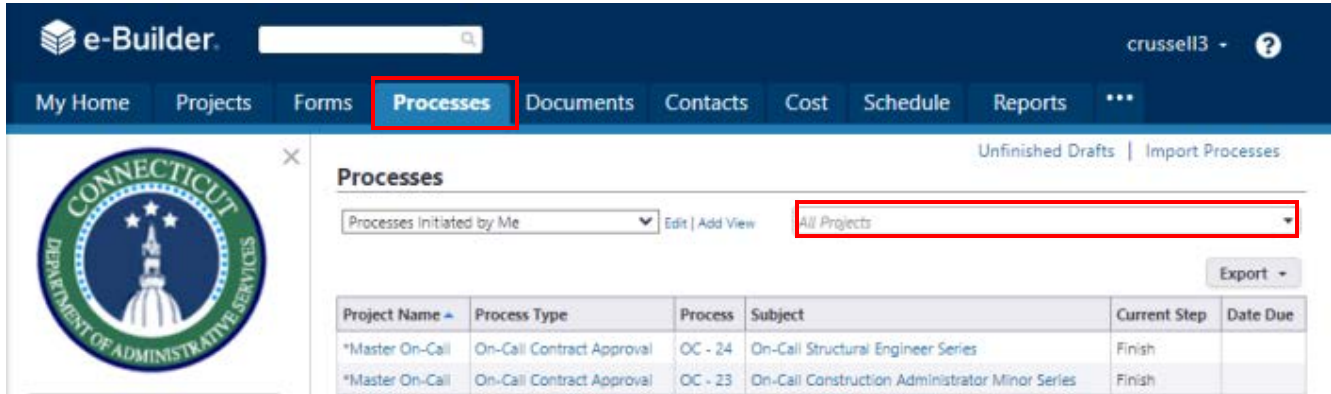


Section 10: 1135 Task Letter

10.01 Accessing the Process

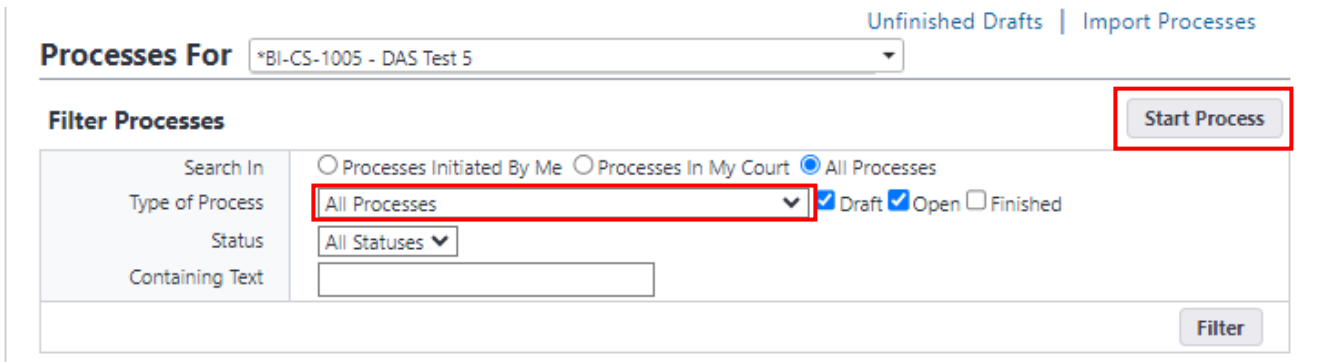
Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>

On your homepage, Go to the “Processes” tab and select the project for which you want to submit Form 1135 from the dropdown list.



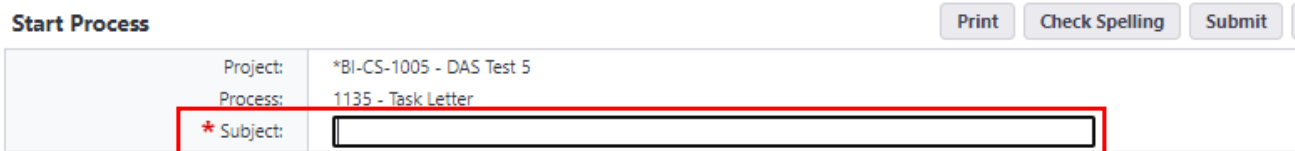
10.02 On-Call Request (PM if DAS Administered or Supplemental Task; CSS if AA)

Select 1135 – Task Letter from the “All Processes” dropdown list and click “Start Process”.



In the subject field at the top of the page input “**Project Number - On-Call (On-Call Contract Type – ARC, CA, etc.) Request**”, i.e. BI-2B-472 – On-Call Architect Request.

1135 - Task Letter (TL)





Below the subject are directions with a link to create a project task letter file folder within:

- * The [On-Call Checklist Review](#) file folder (if the cumulative total of all task letters for a consultant is less than \$100,000, or in the case of CSCU or the Judicial Branch the cumulative total of all task letters is less than \$300,000) for DAS Administered Projects (PM); or
- * The [AA Projects – DAS.CS.PM](#) file folder (if the cumulative total of all task letters for a consultant is less than \$100,000, or in the case of CSCU or the Judicial Branch the cumulative total of all task letters is less than \$300,000) for AA Projects (CSS); or
- * The [SPRB Contract Approval](#) file folder (if the cumulative total of all task letters for a consultant is greater than or equal to \$100,000, or in the case of CSCU or the Judicial Branch, the cumulative total is greater than or equal to \$300,000) for DAS Administered Projects (PM) or Agency Administered Projects (CSS).

On-Call Consultant Selection Request:

In the "Subject" line above, input the Project Number followed by the name of the type of On-Call Service being requested, i.e. "BI-2B-472 - On-Call Architect Request".

DAS Administered Projects:

1. If the subject project is Administered by DAS and the cumulative total of all task letters with a consultant for the same project is less than \$100,000, the DAS PM assigned to the project shall create a new file folder in your ADPM's [On-Call Checklist Review](#) file folder on the OneDrive with the following naming protocol – **Project # - Project Name**.
2. If the subject project is Administered by DAS and the cumulative total of all task letters with a consultant for the same project is greater than or equal to \$100,000, the DAS PM assigned to the project shall create a new file folder in your ADPM's [SPRB Contract Approval](#) file folder on the OneDrive with the following naming protocol – **Project # - Project Name**.
3. The DAS PM shall then prepare an On-Call Selection Request, Form 1135, to initiate selection process, upload the draft Form 1135 (in Word format), along with a copy of the completed Form 1105 (signed by DC), and a copy of the corresponding 1105 project budget details to the subject file folder.
4. After both Form 1105, the corresponding 1105 project budget details, and Form 1135 have been uploaded to the subject file folder, copy the link to the subject file folder and paste the link in the On-Call Selection Request Field below. To create a copy of the file folder link, proceed as follows:
 - a. Either right click on the subject file folder on the OneDrive on your computer and select "View online" from the dropdown list, or
 - b. Click on the On-Call Checklist Review link, open your ADPM's file folder, and scroll down the list to find the file folder you created;
 - c. Hover over the subject file folder from the online OneDrive and click on the ellipsis;
 - d. Click on "Copy link";
 - e. Paste the link in the On-Call Selection Request field below.

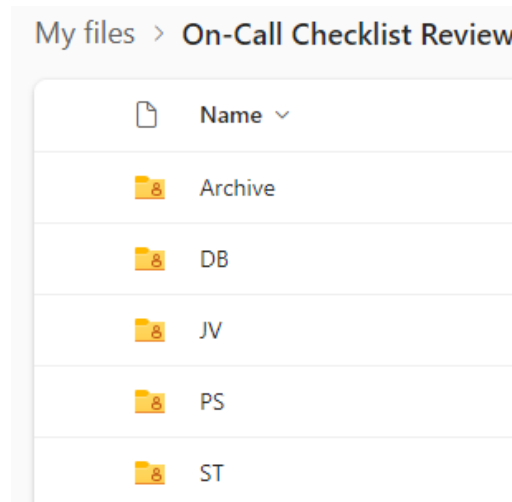
Agency Administered Projects:

1. If the subject project is Agency Administered and the cumulative total of all task letters with a consultant for the same project is less than \$100,000, either Project Support Services or the DAS PM assigned to the project shall create a new file folder in the [AA Projects - DAS CS.PM](#) file folder on the OneDrive with the following naming protocol – **Project # - Project Name**.
2. If the subject project is Agency Administered and the cumulative total of all task letters with a consultant for the same project is greater than or equal to \$100,000, the DAS PM assigned to the project shall create a new file folder in your ADPM's "SPRB Contract Approval" file folder on the OneDrive with the following naming protocol – **Project # - Project Name**.
3. PSS or the DAS PM assigned to the project shall then prepare an On-Call Selection Request, Form 1135, to initiate selection process, upload the draft Form 1135 (in Word format), along with a copy of the completed Form 1105 (signed by DC), and a copy of the corresponding 1105 project budget details to the subject file folder.
4. After both Form 1105, the corresponding 1105 project budget details, and Form 1135 have been uploaded to the subject file folder, copy the link to the subject file folder and paste the link in the On-Call Selection Request Field below. To create a copy of the file folder link, proceed as follows:
 - a. Either right click on the subject file folder on the OneDrive on your computer and select "View online" from the dropdown list, or
 - b. Click on the AA Projects - DAS CS.PM link and scroll down the list to find the file folder you created;
 - c. Hover over the subject file folder from the online OneDrive and click on the ellipsis;
 - d. Click on "Copy link";
 - e. Paste the link in the On-Call Selection Request field below.

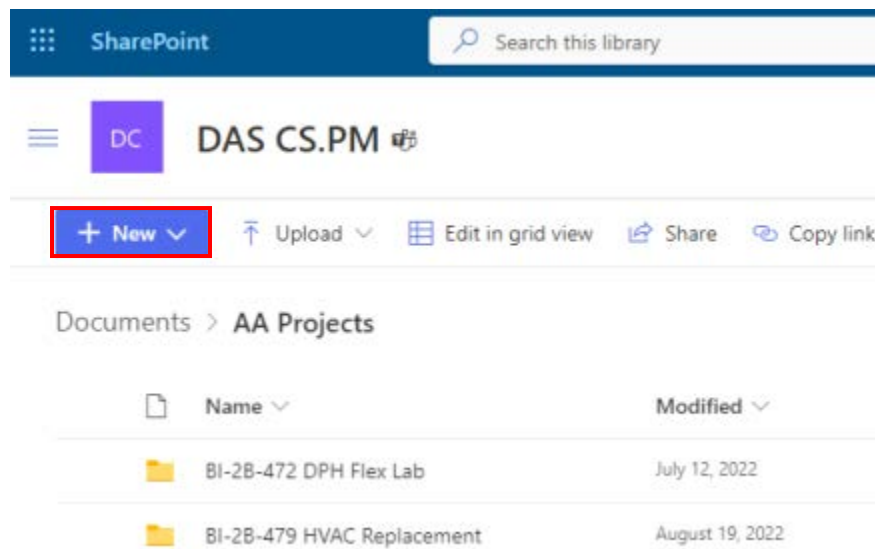
Right click on the applicable hyperlink and select "Open Link in New Tab" to open the file folder structure in SharePoint.



If the “On-Call Checklist Review” file folder was selected, click on the file folder with your ADPM’s initials to open the file folder.

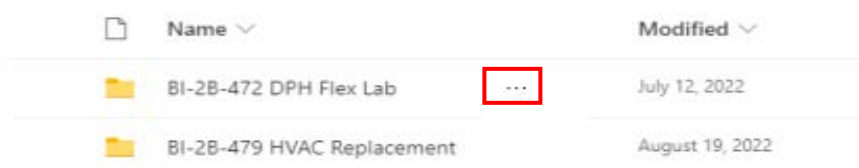


After opening either the appropriate file folder within “On-Call Checklist Review”, or the “SPRB Contract Review”, or the “AA Projects – DAS.CS.PM” file folder under a separate tab, click the “New” button at the top of the page to create a new file folder for the subject project.



Naming protocol for the project task letter file folder is the **Project Number – Project Name**, i.e. **BI-2B-472 – DPH Flex Lab**.

Upon completion, hover over the newly created file folder and click on the ellipsis “...”.





Select "Copy Link" and then paste the link in the "On-Call Selection Request" field in eBuilder and click "Save Draft".

* On-Call Selection Request:

1135 - Task Letter (TL)

Start Process Print Check Spelling Submit **Save Draft** Cancel

Project: *BI-CS-1005 - DAS Test 5
 Process: 1135 - Task Letter
 * Subject: BI-CS-1005 - On-Call Architect Request

Complete Form 1135 and upload the 1135 and the executed 1105 with the project budget to the project task letter file folder you created.

* If the Form 1135 submission is for a supplemental task on an expired On-Call Contract, also complete and upload a "Supplemental Task Justification Memo" to the project task letter file folder.

After uploading the documents to the project task letter file folder, return to the "Processes" tab in eBuilder and select the subject project from the "All Projects" dropdown list.

Project Name	Process Type	Process	Subject	Current Step	Date Due
*Master On-Call	On-Call Contract Approval	OC - 24	On-Call Structural Engineer Series	Finish	
*Master On-Call	On-Call Contract Approval	OC - 23	On-Call Construction Administrator Minor Series	Finish	

Click on the link to the subject project to open the project process.

Processes For: *BI-CS-1005 - DAS Test 5

Filter Processes: Search In: Processes Initiated By Me Processes in My Court All Processes

Type of Process: 1135 - Task Letter (TL) Draft Open Finished

Status: All Statuses

Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
<input type="checkbox"/>	TL	BI-CS-1005 - Architect Request			NotAssigned	



After opening the project process, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click on the "Take Action" button.

After clicking the "Take Action" button, you will receive a prompt to select an ADPM to review the 1135 submission. Select the appropriate ADPM from "Available Users" and move them to "Selected Users" by clicking the ">". Then click "Submit" to submit the request to your ADPM.

Add actors to the next step

10.03 ADPM 1135 Review (ADPM)

The ADPM will receive an email from eBuilder as notification of the request for On-Call Assignment. To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project process link from the "My Processes" section.

*BI-CS-1005 - DAS Test 5

Process instance is in your court. To view details or take action [click here](#).

Project	Instance	Subject	Step	Date Due	Requested Com...
*Becky Test Project	1105 - 20	Test	1105 Executed		
*BI-CS-1005 - DAS Test 5	TL - 10	BI-CS-1005 - On-Call Architect Request	Support Services Task Letter Review		

After opening the project process, review the "General Instructions" and then click on the file folder project link provided in the "On-Call Selection Request" field to access the On-Call Selection Request (Form 1135) for review.

After completing the review, scroll down to the bottom of the page and either select "Submit" from the dropdown list next to the "Take Action" button to forward the On-Call Selection Request to CSS for assignment, or "Revise" to return the On-Call Selection Request to the PM for revision, and click the "Take Action" button. You will be prompted to provide a comment.

If "Submit" was selected, utilize the comment section to provide applicable detail regarding any intricacies to the project that CSS should be made aware of, or if there is a specific consultant that is



being requested for this project, please provide that information along with the reason why that specific consultant should be selected.

If "Revise" was selected, provide the PM with direction on the revisions required to process the submission for approval in the comment section.

10.04 PM Revision – 1105/1135 (PM)

The PM will receive an email from eBuilder as notification that a revision is required to process the request. To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project under the “My Processes” section. The process “Step” will be entitled “PM Revision – 1105/1135”.

Process instance is in your court. To view details or take action, [click here.](#)

My Home
Projects
Forms
Processes
Documents
Contacts
Cost
Schedule

Welcome, Craig!

My Processes

Project	Instance	Subject	Step
*Becky Test Project	6010 - 12	6010 Bid Release Form for BI-RCTEST-999	03 - ADPM: Approve Bid Release Form
*BI-CS-1005 - DAS Tst 5	TL - 5	BI-CS-1005 - On-Call Architect Request	PM Revision - 1105/1135

After opening the project process, review the “General Instructions” under the “Details” tab, and any comments provided under the “Comments” tab. Click on the file folder project link provided in the “On-Call Selection Request” field to access the On-Call Selection Request (Form 1135) Forms for revision and revise accordingly. Upon completion, click “Take Action”.

Details
Comments (1)
Documents (0)
Attached Processes (0)
Attached Forms (0)
Attached To (0)

Expand All | Collapse All

General Instructions

The subject on-call selection request (Form 1135) and/or the Capital Project Initiation Request (Form 1105) for the subject project requires revision prior to submission of said document to DAS/CS Project Support Services for assignment. Please review the comments provided by your ADPM under the comments tab and revise accordingly.

Upon completion, scroll down to the bottom of the page, select "Submit" from the dropdown list and click the "Take Action" button. You will be prompted to provide a comment. Provide a comment if applicable.

On-Call Selection Request:
<https://ctgovevec.sharepoint.com/:f/r/sites/DASCS.PM/Shared%20Documents/AA%20Projects/BI-CTC-685%20Norwalk%20CC%20-%20AHU%20Replacement%20at%20the%20West%20Campus?csf=1&web=1&e=OugBf>

Project Contacts

Project Manager:	Russell, Craig
ADPM:	Russell, Craig
Agency PM:	Russell, Craig

Capital Project Information

1105 Submission:	12.19.2022
1105 Reviewed:	12.19.2022
Agency Request for Project Administration:	DAS/CS
DAS Project Number:	BI-CS-1005
Project Name:	BI-CS-1005 - DAS Tst 5
Construction Budget:	3,000,000.00
Total Project Cost:	5,000,000
DCS Fees:	100,000.00

Submit
Take Action
Check Spelling
Print
Copy
Delegate
Save
Cancel



10.05 On-Call Assignment (CSS)

CSS will receive an email from eBuilder as notification of the request for On-Call Assignment. To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project link from the "My Processes" section. To access the On-Call Selection Request (Form 1135), click on the file folder project link provided in the "On-Call Selection Request" field.

CSS shall then review Form 1135, assign a Consultant to the project, upload the executed Form 1135 to the project file folder, complete filling out the "On-Call Information" section in eBuilder and click "Submit" to spawn the "Task Letter Cost Integration" process. After completing the Task Letter Cost Integration process, CSS will click the "Take Action" button to forward the assigned request to the PM to begin preparing the task letter package.

10.06 Prepare Task Letter Package (PM)

The PM will receive an email from eBuilder as notification that a revision is required to process the request for On-Call Assignment. To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project under the "My Processes" section. The process "Step" will be entitled "PM Revision – 1105/1135".

*BI-CS-1005 - DAS Test 5

Process instance is in your court. To view details or take action, [click here.](#)

- [My Home](#)
- Projects
- Forms
- Processes
- Documents
- Contacts
- Cost
- Schedule



Welcome, Craig!

All pr

My Processes

Project	Instance	Subject	Step
*Becky Test Project	6010 - 12	6010 Bid Release Form for BI-RCTEST-999	03 - ADPM: Approve Bid Release Form
*BI-CS-1005 - DAS Test 5	TL - 5	BI-CS-1005 - On-Call Architect Request	PM Revision - 1105/1135

After opening the project process, review the instructions provided under the "On-Call Consultant Request" section to begin preparing the task letter package for submission.

To access the On-Call Assignment, click on the file folder project link provided in the "On-Call Selection Request" field.

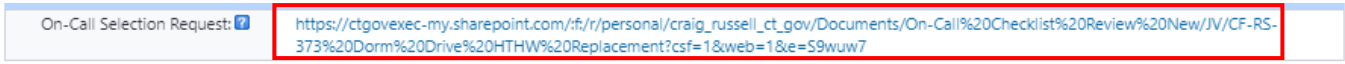
On-Call Selection Request: https://ctgovexec-my.sharepoint.com/:f/r/personal/craig_russell_ct_gov/Documents/On-Call%20Checklist%20Review%20New/JV/CF-RS-373%20Dorm%20Drive%20HTHW%20Replacement?csf=1&web=1&e=59uwu7



After opening the project process file folder, open the executed Form 1135 from the project file folder to see the consultant assigned to the project and schedule the scope review meeting. No action will be taken in eBuilder until the draft task letter package is complete.

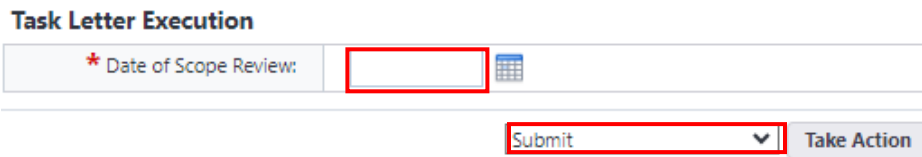
Upon completion of the draft task letter package, log back into eBuilder, select the “My Home” tab, and click on the subject project from the list under “My Processes”.

Right click on the file folder project link provided in the “On-Call Selection Request” field and select “Open Link in New Tab”.



Upload the applicable documents, listed in the instructions, to the file folder to complete the task letter package for submission.

Return to the open eBuilder tab and enter the “Date of Scope Review”, select “Submit” from the dropdown list and click the “Take Action” button.



10.07 Support Services Review (CSS)

CSS will receive an email from eBuilder as notification of the request for On-Call Assignment.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.

Right click on the file folder project link provided in the “On-Call Selection Request” field and select “Open Link in New Tab”.

Review the task letter package submission.

If the value of the task letter, or if a supplemental task the cumulative value of all task letters, is less than \$100,000, or in the case of CSCU or the Judicial Branch the cumulative value of all task letters is less than \$300,000, CSS shall conduct the initial review of said task letter, and if applicable, revise and return the task letter to the PM for review and revision.

If the value of the task letter, or if a supplemental task the cumulative value of all task letters, is greater than \$100,000, or in the case of CSCU or the Judicial Branch the cumulative value of all task letters is greater than or equal to \$300,000, CSS shall forward the task letter package to the ADPM to conduct the initial review of said task letter.

After the value of the task letter has been confirmed, and if applicable, the task letter has been reviewed by CSS, CSS will return to the open tab in eBuilder and complete the “On-Call Information” and “Task Letter Execution” sections.

Upon completion, CSS will either select “Revise” from the drop-down list, next to the “Take Action” button, to return the task letter package to the PM revision or select “Submit” to forward the task letter



package to the ADPM for review. After taking action, CSS will be prompted to provide a comment regarding the proposed revisions for the PM or a comment regarding the type of review the ADPM is to conduct prior to submitting the package to Legal.

10.08 Task Letter Revision (PM)


If “Revise” was selected in the previous or consequent step, the task letter package is returned to the PM. The PM will receive an email notification from eBuilder that the task letter package has been returned and the task letter package will also appear in eBuilder under “My Processes” within the “My Home” tab in eBuilder.

The PM can either click on the email link to connect to the subject project process in eBuilder, or the PM can access the project process by logging into eBuilder, selecting the “My Home” tab, and clicking on the link in the “Instance” column for the subject project from the “My Processes” section.

*BI-CS-1005 - DAS Test 5

Process instance is in your court. To view details or take action, [click here.](#)

My Home Projects Forms Processes Documents Contacts Cost Schedule



Welcome, Craig!

My Processes

Project	Instance	Subject	Step
*Becky Test Project	6010 - 12	6010 Bid Release Form for BI-RCTEST-999	03 - ADPM: Approve Bid Release Form
*BI-CS-1005 - DAS Test 5	TL - 5	BI-CS-1005 - On-Call Architect Request	PM Revision - 1105/1135

After gaining access to the project, within the task letter process, the PM should review the “Comments” tab for additional information regarding proposed revisions.

Details **Comments (0)** Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Request Comment Comment

Private Comment

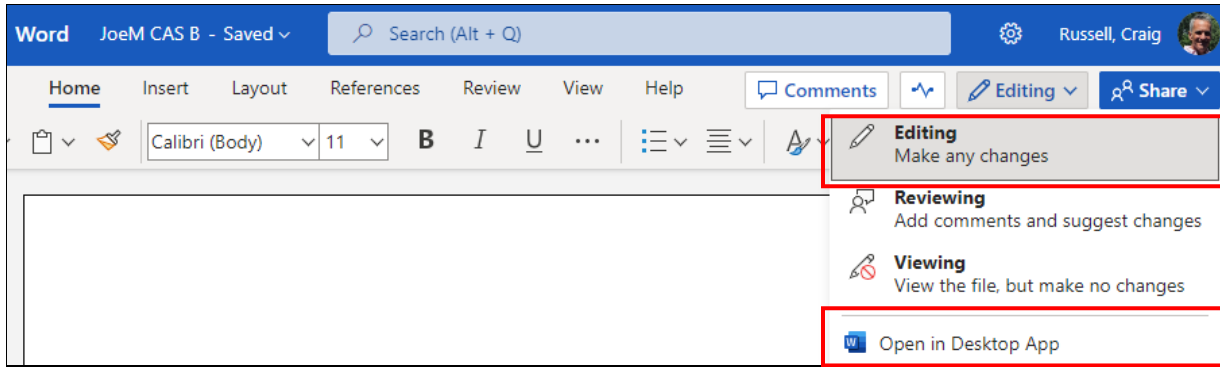
There are no comments for this process.

After reviewing the comments, the PM should re-open the “Details” tab and right click on the file folder project link provided in the “On-Call Selection Request” field, and select “Open Link in New Tab” to open the project file. The PM should review the proposed task letter revisions, and if applicable, accept said revisions and/or make additional revisions for resubmission.

On-Call Selection Request: https://ctgovexec-my.sharepoint.com/:f/r/personal/craig_russell_ct_gov/Documents/On-Call%20Checklist%20Review%20New/JV/CF-RS-373%20Dorm%20Drive%20HTHW%20Replacement?csf=1&web=1&e=S9wuw7



- * **User Tip** – To get more accessibility when editing a Microsoft Word document in SharePoint, double click on the subject document to open it in SharePoint. After opening the document in SharePoint, make sure the dropdown list next to “Share” is in “Editing” mode and select “Open in Desktop App”. This will allow you to open the document in your desktop to make edits and those edits will automatically be save to the document in SharePoint.

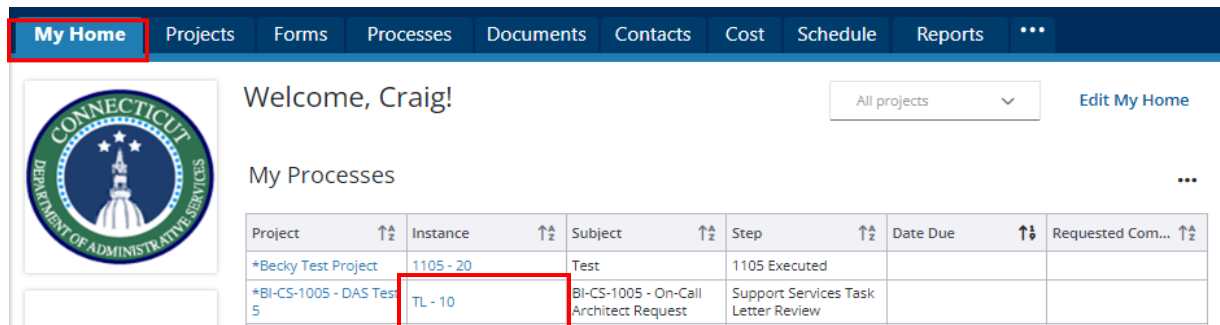


After completing the review, return to the open eBuilder tab, select “Submit” from the dropdown list and click on the “Take Action” button.

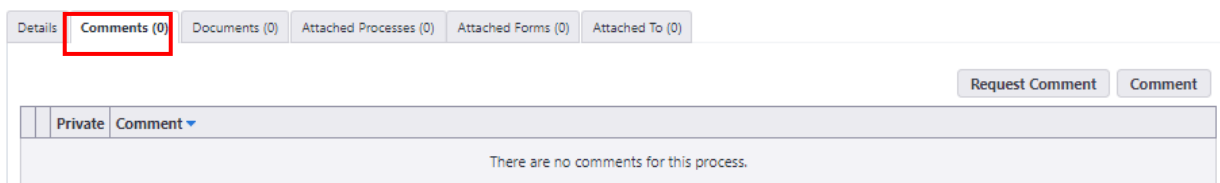
10.09 ADPM Review (ADPM)

The ADPM will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action. To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.

Process instance is in your court. To view details or take action [click here](#)



After opening the project in eBuilder, select the “Comments” tab to note whether the task letter was initially reviewed by CSS for their review and submission to the Legal Director for final approval or if the ADPM is to conduct the initial review and submit the task letter package for legal for assignment and SPRB review.





After reviewing the comments, re-open the “Details” tab and then right click on the file folder project link provided in the “On-Call Selection Request” field, select “Open Link in New Tab” to open the project file to review the draft task letter, and if applicable, recommend additional revisions prior to submission to legal.

On-Call Selection Request: https://ctgovexec-my.sharepoint.com/:f/r/personal/craig_russell_ct_gov/Documents/On-Call%20Checklist%20Review%20New/JV/CF-RS-373%20Dorm%20Drive%20HTHW%20Replacement?csf=1&web=1&e=S9wuw7

After completing the review, return to the open eBuilder tab, scroll down to the bottom of the page and either select “Revise” from the drop-down list next to the “Take Action” button to return the task letter package to CSS to complete the revision; or select “Submit” to forward the task letter package to the Legal Director for final review and approval or for assignment and SPRB Approval.

- * If “Revise” was selected, the ADPM will be prompted to provide a comment after clicking the “Take Action” button to provide direction for revising the task letter package for resubmission.

10.10 Legal Assignment/SPRB Review or Legal Director Review (Legal Director)

If the cumulative value of all task letters is less than \$100,000 (or if CSCU or JD less than \$300,000):

The Legal Director will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.

*BI-CS-1005 - DAS Test 5

Process instance is in your court. To view details or take action, [click here.](#)

The screenshot shows the 'My Home' dashboard with a navigation bar containing 'My Home', 'Projects', 'Forms', 'Processes', 'Documents', 'Contacts', 'Cost', 'Schedule', and 'Reports'. Below the navigation bar, there is a 'Welcome, Craig!' message and a 'My Processes' section. The 'My Processes' section contains a table with the following data:

Project	Instance	Subject	Step	Date Due	Requested Com...
*Becky Test Project	1105 - 20	Test	1105 Executed		
*BI-CS-1005 - DAS Test 5	TL - 10	BI-CS-1005 - On-Call Architect Request	Support Services Task Letter Review		

To review the task letter package, right click on the file folder project link provided in the “On-Call Selection Request” field and select “Open Link in New Tab”. The project file folder will open with the draft task letter package inside for review, and if applicable, revision.

On-Call Selection Request: https://ctgovexec-my.sharepoint.com/:f/r/personal/craig_russell_ct_gov/Documents/On-Call%20Checklist%20Review%20New/JV/CF-RS-373%20Dorm%20Drive%20HTHW%20Replacement?csf=1&web=1&e=S9wuw7

After reviewing the comments, re-open the “Details” tab and then right click on the file folder project link provided in the “On-Call Selection Request” field, select “Open Link in New Tab” to open the project



file to review the draft task letter, and if applicable, recommend additional revisions prior to submission to legal.

Upon completion of the task letter review, return to the open eBuilder tab and scroll down to the bottom of the page and either select "Revise" from the drop-down list next to the "Take Action" button to return the task letter package to CSS for additional revision or select "Submit" to forward the task letter package to CSS for processing through DocuSign (Step Eleven).

If the cumulative value of all task letters is greater than or equal to \$100,000 (or if CSCU or JD greater than or equal to \$300,000):

The Legal Director will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project process link from the "My Processes" section.

After opening the project in eBuilder, answer the "Make Legal Assignment?" question by selecting "Yes" from the dropdown list and then will select "Submit" from the dropdown list next to the "Take Action" button and click the "Take Action" button to proceed to the next step.

On-Call Information

Type of OC Consultant:	
On-Call Consultant Name:	
On-Call Contract Number:	
Task No.:	
Actual Consultant Fee:	
* Make Legal Assignment?:	-- Please select an option --

Task Letter Execution

Date of Scope Review:	06.21.2023
Date Legal Received:	06.07.2023

After the "Take Action" button has been clicked, a prompt will be displayed to provide a comment, and a list of Attorneys and Paralegals will be visible to select from for assignment. Click on the Attorney and Paralegal to be assigned, and then click on the ">" to move the Attorney from the "Available Users" to the "Selected Users" section and click "Submit" to make the assignment.

Add Comment

Private

Add actors to the next step

<p>Available Users</p> <ul style="list-style-type: none"> LaChance, Amy (Department of Administrative Services) Peterson, Anne (Department of Administrative Services - Construction Services) Tamborra, Rebecca (Department of Administrative Services) 	<input type="button" value=">"/>	<p>Selected Users</p> <ul style="list-style-type: none"> Russell, Craig (Department of Administrative Services - Construction Services)
---	-------------------------------------	--



10.11 OLAPP Review (OLAPP – Attorneys & Paralegals)

The OLAPP Attorney assigned to the project will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.

*BI-CS-1005 - DAS Test 5

Process instance is in your court. To view details or take action, [click here](#).

The screenshot shows the 'My Home' dashboard with a navigation bar containing 'My Home', 'Projects', 'Forms', 'Processes', 'Documents', 'Contacts', 'Cost', 'Schedule', 'Reports', and a menu icon. Below the navigation bar, there is a 'Welcome, Craig!' message and a 'My Processes' section. A table lists processes with columns: Project, Instance, Subject, Step, Date Due, and Requested Com... The entry '*BI-CS-1005 - DAS Test 5' is highlighted with a red box.

Project	Instance	Subject	Step	Date Due	Requested Com...
*Becky Test Project	1105 - 20	Test	1105 Executed		
*BI-CS-1005 - DAS Test 5	TL - 10	BI-CS-1005 - On-Call Architect Request	Support Services Task Letter Review		

After opening the project process in eBuilder, select the “Comments” tab to note comments provided by previous actors in the process.

The screenshot shows the 'Comments' tab selected in the navigation bar. Below the navigation bar, there are buttons for 'Request Comment' and 'Comment'. A message box displays: 'There are no comments for this process.'

After reviewing the “Comments”, return to the “Details” tab, right click on the file folder project link provided in the “On-Call Selection Request” field, and select “Open Link in New Tab”. The project file folder will open with the draft task letter package inside for review, and if applicable, revision.

The screenshot shows the 'On-Call Selection Request' field with a red box around the URL: https://ctgovexec-my.sharepoint.com/:f/r/personal/craig_russell_ct_gov/Documents/On-Call%20Checklist%20Review%20New/JV/CF-RS-373%20Dorm%20Drive%20HTHW%20Replacement?csf=1&web=1&e=S9wuw7

Upon completion of the task letter review, return to the open eBuilder tab and scroll down to the bottom of the page and either select “Revise” from the drop-down list next to the “Take Action” button to return the task letter package to the PM for revision or select “Submit” to forward the task letter package to the assigned Paralegal for submission to SPRB.

10.12 SPRB Review (OLAPP - Paralegals)

The OLAPP Paralegal assigned to the project will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action.



To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject project process link from the “My Processes” section.

Process instance is in your court. To view details or take action, [click here](#).

Project	Instance	Subject	Step	Date Due	Requested Com...
*Becky Test Project	1105 - 20	Test	1105 Executed		
*BI-CS-1005 - DAS Test 5	TL - 10	BI-CS-1005 - On-Call Architect Request	Support Services Task Letter Review		

After opening the project process in eBuilder, right click on the file folder project link in the “On-Call Selection Request” field and select “Open Link in New Tab” to access the task letter package.

On-Call Selection Request: https://ctgovexec-my.sharepoint.com/:f/r/personal/craig_russell_ct_gov/Documents/On-Call%20Checklist%20Review%20New/JV/CF-RS-373%20Dorm%20Drive%20HTHW%20Replacement?csf=1&web=1&e=S9uw7

Download the applicable task letter package for submission to SPRB and provide the “SPRB File Number” and the date “Sent to SPRB” under the section entitled “On-Call Information”. Then scroll down to the bottom of the page and click the “Take Action” button to proceed to the next step.

On-Call Information

Type of OC Consultant:	ARC
On-Call Consultant Name:	*Sample Company
On-Call Contract Number:	OC-DCS-DAS-0001
Task No.:	T1
Actual Consultant Fee:	101,000.00
* SPRB File Number:	23-999
* Sent to SPRB:	05.22.2023

The subject task letter package will not be submitted to SPRB through eBuilder. The TL Package should be submitted to SPRB through normal means for their review.

10.13 SPRB Approval (OLAPP - Paralegals)

After SPRB has completed their review, select the “My Home” tab again, and click on the link to the subject project from the “My Processes” section to open the process in eBuilder. Once opened, scroll down to the section entitled “On-Call Information” and provide the date “Approved by SPRB”, if applicable. Then, follow the “General Instructions” provided to “Approve”, “Revise”, or “Void” the task letter package and click the “Take Action” button to proceed to the next step in the process.

10.14 Process Task Letter through DocuSign (OLAPP-Paralegals)

If “Approved” by SPRB, the task letter package will proceed to this placeholder step to allow for the OLAPP Paralegal to process the task letter through DocuSign.



As was the case in the previous step, the assigned OLAPP Paralegal will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action and will appear under “My Home” tab in the “My Processes” section in eBuilder to take action.

Again, the OLAPP Paralegal can either click on the email link to connect to the project process in eBuilder or can click on the link to the subject project from the “My Processes” section, under the “My Home” tab, to connect to the project process (refer to diagrams in Step 11).

After opening the project process, the paralegal should right click on the file folder project link in the “On-Call Selection Request” field and select “Open Link in New Tab” to gain access to the task letter package file folder, download the final version of the subject task letter, and process the task letter through DocuSign.

After initiating the processing of the task letter through DocuSign, the paralegal should return to the open eBuilder tab, scroll down to the bottom of the page, select “Submit” from the dropdown list next to the “Take Action” button and click on the “Take Action” button.

10.15 Process Task Letter through DocuSign (CSS)

CSS will receive an email from eBuilder as notification that the task letter package has been forwarded to their attention to take action and will appear under “My Home” tab in the “My Processes” section in eBuilder to take action.

CSS will access the project file folder, download the final version of the task letter and process the task letter through DocuSign.

After initiating the processing of the task letter through DocuSign, select “Submit” from the dropdown list next to the “Take Action” button and click on the “Take Action” button.

10.16 Task Letter Executed (CSS)

CSS will receive an email from eBuilder as notification that the task letter has been processed through DocuSign.

CSS will access the project process, complete the “Task Letter Executed” section of eBuilder, upload a copy the executed task letter to the “Task Letter Executed” field for placement in the project file (Pre-Construction/On-Call Task Letters), and select “Submit” to complete the task letter process.



Section 11: Contract and Amendment Process

THIS PROCESS IS CURRENTLY UNDER DEVELOPMENT

11.01 Accessing the Process (OLAPP Procurement or PM)

Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>

On your homepage, Go to the “Processes” tab and select the subject project for which you wish to draft a Contract or Amendment from the from the “All Projects” dropdown list. If the Contract or Amendment to be drafted is an On-Call, select “*Master On-Call” from the “All Projects” dropdown list.

Select “Contract and Amendment” from the “Type of Process” dropdown list and click “Start Selected Process Type”.

11.02 Selecting the Contract Type (OLAPP Procurement or PM)

Select the type of Contract being submitted for approval from the “Contract Submission Type” dropdown list and click the “Take Action” button.

11.03 Selecting the Document Type (OLAPP Procurement or PM)

Select the type of document being submitted for approval from the “Document Type” dropdown list and click the “Take Action” button.



Section 11A: On-Call Contract Approval

THIS PROCESS IS CURRENTLY UNDER DEVELOPMENT

11A.01 On-Call Contract Series Initiation (OLAPP Procurement)

Create an On-Call Contract Series file folder on the OneDrive by clicking on the following hyperlink: "[On-Call Consultant Services](#)".

Hover the cursor over the file folder entitled "OC-DCS-(Series Number)" and click on the ellipsis "...".

Select "Copy to" and then click "Copy here". A prompt will appear "1 item wasn't copied...". Click "Keep both".

Hover the cursor over the file folder entitled "OC-DCS-(Series Number)1" and click on the ellipsis "...". Select "Rename" and rename the newly pasted file folder with the subject On-Call Series Number, i.e. OC-DCS-ARC-0073-0078.

Hover the cursor over the renamed file folder and select "Copy link". Paste the link in the "Contract Approval File Folder" field in the "On-Call Contract Series" section.

Provide data input for the remaining fields in "On-Call Contract Series" section. Upon completion of data input and after uploading the respective supporting documents, scroll down to the bottom of the page and press the "Take Action" button.

Note: If legal requires additional documentation and/or information regarding the subject On-Call Contract Series submission, OLAPP Procurement will receive an email from eBuilder as notification that additional documentation and/or information is required.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project process instance link from the "My Processes" section.

*Master On-Call

Process instance is in your court. To view details or take action, [click here](#)

- My Home**
- Projects
- Forms
- Processes
- Documents
- Contacts
- Cost
- Schedule



Welcome, Craig!

All pr

My Processes

Project	Instance	Subject	Step
*Master On-Call	OC - 27	On-Call Architect Series	Prepare Contract Pac



Click on the "Comments" tab to see what additional information or documentation is required.

Details **Comments (0)** Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Request Comment Comment

Private Comment ▾

If additional documentation is required, return to the "Details" tab and click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Upload the respective supporting documents to the "Supporting Documents" file folder and scroll down to the bottom of the page and press the "Take Action" button.

If additional information is required, scroll down to the bottom of the page and press the "Take Action" button.

After clicking the "Take Action" button a prompt will appear that will allow you to provide a comment regarding the request for additional documentation and/or information. After providing the comment, click "Submit".

Contract Approval File Folder:

Submit ▾ **Take Action** Check Spelling Print Copy Delegate Save Cancel

Add Comment

Private

11A.02 On-Call Contract Series Initiation (CSS)

CSS will receive an email from eBuilder as notification that the required documents have been submitted by DAS Procurement to initiate the drafting of a new On-Call Contract Series.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project process instance link from the "My Processes" section.

*Master On-Call

Process instance is in your court. To view details or take action, [click here.](#)

My Home Projects Forms Processes Documents Contacts Cost Schedule



Welcome, Craig!

All pr

My Processes

Project	Instance	Subject	Step
*Master On-Call	OC - 27	On-Call Architect Series	Prepare Contract Package for SPRB



Refer to the "On-Call Contract Checklist" field in the "On-Call Contract Series" section for a list of the documents submitted.

Click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Open the "Supporting Documents" file folder to view the "On-Call Contract Checklist" documents.

Open the On-Call Selection Approval Memo on your desktop and return to the On-Call Contract Series file folder. Rename each of the individual On-Call Contract file folders, starting with the first number in the On-Call Contract Series and the first firm name from the On-Call Selection Approval Memo. Repeat this step until all of the firm names from the On-Call Selection Approval Memo have their own file folder.

Return to the process instance to complete the section entitled "On-Call Contract Data".

Under the subsection entitled "Add New Item for On-Call Contract Data", click the "Lookup" link in the "Vendor" field to lookup the first "Vendor" selected from the On-Call Selection Approval Memo, answer the remaining questions in the section, and click "Add". Repeat this process for each selected Vendor. Upon completion, select "Send to Legal" from the dropdown list next to the "Take Action" button and click "Take Action".

Add New Item for On-Call Contract Data

* Vendor

* On-Call Contract No.

* Actual Fee

Clear

Send to Legal Check Spelling Print Copy Delegate 24 of 24

11A.03 Legal Assignment (Legal Director)

The Legal Director will receive an email from eBuilder as notification that the required documents have been submitted by DAS Procurement to initiate the drafting of a new On-Call Contract Series.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project process link from the "My Processes" section.

*Master On-Call

Process instance is in your court. To view details or take action, [click here.](#)

- [My Home](#)
- Projects
- Forms
- Processes
- Documents
- Contacts
- Cost
- Schedule



Welcome, Craig!

All pr

My Processes

Project	Instance	Subject	Step
*Master On-Call	OC - 27	On-Call Architect Series	Prepare Contract Package for SPRB



Refer to the "On-Call Contract Checklist" field in the "On-Call Contract Series" section for a list of the documents submitted.

Click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Double click on the "Supporting Documents" file folder to view the "On-Call Contract Checklist" documents.

If additional documentation is required to initiate the drafting of said contract, scroll down to the bottom of the page and select "Return" from the dropdown list next to the "Take Action" button and then click the "Take Action" button. A prompt will appear to add a comment for the request of additional documentation.

If the necessary documentation has been submitted, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and then click the "Take Action" to assign an Attorney and a Paralegal to draft the contract.

After the "Take Action" button has been clicked, a prompt will be displayed to provide a comment, and a list of Attorney's and Paralegals will be visible to select from for assignment. Click on the name of the Attorney and Paralegal to be assigned, and then click on the ">" to move the Attorney and Paralegal from the "Available Users" to the "Selected Users" section. Click "Submit" to make the assignment.

11A.04 Draft Contract/Credential Review (Attorney and/or Paralegal)

The Attorney and/or Paralegal assigned to draft the subject On-Call Contract Series will receive an email from eBuilder as notification that the required documents have been submitted by DAS Procurement to initiate the drafting of a new On-Call Contract Series.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project process link from the "My Processes" section.

*Master On-Call

Process instance is in your court. To view details or take action, [click here](#)

My Home Projects Forms Processes Documents Contacts Cost Schedule



Welcome, Craig!

All pr

My Processes

Project	Instance	Subject	Step
*Master On-Call	OC - 27	On-Call Architect Series	

Refer to the "On-Call Contract Checklist" field in the "On-Call Contract Series" section for a list of the documents submitted.



Click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Double click on the "Supporting Documents" file folder to view the "On-Call Contract Checklist" documents.

Complete data input for the "On-Call Checklist for Credential Review" field in the "On-Call Information" section. Upload copies of each of the respective documents checked off to the respective file folder listed in the field instructions.

Prepare a draft contract for the subject On-Call Contract Series.

Upon completion of the draft contract, click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Upload a copy of the draft contract to the "Drafts" subfolder within the subject On-Call Contract Series file folder.

After completing the draft contract, the data input, and after all of the required documents have been uploaded to the respective file folders, scroll down to the bottom of the screen and click the "Take Action" button to submit the draft to the Legal Director for review and approval.

Note: If all of the required documentation has not yet been submitted by selected firms by the time the draft On-Call Contract is ready for the Legal Director to review, you can proceed with clicking the "Take Action" button and finish the data input and uploading the required documents in step 11A.06 - Prepare On-Call Contract Packages for SPRB Review.

11A.05 Legal Director Contract Review

The Legal Director will receive an email from eBuilder as notification that the draft contract for the subject On-Call Contract Series is ready to be reviewed.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project process link from the "My Processes" section.

*Master On-Call

Process instance is in your court. To view details or take action, [click here.](#)



Welcome, Craig!

All pr

My Processes

Project	Instance	Subject	Step
*Master On-Call	OC - 27	On-Call Architect Series	Prepare Contract Packages for SPRB

Click on the link in the "Contract Approval File Folder" field to open subject On-Call Contract Series file folder. Open the "Drafts" file folder to view the draft Contract. Open the "Credentials and Insurance",



and "Supporting Documents" file folders to review such documents related to the On-Call Series Contract.

Review and revise the draft contract as needed. Upon completion of your review, scroll down to the bottom of the page and select one of the following from the dropdown list next to the "Take Action" button:

- Select "Return" and then click the "Take Action" button to return the draft to the Attorney and/or Paralegal assigned to the project for additional review and revision; or
- Select "Submit" and then click the "Take Action" button to forward the process to Attorney and/or Paralegal assigned to the project to finalize the On-Call Contract for each of the selected firms and further prepare the On-Call Contract Series package for SPRB review.

After clicking the "Take Action" button, a prompt will appear to allow for comments related to the draft agreement and to again select the Attorney and/or Paralegal assigned to the project to complete the next step in the process. After providing your comments and making your selection, either click the "Return" or "Submit" button.

11A.06 Prepare On-Call Contract Packages for SPRB Review (Attorney and/or Paralegal)

The Attorney and/or Paralegal assigned to the subject On-Call Contract Series will receive an email from eBuilder as notification that the Legal Director has completed a review of the draft contract and the Attorney and/or Paralegal can finalize the draft contract for each of the selected firms and begin preparing the On-Call Contract Series package for SPRB review.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project process link from the "My Processes" section.

*Master On-Call

Process instance is in your court. To view details or take action, [click here.](#)

My Home Projects Forms Processes Documents Contacts Cost Schedule



Welcome, Craig! All pr

My Processes

Project	Instance	Subject	Step
*Master On-Call	OC - 27	On-Call Architect Series	Prepare Contract Package for SPRB

Complete data input for the "On-Call Checklist for Credential Review" and "On-Call SF" the "On-Call Information" section.

Click on the link in the "Contract Approval File Folder" field, in the "On-Call Contract Series" section, to open the subject On-Call Contract Series file folder. Upload copies of each of the respective documents checked off in the "On-Call Checklist for Credential Review" and "On-Call SPRB Checklist" fields to the respective file folders listed in the field instructions.



Upload copies of the final draft Contract for each of the selected firms to the SPRB file folder and into the "Drafts" subfolder within each respective "On-Call Contract" file folder.

Complete data input for the "SPRB File No." and "Date Sent to SPRB" fields in the "On-Call Contract Data" section.

To edit the above referenced fields for any given On-Call Contract, go to the row of the subject vendor; then scroll over to the column for the subject field and click on the "Pencil" toggle (✎) to edit the field.

On-Call Contract Data Show Filter | Select All Row Height: 1X Delete

For each individual On-Call Contract, OLAPP shall input data into the following fields:

1. SPRB File No.
2. Date Sent to SPRB

To edit the above referenced fields for any given On-Call Contract, go to the row of the subject vendor; then scroll over to the column for the subject field and click on the "Pencil" toggle to edit the subject field.

If any of the subject On-Call Contracts is cancelled, select the specified row of the contract that is to be cancelled and click "Delete" in the first cell of the specified row to delete the contract data. After deleting the contract data, select the "Comments" tab above and provide an explanation for the contract deletion. After providing a comment, return to the "Details" tab and finish providing the data input for each individual On-Call Contract.

After completing the data input for one or more On-Call Contracts, scroll down to the bottom of the page, select "Submit" from the dropdown list and press the "Take Action" button.

	#	Vendor	On-Call Contract No.	Actual Fee	SPRB File No.	Date Sent to SPRB	Date Approved by SPRB	Date Sent to AC
Delete	1	*Sample Company	OC-DCS-ARC-0001	1,000,000	✎ 9999	✎ 06.01.2023		
Delete	2	*Sample Company	OC-DCS-ARC-0002	1,000,000	✎ 9998	✎ 06.05.2023		
Grand Totals (2 items)								

Submit
Take Action
Check Spelling
Print
Copy
Delegate
Save
Cancel

After completing the data input in the "On-Call Information" and "On-Call Contract Data" sections, and after all of the required documents have been uploaded to the respective file folders, scroll down to the bottom of the screen and click the "Take Action" button.

11A.07 SPRB Approval/AG Review (Paralegal)

The Paralegal assigned to the subject On-Call Contract Series will receive an email from eBuilder as notification that the On-Call Contract series has been submitted to SPRB for review and approval. This will serve as a hold step until such time that the SPRB has reviewed and approved one or more of the subject On-Call Series Contracts.

After SPRB has reviewed and approved one more of the subject On-Call Series Contracts, the Paralegal should proceed to process On-Call Series Contracts through DocuSign and prepare the Contracts for sign off by the Attorney General's Office. A copy of each executed On-Call Contract should be sent to CSS upon completion.

After sending the Contracts for sign off, the Paralegal should open the process instance in eBuilder for data input.



To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject project process link from the "My Processes" section.

*Master On-Call

Process instance is in your court. To view details or take action [click here.](#)

My Home Projects Forms Processes Documents Contacts Cost Schedule



Welcome, Craig!

All pr

My Processes

Project	Instance	Subject	Step
*Master On-Call	OC - 27	On-Call Architect Series	Prepare Contract Package for SPRB

Follow the instructions provided under the "On-Call Contract Data" section and provide the "Date Approved by SPRB" and the "Date Sent to the AG" for each individual On-Call contract. Click on the "Pencil" toggle () under the respective column header to provide the necessary data input.

On-Call Contract Data

Show Filter | Select All Row Height: 1X

For each individual On-Call Contract, input data into the following fields:

1. SPRB File No.
2. Date Sent to SPRB

To edit the above referenced fields for any given On-Call Contract, go to the row of the subject vendor; then scroll over to the column for the subject field and click on the "Pencil" toggle to edit

After completing the data input in the "On-Call Information" and "On-Call Contract Data" sections, and after all of the required documents have been uploaded to the respective file folders, scroll

#	Vendor	On-Call Contract No. ?	Actual Fee ?	SPRB File No. ?	Date Sent to SPRB ?	Date Approved by SPRB ?	Date Sent to AG ?
Delete	Nautilus Consulti...	OC-DCS-ANLY-AUD...	500,000				
Delete	ARCADIS US INC	OC-DCS-ANLY-AUD...	500,000				
Delete	Whittlesey PC	OC-DCS-ANLY-AUD...	500,000				

After completing the data input for one or more On-Call Contracts, scroll down to the bottom of the page and click the "Take Action" button.

After clicking "Take Action", a prompt will appear to allow the Paralegal the opportunity to comment on the SPRB Review and Approval Process. If any of the subject On-Call Series Contracts were suspended or rejected, the Paralegal should provide a listing of those On-Call Contracts and the status of those contracts as being suspended or rejected in the "Comments" box. Upon completion, click "Submit".

Add Comment

Private



Note: If any of the subject On-Call Series Contracts were suspended or rejected, the data input for those respective Contracts will be input by CSS during the Final Review step.

11A.08 Support Services Final Review (CSS)

CSS will receive an email from eBuilder as notification that an On-Call Contract Series has been submitted to the AG for approval. **No action is required by CSS at this time.** After one or more of the On-Call contracts has been processed through DocuSign and executed, the OLAPP – Paralegals will provide CSS with a copy of said contract(s).

Upon receipt of said contract(s), CSS should access the On-Call Contract Approval process by either clicking on the link provided in the email or by logging into eBuilder, selecting the “My Home” tab, and clicking on the link in the “Instance” column for the *Master On-Call project from the “My Processes” section.

After opening the On-Call Contract Approval process in eBuilder, select the “Comments” tab to note comments provided by previous actors in the process.

Select the “Documents” tab and upload copies of the executed On-Call Contracts.

Select the “Details” tab and follow the instructions provided under the section header “On-Call Contract Data” and provide data input for all of the remaining date fields, answer the “Document Uploaded?”, and provide the “CORE Contract No.” for each individual On-Call contract.

- * To edit the "Document Uploaded" field for any given On-Call Contract, go to the row of the subject vendor; then scroll over to the column for the subject field and click on the dropdown list within the field to select your response. To edit all other fields, click on the “ ” toggle under the respective column header to provide the necessary data input.

After entering the data for one or more On-Call Contracts, scroll down to the bottom of the page and select "Create OC" from the dropdown list and click the "Take Action" button to proceed to the “On-Call Contract Creation – Cost Integrated” process.

11A.09 On-Call Contract Creation – Cost Integrated (CSS)

CSS will receive an email from eBuilder as notification that one or more of the On-Call Contracts in the contract series has been executed and is ready to be set up as a Master Commitment.

To access the On-Call Contract Creation – Cost Integrated process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Process” column for the “Subject” - “On-Call ... Series” from the “My Processes” section.

<input type="checkbox"/>	Process	Subject	Step	In Step Since	Date Due	Status ▾	Requested Comment
<input type="checkbox"/>	OC - 23	On-Call Construction Administrator Minor Series	Finish	06.05.2023		Submitted	
<input type="checkbox"/>	OC - 27	On-Call Architect Series	Cost Integrated OC	06.30.2023		Submitted	




Upon opening the On-Call Contract Creation – Cost Integrated process, a warning prompt will appear. Select the “Click here” link in the prompt to proceed to the next step and create the Master Commitment.

On-Call Contract Approval (OC) - 27

Delete Instance

Workflow Override


All Fields View

 **Warning**
A draft On-Call Contract Creation - Cost Integrated has been automatically created. [Click here](#) to provide required Master Commitment information and submit the instance. x

In the section entitled “Master Commitment Overview” section, provide data input for the following fields:

1. Master Commitment Type: Select “On-Call Contract” from the dropdown list.
2. Company: Select the vendor from the dropdown list that is assigned to the On-Call Contract.
3. Contact: Select a contact for the subject company from the dropdown list.

In the section entitled “Add New Master Commitment Item” section, provide data input for the following fields:

1. Account Code: Click the “” toggle.

Select one of the following from the “Category” dropdown list:

- a. 10.0 – CA if the subject On-Call Contract is for CA, CA, or Cx services.
- b. 13.0 – Claims if the subject On-Call Contract is for ANLY or Audit services.
- c. 8.0 – A/E for all other On-Call Contract services.

Select one of the following from the “Code” dropdown list:

- a. 10.130 – CA if the subject On-Call Contract is for CA, CA, or Cx services.
- b. 13.130 – Claims if the subject On-Call Contract is for ANLY or Audit services.
- c. 8.130 – A/E for all other On-Call Contract services.

2. Amount: Input the Award amount for the subject On-Call Contract.

Complete the “Master Commitment Custom Fields” section in its entirety for each individual on-call contract that has been executed. Each individual on-call contract will be submitted separately.

Helpful Hints for completing the “Master Commitment Custom Fields” section

1. Return to the eBuilder webpage tab and select the “Processes” tab.
2. Select “*Master On-Call” from the “All Projects” dropdown list.
3. Click on the link under the “Subject” column header for the respective On-Call Contract Series. This will open the “On-Call Contract Creation – Cost Integrated” process page again. All of the subject On-Call Contract data for each individual On-Call contract will be visible under the “On-Call Contracts” section.

After entering the On-Call Contract data, scroll down to the bottom of the page and select "Submit" from the dropdown list and click the "Take Action" button.

Return to the “Processes” tab and click on the link for the subject On-Call Contract Series.



Answer the question “All Contracts Complete?” under the “On-Call Contract Series” section. Respond “No” to the question each time, until such time that all of the subject On-Call Contracts in the series have been executed and the data input has been completed for each contract.

Select “Complete” from the dropdown list next to the “Take Action” button and click “Take Action” each time an individual On-Call Contract is executed.

<input type="button" value="Accept"/>	<input type="button" value="Decline"/>	<input type="text" value="Complete"/>	<input type="button" value="Take Action"/>	<input type="button" value="Check Spelling"/>	<input type="button" value="Print"/>	<input type="button" value="Copy"/>	<input type="button" value="Delegate"/>	<input type="button" value="Save"/>
Process Document:	OCC - 45						Overall Due Date:	
	Show History Current Actors							
Current Workflow Step:	Support Services - Procurement Show Workflow Diagram						Step Due Date:	
* Subject:	<input type="text" value="On-Call Architect Series (OC - 27)"/>							
Status:	Submitted							

When prompted, insert the “Approval Date” and click “Yes, Approve”.

After all contracts have been executed and the data input for each individual contract has been completed, return to the “Processes” tab and click on the link in the “Instance” column for the *Master On-Call project one last time.

Answer the question “All Contracts Complete?” under the “On-Call Contract Series” section. Respond “Yes”, scroll down to the bottom of the page and select “Complete” from the dropdown list next to the “Take Action” button and click “Take Action” to complete the process.



Section 11B: Design Bid Build – DBB

11B.01 (Coming Soon)



Section 11C: Construction Manager at Risk – CMR

11C.01 (Coming Soon)



Section 11D: Design Bid Build – DBB

11D.01 (Coming Soon)



Section 12: 1165 HazMat Project Intake Request

12.01 Accessing the Process

Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>

On your homepage, Go to the “Processes” tab and select the “*HazMat Project Creation Project” from the “All Projects” dropdown list.

Project Name	Agency	Agency PM
24-XX-HAZ-05_Paff Test	DAS/CS	Matthew Pafford

Click the “Start Selected Process Type” button. The Type of Process should be listed as “1165 HazMat Project Intake Request (HAZ)”.

Processes For: *HazMat Project Creation Project

Filter Processes: **Start Selected Process Type** Start Process

Search In: Processes Initiated By Me Processes In My Court All Processes

Type of Process: **1165 HazMat Project Intake Request (HAZ)** Draft Open Finished

Status: All Statuses

Step Name: [Dropdown]

Containing Text: [Text Box]

12.02 Hazardous Materials Assistance Request (Agency PM)

Click the “Instructions” button at the top of the page for an overview of the Statewide Hazardous Abatement Program, general eBuilder instructions, and additional instructions for completing Form 1165.

1165 HazMat Project Intake Request (HAZ) **Instructions**

Start Process: Print Check Spelling Submit Save Draft Cancel

Project: *HazMat Project Creation Project

Process: 1165 HazMat Project Intake Request

* Subject: [Redacted]



Hazardous Materials Assistance Request - Form 1165

Please click on the "Instructions" button above for an overview of the Statewide Hazardous Abatement Program, general eBuilder instructions, and additional instructions for completing Form 1165.

In the "Subject" field above, input the name of the project for which you are applying to participate in the Statewide Hazardous Abatement Program, then provide the requested "Agency Information" below to initiate the Hazardous Materials Assistance Request. Upon completion, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and then click the "Take Action" button to proceed to the next step in the application process.

* Incomplete applications will not be accepted. If response is not applicable (N/A), or unknown (UNK), mark accordingly. Approved applications will be funded through the Statewide Hazardous Abatement Program.

Agency Information

* Agency: Board of Regents for Higher Education

* Agency PM: Please select...

* Agency PM - Email:

* Agency PM - Phone:

Print Check Spelling **Submit** Save Draft Cancel

- * If the name of the Agency PM is not listed in the dropdown list, please notify Craig Russell by email at craig.russell@ct.gov to have that individual added to the list and provide that individual with an eBuilder license, username, and password.

12.03 HazMat Project Information (Agency PM)

Return to the "Processes" tab and click on the link for the subject project in the "Subject" column.

ns **Processes** Documents Contacts Cost Schedule Reports ...

Unfinished Drafts | Import Processes

Processes For *HazMat Project Creation Project

Filter Processes Start Selected Process Type Start Process

Search In: Processes Initiated By Me Processes in My Court All Processes

Type of Process: 1165 HazMat Project Intake Request (HAZ) Draft Open Finished

Status: All Statuses

Step Name:

Containing Text:

Filter

Processes Reports (0)

Print Log

<input type="checkbox"/>	Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
<input type="checkbox"/>	HAZ - 21	HazMat Test Project	Agency Project Info	08.25.2023		Submitted	



Review the general instructions for and complete the sections entitled “Project Information” and “Emergency Use of HazMat Funds”.

Project Information

Provide information regarding the subject project below. Upon completion, scroll down to the bottom of the page and select “Submit” from the dropdown list next to the “Take Action” button and then click on the “Take Action” button to proceed to the next step in the application process.

* Project Building Name:	<input type="text"/>
* Project Address:	<input type="text"/>
* City:	<input type="text"/>
DAS/CS Building Number: <input type="checkbox"/>	<input type="text"/>
Room Number: <input type="checkbox"/>	<input type="text"/>
DAS Project Number:	If this project is part of a larger project for which a DAS Project Number was assigned, please provide the project number here. <input type="text"/>
* Project Description/HazMat SOW:	In 300 words or less, describe the project scope, including type of work (e.g. initial investigation/testing, abatement/remediation, abatement monitoring, other), type of hazmat(s), and location specifics. <input type="text"/>

Emergency Use of HazMat Funds

In limited instances, DAS/CS may authorize the use of HazMat Program funding in response to an emergency condition if the condition meets the criteria defined below or as approved at the discretion of the DAS Deputy Commissioner.

An emergency is defined as a condition which presents an immediate threat to the health and safety of any persons, and/or disrupts the normal operation of the agency (or portions thereof) and requires the commencement of hazmat services within a twenty-four (24) hour period.

* Emergency Use of Funds: <input type="checkbox"/>	<input type="text" value="-- Please select an option --"/>
--	--

- * Only answer “Yes” to the “**Emergency Use of Funds**” question if the subject project presents a condition that is an immediate threat to the health and safety of any persons, and/or disrupts the normal operation of the agency (or portions thereof) and requires the commencement of hazmat services within a twenty-four (24) hour period.

Upon completion, scroll down to the bottom of the page and select “Submit” from the dropdown list next to the “Take Action” button and click the “Take Action” button. If you answered “Yes” to the “Emergency Use of Funds” question, proceed to Section 12.04. If you answered “No”, proceed to Section 12.05.



12.04 HazMat Emergency Project (Agency PM)

If the response to the “Emergency Use of Funds” question was “Yes”, return to the “Processes” tab and click on the link for the subject project in the “Subject” column. The “Step” column should denote the subject project as “Agency Emergency Project”.

Click the “Instructions” button at the top of the page for an overview of the processing of emergency HazMat project requests.

Review the general instructions for and complete the sections entitled “Services Requested”, “Emergency Consultant/Contractor”, “Statement of Verification” and “Terms of Acceptance & Signature”.



To complete the “Emergency Consultant/Contractor” section, scroll down to subsection “Add New Item for Emergency Consultant/Contractor” and select the “Preferred Consultant/Contractor” from the dropdown list provided and provide the “Preferred Consultant/Contractor Quote”. Select “Other” from the dropdown list if your selected Consultant/Contractor is not formally listed. After providing the information for the first Consultant/Contractor, click the “Add” button and repeat this process if applicable.

Emergency Consultant/Contractor

Show Filter | Select All Row Height: 1X

Download Template Import Delete

This request to participate in the Statewide Hazardous Abatement Program is for an emergency project. Please click on the "Instructions" button above for additional detail regarding the processing of emergency HazMat project requests.

After reviewing the instructions, please provide the name of the Consultant(s)/Contractor(s) selected to perform the work in the "Preferred Consultant/Contractor" space below and, if available at the time of submission, the estimated fee for the work to be performed. After providing the information for the first "Preferred Consultant/Contractor", click the "Add" button. Repeat this process for each "Preferred Consultant/Contractor".

#	Preferred Consultant/Contractor	Preferred Consultant/Contractor Quote
Grand Totals (0 items)		0.00

Add New Item for Emergency Consultant/Contractor

* Preferred Consultant/Contractor

* Preferred Consultant/Contractor Quote

Clear Add

If “Other” was selected from the “Preferred Consultant/Contractor” dropdown list, then provide the name of the Consultant/Contractor and the proposed fee in the “Other Consultant/Contractor” section.

Other Consultant/Contractor

If the Consultant/Contractor is not listed in the "Preferred Consultant Contractor" list above, please provide the name of the Consultant and/or Contractor and the proposed fee in the space provided below.

Other Consultant/Contractor:

Other Consultant/Contractor Fee:

After adding the Emergency Consultant/Contractor, answer the “Estimated Fee Known” question by selecting “Yes” or “No” from the dropdown list.

Estimated Fee Known?:

- Answer “Yes” if the estimated fee is known for all "Preferred Consultant/Contractor"(s).
- Answer “No” if the estimated fee is unknown for either the Consultant or Contractor and leave the "Preferred Consultant/Contractor Quote" field blank.
- * Please note that if no fee was provided at the time of submission, you will have 24 hours after the work has started to acquire a rough estimate from the Consultant and/or Contractor for the services that are to be provided. sufficient time to assess and gain a better understanding of the emergency project, so that a rough estimate can be provided.



After responding the "Estimated Fee Known?" question, complete the sections entitled "Statement of Verification" and "Terms of Acceptance and Signature".

Upon completion of all sections, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click the "Take Action" button.

The Client Agency may begin work immediately after notifying DAS/CS of the emergency project through the submission of Form 1165. Pre-approval is not required to initiate the work on an emergency project.

If the client agency answered "No" to the "Estimated Fee Known?" question, then the client agency will receive an email notification through eBuilder that action is required by the client agency to complete the application.

To access the application, the client agency can either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the "*HazMat Project Creation Project" from the "My Processes" section. The "Step" column should read "Emergency Fee".

ACTION REQ'D - *HazMat Project Creation Project - HazMat Test Project



Craig Russell via e-Builder <bounces@e-builder.net>
To Russell, Craig



Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures.

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*HazMat Project Creation Project

Process instance is in your court. To view details or take action, [click here.](#)

Process Details	
Project	*HazMat Project Creation Project
Process	HAZ - 21
Subject	HazMat Test Project
Step	Emergency Fee

- My Home**
- Projects
- Forms
- Processes
- Documents
- Contacts
- Cost
- Schedule



Welcome, Craig!

All pr

My Processes

Project	Instance	Subject	Step
*Becky Test Project	6010 - 12	6010 Bid Release Form for BI-RCTEST-999	03 - ADPM: Approve Bid Release Form
*BI-CS-1005 - DAS Test 5	TL-T - 3	*BI-CS-1005 - On-Call Architect Request	PM Prepare Task Letter Package
*HazMat Project Creation Project	HAZ - 21	HazMat Test Project	Emergency Fee

Announcements



To add the rough estimate, click on the "✎" icon in the column entitled "Preferred Consultant/Contractor Quote", next to the name of the respective Consultant/Contractor, and input the estimated fee. Repeat this action for each Consultant/Contractor.

Emergency Consultant/Contractor

Show Filter | Select All Row Height: 1X

Download Template Import Delete

For the subject emergency project, the client agency answered "No" to the "Estimated Fee Known?" question and as such are required to provide a rough estimate for the proposed Consultant and/or Contractor services within 24 hours after the work has started. This will allow the Consultant and/or Contractor the opportunity to assess and gain an understanding of the emergency scope of work in order to provide a rough estimate. DAS/CS understands that the rough estimate is subject to change.

To add/edit the estimate, click on the "✎" icon in the column entitled "Preferred Consultant/Contractor Quote" next to the name of the respective Consultant/Contractor and input the estimated fee.

Repeat this action for each Consultant/Contractor. Upon completion, scroll down to the bottom of the page and click the "Take Action" button.

	#	Preferred Consultant/Contractor	Preferred Consultant/Contractor Quote
Delete	1	ATC/Atias	0.00 ✎
Delete	2	Bestech	0.00 ✎

Upon completion, scroll down to the bottom of the page and click the "Take Action" button to submit the application to the DAS Supervising Environmental Analyst for review and for sign off on the application.

After the application has been signed and executed, the client agency will receive an email notification from eBuilder with a copy of the executed Form 1165.

FYI - *HazMat Project Creation Project - Paff Test 05

EN e-Builder Network Notification <bounces@e-builder.net>
To Russell, Craig

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures.

HAZ-00015 - Paff Test 05.pdf
.pdf File

EXTERNAL EMAIL: This email originated from outside of the organization. Do not click any links or open any attachments unless you are sure the content is safe.

*HazMat Project Creation Project

The mail merge for the following process is attached. To view process details, click here.

At the conclusion of the emergency project, the consultant/contractor shall provide an itemized invoice for time and materials for services performed, and payment will be made in accordance with the approved rates in the appropriate state contracts. DAS/CS reserves the right to reject payment at the discretion of the DAS Chief Architect.

This concludes the HazMat Application process for emergency projects for the client agency in eBuilder.



12.05 HazMat Services Requested (Agency PM)

If the response to the “Emergency Use of Funds” question was “No”, return to the “Processes” tab and click on the link for the subject project in the “Subject” column. The “Step” column should denote the subject project as “Agency HazMat Service Request”.

Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
HAZ - 8	HazMat Test Project 8	Agency HazMat Services Request	07.20.2023		Submitted	

Review the General Instructions for and complete the sections entitled “Services Requested”, “Environmental Consultant Services”, “Abatement Contractor Services”, “Other Consultant/Contractor” - if applicable, “Preferred Consultant/Contractor”, “Service Justification” if applicable, “Work Plans & Cost Estimates”, and “Terms of Acceptance & Signature”.

To complete the “Environmental Consultant Services” and “Abatement Contractor Services” sections, scroll down to the subsection entitled “Add New Item for...” in those respective sections and select one of the “Environmental Consultants” and/or “Abatement Contractors” solicited from the dropdown list and input the “Environmental Services Quote” and/or “Abatement Contractor Quote”. Click the “Add” button and repeat this process for all Consultants/Contractors solicited.

#	Environmental Consultant	Environmental Services Quote
Delete	TRC	50,000
Delete	ATC/Atlas	51,000
Delete	Fuss & O'Neill	52,000

Grand Totals (3 Items) Min: 50,000

Add New Item for Environmental Consultant Services

Environmental Consultant: Please select...
 Environmental Services Quote:
 Clear Add



Abatement Contractor Services

Show Filter | Select All Row Height: 1X

Download Template Import Delete

Select the Contractor name and provide the dollar value for all estimates received. After providing the name and cost estimate for the first Contractor, click the "Add" button and repeat for each Contractor proposal solicited. Click the "Instructions" button at the top of the page for detail on the number of estimates required for approval.

	#	Abatement Contractor	Abatement Contractor Quote
Delete		Omni	100,000.00
Delete		Bestech	101,000.00
Delete		Haz-Pros	102,000.00
Grand Totals (3 items)			Min: 100,000.00

Add New Item for Abatement Contractor Services

Abatement Contractor

Abatement Contractor Quote

Clear Add

If the Consultant and or Contractor is not in the respective dropdown list, select "Other" from the respective proposal dropdown list and provide the name of said Consultant/Contractor and their proposed fee in the "Other Consultant/Contractor" section.

Other Consultant/Contractor

If the Consultant/Contractor listed above is "Other", please provide the name of the Consultant and/or Contractor in the space provided below.

Other Consultant/Contractor:

Complete the same steps noted above for the "Preferred Consultant/Contractor" section, adding only the "Preferred Consultant/Contractor" and their respective quotes.

Preferred Consultant/Contractor

Show Filter | Select All Row Height: 1X

Download Template Import Delete

Select the Consultant and/or Contractor name and provide the dollar value of the low-bid/preferred bidder in the space provided.

	#	Preferred Consultant/Contractor	Preferred Consultant/Contractor Quote
Delete	1	TRC	50,000.00
Delete	2	Omni	100,000.00
Grand Totals (2 items)			Sum: 150,000.00

Add New Item for Preferred Consultant/Contractor

* Preferred Consultant/Contractor

* Preferred Consultant/Contractor Quote

Clear Add

If the "Preferred Consultant/Contractor" is not the low bid, complete the "Service Justification" section.

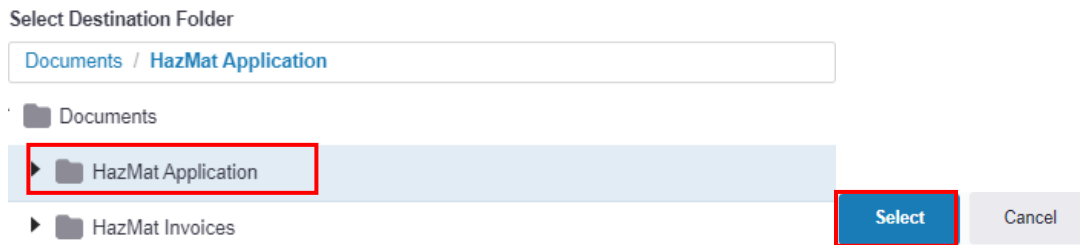
Review the instructions and complete the "Work Plans & Cost Estimates" section. After reviewing the instructions, click on the "Documents" tab, and then click the "Attach Documents" button.

- Details
- Comments (5)
- Documents (4)**
- Attached Processes (0)
- Attached Forms (0)
- Attached To (0)

Attach Documents



Once prompted, select “Upload from your Computer”, click “HazMat Application” as the destination folder and press the “Select” button.



Upload the required documents into the space provided. Please note that the upload process may be delayed.

Upon completion of the upload, click on the “Details” tab to return to the application. Scroll down to the end of the application and complete the section entitled “Terms of Acceptance and Signature”.

Upon completion of all sections, select “Submit” from the dropdown list next to the “Take Action” button at the bottom of the page, and click the “Take Action” button.

After the Supervising Environmental Analyst reviews the application for approval, the client agency will receive an email notification through eBuilder that either the application will need to be revised to be considered for approval, or the request has been approved and assigned.

To access the application after the Environmental Analyst has completed his review, the client agency can either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “Agency Project Info”.

*HazMat Project Creation Project

Process instance is in your court. To view details or take action, [click here.](#)



Welcome, Craig!

All pr

My Processes

Project	Instance	Subject	Step
*Becky Test Project	6010 - 12	6010 Bid Release Form for BI-RCTEST-999	03 - ADPM: Approve Bid Release Form
*BI-CS-1005 - DAS Test 5	TL-T - 3	*BI-CS-1005 - On-Call Architect Request	PM Prepare Task Letter Package
*HazMat Project Creation Project	HAZ - 21	HazMat Test Project	Emergency Fee

Announcem ...
ents



After opening the application in eBuilder, scroll down to the bottom of the page and review the section entitled “Consultant/Contractor Approval and Assignment”.

Consultant/Contractor Approval & Assignment

FOR DAS USE ONLY

Environmental Consultant Request:	Rejected
Approved Environmental Consultant:	ATC/Atlas
Environmental CORE No.:	19PSX0120AB - ATLAS (ATC)
Approved Environmental Consultant Fee:	0.00
Abatement Contractor Request:	Rejected
Approved Abatement Contractor:	Bestech
Abatement CORE No.:	20PSX0154AB - BESTECH
Approved Abatement Contractor Fee:	0.00
Assignment Comments:	Please provide the required number of quotes and resubmit.
Request Reviewed by:	Supervising Environmental Analyst
Date of Review:	08.17.2023

Submit [v] **Take Action** Check Spelling Print Copy Delegate Save Cancel

If the application was rejected, the field entitled “Assignment Comments” will provide the reason for rejection and instructions for corrective action, if applicable.

After reviewing the “Assignment Comments”, revise the application in accordance with the comments. Upon completion, scroll down to the bottom of the page and click the “Take Action” button to resubmit your application.

If the application was approved, follow the same process noted above to access the application. After opening the application in eBuilder, scroll down to the bottom of the page to the section entitled “Consultant/Contractor Approval and Assignment” and review the field entitled “Assignment Comments”. This will serve as the notification to the client agency and the assigned consultant/contractor that the application has been approved and the Supervising Environmental Analyst will follow up with the respective parties to schedule a scope review meeting.

The process is similar for the recommendation of the Notice to Proceed.

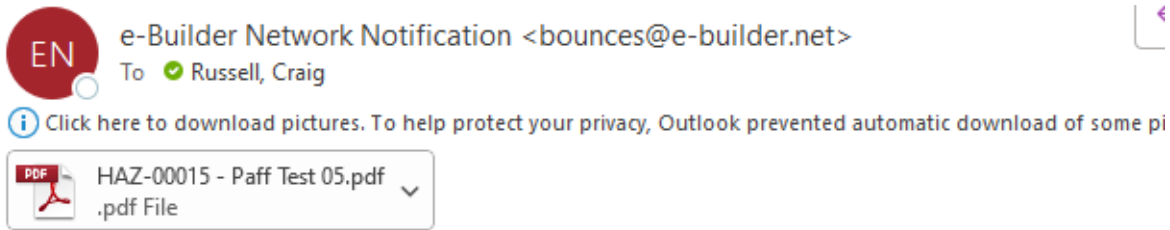
After the Supervising Environmental Analyst provides a recommendation for the Notice to Proceed, the client agency will receive an email notification through eBuilder that either the application has been submitted to the DAS Authorized Authority for signature or that the application will need to be revised before it can be considered for recommendation.

If the application is rejected, the client agency should access the application by either clicking on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “Agency Project Info” (see sample diagrams above for illustrations regarding accessing the application). After opening the application in eBuilder, scroll down to the bottom of the page and review the section entitled “Notice to Proceed Recommendation” and refer to the field entitled “Notice to Proceed Comments” for an explanation of rejection and instructions for corrective action, if applicable.



After reviewing the “Notice to Proceed Comments”, revise the application in accordance with the comments. Upon completion, scroll down to the bottom of the page and click the “Take Action” button to resubmit your application.

If the application is recommended for a Notice to Proceed, the application will be forwarded to the DAS Authorized Authority to sign-off on the project. After the application has been signed and executed, the client agency will receive an email notification from eBuilder with a copy of the executed Form 1165.



EXTERNAL EMAIL: This email originated from outside of the organization. Do not click any links or open any attachments unless you are expecting them. This content is safe.

This concludes the HazMat Application process for the client agency in eBuilder.



12.06 DAS Approval & Assignment (Environmental Analyst – DAS Only)

The Environmental Analyst will receive an email from eBuilder as notification that the HazMat Assistance Request has been submitted for DAS Approval and Assignment.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “DAS Approval & Assignment”.

*HazMat Project Creation Project

Submit action was taken on Agency HazMat Services Request step. To view details on this item, [click here.](#)

Process Details	
Project	*HazMat Project Creation Project
Process	HAZ - 8
Subject	HazMat Test Project 8
Step	DAS Approval & Assignment

My Home Projects Forms Processes Documents Contacts Cost Schedule

Welcome, Craig!

My Processes

Project	Instance	Subject	Step
*Becky Test Project	6010 - 12	6010 Bid Release Form for BI-RCTEST-999	03 - ADPM: Approve Bid Release Form
*BI-CS-1005 - DAS Test 5	TL-T - 3	*BI-CS-1005 - On-Call Architect Request	PM Prepare Task Letter Package
*HazMat Project Creation Project	HAZ - 21	HazMat Test Project	Emergency Fee

Review the application submission under the “Details” tab. To review any comments provided on the application submission, click on the “Comments” tab. To review any supporting documents submitted with the application, click on the “Documents” tab.

Project:	*HazMat Project Creation Project
Process Document:	HAZ - 8 Show History Current Actors
Current Workflow Step:	DAS Project Authorization Show Workflow Diagram
* Subject:	<input type="text" value="HazMat Test Project 8"/>
Status:	Submitted

[Details](#) [Comments \(2\)](#) [Documents \(2\)](#) [Attached Processes \(0\)](#) [Attached Forms \(0\)](#) [Attac](#)



After reviewing the application submission, scroll down to the sections entitled “Consultant/Contractor Approval & Assignment” and “Project Status Summary”, review the general instructions for and complete those sections.

Consultant/Contractor Approval & Assignment

Complete the Consultant/Contractor Approval & Assignment section below.

Environmental Consultant Request:	-- Please select an option --
Approved Environmental Consultant:	-- Please select an option --
Environmental CORE No.:	-- Please select an option --
Approved Environmental Consultant Fee:	
Abatement Contractor Request:	-- Please select an option --
Approved Abatement Contractor:	-- Please select an option --
Abatement CORE No.:	-- Please select an option --
Approved Abatement Contractor Fee:	
Reason for Consultant/Contractor Approval/Rejection:	
* Request Reviewed by:	-- Please select an option --
Date of Review:	07.20.2023

Project Status Summary

Complete the Project Status Summary section below, if applicable. Once complete, scroll down to the bottom of the page and either select “Approve”, “Reject”, or “Void” from the dropdown list next to the “Take Action” button and click on the “Take Action” button. After clicking the “Take Action” button, you will be prompted to provide a comment, where you can provide additional detail regarding the reason for approval or rejection, if applicable, and you can select additional users (i.e. approved Consultant/Contractor) to allow access to the submitted Form 1165 for review and comment.

Project Status Summary:	Provide notes on the status of the project application and/or status of the project as applicable.
-------------------------	--

-- Please select an action -- | **Take Action** | Check Spelling | Forward | Print | Copy | Save | Cancel

Upon completion of all sections, scroll down to the bottom of the page and select either “Approve”, “Reject”, or “Void” from the dropdown list next to the “Take Action” button and click the “Take Action” button.

If “Approve” was selected, you will be prompted to “Add users for review and comment”, which will allow access to the submitted Form 1165 to those selected users for review and comment. Select the approved consultant/contractor from the list of “Available Users” to grant them access to review the application and receive notification that a scope review meeting is to be scheduled.

Add users to review and comment

<p>Available Users</p> <ul style="list-style-type: none"> Asselin, Mathieu (Department of Emergency Services and Public Protection) Bantz, Marilyn (Department of Administrative Services) Beermann, Ahmed (Connecticut State Colleges and Universities) Burke, Stephen (Connecticut State Colleges and Universities) Calvi, Frank (Connecticut State Library) Caminero, Ervin (CT Military Department) 	<p>Selected Users</p>
<p>Check Spelling Approve Cancel</p>	



If “Reject” was selected, Form 1165 will be returned to the client agency for revision, if applicable.

12.07 Emergency Assignment/NTP (Environmental Analyst – DAS Only)

The Environmental Analyst will receive an email from eBuilder as notification that an Emergency HazMat Assistance Request has been submitted for DAS Review and Processing.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “Emergency Assignment/NTP”. Please refer to the diagrams in Section 12.0.6 DAS Approval & Assignment for a visual representation on accessing the process.

Review the general instructions and complete the “Emergency Assignment”, “Notice to Proceed Recommendation”, and “Project Status Summary” sections.

When completing the “Emergency Assignment” section (*see diagram on the next page*):

- a) Select “Emergency” from the dropdown list for the fields entitled “Environmental Consultant Request” and “Abatement Contractor Request”;
- b) Input the names and quotes provided by the client agency from the “Preferred Consultant/Contractor” section into the respective “Approved” consultant, contractor and fee fields.
- c) The “Project Name” field should consist of the following: “HazMat Project Number – HazMat Project Name” as listed under “Subject” at the top of the page, i.e. 24-CSCU-HAZ-01 - HazMat Test Project 8.
- d) Select Craig Russell as the “eBuilder Project Administrator”.

Select Matthew Pafford as the “Project Manager” of the HazMat Program.

Emergency Assignment

Complete the Emergency Assignment section below. If the Consultant and/or Contractor fee is unknown at the time of submission, input a dollar value of 0 and make a note in the Notice to Proceed Recommendation - Recommendation Comments that the fees are to be determined.

Environmental Consultant Request:	-- Please select an option --
Environmental CORE No.:	-- Please select an option --
Approved Environmental Consultant:	-- Please select an option --
Approved Environmental Consultant Fee:	
Abatement Contractor Request:	-- Please select an option --
Approved Abatement Contractor:	-- Please select an option --
Abatement CORE No.:	-- Please select an option --
Approved Abatement Contractor Fee:	
* HazMat Project Number:	
* Project Name:	
* e-Builder Project Administrator:	Please select...



When completing the “Project Status Summary” section, select “Active” from the dropdown list for “Project Status”.

Project Status Summary

Complete the Project Status Summary section below, if applicable. Upon completion, scroll down to the bottom of the page and either select “Approve”, “Reject”, or “Void” from the dropdown list next to the “Take Action” button and click on the “Take Action” button. Once you have clicked the “Take Action” button, you will be prompted to provide a comment, where you can provide additional detail regarding your recommendation, if applicable. You will also be prompted to add an “Actor” to the next step for project authorization. Select either the DC or Chief Architect and click the “Recommend” button.

* Project Status: **Active**

Project Status Summary: Provide notes on the status of the project application and/or status of the project as applicable.

N/A

Upon completion of all sections, scroll down to the bottom of the page and select “Recommend” from the dropdown list next to the “Take Action” button and click the “Take Action” button.

After clicking the “Take Action” button, you will be prompted to “Add actors to the next step”, which will direct the application to the Authorized Authority to sign off on the approval of the application; and to “Add users to review and comment”, which will allow selected users access to the submitted Form 1165 for review and comment.

To add an actor to act as the Authorized Signatory, select the individual’s name from the list of “Available Users” for which you wish to sign off on the application, then click on the “>” to move that individual into “Selected Users”.

Add actors to the next step

Available Users		Selected Users
Barkin, David (Department of Administrative Services - Construction Services)	<input type="button" value=">"/>	Russell, Craig (Department of Administrative Services - Construction Services)
Hobbs, Darren (Department of Administrative Services - Office of Regulatory Compliz)	<input type="button" value="<"/>	
Pafford, Matthew (Department of Administrative Services - Construction Services)	<input type="button" value="<"/>	

Repeat this process to “Add users for review and comment”. Select the “Approved” Consultant and/or Contractor from the list of “Available Users” so that they can receive notification that the application is being processed and to allow them access to the application for review and comment. After adding the actors and users, click the “Recommend” button. Proceed to Section 12.10 Form 1165 Executed.

12.08 Scope Review/NTP Recommendation/Project Assignment (EA – DAS Only)

The “Scope Review/NTP/Project Assignment” step should not be completed until after the scope review meeting has been scheduled and completed.

After the scope review meeting, the Environmental Analyst can access the project process by either clicking on the link provided in the aforementioned email or by logging into eBuilder, selecting the “My Home” tab and clicking on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “Scope Review/NTP/Project Assignment”. Please refer to the diagrams in Section 12.06 DAS Approval & Assignment for a visual representation on accessing the process.



Review the general instructions and complete the “Scope Review”, “Consultant/Contractor Approval & Assignment”, “Notice to Proceed Recommendation”, “Project Assignment”, and “Project Status Summary” sections.

- * When completing the “Project Assignment” section, the “Project Name” should consist of the following: “HazMat Project Number – HazMat Project Name” as listed under “Subject” at the top of the page, i.e. 24-CSCU-HAZ-01 - HazMat Test Project 8. Select Craig Russell as the “eBuilder Project Administrator”. Select Matthew Pafford as the “Project Manager” of the HazMat Program.

Project Assignment

Assign a HazMat Project Number in the space provided.

HazMat Project Number:	24-CSCU-HAZ-01
* Project Name:	24-CSCU-HAZ-01 - HazMat Test Project 8
* e-Builder Project Administrator:	Please select...

- * When completing the “Project Status Summary” section, select “Active” from the dropdown list for “Project Status”.

* Project Status: Active

If “Recommend” was selected, you will be prompted to “Add actors to the next step”, which will direct the application to the Authorized Authority to sign off on the approval of the application.

To add a user, select the individuals name from the list of “Available Users” for which you wish to sign off on the application, then click on the “>” to move that individual into “Selected Users” and click the “Recommend” button.

Add actors to the next step

Available Users		Selected Users
Barkin, David (Department of Administrative Services - Construction Services)	>	Russell, Craig (Department of Administrative Services - Construction Services)
Hobbs, Darren (Department of Administrative Services - Office of Regulatory Compliance)	>	
Pafford, Matthew (Department of Administrative Services - Construction Services)	>	

Check Spelling **Recommend** Cancel

If “Reject” was selected, Form 1165 will be returned to the client agency for revision, if applicable.

12.09 Project Authorization (Chief Architect/Deputy Commissioner – DAS Only)

Either the Chief Architect or the Deputy Commissioner will receive an email from eBuilder as notification that the HazMat Assistance Request has been submitted for Project Authorization.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section.

*HazMat Project Creation Project

Submit action was taken on Agency HazMat Services Request step. To view details on this item, [click here.](#)



My Home Projects Forms Processes Documents Contacts Cost Schedule

Welcome, Craig! All pr

My Processes

Project	Instance	Subject	Step
*Becky Test Project	6010 - 12	6010 Bid Release Form for BI-RCTEST-999	03 - ADPM: Approve Bid Release Form
*BI-CS-1005 - DAS Test 5	TL-T - 3	*BI-CS-1005 - On-Call Architect Request	PM Prepare Task Letter Package
*HazMat Project Creation Project	HAZ - 21	HazMat Test Project	Emergency Fee

Announcem ...
ents

Review the application submission under the “Details” tab. To review any comments provided on the application submission, click on the “Comments” tab. To review any supporting documents submitted with the application, click on the “Documents” tab.

Project:	*HazMat Project Creation Project
Process Document:	HAZ - 8 Show History Current Actors
Current Workflow Step:	DAS Project Authorization Show Workflow Diagram
* Subject:	<input type="text" value="HazMat Test Project 8"/>
Status:	Submitted

Details Comments (2) Documents (2) Attached Processes (0) Attached Forms (0) Attac

To review comments specific to the “Recommendation for Notice Proceed”, scroll down to the section entitled “Notice to Proceed Recommendation” and refer to the field entitled “Notice to Proceed Comments”.

Notice to Proceed Recommendation

Complete the Notice to Proceed Recommendation and Project Assignment sections.

* Recommend Notice to Proceed:	<input type="text" value="-- Please select an option --"/>
Expected Deliverables:	<p>If applicable, select one or more deliverables from the list below.</p> <ul style="list-style-type: none"> Survey Report Compliance Report Other <p>Note: Please hold Ctrl to select multiple items from the list.</p> <p>If "Other" was selected from the list of expected deliverables, please provide a listing of said deliverables below.</p> <input type="text"/>
Other Deliverables:	
Notice to Proceed Comments:	<div style="border: 2px solid red; height: 50px;"></div>



After completing your review of the application submission, scroll down to the section entitled “Project Authorization”, review the general instructions for and complete that section.

Project Authorization

Sign in the space provided for project authorization. Upon completion, scroll down to the bottom of the page and either select “Approve” or “Reject” from the dropdown list next to the “Take Action” button and then click the “Take Action”. If “Rejected”, you will be prompted to provide a comment to explain the reason for rejection.

Project Authorization:

Authorization Date:

Upon completion of all sections, scroll down to the bottom of the page and select either “Approve” or “Reject” from the dropdown list next to the “Take Action” button and click the “Take Action” button.

If "Reject" was selected, you will be prompted to provide a comment to explain the reason for rejection and to provide guidance for corrective action. After providing the comment, click the “Reject” button.

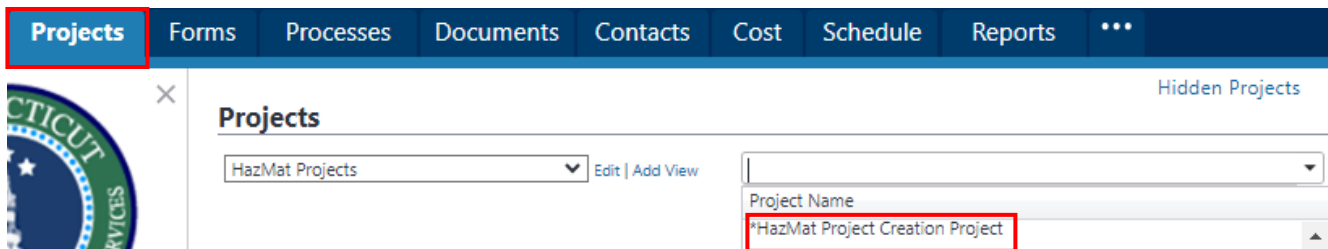
Add Comment

Private

If "Approve" was selected, the application will be finalized, and an email will be distributed through eBuilder to the client agency that includes a copy of the executed Form 1165. The executed Form 1165 will also be uploaded to the eBuilder the subject project “HazMat Application” project file folder.

12.10 Project Files (Environmental Analyst – DAS Only)

To access the newly created HazMat Project/HazMat Application file folder, go to the “Projects” tab and select the name of the newly created project from the dropdown list, i.e. 24-CSCU-Hazmat-900 – HazMat Test Project.





Next, select “Documents” from the “Project Menu” on the lefthand side of your screen. After selecting “Documents”, click on the “HazMat Application” file folder to access the newly executed Form 1165 and any other documents that were uploaded as part of the HazMat Project Intake Process.

Project Menu

- Details
 - Apply Templates
 - Project Participants
 - Manage Bill Rates
 - Manage Form Types
 - Manage Permissions
 - Permissions By User
 - Process Notification
 - Settings
 - Sent Items
 - Project Level
 - Options
- Planning
- Forms
- Issues
- Processes
- Documents**

Documents For: *HazMat Project Creation Project

Folders: Documents \ HazMat Application

Expand All | Collapse All | Refresh All

Upload | Properties | Create Folder | Subscriptions | Copy To Clipboard

Name
HAZ-00031 - HazMat Test Project.pdf (version 1)

Download (124.1KB) | Redline | Stamp | Compare With | Send

If Work Plans and/or Cost Estimates were not uploaded as part of the 1165 Project Intake Process, you should upload them to the “HazMat Application” file folder upon receipt. To upload files, click the “browse” link to open the “Upload” prompt and then either drag and drop the files in the space provided, or click “Browse” to open the file structure on your computer so that you can search for the respective file that you want to upload.

Folders: Documents \ HazMat Application

Expand All | Collapse All | Refresh All

Upload | Properties | Create Folder | Subscriptions | Copy To Clipboard: Private URL - Email Address

Name	Date Uploaded	Uploaded By
------	---------------	-------------

Drag and drop files here to upload, or **browse**.



Drag your files or Browse

Note that the upload of files may be delayed. The prompt will note when the upload is complete. Upon completion, click “Done”. This concludes the HazMat Project Intake process.



Section 13: HazMat Commitment

13.01 Accessing the Process

Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>

On your homepage, Go to the “Processes” tab and select the hazmat project number for the project for which you want to make against from the “All Projects” dropdown list.

The screenshot shows the 'Processes' tab selected in a navigation bar. Below the navigation bar, there is a search bar and a dropdown menu. The dropdown menu is open, displaying a list of project names. The project name '24-CSCU-HAZ-900 - HazMat Test Project' is highlighted in red.

Click the “Start Process” button and select the “HazMat Commitment” link.

The screenshot shows the 'Processes For' dropdown menu with '24-CSCU-HAZ-900 - HazMat Test Project' selected. To the right of the dropdown is a 'Start Process' button, which is highlighted in red.

13.02 HazMat Commitment

Read the “General Instructions”, fill in the “Subject” field in accordance with the instructions and click the “Submit” button.

After clicking “Submit”, you will be returned to the “Processes” tab. Click on the link to the project listed in the “Subject” column.

<input type="checkbox"/>	Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
<input type="checkbox"/>	HC - 4	24-CSCU-HAZ-900 - Environmental & Abatement	Finish	10.02.2023		Submitted	
<input type="checkbox"/>	HC - 5	24-CSCU-HAZ-900 - Environmental & Abatement	HazMat Consultant / Contractor	10.04.2023		Submitted	



Read the “General Instructions”, revise the Consultant/Contractor Information, if applicable, and click the “Take Action” button.

After clicking “Take Action”, you will be returned to the “Processes” tab. Click on the link to the project listed in the “Subject” column again to spawn the cost integration for the commitment process.

13.03 HazMat Cost Integration

When spawning the commitment process, you will receive a “Warning” notification. Click on the link within the warning notification to access the cost integrated process where you can enter the commitment details for the subject HazMat project.

HazMat Commitment (HC) - 5

Delete Instance Workflow Override All Fields View

Warning
 A draft HazMat Cost Integrated has been automatically created. [Click here](#) to provide required Commitment information and submit the instance.

Begin the HazMat Cost Integrated process by completing the “Commitment Details” section. Under “Commitment Details”, go to the “Master Commitment” field and select the Master Commitment Contract, from the dropdown list, for either the “Approved Environmental Consultant” or “Approved Abatement Contractor” listed under the Consultant/Contractor Information section.

- * This process will be repeated at a later stage if there are multiple Consultant / Contractor(s) listed within the Consultant/Contractor Information section.

Consultant/Contractor Information

Approved Environmental Consultant:	Langan Engineerng and Environmental	Approved Environmental Consultant Fee:	50,000
Approved Abatement Contractor:	New England Yankee	Approved Abatement Contractor Fee:	101,000

Commitment Details

Status:	Draft		
Master Commitment:	Please select a master commitm		
* Commitment Type:	Master Commitment Number	Company	Description
* Commitment Control:			Current Contract Value
* Company:			Jump Sum Amount
Contact:			

DASX2B501	ARCADIS US INC	HazMat CA	75,000.00
DASX2B829	LANGAN ENGINEERING	Environmental Consultant	718.12

After selecting the Master Commitment Contract, all of the remaining fields in the “Commitment Details” section will infill automatically, but for the “Contact” field for the company. You may leave this field blank, or you may select a contact from the dropdown list. Please note that the contact is specific to the contract, not to the project.

After completing the “Commitment Details” section, scroll down to the “Commitment Custom Fields” section and input the “CORE Contract No.” for the subject Consultant/Contractor and the “PO Number” assigned to the CORE Contract.

Commitment Custom Fields

Primary Construction Contract On Project?:	No
Type of OC Consultant:	Please select...
CORE Contract No.:	
PO Number:	0000000000



Then, scroll down to the “Add New Commitment Item” section. Click on the link in the “Master Commitment Item” field and then click on the “Item Number” link under “Master Commitment Items”.

Next, input the dollar amount of the approved fee for the subject Consultant/Contractor in the “Amount” field and click the “Add” button. Upon completion, scroll down to the bottom of the page and click the “Submit” button.

Add New Commitment Item

Item Number	001
Master Commitment Item	Please Select a Master Commitment Item
Budget Line Item	Please Select a Line Item
Current Budget	
Description	
Retainage Percent	0.00
Amount	0.00
Allowance Item?	<input type="checkbox"/>
Custom Fields	

Add

After clicking “Submit”, you will be returned to the “Processes” tab. First, click on the “Reset filters” link.

Processes For 24-CSCU-HAZ-900 - HazMat Test Project

Start Selected Process Type Start Process

Filter by...

In My Court Process: HazMat Cost ... Status All filters 1 **Reset filters**

Then, click on the project link in the “Subject” column to return to the HazMat Commitment Process (The “Step” column should read “Commitments Complete?”).

Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
HC - 7	24-CSCU-HAZ-900 - Environmental & Abatement	Commitments Complete?	10.05.2023		Approved	

Read the HazMat Commitment(s) instructions, answer the “All Commitments Entered” question and click the “Take Action” button.

HazMat Commitment(s)

Answer the question below. **Only answer “Yes” to this question if all commitments for this project have been entered. This process cannot be undone.**

* All Commitments Entered?: -- Please select an option --

Submit Take Action Check Spelling Print Copy Delegate

If you answered “No” to the question, you will be returned to the “Processes” tab. Click on the project link under the “Subject” column to spawn the commitment process again (The “Step” column should read “Spawn Commitment”) . Repeat Step 13.02 until all commitments have been entered.

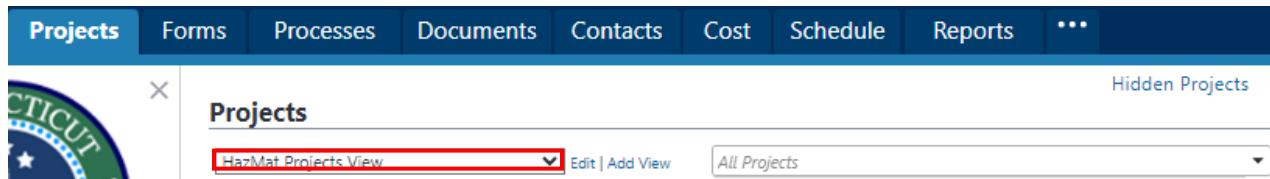
Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
HC - 7	24-CSCU-HAZ-900 - Environmental & Abatement	Spawn Commitment	10.05.2023		Approved	



If you answered “Yes” to the question, the commitment process will be completed. The commitment status will be marked as “Pending”, so that the line item can be adjusted if necessary. The commitment status will need to be “Approved”, prior to payment.

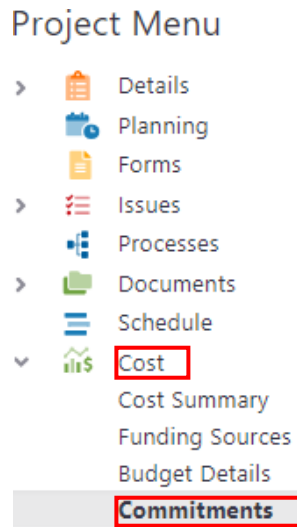
13.04 Edit or Approve a HazMat Commitment

Click on the “Projects” tab and select “HazMat Projects View” from the View dropdown list.



Click on the link in the “Project Name” column to access the HazMat Project Details page.

After opening the HazMat Project Details page, select “Cost” from the “Project Menu” and then select “Commitments” under the Cost dropdown list. This will open the Commitments display page, which will show all commitments related to that project.



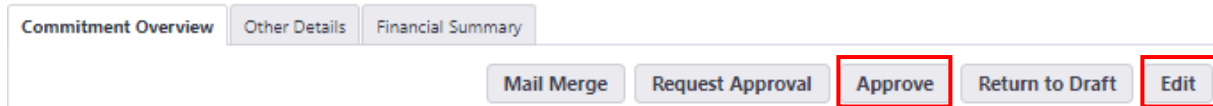
Click on the link in the “Description” column to access the “Commitment Details” page for the line item commitment you wish to edit or approve.

Show: All		All Commitments		Go	Show All	Show Filter	Export	Mail Merge	Add
<input type="checkbox"/>	#	Description	Company	Date	Status	Commitment Type	Commitment Amount	Current Commitment	Projected Commitment
<input type="checkbox"/>	HCI - 00009	24-CSCU-HAZ-900 - Environmental & Abatement (HC - 7)	LANGAN ENGINEERING AND ENVIRONMENTAL	10.05.2023	Pending	HazMat Program	50,000.00		50,000.00
<input type="checkbox"/>	HCI - 00010	24-CSCU-HAZ-900 - Environmental & Abatement (HC - 7)	NEW ENGLAND YANKEE CONSTRUCTION LLC	10.05.2023	Pending	HazMat Program	100,000.00		100,000.00



After opening the “Commitment Details” page, you can either click the “Approve” button, if you wish to approve the commitment as is, or click the “Edit” button if you wish to edit the commitment amount.

Commitment Details



If the “Edit” button was clicked, then scroll down to the section entitled “Commitment Items” and scroll over to the column entitled “Amount”. Click on the “Pencil” toggle to edit the commitment amount. Upon completion, scroll down to the bottom of the page and click the “Save” button.

Commitment Items

Item Number	Master Commitment Item	Line Item	Description	Current Budget	Retainage Percent	Amount
001	001 - Total Haz-Mat	02.000	Total Environmental Remediation & Haz-Mat Abatement By Owner	1,151,000.00	0.00	50,000.00

After saving your changes, you can either click the “Approve” button, if you wish to approve the commitment, or closeout of the “” page until such time that you wish to approve the commitment.

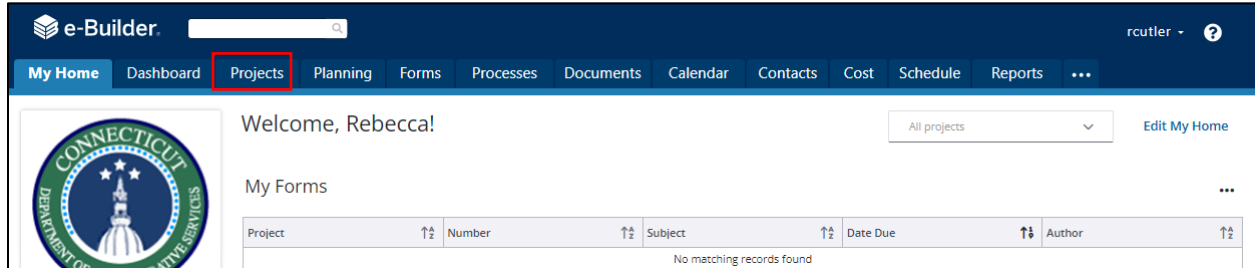


Section 14: 6010 Bid Release Form

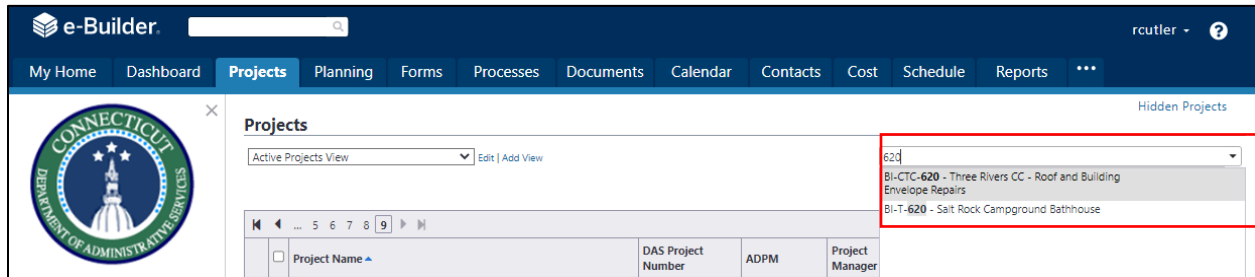
14.01 Accessing the Form

Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>

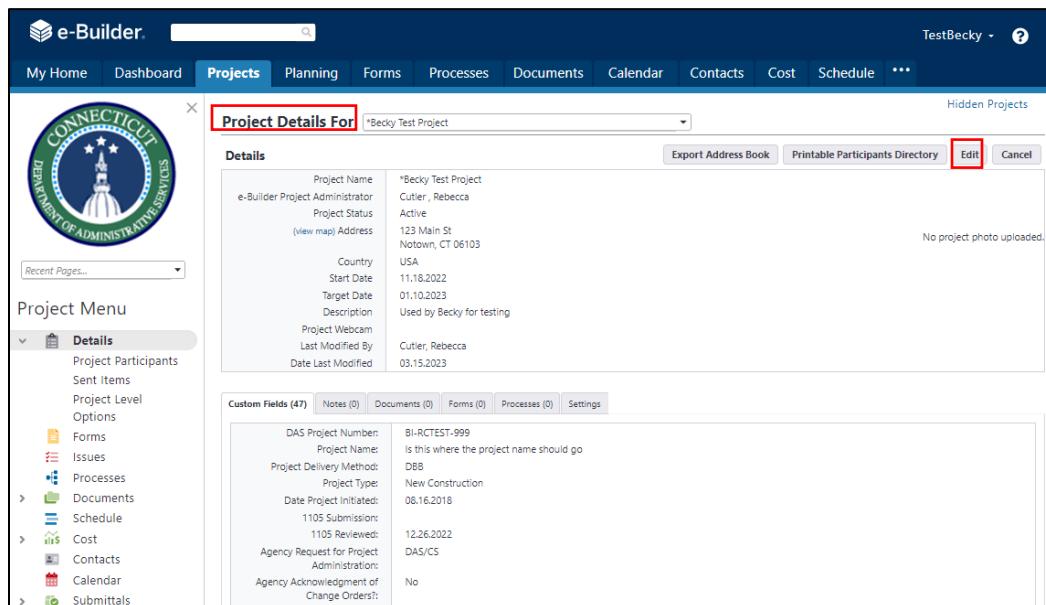
On your homepage, find your project by clicking on the top tab for “Projects”:



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



The “Project Details” page is your home page for your project. (Click “Edit” to edit info.). Under the “Project Menu” on the left, click on Processes to find project-specific processes.





Click on "Start Process" to find and start a process.

The screenshot shows the 'Processes' section of the e-Builder interface. At the top, there is a search bar and a user profile 'TestBecky'. Below the navigation tabs, the 'Processes' tab is selected. A dropdown menu shows 'Processes For *Becky Test Project'. A 'Start Process' button is highlighted with a red box. Below this, there are filter options for 'Filter Processes', including radio buttons for 'Processes Initiated By Me', 'Processes In My Court', and 'All Processes', and checkboxes for 'Draft', 'Open', and 'Finished'.

Click on "6010 Bid Release Form (6010)" to begin the process.

The screenshot shows the 'Start a process on *Becky Test Project' page. It features a table with two columns: 'Process Name' and 'Description'. The row for '6010 Bid Release Form (6010)' is highlighted with a red box. The description for this process states: 'The "Bid Release Form - 6010" process is used as follows: (1) by the DAS/CS Project Manager to submit Bid Information to the DAS/CS Procurement Unit, and (2) by the DAS/CS Procurement Unit to document the Construction Contract Award process.'

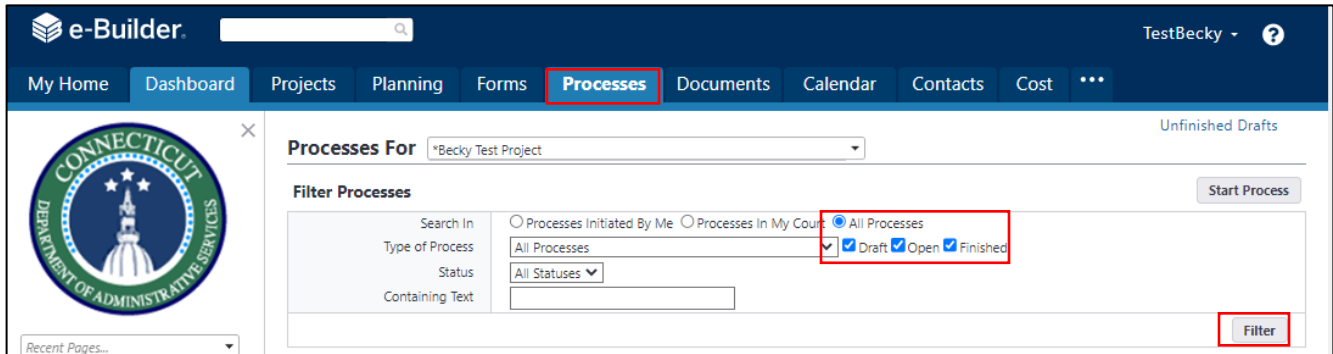
Read the first page and then click on "Submit".

The screenshot shows the '6010 Bid Release Form (6010)' page. At the top, there is a title bar with '6010 Bid Release Form (6010)' and an 'Instructions' link. Below the title, there is a 'Start Process' section with a 'Project' dropdown set to '*Becky Test Project - 2' and a 'Process' dropdown set to '6010 Bid Release Form'. A row of buttons includes 'Print', 'Check Spelling', 'Submit', 'Save Draft', and 'Cancel'. The 'Submit' button is highlighted with a red box. Below this, there is a 'Details' section with tabs for 'Documents (0)', 'Attached Processes (0)', and 'Attached Forms (0)'. A large blue box contains instructions: 'Press the "Submit" button below to initiate the "6010 Bid Release Form" process. NOTE: After pressing "Submit", you will be taken to the list of processes in your court. Find the 6010 process and click on it to begin entering information. For a list of bid release items, download the original "6010 Bid Release Form" from the DAS/CS Library (do NOT email the form to OLAPP; the form is for your use only).'

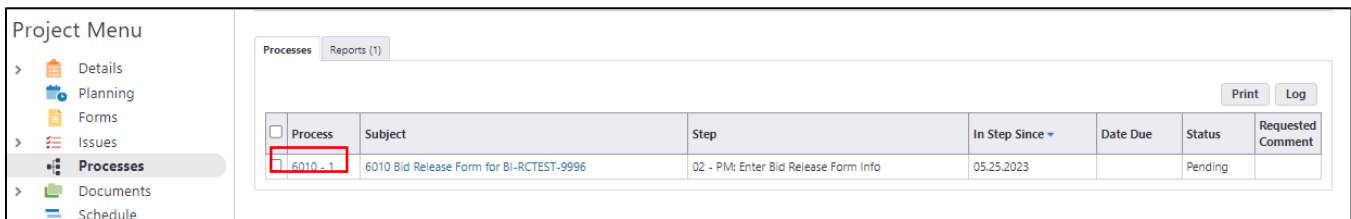


14.02 Project Manager Instructions for Entering Bid Release Form Information:

On the Processes page, if you cannot find the process, check the boxes for “Draft”, “Open”, and “Finished”, and click on “Filter”. This should show you the process for 6010.



On the Processes page for the Project, click on the process for 6010.



Read the “Bid Release Form Instructions”.

Upload all files indicated with a red asterisk (*).

FILES:

- * FILE 1: Liquidated Damages: ?
- * FILE 2: Certificate of Compliance - Part I (Form 3150): ?
- * FILE 3: Consultant Bid Data Statement (Form 6005): ?
- * FILE 4: Building Permit: ?
- * FILE 5: 00 01 01 Title Page: ?
- * FILE 6: 00 01 10 Table of Contents: ?
- * FILE 7: 00 01 07 Seals Page: ?
- * FILE 8: 00 01 15 List of Drawing Sheets: ?
- * FILE 9: 00 25 13 Pre-Bid Meeting Agenda: ?
- * FILE 10: 00 30 00 General Statements for Available Information: ?
- * FILE 11: Specifications (Vol. 1): ?
- * FILE 12: Drawings (Vol. 1): ?

Complete and upload form 3080 Liquidated Damages Calculator.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload form 3150 signed by Consultant and Chief Architect.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload form 6005 completed by the Consultant.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload the Building Permit from the Office of State Building Inspector (OSBI)
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one MS Word file.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file less than 2 GB (2000 MB) in size.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file less than 2 GB (2000 MB) in size.
 Drag and drop file here or Browse e-Builder Browse Computer

Enter all Bid Information as instructed. Any items indicated with a red asterisk (*) are required.



For Supplemental Bids and Named Subcontractors, follow the instructions in the process. Once the Bid Information has been entered, you have three options:

1. Save as a Draft: Select "Save".
2. Perform Final Review Prior to Submitting to the Procurement Unit: Click on "Please select an action", select "Review", then click on "Take Action".
3. Delete this Process: Click on "Please select an action", select "Void", then click on "Take Action".

NOTE: You will LOSE all of the information you have input and will NOT be able to return to this page.

"TAKE ACTION" INSTRUCTIONS:

NOTES TO PROJECT MANAGER:

- To save as a draft, select "**Save**" at the bottom of this page.
- To perform the final review prior to submitting to Bidding, click "**Please select an action**", select "**Review**", and then click "**Take Action**".
- To delete this process, click "**Please select an action**", select "**Void**" and "**Take Action**". **NOTE:** You will **LOSE** all of the information you have submitted and will **NOT** be able to return to this page.

-- Please select an action --
Take Action

Check Spelling
Print
Copy
Delegate
Save
Cancel

14.03 Project Manager Instructions for Reviewing the Bid Release Form Information:

From the Processes page for the Project, click on the process for 6010. Review the Bid Information. If the information is correct and complete, you have three options:

1. Save as a Draft: Select "Save".
2. Submit to the Procurement Unit: Click on "Please select an action", select "Submit", then click on "Take Action".
3. Delete this Process: Click on "Please select an action", select "Void", then click on "Take Action".

The process is then in Procurement Unit's ball court.

BID RELEASE FORM SUBMITTAL & "TAKE ACTION" INSTRUCTIONS:

NOTES TO PROJECT MANAGER:

- Review all of the information above.
- Ensure that any information with a "*" has been completed (it is required).
- To save as a draft, select "**Save**" at the bottom of this page.
- To submit to Bidding, click "**Please select an action**", select "**Submit**", and then click "**Take Action**".
- To delete this process, click "**Please select an action**", select "**Void**" and "**Take Action**". **NOTE:** You will **LOSE** all of the information you have submitted and will **NOT** be able to return to this page.

14.04 Procurement Unit Instructions for Bid Release Form:

Read the instructions. Download the files. Review the Bid Information.



At the bottom (or top) of the page, click on “Please select an action” and select “Approve” or “Revise”. Then click on “Take Action”. The process is then in the ADPM’s ball court.

OLAPP: BID RELEASE FORM INSTRUCTIONS:

- Review the information below.
- If **incorrect**, select “**Revise**” and “**Take Action**” at the bottom of the page. **Add comments** to describe information to be corrected.
- If **correct**, select “**Approve**” and “**Take Action**” at the bottom of the page.

6010 BID RELEASE FORM (“mail merge”):

Once approved by the ADPM and Chief Architect, the “**6010 Bid Release Form**” will be printed to PDF and emailed to:

- DAS/CS Agency Legal Director
- DAS/CS Chief Architect
- DAS/CS DPM
- DAS/CS ADPM for Project
- DAS/CS Project Manager
- DAS/CS OLAPP Bidding Unit
- Agency Representative
- Teams Project File

14.05 ADPM Instructions for Bid Release Form:

Read the instructions. Review the Bid Information.

Click on “Please select an action” and select “Approve” or “Revise”. Then click on “Take Action”. The process is then in the Chief Architect’s ball court.

ADPM: BID RELEASE FORM INSTRUCTIONS:

- Review the information below.
- If **incorrect**, select “**Revise**” and “**Take Action**” at the bottom of the page. **Add comments** to describe information to be corrected.
- If **correct**, select “**Approve**” and “**Take Action**” at the bottom of the page.

6010 BID RELEASE FORM (“mail merge”):

Once approved by the ADPM and Chief Architect, the “**6010 Bid Release Form**” will be printed to PDF and emailed to:

- DAS/CS Agency Legal Director
- DAS/CS Chief Architect
- DAS/CS DPM
- DAS/CS ADPM for Project
- DAS/CS Project Manager
- DAS/CS OLAPP Bidding Unit
- Agency Representative
- Teams Project File



14.06 Chief Architect Instructions for Bid Release Form:

Read the instructions. Select Yes or No for Priority Project. Review the bid information. Click on “Please select an action” and select “Approve” or “Revise”. Then click on “Take Action”.

CHIEF ARCHITECT: BID RELEASE FORM INSTRUCTIONS:

- Select "Yes" or "No" when asked if this is a Priority Project.
- Review the information below.
- If **incorrect**, select **Revise** and **Take Action** at the bottom of the page. **Add comments** to describe information to be corrected.
- If **correct**, select **Approve** and **Take Action** at the bottom of the page.

6010 BID RELEASE FORM ("mail merge"):

Once approved by the ADPM and Chief Architect, the **"6010 Bid Release Form"** will be printed to PDF and emailed to:

- DAS/CS Agency Legal Director
- DAS/CS Chief Architect
- DAS/CS DPM
- DAS/CS ADPM for Project
- DAS/CS Project Manager
- DAS/CS OLAPP Bidding Unit
- Agency Representative
- Teams Project File

DAS/CS Chief Architect: Is This A Priority Project?

* DAS/CS Chief Architect - Approved Priority Project:

Select "YES" if this is a Priority Project; select "NO" if this is not a Priority Project.

YES

NO

14.07 6010 Mail Merge:

When the 6010 Bid Release Form has been reviewed and approved by the Procurement Unit, the ADPM, and the Chief Architect, the 6010 Bid Release Form “mail merge” will be generated as a PDF document and emailed to everyone as indicated at the beginning of the process.

The 6010 Mail Merge will also be saved in the following e-Builder Documents folder:
Documents > 08 Bidding > DAS Procurement

Once the 6010 Mail Merge step is complete, the process is in the Procurement Unit’s ball court.

14.08 Procurement Unit Instructions for Pre-Bid Meeting Information:

Enter the Date of the Bid Advertisement and the Planned Date of the Bid Advertisement Ending. Select “Send” and “Take Action” to forward the process to the Project Manager.

The process is then in the Project Manager’s ball court, who will have three (3) days to enter the Pre-Bid Meeting Information and re-submit back to the Procurement Unit.

BID SCHEDULE:

- **Bidding:** Enter the following information for the bid:

Date of Bid Advertisement: <input type="text"/>	Date of Bid Advertisement on State Contracting Portal: 10.31.2023 <input type="text"/>
Planned Date of Bid Opening: <input type="text"/>	Planned Date of Bid Advertisement Ending on State Contracting Portal: 11.23.2023 <input type="text"/>



14.09 Project Manager Instructions for Pre-Bid Meeting Information:

Enter the Pre-Bid Meeting Information and send the process back to Bidding within three (3) days by selecting “Send” and “Take Action”. The process is then in the Procurement Unit’s ball court.

REQUEST FOR PRE-BID MEETING INFORMATION:	
NOTES TO PROJECT MANAGER:	
<ul style="list-style-type: none"> Using the bid information provided below by the OLAPP Bidding Unit, enter the Pre-Bid Meeting Information. Send to the Bidding Unit within three (3) business days of this request. 	
Date of Bid Advertisement: ?	Date of Bid Advertisement on State Contracting Portal: 10.31.2023
Planned Date of Bid Opening: ?	Planned Date of Bid Advertisement Ending on State Contracting Portal: 11.23.2023
* PRE-BID MEETING Attendance: ?	Select One for Pre-Bid Meeting Attendance: <input type="radio"/> No Pre-Bid Meeting Will Be Held <input type="radio"/> Attendance is Encouraged <input checked="" type="radio"/> Attendance is MANDATORY
PRE-BID MEETING Date: ?	Date of Pre-Bid Meeting: 11.01.2023
PRE-BID MEETING Time: ?	Time of Pre-Bid Meeting (with AM or PM): 10:00 am
PRE-BID MEETING Location: ?	Exact Location of Pre-Bid Meeting (building name, room number, street, town, etc.): Town Hall, 123 Main St, Notown, CT 06555
PRE-BID MEETING Site Contact: ?	Site Contact for Pre-Bid Meeting (name, cell phone number, email address, etc.): Ms. Jane Doe (860-555-1234); janedoe@fakegmail.com

14.10 Procurement Unit Instructions for Reviewing the Pre-Bid Meeting Information:

Review the Pre-Bid Meeting Information. You have three options:

1. Select “Save” to save as a draft.
2. If the information is correct, select “Go To Wages” and “Take Action” to enter the dates that the Prevailing Wages were requested from the Department of Labor.
3. If edits are required, select “Revise” and “Take Action” to send the process back to the Project Manager.

PRE-BID MEETING INFORMATION:	
Date of Bid Advertisement: ?	Date of Bid Advertisement on State Contracting Portal: 10.31.2023
Planned Date of Bid Opening: ?	Planned Date of Bid Advertisement Ending on State Contracting Portal: 11.23.2023
PRE-BID MEETING Attendance: ?	Select One for Pre-Bid Meeting Attendance: Attendance is MANDATORY
PRE-BID MEETING Date: ?	Date of Pre-Bid Meeting: 11.01.2023
PRE-BID MEETING Time: ?	Time of Pre-Bid Meeting (with AM or PM): 10:00 am
PRE-BID MEETING Location: ?	Exact Location of Pre-Bid Meeting (building name, room number, street, town, etc.): Town Hall, 123 Main St, Notown, CT 06555
PRE-BID MEETING Site Contact: ?	Site Contact for Pre-Bid Meeting (name, cell phone number, email address, etc.): Ms. Jane Doe (860-555-1234); janedoe@fakegmail.com



14.11 Procurement Unit Instructions for Prevailing Wage Rates:

NOTE: Instructions are provided in e-Builder for requesting Prevailing Wage Rates from the Department of Labor. The request itself is conducted separately from e-Builder. E-Builder is only used to track the dates that the wage rates were requested and the dates they were received.

Enter the Date Requested and (if available) Date Received. Select either "Refresh Screen" (to view the date that the wage rates are due) or "Go To Bid" to view Bid Information from the Project Manager and to begin entering additional Bid Information.

PREVAILING WAGE RATE REQUEST:

NOTE TO BIDDING PERSONNEL:

- Enter the dates below as instructed.

Date of Bid Advertisement: ?	Date of Bid Advertisement on State Contracting Portal: 10.31.2023
Planned Date of Bid Opening: ?	Planned Date of Bid Advertisement Ending on State Contracting Portal: 11.23.2023
PREVAILING WAGE RATES Requested: ?	Enter Date REQUESTED from CT Department of Labor: 10.17.2023
PREVAILING WAGE RATES Due (10 Business Days): ?	(Automatic Field: To update, scroll to bottom of page and select "Refresh Screen" then "Take Action".) The DUE DATE of the Prevailing Wage Rates from the CT Department of Labor is as follows: 10.31.2023
PREVAILING WAGE RATES Received: ?	Enter Date RECEIVED from CT Department of Labor: 10.30.2023

14.12 Procurement Unit Instructions for Bidding Information:

NOTE: After Pre-Bid Meeting Information and Prevailing Wages Request Information has been entered, the Procurement Unit arrives at the final Bid Information page. The Procurement Unit will insert the Unique Solicitation Number and use the information to complete the Invitation to Bid and Bid Proposal Form outside of e-Builder. The Procurement Unit will also enter the Actual Date that the Bid Advertisement ends as well as the Number of Addendum for the Solicitation.

Follow the instructions on the e-Builder page in order to enter information and dates. Select "Refresh Screen" and "Take Action" at the bottom (or top) of the page in order to update Automatic Fields.

INVITATION TO BID & BID PROPOSAL FORM INFORMATION:

NOTE TO BIDDING PERSONNEL:

- Use the following information to complete the **Invitation to Bid** and **Bid Proposal Form**.

Solicitation Number: ?	Unique Solicitation Number Assigned by OLAPP Bidding Personnel: <input type="text"/>
------------------------	--



BID ADVERTISEMENT:

NOTES TO BIDDING PERSONNEL:

- Enter the following information as instructed.
- Select **"Refresh Screen"** and **"Take Action"** at the bottom of the page to update automatic fields.

Actual Date of Bid Opening: ?

Actual Date that the Bid Advertisement ends on the Portal (same date that the Bid Tab is uploaded to the Portal and emailed to the PM):

Date Pre-Bid RFIs Must Be Submitted By: ?

(Automatic Field: To update, scroll to bottom of page and select "Refresh Screen" then "Take Action".) The DUE DATE of all Project Questions, Bid Questions, and Pre-Bid Equals and Substitution Requests is as follows (14 Calendar Days prior to Actual Date of Bid Opening):

Number of Addendum: ?

Number of Addendum:

14.13 Procurement Unit Instructions for 6010 Bid Release Form Closeout:

Once the Project has gone into construction (or the Bid is cancelled/no award), close the e-Builder 6010 Bid Release Form process by selecting "Closeout" and "Take Action".

NOTE: "Closeout" will permanently close the process – do NOT select this option if the process is still open.



Section 15: (Reserved for future instructions)



Section 16: (Reserved for future instructions)



Section 17: GC / CMR - Create Schedule of Values

17.01 SOV Approval for Upload

Construction Support Services (CSS) uploads SOVs into e-Builder commitments upon request of the DAS project manager for that project. Please submit a request for the project manager to ask CSS to carry out the upload of the file described in Section 17.02, below.

17.02 SOV file format

When sending the SOV for upload, please follow the following format:

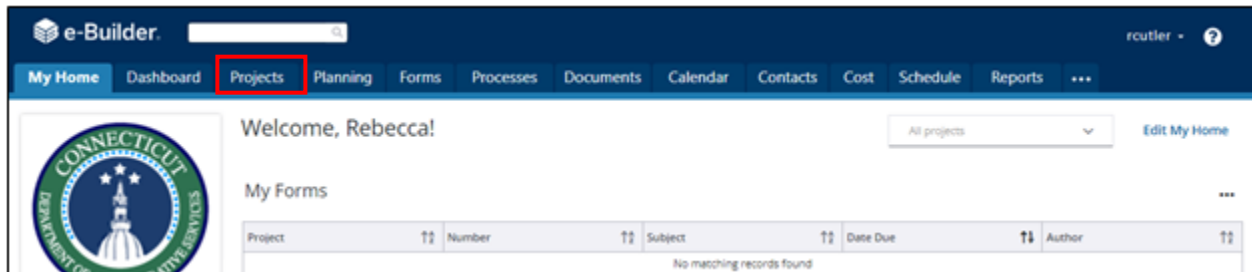
1. Use Excel, another similar spreadsheet format or CSV. Please do not send it in PDF, Word or similar file formats.
2. If the file is Excel or another spreadsheet, the data should be in a single sheet, not divided between two or more sheets.
3. Ensure that each SOV row has at least columns for (1) description or title and (2) SOV dollar amount. A row line number is permitted, as well.
4. Do not have any blank rows.
5. If it is desired to have rows that are section titles, please place this title in the description column and place a \$0 in the amount column.



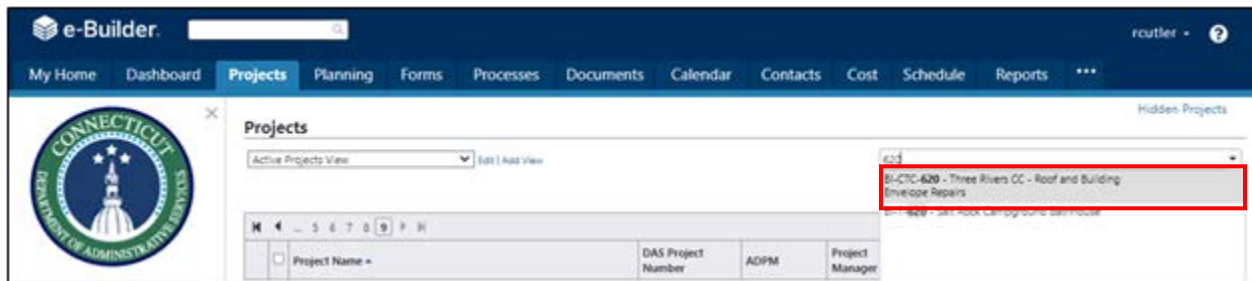
Section 18: Consultant and General Vendor Invoice

18.01 Access the project Process

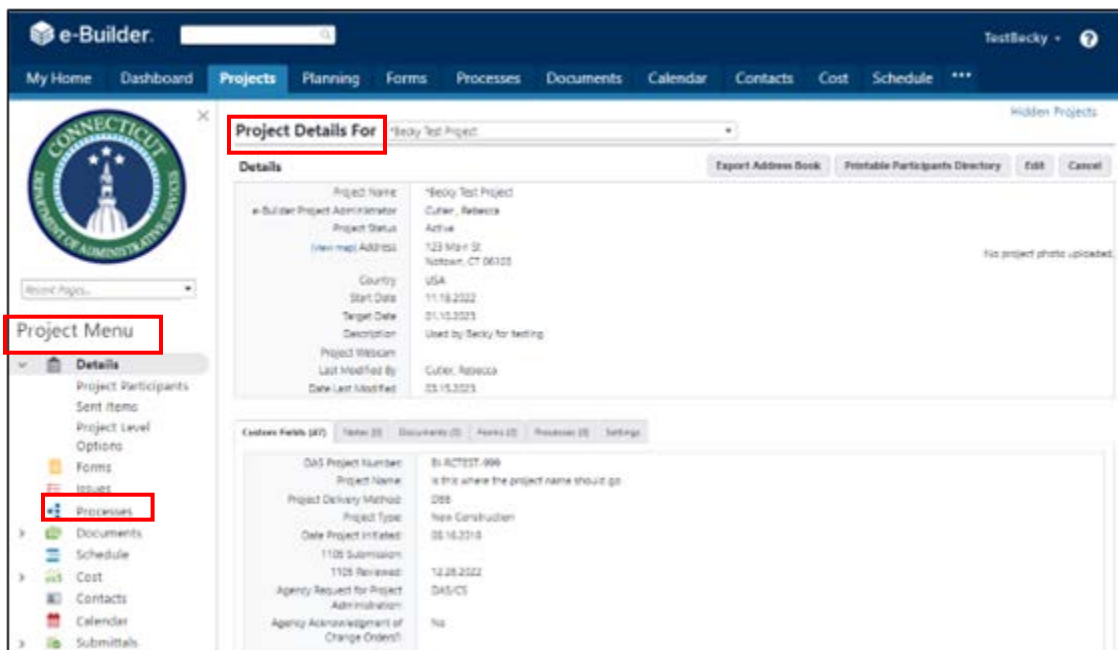
Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for “Projects”:



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



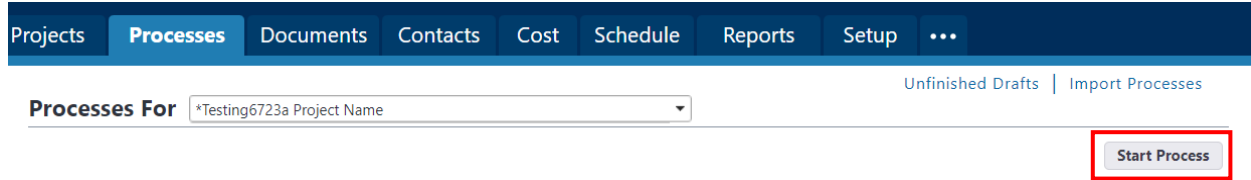
The “Project Details” page is your home page for your project. Under the “Project Menu” on the left, click on Processes to find project-specific processes.





18.02 Initiate the invoicing Process.

Click on “Start Process” to find and start a process.

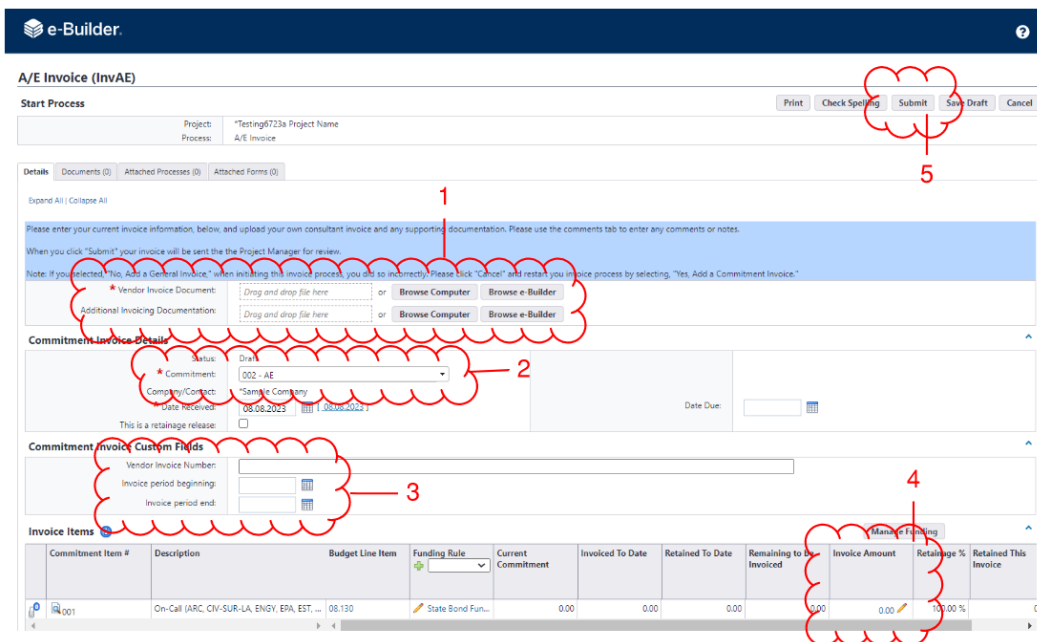


A/E users then click on “A/E Invoice (InvAE)” to begin the process. Users from other consultant types click the equivalent process, including “CA Invoice (InvCA)”, “CMR Pre-Construction Invoice (CMpre)”, “Other Consultant Invoice (InvOt)” or “Hazmat Invoice (InvHz)”



Proceed as follows to complete the consultant Invoice form:

1. Either drag and drop the invoice into the “Drag and drop file here” or click “Browse Computer” to locate and upload the file. For other supporting documentation, a second upload block is available.
2. Select the applicable vendor commitment. Take care to select the correct commitment if the vendor has more than one task on the project. Once selected, note that the “Invoice Items” part populates.
3. Enter the vendor’s invoice number and the beginning and end dates for the invoice.
4. Click on the “0.00” or pencil icon the “Invoice Amount” column and enter the amount of the invoice.
5. When the invoice form is correct, click “Submit” to submit the invoice to the project manager. The “Save Draft” button is available to save the form as a draft and return later.





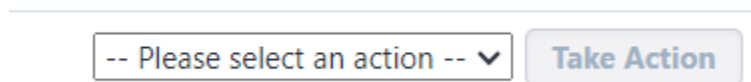
18.03 Invoices Returned for Revision

Once the form is submitted, the project manager may return it to the vendor if changes are needed.



Clicking on that will remove the current document, and a replacement can then be uploaded in its place.

After the needed changes are made, note, at the top and bottom of the pop-up, that there are workflow action controls.



By clicking “Please select an action” the user can select what action is intended on the invoice.

The option to “Resubmit” will appear and, if that is the intended action, select that. There is also an option to “Void”, which has the effect of closing review of the invoice and voiding the invoice process instance.

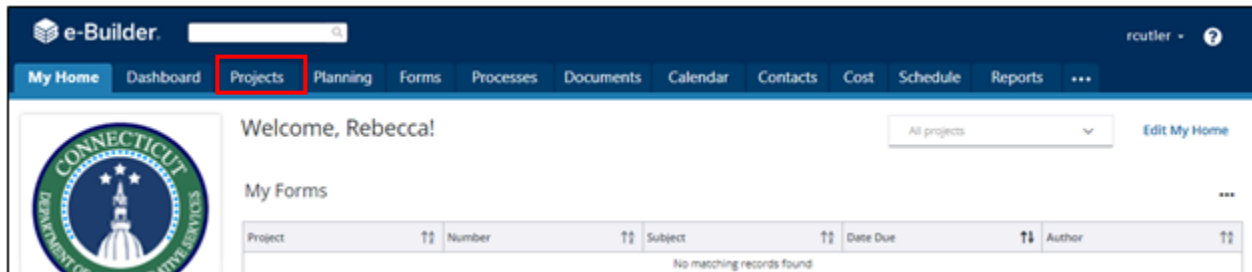
When the action is selected, clicking on the “Take Action” button finalizes the user’s action and sends the item to the next user in the workflow, if the “Resubmit” option is taken, or ends the workflow with no payment, if the “Reject” option is taken.



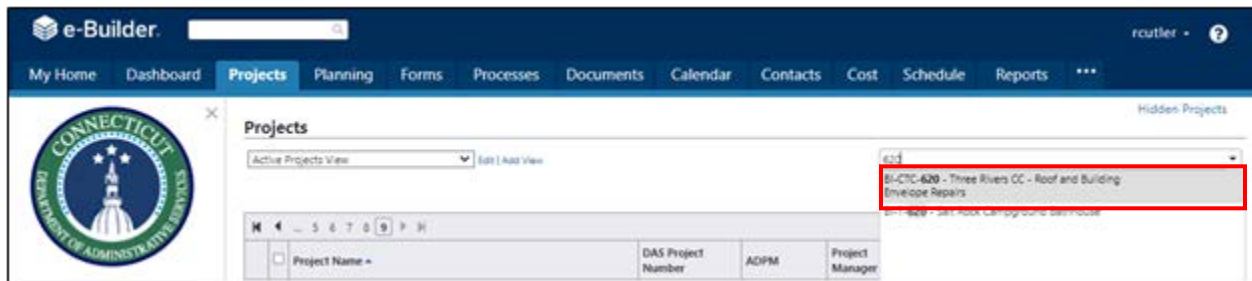
Section 18A: PM Review of Consultant & Vendor Invoice

18A.01 Access the Project Process

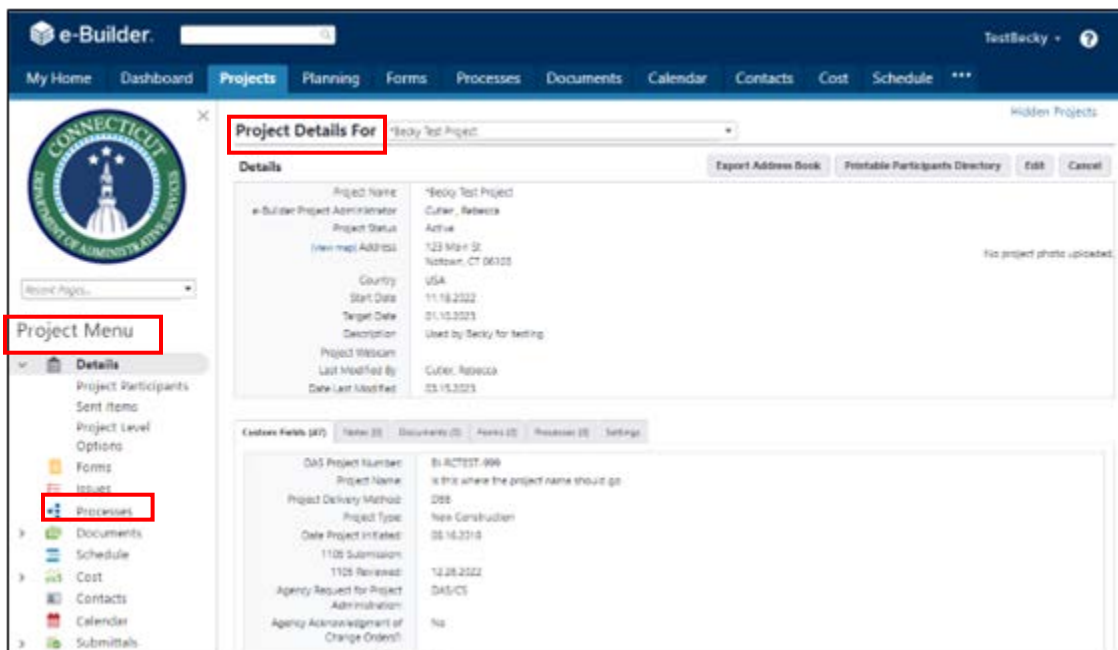
Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for “Projects”:



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



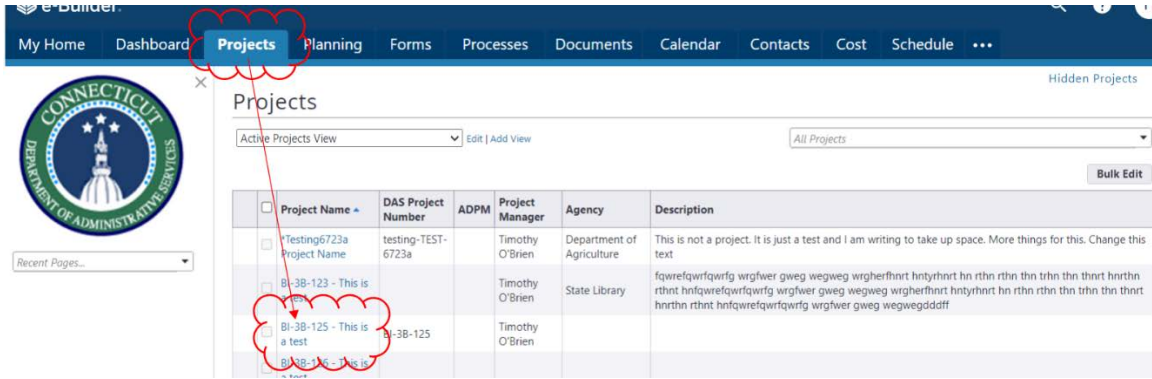
The “Project Details” page is your home page for your project. Under the “Project Menu” on the left, click on Processes to find project-specific processes.



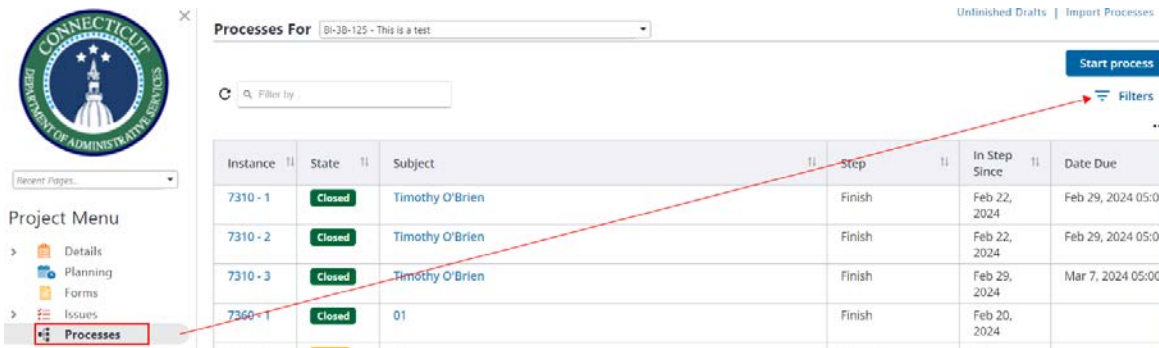


18A.02 Locate the Process Instance

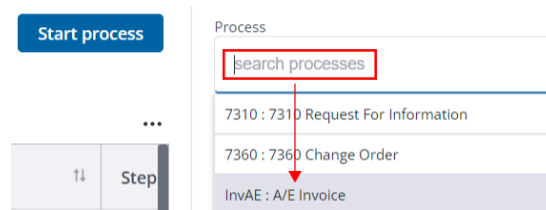
Click on the Projects tab and then open the project by clicking on the project name.



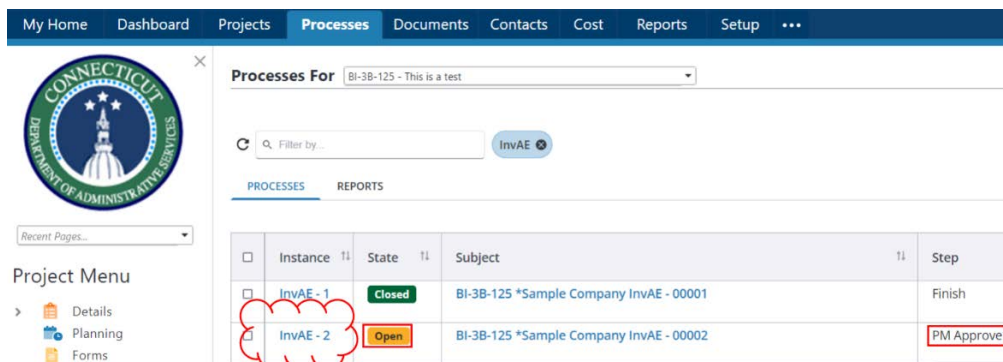
Next, click on the Processes module under the Project Menu and click on the Filters icon.



Under the Filters control, click “search processes”. Then, click on the consultant type invoice that is to be reviewed, i.e. “A/E Invoice (InvAE)”, “CA Invoice (InvCA)”, etc.



Click on the process instance number for the pending invoice, which should appear in the “PM Approve” step. It will also appear as “Open” in the State column.





18A.03 Key Items for PM Review

Key items for PM Review include:

- A. Click on the filename to cause a pop-up window to appear that has the vendor’s invoice.
- B. Under “Commitment Invoice Details”, it is important to make sure that the vendor is invoicing their own company and the correct commitment, if they have more than one commitment on the project.
- C. Vendor invoice number, and beginning and end dates are requested for the Business Office.
- D. The Invoice Amount needs to be entered correctly for the e-Builder record to be accurate.
- E. Select one of the following for payment of the invoice:
 - a. Select “Business Office” to send the invoice automatically to the Business Office to be paid when the PM Approves the invoice, as described in items F and G, below.
 - b. Select “Agency” to send the invoice to the appropriate agency to pay expenses on a project. If the “Agency” is paying the invoice, the person processing these payments will need to be added to the Agency Payor role on the project.
- F. The Action pull down menu allows the PM to select Approve, Revise or Void.
 - a. “Approve” causes the invoice, with a cover sheet noting that the PM has determined that it is OK to Pay, to be sent to the Business office or agency for payment, depending on what was selected in item E, above.
 - b. “Revise” sends the invoice back to the vendor for any needed corrections. The PM will be prompted to enter comments for the vendor about what needs to be corrected.
 - c. “Void” ends consideration of the invoice.
- G. After the Action to be taken is selected, the Take Action button causes that Action.

The consultant invoice, below, has been submitted for your review.

Vendor Invoice Document: **A** Use this field to upload vendor invoice document.
202222500_0051253.pdf (version 1)
Properties | Download (671 KB) | Redmine

Additional Invoicing Documentation:

Commitment Invoice Details

B

Status: Draft
Commitment: 12952-T6 - On-Call (ARC, CIV-SUR-LA, ENGY, EPA, EST, MBE-ARC, MBE-CIV, MDE, MEP, RDOF, SCH, STR, VEH)
Company/Contact: VAN ZELM HEYWOOD & SHADFORD INC
Date Received: 12.15.2023
Date Due:

This is a retainage release.

Commitment Invoice Custom Fields

C

Vendor Invoice Number: 0051253
Invoice period beginning: 10.01.2023
Invoice period end: 10.28.2023
CORE Voucher ID:

Invoice Items Show Approved Commitment Items

D

Commitment Item #	Description	Budget Line Item	Funding Rule	Current Commitment	Invoiced To Date	Retained To Date	Remaining to be Invoiced	Invoice Amount	Retainage %	Retained This Invoice
001	On-Call MEP Fee	08.130	State Bond Funds	89,820.00	0.00	0.00	89,820.00	62,874.00	0.00 %	0.00
Total				89,820.00	0.00	0.00	89,820.00	62,874.00		0.00

E * Who is responsible for tracking payment of this invoice? Business Office Agency

F Please select an action --
Approve
Revise
Void
-- Please select an action --

G Take Action Check Spelling Print Copy Delegate Save Cancel



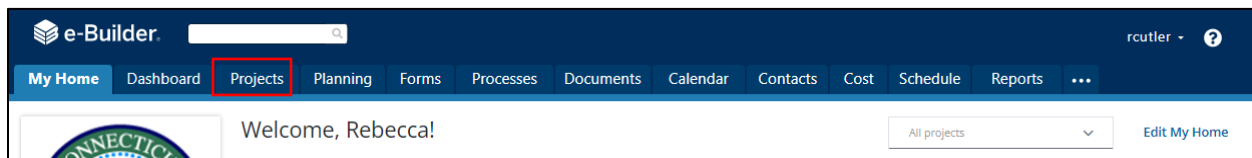
Section 18B: Hazmat Invoice Instructions for Agencies

18B.01 Access the Project Process

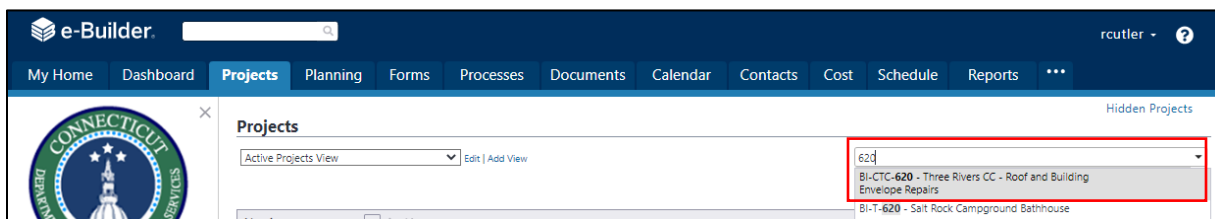
HazMat Invoices require review and approval by agencies. Agency staff will receive an email notification from eBuilder that an invoice is pending. To access the pending invoice, the agency can either click on the link in the email and the browser instance will appear as a pop-up.

Process instance is in your court. To view details or take action [click here](#).

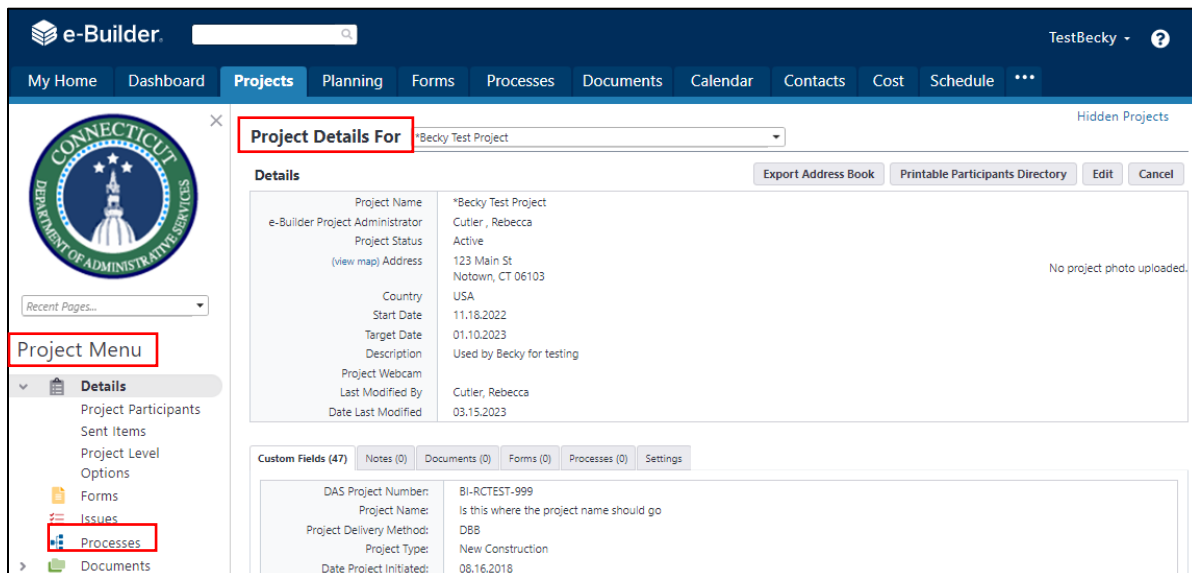
or the agency can log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f> and click on the “Projects” tab to find the applicable project.



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



The “Project Details” page is your home page for your project. (Click “Edit” to edit info.). Under the “Project Menu” on the left, click on Processes to find project-specific processes.





1. Change the Process filter settings to find the process instances you are looking for. In this case, switch Type of Process to “Hazmat Invoice (InvHz)”. Selecting All Processes will show all instances, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list appears here. Click on the instance you wish to open. A pop-up will open. That is the process instance.

The screenshot shows the 'Processes For' section with a dropdown menu set to '*Testing6723a Project Name'. Below this are buttons for 'Start Selected Process Type' and 'Start Process'. A filter bar includes 'Filter by...', 'In My Court', 'In Progress', 'Process: 7390 Applic...', and 'Status'. A table of processes is shown with columns for Process, Subject, Step, In Step Since, Date Due, Status, and Requested Comment. A list of process instances is displayed on the right, including '0-X1 Test 1105 Project Intake ... (0-X', '1105R Project Revision Request (11C', '7055 Construction Phase Agency ...', '7310 Request For Information (731C', '7360 Change Order (7360)', '7390 Application and Certifica ...', 'A/E Invoice (InvAE)', 'A/E Invoice - deprecated - do ... (InA', and 'Potential Change Order (PCO)'. Red annotations include a circle around the filter bar, a line pointing from the filter bar to the list, and a circle around the list itself.

18B.02 Invoice Review

Regardless of which route used to access it, when the pop-up for the invoice process instance appears, review the invoice information.

1. Click on the document name in the “Vendor Invoice Document” field. A viewer pop-up will appear, allowing review of the vendor’s invoice document. There may be supporting materials attached to this document or in “Addition Invoicing Documentation” field.

The screenshot shows a document upload area. On the left, there are two fields: '* Vendor Invoice Document:' and 'Additional Invoicing Documentation:'. On the right, there is a text area with the instruction 'Use this field to upload vendor invoice document.' Below this, a document named 'supporting test 2.pdf (version 8)' is shown with options for 'Properties', 'Download (36.1KB)', 'Redline', and 'Remove'. At the bottom, there is a dashed box for 'Drag and drop file here' and two buttons: 'Browse Computer' and 'Browse e-Builder'.

2. Documentation may also be uploaded into the Documents tab of the process instance. Review all documentation in each of these locations.

The screenshot shows a navigation bar with four tabs: 'Details', 'Comments (4)', 'Documents (2)', and 'Attachments'. The 'Documents (2)' tab is highlighted with a red box.

3. In the “Invoice Items” section, scroll to the right until the “Invoice Amount” column is seen. This is where the vendor should have entered the correct invoice amount. If there is more than one invoice



row, the correct amount should be in each row and the correct total for the invoice should appear in the gray summary row at the bottom.

Invoice Amount	R
0.00	
1.00	
1.00	

18B.03 Invoice Approval

If the information included in the invoice process instance is correct, and the agency wishes to approve, doing so involves two steps.

1. The first step is to select the “Agency Approver” and the approval date.

Report url:
* Agency Approver:
* Agency Approver Date:

2. Then, at the top and bottom of the pop-up, there are workflow action controls.

-- Please select an action --

3. By clicking “Please select an action” the user can select what action is intended on the invoice. The option to “Approve” will appear and, if that is the intended action, select that. There is also an option to “Reject”, which has the effect of closing review of the invoice and voiding the invoice process instance.
4. When the action is selected, clicking on the “Take Action” button finalizes the user’s action and sends the item to the next user in the workflow, if the “Approve” option is taken, or ends the workflow with no payment, if the “Reject” option is taken.

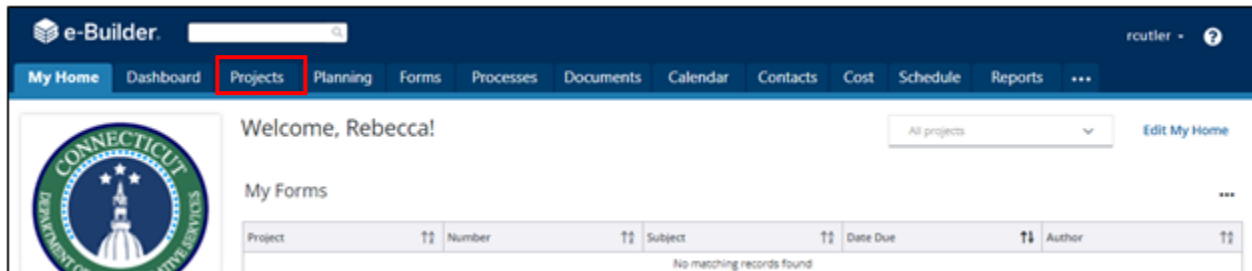


Section 19: 7390 Application and Certification for Payment

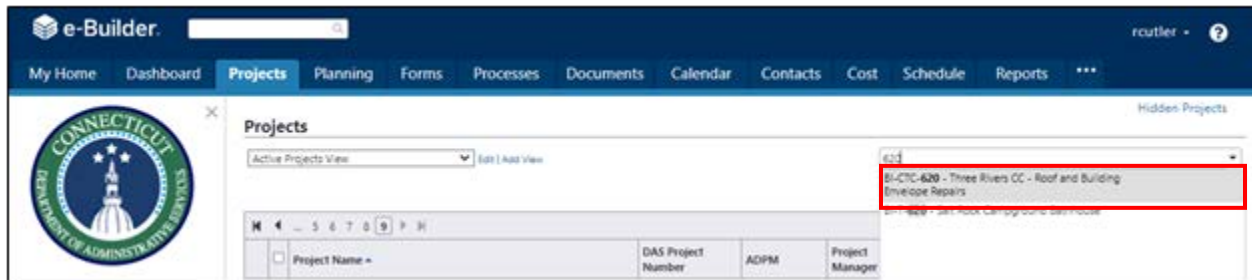
19A GC & CMR Users

19A.01 Instructions for the GC/CMR for creating and submitting Payment Applications:

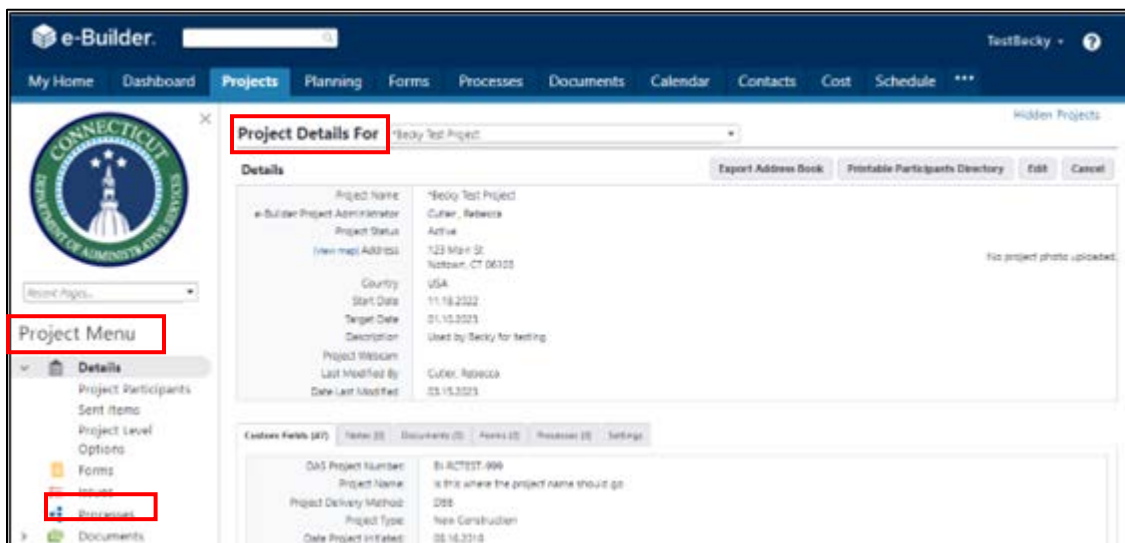
Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for “Projects”:



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.

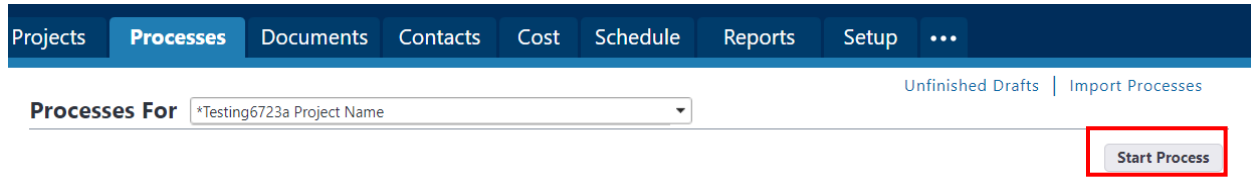


The “Project Details” page is your home page for your project. Under the “Project Menu” on the left, click on Processes to find project-specific processes.





Click on "Start Process" to find and start a process.

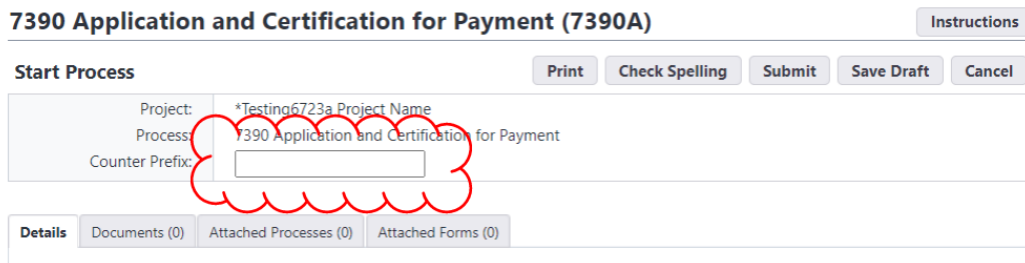


Click on "7390 Application and Certification for Payment (7390A)" to begin the process.



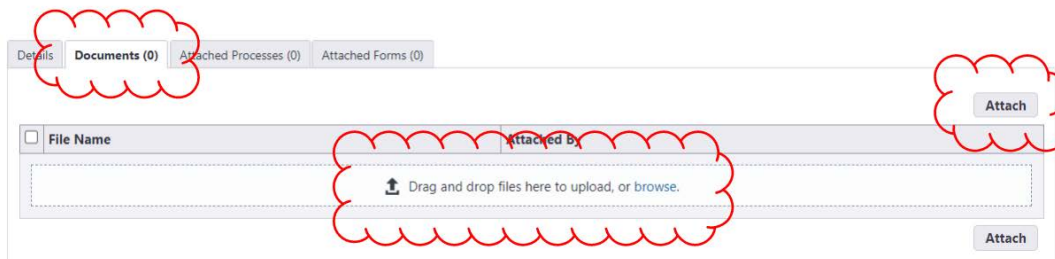
19A.02 Complete the Payment Application Form

In the "Counter Prefix" field, enter the Payment Application number of this payment application.



Carefully read and follow the instructions provided.

Upload supporting documentation for the Payment Application to the Documents tab. Click on the tab header to access the tab. Either drag-and-drop the documents to the tab or click the "Attach" button.

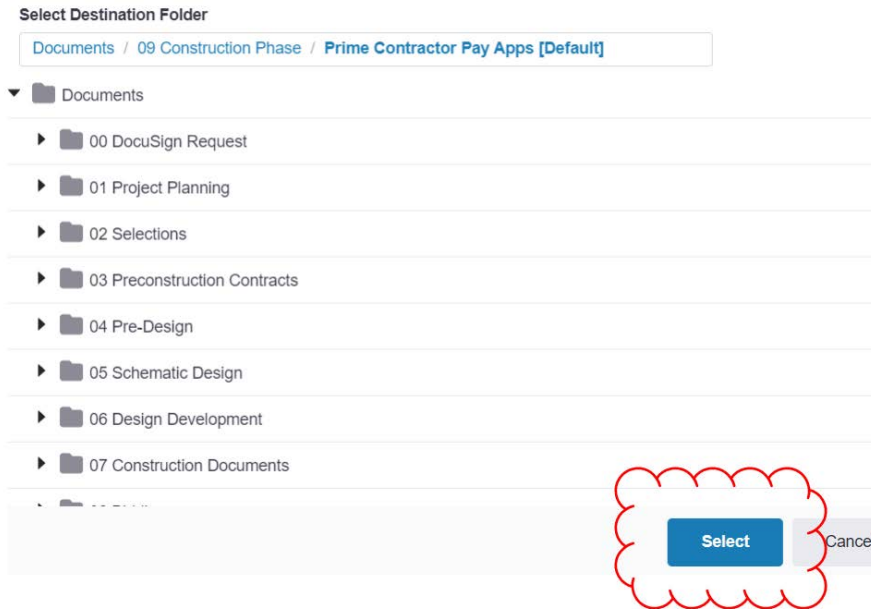


If the "Attach" button is clicked, a pop-up will appear. Click "Upload from your Computer" to locate a locally stored document.

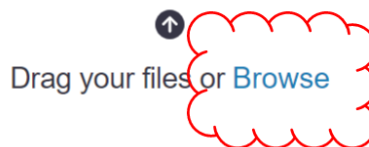




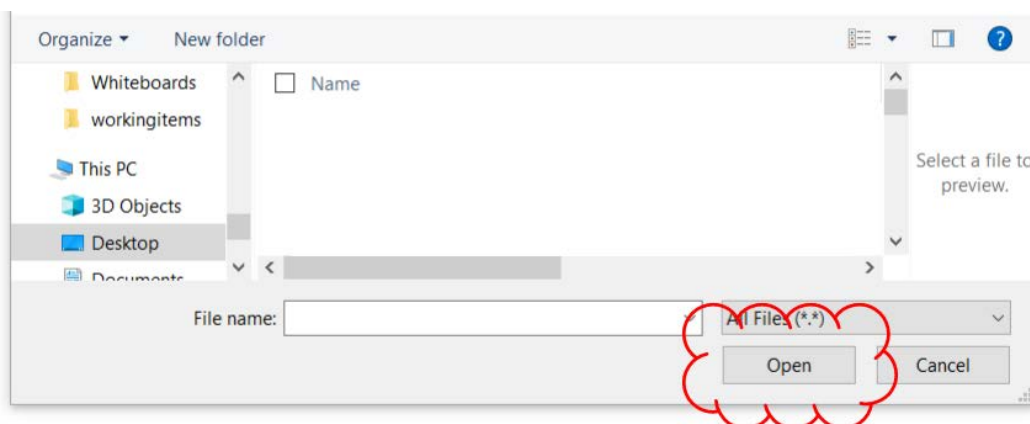
Then, click “Select” to use the pre-selected default folder (highlighted in blue font) as the destination folder in the eBuilder Documents module to upload the supporting documents. If applicable, an alternate folder can be selected.



Then click “Browse”.

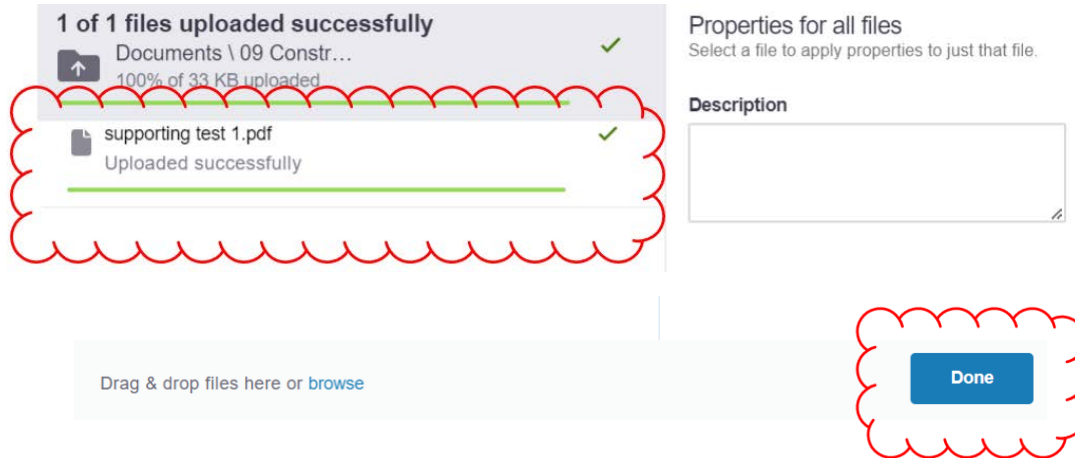


Select the file(s) you wish to upload and click “Open”.





If it worked properly, you should see the words “Uploaded successfully” under the filename . Click “Done” after the file has been uploaded.



The uploaded document should then appear in the Documents tab. Also note the number in parentheses next to the “Documents” tab title, indicating the number of uploaded files.



Complete the rest of the Payment Application Form as follows:

1. First group of questions after the blue instructions area.
 - a. Ensure that all required documentation is attached, as described above, and then acknowledge that it is in the field here.
 - b. Select who the contractor’s approver is in that field. This is the person whose name will appear in the signature block on the PDF copy of the Application and Certification for Payment, signing on behalf of the contractor.
 - c. Indicate whether securities in lieu of retainage is being used and, if so, the amount.
2. Select the correct commitment for the vendor. Take care to select the correct commitment if the vendor has more than one on the project. Once selected, note that the “Invoice Items” part of the form populates.
3. Enter the vendor’s own invoice number and the beginning and end dates of the period being invoiced. This information is required.
4. Click on the “0.00” or pencil icon in the “This Period” column and enter the amount of the current invoice in each line.
5. If stored materials are being used, update each relevant row with the amount of current stored materials as of this Payment Application. In subsequent Payment Applications, when those amounts



are to be used, reduce this amount and add the amount reduced to the amount billed in that Payment Application under This Period for that row.

- 6. If there is any retainage release for this Payment Application, enter the amount released for each row under Retainage Release Amount. (If there is a need to change retainage percentages, please communicate that to the DAS Project Manager.)

The screenshot shows the 'Commitment Invoice Details' form. Red callouts are placed over the following fields:

- 1: 'All Required Documentation Attached?' dropdown menu.
- 2: 'Do you require Securities in lieu of Retainage (CGS 3-112a)?' radio buttons.
- 3: 'Commitment Invoice Details' header area.
- 4: 'Commitment Invoice Custom Fields' section.
- 5: 'Invoice Items' table, specifically the 'This Period' and 'Total Materials Previously Stored' columns.
- 6: 'Retainage Release Amount' column in the 'Invoice Items' table.

(NEW as of April 10, 2024) The Payment Application process now includes a new question, asking the “Type” of Payment Application. This question will, by default, be set to “Progress”. It can be set to “Substantial Completion” or “Final”. “Final” is only selected if the Payment Application was initiated by a 7990 Project Closeout process instance. The GC/CMR users are referred to [Section 19F](#) for this procedure.

retainage:

* Type of Payment Application:

When the invoice form is correct, click “Submit” to submit the invoice into the workflow for review. If “Substantial Completion” was selected as a “Type”, refer to [Section 19E](#) for the next step. In the case of final payment applications, ensure that “Final” was selected as a “Type” and refer to [Section 19F](#) for the next step.

The “Save Draft” button is also available to save the form as a draft to return to later.

19A.03 Payment Application Form Returned for Revision

A payment application may be returned for revision. If the payment application is returned, the Actor having submitted the application will receive an email notification that the application has been returned for revision. The email will appear as follows and include the following information:



1. Process Details show the project, process type the notice concerns and the step the workflow is presently in, as of the notification.
2. The Comments section has comments from the workflow and other information.
3. There are links, top and bottom. Clicking on the link, if you are logged into e-Builder, will open the process instance pop-up.

The screenshot displays a process instance for '*Testing6723a Project Name'. At the top, a yellow banner contains a comment: 'A comment was added by Timothy O'Brien on step GC/CMR Revise on the following process. To view details or take action, [click here.](#)' This banner is annotated with a red '3' and a red arrow pointing to the 'click here' link. Below this is the 'Process Details' section, which is circled in red and annotated with a red '1'. It contains the following information:

Project	*Testing6723a Project Name
Process	7390A - new test 1 - 15
Subject	testing-TEST-6723a - Application for Payment - 08/31/2023
Step	GC/CMR Revise
In-Step Since	10/11/2023
Last Action	Revise
Last Action Taken By	Timothy O'Brien
Status	Received

Below the process details is the 'Comment(s)' section, also circled in red and annotated with a red '2'. It shows two comments from Timothy O'Brien, Department of Administrative Services - Construction Services, dated 10/11/2023. The first comment is at 10:26 AM and states 'A document was attached'. The second comment is at 10:14 AM and states 'This is a test'. At the bottom of the screenshot, another yellow banner is circled in red and annotated with a red '3', containing the same text as the top banner: 'A comment was added by Timothy O'Brien on step GC/CMR Revise on the following process. To view details or take action, [click here.](#)'

Comments explaining the reasons for the return information on the actions needed may be included in the Documents tab:

The screenshot shows the 'Documents' tab selected in the interface. The tab bar includes 'Details', 'Comments (2)', 'Documents (1)', 'Attached Processes (0)', and 'Attached F...'. The 'Documents (1)' tab is circled in red. Below the tab bar, there is a table with one document entry:

<input type="checkbox"/>	File Name
<input type="checkbox"/>	supporting test 1.pdf (version 3) Properties Download (33.6KB) Redline Stamp Remove

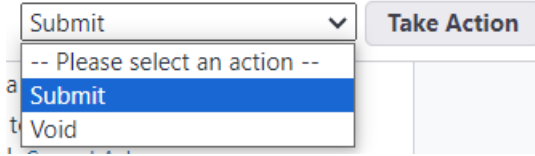
Or the Comments tab:

The screenshot shows the 'Comments' tab selected in the interface. The tab bar includes 'Details', 'Comments (1)', 'Documents (0)', 'Attached Processes (0)', 'Attached Forms (0)', and 'Attached To (0)'. The 'Comments (1)' tab is circled in red. Below the tab bar, there is a comment entry:

Private	Comment
<input type="checkbox"/>	Timothy O'Brien, Department of Administrative Services - Construction Services 10.11.2023 10:14 AM This is a test



Make the needed changes and resubmit the application by selecting “Submit” from the action menu on the top or bottom of the form and clicking “Take Action”. There is also an option to void the Payment Application.



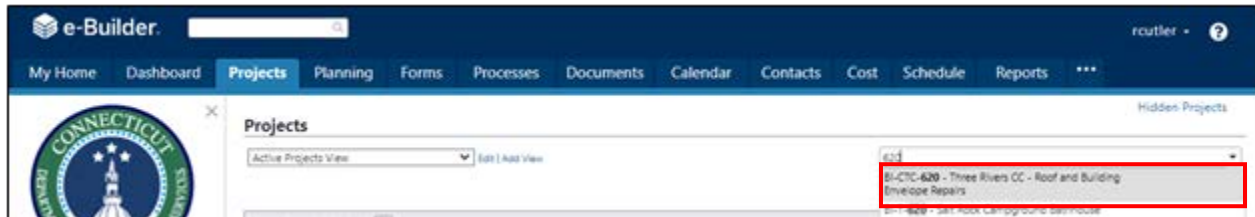
19B CA Users

19B.01 Instructions for the CA for Review and Certification of Payment Applications:

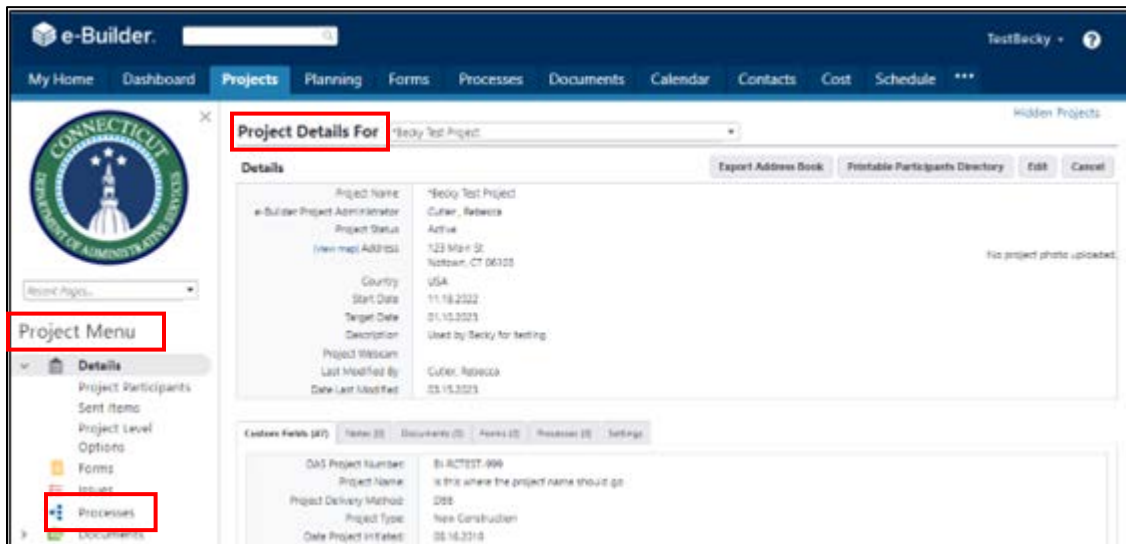
Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for “Projects”:



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



The “Project Details” page is your home page for your project. Under the “Project Menu” on the left, click on Processes to find project-specific processes.





Change the Process filter settings to find the process instances you are looking for.

1. Select “7390 Application and Certification for Payment” from the “Search Processes” dropdown menu. Select one or more of the following from the “Filter by” dropdown menu: “All Processes”, “Draft”, “Open”, or “Finish”. “All Processes” will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.

The screenshot shows the 'Processes For' section with a dropdown menu set to '*Testing6723a Project Name'. Below this, there are buttons for 'Start Selected Process Type' and 'Start Process'. A 'Filter by...' dropdown is set to 'Process: 7390 Applic...'. Below the filter, there are buttons for 'In My Court', 'In Progress', and 'Status'. A table of processes is displayed with columns: Process, Subject, Step, In Step Since, Date Due, Status, and Requested Comment. The selected process is '7390A - aaa - 2' with status 'Paid'. A pop-up window titled 'Process' is open on the right, showing a list of processes with '7390 Application and Certifica...' selected.

Once the process instance opens, review all of the information entered, including the files uploaded to the Documents tab. To view the pencil requisition, click the “Details tab” and then click on the link to the PDF, as shown below:

The screenshot shows the 'Documents' tab of a process instance. It includes a question: '* Who is responsible for payment of this invoice?:' with a dropdown menu set to 'Business Office'. Below this, there is a section for 'Contractor Approve:' with the name 'O'Brien, Timothy'. A document titled '7390A-00015 - testing-TEST-6723a - Application for Payment - 08312023 - DRAFT.pdf (version 1)' is listed with a download link and a redline link.



After reviewing the pencil requisition, return to the “Details” tab and:

1. Select whether the payment is to be issued by the DAS Business Office or by the client agency. If there is any question about this, consult with the DAS Project Manager.
2. The CA should then select their firm name from the “CA Reviewer” dropdown list and the input the date of approval.

* Who is responsible for payment of this invoice?: Business Office Agency — 1

Invoice: 7390A-00015 - testing-TEST-6723a - Application for Payment - 08312023 - DRAFT.pdf (version 1)
 Properties | Download (38.2KB) | Redline

Contractor Approver: O'Brien, Timothy

Do you require Securities in lieu of Retainage (CGS 3-112a)?: No

If yes, enter value of Securities in lieu of Retainage:

* CA Reviewer: Please select... — 2

* CA Review Date: [Date Input]

At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take on the item. “Submit” will send the item to the A/E for review. “Revise” will send the item back to the GC/CMR for any corrections that are needed. Once the action to be taken is selected, click the “Take Action” button.

Submit ▼ Take Action

-- Please select an action --

Submit

Revise

If “Revise” was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click “Revise” to complete and send the comments.

7390 Application and Certification for Payment (7390A) - new test 1 - 15

Add a comment.

* Add Comment

Private

[Text Area] — 1

Check Spelling Revise Cancel



19B.02 Other Items for Verification

Under Cost > Commitments, in the Custom Fields tab of each commitment, please check to ensure that the PO Number field is the correct purchase order number, especially for DAS Business Office invoicing. (The number "0000000000" is a placeholder and is not an actual PO Number.) This is important to ensure that the DAS Business Office is able to process payments without them being held up by uncertainty about the what purchase order to use for payment.

Commitment Details

Commitment Overview | Other Details | Financial Summary

Project: *Testing6723a Project Name
 Commitment Type: Prime Contractor Contract
 Commitment Number: 001
 Unit Cost Options: Lump Sum Amount
 Description: GC TEST TEST TEST
 Commitment Control: Controlled By Line Item
 Created: 06.07.2023 (Timothy O'Brien)

Status:
Company:
Company Number:
Contact:
Approved:

Commitment Items (12) | Commitment Changes (8) | Actual Costs (6) | **Custom Fields (7)** | Notes (0)

Processes (0)

Primary Construction Contract On Project?: No
 Type of OC Consultant:
 CORE Contract No.:
 PO Number: 0000000000
 DAS Contract Number:
 Project Status Summary:

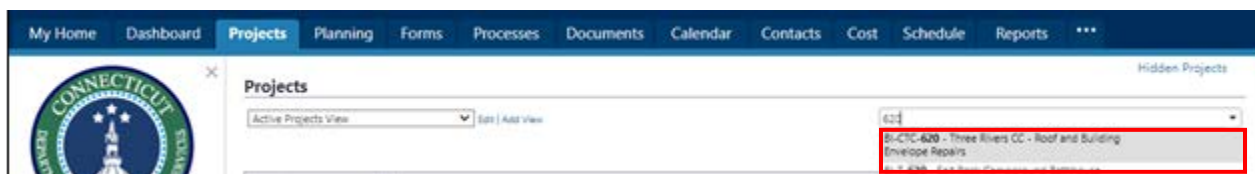
19C A/E Users

19C.01 Instructions for the A/E for Review and Certification of Payment Applications:

Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for "Projects":

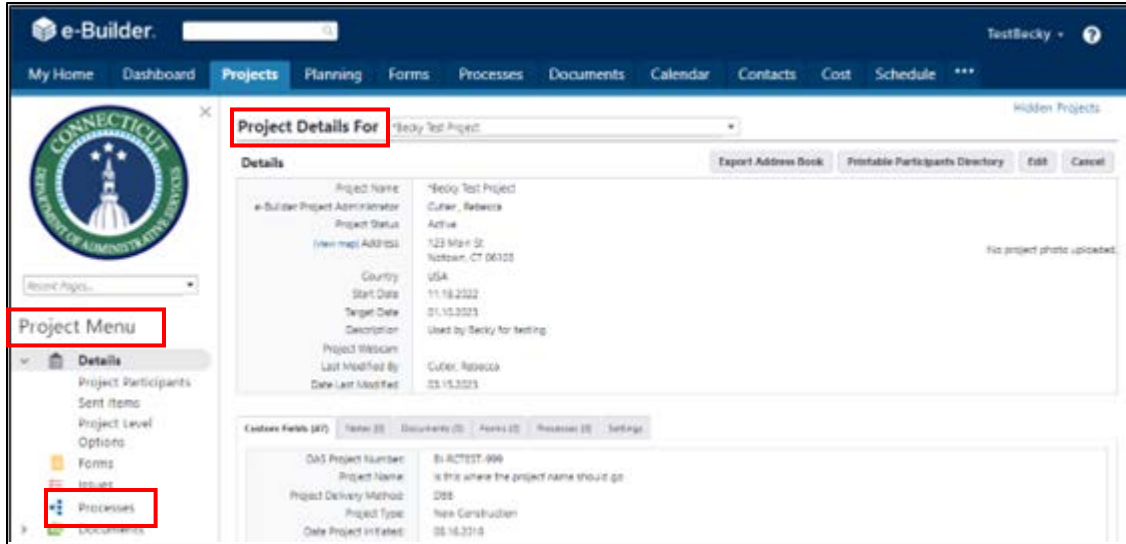


Search for your project by entering the project number. Click on your project to bring up the "Project Details" page.



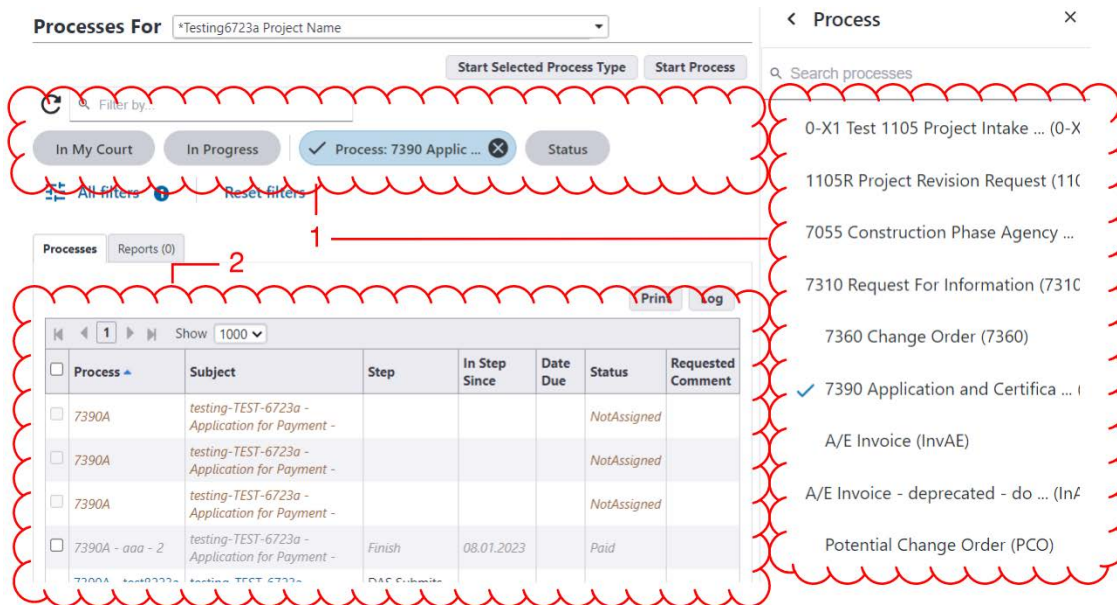


The "Project Details" page is your home page for your project. Under the "Project Menu" on the left, click on Processes to find project-specific processes.



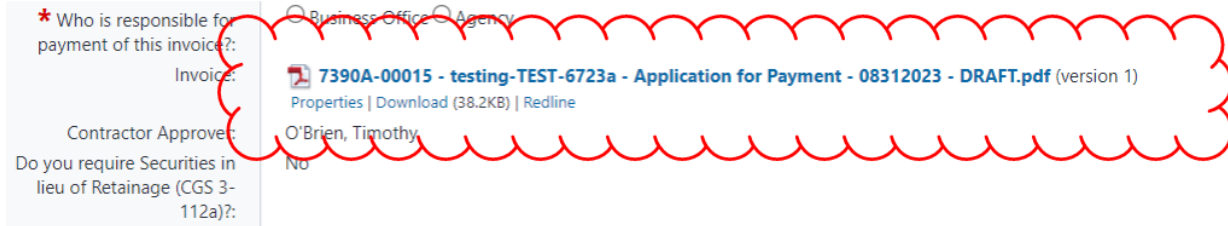
Change the Process filter settings to find the process instances you are looking for.

1. Select "7390 Application and Certification for Payment" from the "Search Processes" dropdown menu. Select one or more of the following from the "Filter by" dropdown menu: "All Processes", "Draft", "Open", or "Finish". "All Processes" will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.



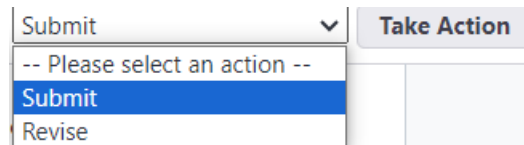


Once the process instance opens, review all of the information entered, including the files uploaded to the Documents tab. To view the pencil requisition, click the “Details tab” and then click on the link to the PDF, as shown below:



The A/E should then select their firm name from the “AE Approver” dropdown list and the input the date of approval.

At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take on the item. “Submit” will send the item to the A/E for review. “Revise” will send the item back to the GC/CMR for any corrections that are needed. Once the action to be taken is selected, click the “Take Action” button.



If “Revise” was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click “Revise” to complete and send the comments.

7390 Application and Certification for Payment (7390A) - new test 1 - 15



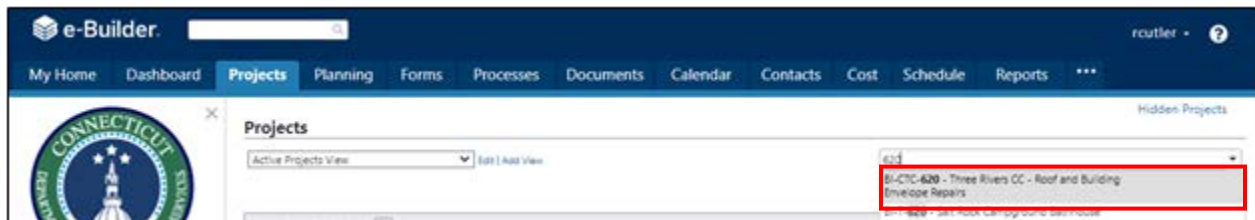
19D PM Users

19D.01 Instructions for the PM for Review and Certification of Payment Applications:

Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for “Projects”:



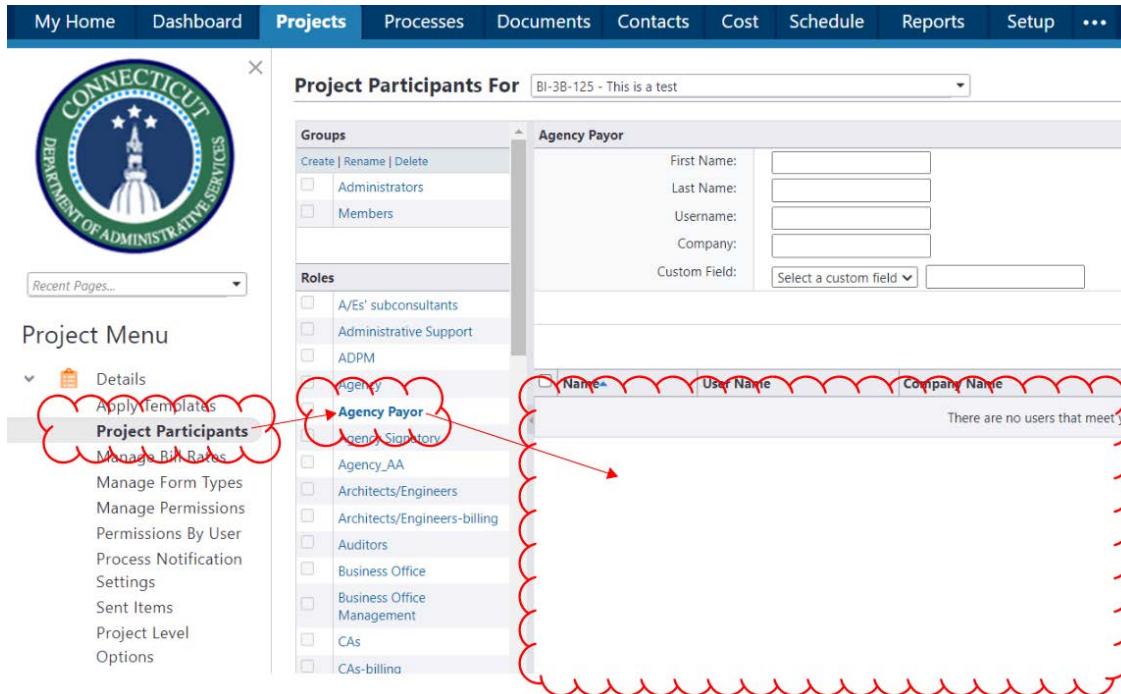
Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



The “Project Details” page is your home page for your project.

19D.02 Project set-up on Payment Applications whose costs are paid for by the Agency

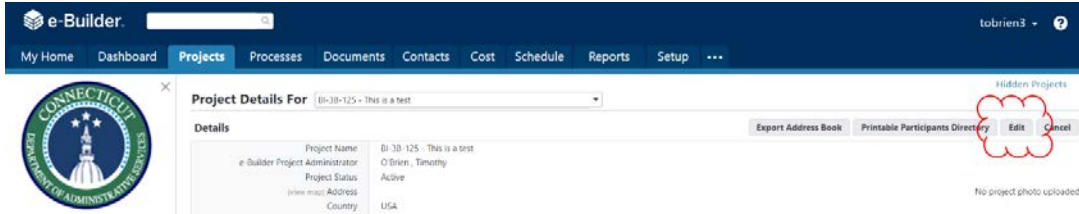
If the Agency is directly responsible paying payment applications, the person who attends to the payment must be in the Agency Payor role. If that person is not in that role, please request that Construction Support Services (Tim O’Brien) place that person in that role.



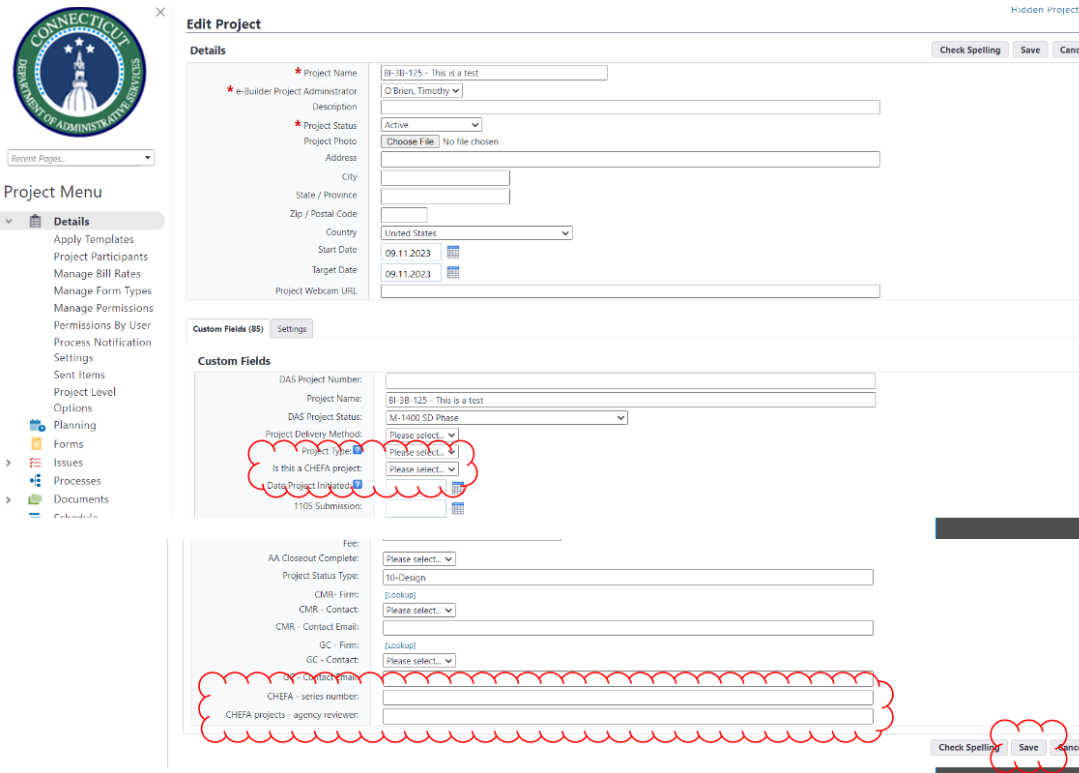


If the payment will be made using CHEFA funds, proceed as follows:

1. At the top of the Project Details page, click "Edit".



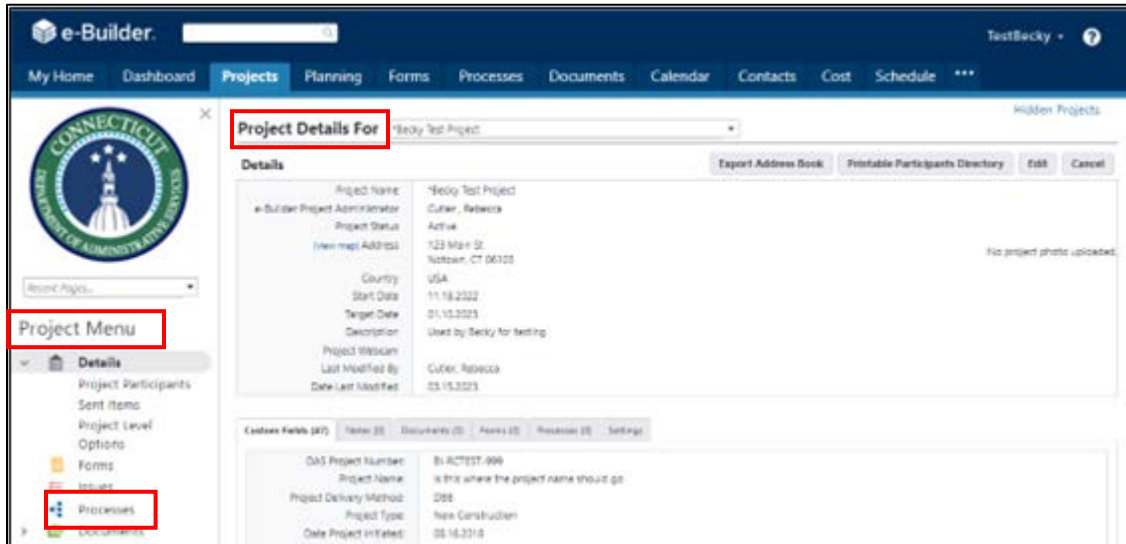
2. Select "Yes" on the line that asks, "Is this a CHEFA project."
3. Enter the CHEFA series number for the Payment Application cover letter.
4. Enter the agency reviewer for the signature page on the cover letter.
5. Click "Save."





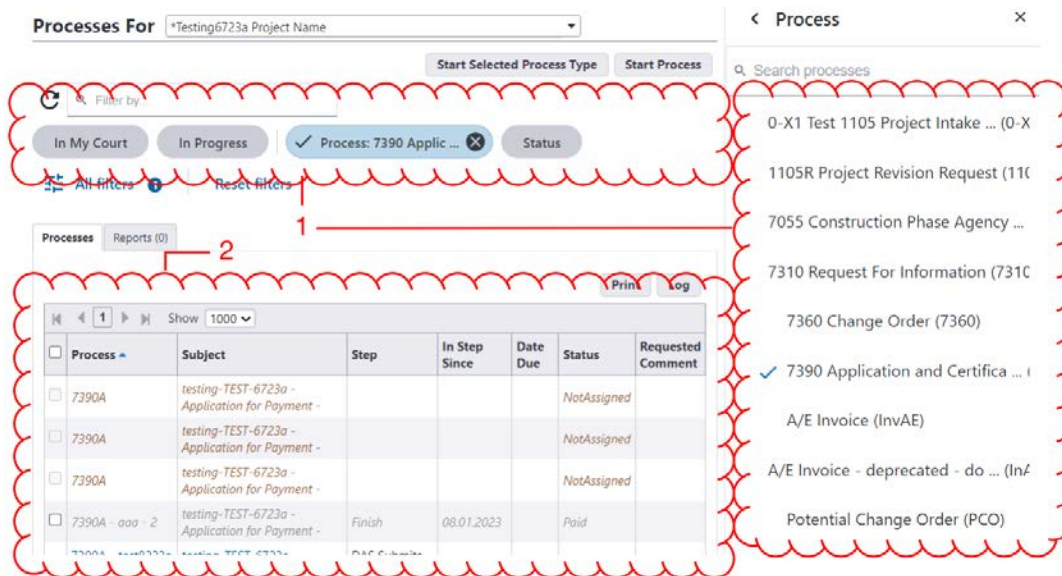
19D.03 Accessing the Process Instance

Under the “Project Menu” on the left, click on Processes to find project-specific processes.



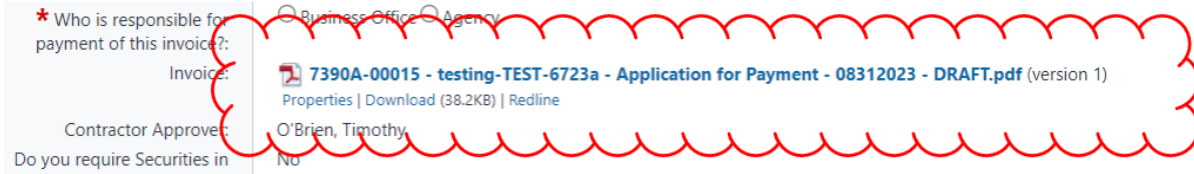
Change the Process filter settings to find the process instance you are looking for.

1. Select “7390 Application and Certification for Payment” from the “Search Processes” dropdown menu. Select one or more of the following from the “Filter by” dropdown menu: “All Processes”, “Draft”, “Open”, or “Finish”. “All Processes” will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.





Once the process instance opens, review all of the information entered, including the files uploaded to the Documents tab. To view the pencil requisition, click the "Details tab" and then click on the link to the PDF, as shown below:



The PM should then select their firm name from the "PM Approver" dropdown list and the input the date of approval.

Form fields for PM Approver (dropdown menu) and PM Approve Date (calendar icon).

At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take on the item. "Submit" will send the item to the A/E for review. "Revise" will send the item back to the GC/CMR for any corrections that are needed. Once the action to be taken is selected, click the "Take Action" button.

Action selection dropdown menu with options: Submit, -- Please select an action --, Submit, Revise, and a Take Action button.

The project manager will then be prompted to approve the payment for the project Cost part of e-Builder and enter the Approved date.

Approval confirmation form with question: 'Are you sure you want to approve the commitment invoice?', Approval Date field with calendar icon and date [02.08.2024], and buttons: Yes, Approve; No, Cancel.

If "Revise" was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click "Revise" to complete and send the comments.

Comment screen with 'Add a comment' header, 'Add Comment' section, a text area with a red cloud annotation, and buttons: Check Spelling, Revise, Cancel.



19E Payment Application at Substantial Completion (Coming Soon)

19E.01 Instructions for the Substantial Completion step:



19F Final Payment Application

19F.01 Notification for the creation of a Final Payment Application

The GC/CMR will receive an email notification from eBuilder for action in the 7990 process to proceed with processing the Final Payment Application.

To access the project process, the GC/CMR should click on the “Click Here” link provided in the email.

BI-3B-127 - This is a test

Approve action was taken on Support Services Review step. To view details on this item, [click here.](#)

Process Details	
Project	BI-3B-127 - This is a test
Process	7990 - 1
Subject	Test Test Test
Step	Spawn Final PayApp
In Step Since	04.16.2024
Last Action	Approve
Last Action Taken By	Timothy O'Brien
Status	Submitted

After opening the process instance, a warning prompt will appear. **Select the “Click here” link in the prompt, as shown below**, to proceed to initiate the Final Payment Application. **No other action should be taken on this page. DO NOT** interact where it says, “Spawn Complete”, or “Take Action.” Doing so will close out the Final Payment Application. This action cannot be undone.

The screenshot shows the e-Builder interface for a process instance titled "7990 Closeout (7990) - 1". At the top, there are navigation buttons: "Delete Instance", "Workflow Override", and "All Fields View". A yellow warning banner contains the text: "Warning: A draft 7390 Application and Certification for Payment has been automatically created. Click here to provide required Commitment Invoice information and submit the instance." The "Click here" link is circled in red. Below the warning, there are buttons for "Spawn Complete", "Take Action", "Print", "Copy", and "Cancel". The "Spawn Complete" and "Take Action" buttons are crossed out with red X's. A table below displays process details:

Project:	BI-3B-127 - This is a test	Overall Due Date:	
Process Document:	7990 - 1	Step Due Date:	
Current Workflow Step:	Spawn Final PayApp Show Workflow Diagram		
Subject:	Test Test Test		
Status:	Submitted		

At the bottom, there are tabs for "Details", "Comments (1)", "Documents (0)", "Attached Processes (0)", "Attached Forms (0)", and "Attached To (0)".



19F.02 Initiating the Final Payment Application in the new 7390 instance

After selecting the “Click here” link, a new “7390 Application and Certification for Payment” process instance will open.

This is the final GC/CMR Payment Application for the project. The GC/CMR should click on the “Documents” tab and upload all required documents, then return to the “Details” tab to complete the 7390 Form. Refer to [Section 19 - 7390 Application and Certification for Payment](#) for instructions on completing Form 7390. Note however that this is the Final Payment Application, and the “Type of Payment Application” should be marked as “Final”. Upon completion of Form 7390, click “Submit”.

7390 Application And Certification For Payment (7390A)

Start Process Print Copy Check Spelling Show Wo

Project: BI-38-127 - This is a test
 Process: 7390 Application and Certification for Payment
 * Subject: Test Test Test (7990 - 1)
 Counter Prefix: 10

Details Documents (0) Attached Processes (1) Attached Forms (0)

Expand All | Collapse All

CONSTRUCTOR:

- **STEP 1:** In the “Counter Prefix” field, enter the Payment Application number of this payment application.
- **STEP 2:** Gather and attach all **REQUIRED DOCUMENTS** to the **Documents** tab above in accordance with the General Conditions and Section 01 29 76 Progress Payment Procedure **DOCUMENTS** below. For *Substantial Completion Payment and Final Payment*, see lists in Section 01 29 76 Progress Payment Procedure).
- **STEP 3:** Complete the fields below (required fields are indicated by a red “*”).

Type of Payment Application: Final

19F.03 Final Payment Application step

After clicking “Submit”, click on the “Processes” module for the project, under the Project Menu, to locate the 7390 Payment Application process instance which should be in its “Final Payment” step. Click on this instance’s number or subject to open it.

Project Processes BI-38-127 - This is a test

Filter by... 7390A

PROCESSES REPORTS

Instance	State	Subject	Step
7390A - 10 - 1	Open	- Application for Payment -	Final Payment

Page View 500



In this step, upload all of the documentation required for Final Payment Application in the “Documents” tab of the process instance.

e-Builder ↑ ?

7390 Application And Certification For Payment (7390A) - 10 - 1 Delete Instance Workflow Override All Fields View Instructions

-- Please select an action -- Take Action Check Spelling Print Copy Delegate Save Cancel

Project:	BI-38-127 - This is a test	Overall Due Date:	
Process Document:	7390A - 10 - 1 Show History Current Actors	Step Due Date:	
Current Workflow Step:	Final Payment Show Workflow Diagram		
Subject:	- Application for Payment -		
Counter Prefix:	<input type="text" value="10"/>		
Status:	Submitted		

Details Comments (0) Documents (0) Attached Processes (1) Attached Forms (0) Attached To (0)

Expand All | Collapse All

Data ^

In the Documents tab, above, upload all documents required for Final Payment.

Final Payment Application: Administrative actions and submittals that must precede or coincide with submittal of the final Application for Payment include, but are not limited, to the following:

1. Completion of Project Closeout requirements.
2. Completion of list of items remaining to be completed as indicated on the attachment to the Certificate of Substantial Completion.

The GC/CMR then indicates the following:

By taking the "Submit" action on this step, the authorized representative of the General Contractor or Construction Manager at Risk agrees to the following:

The undersigned General Contractor or Construction Manager at Risk (the "Contractor") certifies that this Application for Payment has been executed by a person authorized to sign legal documents on behalf of the Contractor. Furthermore, the undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief, the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments were received from the Owner, and that the current payment shown herein is now due.

Does the person signing the Application for Payment for the GC or CMR agree to the above? No Yes

Is All of the information required for final payment uploaded: No Yes

When complete, at the top or bottom of the form, the GC/CMR clicks, "Please select an action", to choose the workflow action desired.

-- Please select an action -- Take Action

-- Please select an action --

Submit
Void
Revise



The options include:

- “Submit” to submit the Payment Application for the creation of a PDF draft to the CA in the Payment Application workflow, as indicated in 0175 e-Builder Guidance Manual, Section 19A.
- “Void” to void the Payment Application instance. This action is permanent and cannot be undone.
- “Revise” to send the Payment Application instance back to the GC/CMR at the workflow step that allows the GC/CMR to further edit it and make corrections.

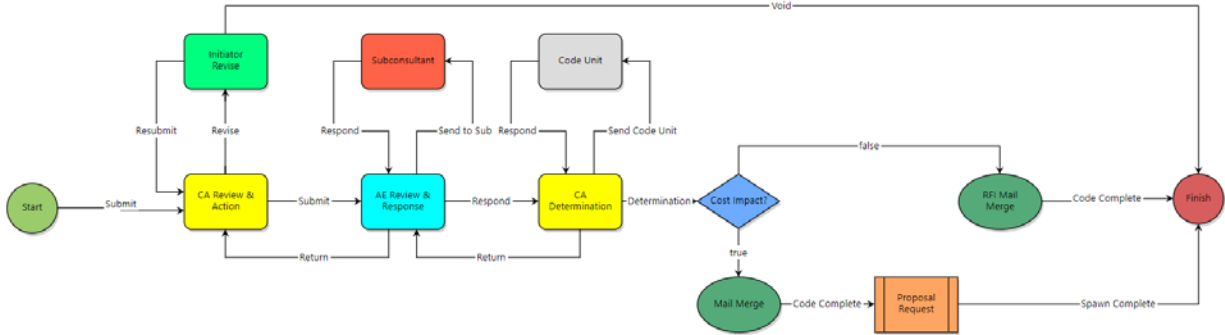
After making a selection, click the “Take Action” button to forward the application process to the next respective user.

As with other processes in e-Builder, a “Save” button is also available to allow the user to save the process instance without clicking “Take Action” yet, to return later for further edit.

19F.04 7390 Process

After the GC/CMR user has clicked “Submit” in 19F.03, the 7390 will be sent to the CA for further action. Please refer to [Section 19B – CA User](#) for CA instructions. If the CA sends the Payment Application back to the GC/CMR for revisions, the GC/CMR’s workflow may include a return to the Final Payment Application step.

Section 20: Request for Information

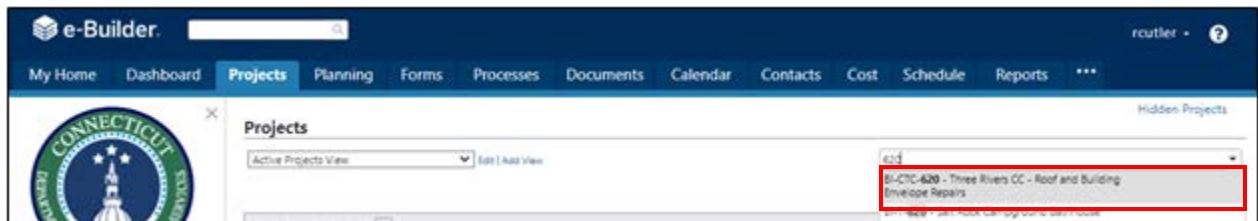


20.01 GC/CMR RFI Submission - Accessing the Process

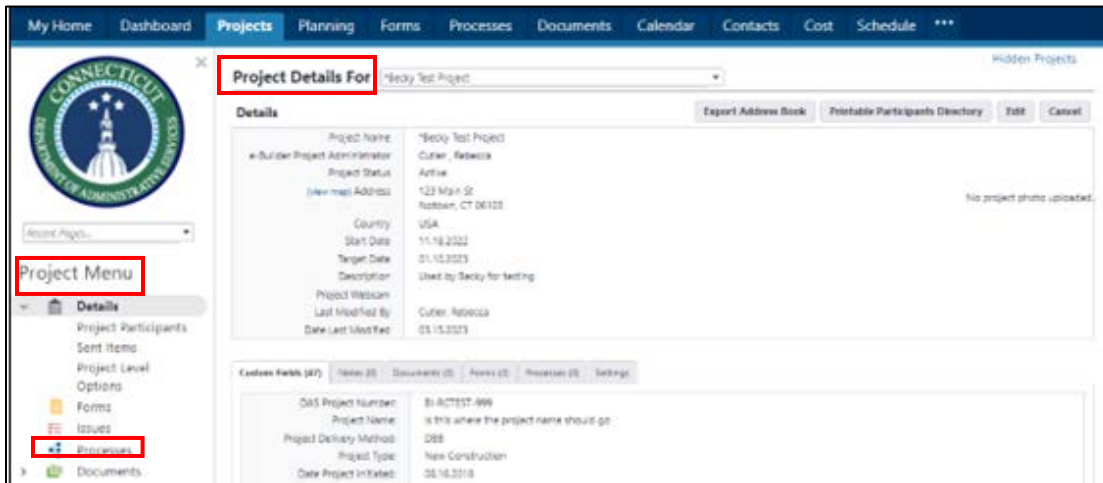
Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for “Projects”:



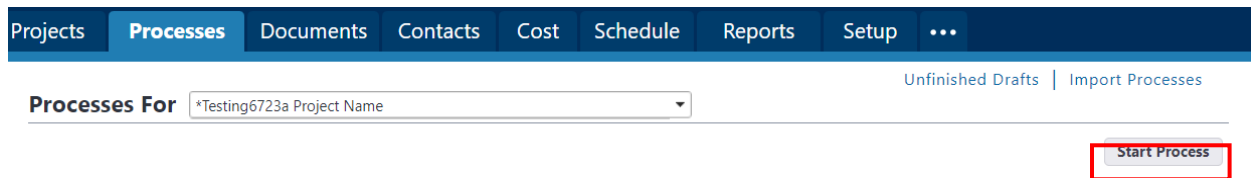
Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



The “Project Details” page is your home page for your project. Under the “Project Menu” on the left, click on Processes to find project-specific processes.



Click on "Start Process" to find and start a process.



A pop up will appear with processes that the user is able to initiate. Select "7310 Request For Information (7310)" from the list of available process types.

Start a process on *Testing6723a Project Name

Processes Cancel	
Process Name	Description
7310 Request For Information (7310)	The RFI process is used for the submission and routing of requests for information. If there is a cost impact, it may spawn a proposal request.

That causes the pop-up to change into the RFI form. Complete the answers to the questions asked in the form.



Click on the “Documents” tab header to open the tab. Upload supporting documents for the RFI to the Documents tab by either using the “drag-and-drop” feature or by clicking the “Attach” button.

If the “Attach” button is clicked, a pop-up will appear. Click the “Upload from your Computer” button to locate a locally stored document.

Then, click “Select” to use the pre-selected default folder (highlighted in blue font) as the destination folder in the eBuilder Documents module to upload the supporting documents. If applicable, an alternate folder can be selected.



Select Destination Folder

Documents / 09 Construction Phase / Prime Contractor Pay Apps [Default]

- Documents
 - 00 DocuSign Request
 - 01 Project Planning
 - 02 Selections
 - 03 Preconstruction Contracts
 - 04 Pre-Design
 - 05 Schematic Design
 - 06 Design Development
 - 07 Construction Documents

Select Cancel

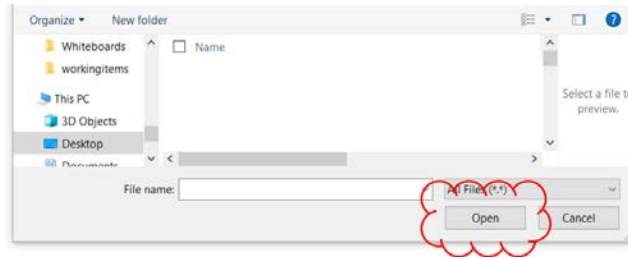
Then click "Browse".

↑

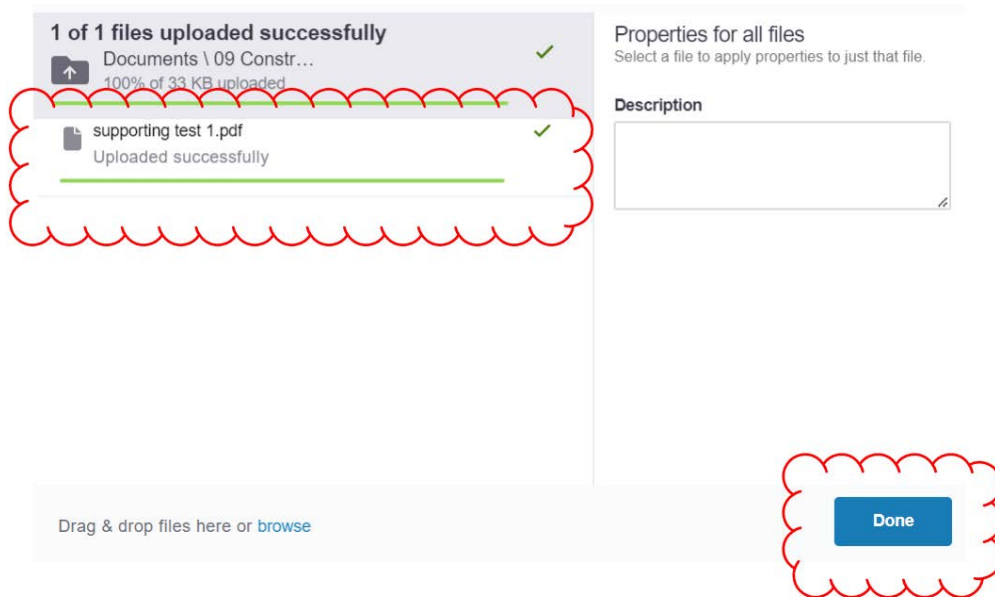
Drag your files or Browse



Select the file(s) you wish to upload and click “Open”.



If it worked properly, you should see a green line under where the filename is. Then click “Done.”



The uploaded document should then appear in the Documents tab. Also note the number in parentheses next to the “Documents” tab title, indicating the number of uploaded files.



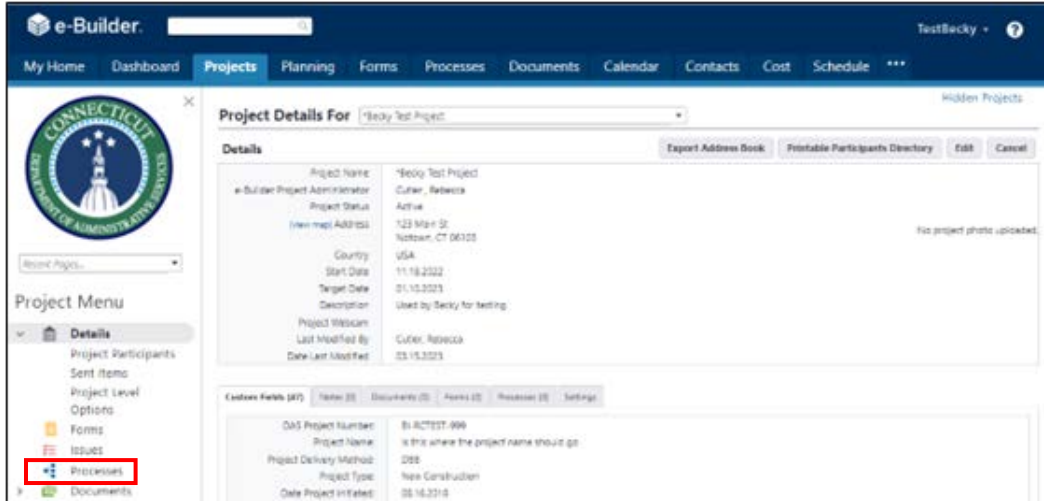
If the user would like to save the RFI, and keep it in draft form for future editing, the “Save Draft” button is available.





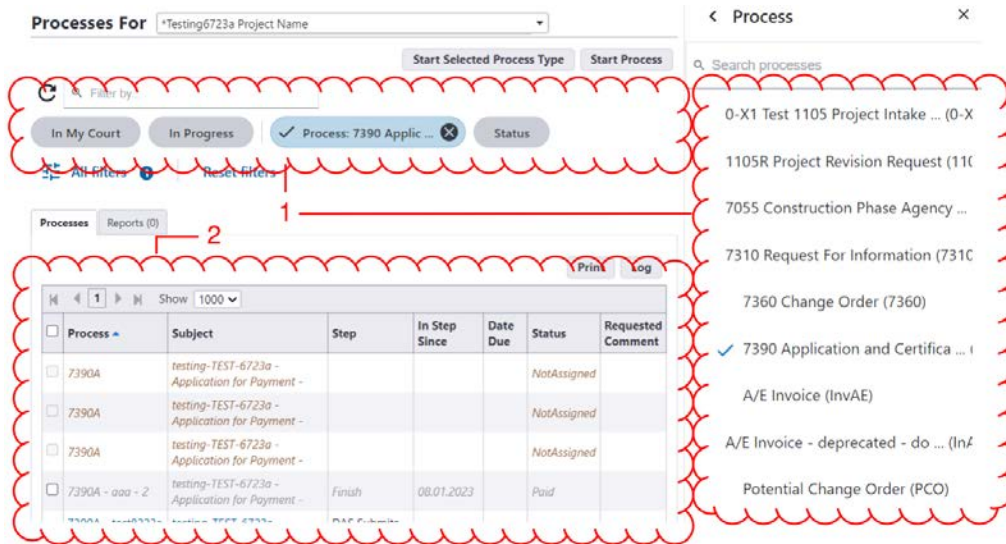
The RFI is saved as a type of e-Builder “Process instance”.

To locate the draft Process instance that is the draft RFI, go back into the project, and open the Processes module within the project.



Proceed as follows to change the Process filter settings to find the process instance you are looking for.

1. Select “7310 Request for Information (7310)” from the “Search Processes” dropdown menu. Select one or more of the following from the “Filter by” dropdown menu: “All Processes”, “Draft”, “Open”, or “Finish”. “All Processes” will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.



When the user is ready to submit the RFI, click “Submit”. This will cause the RFI to be sent into workflow.



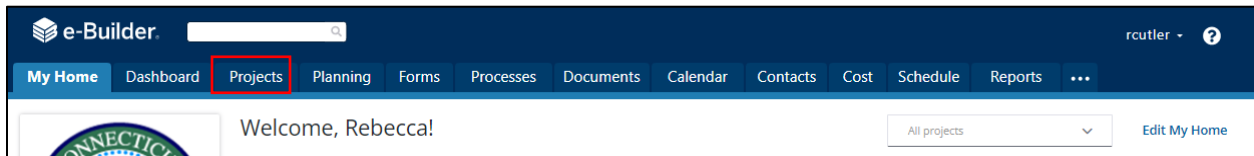


20.02 CA RFI Review - Accessing the Process

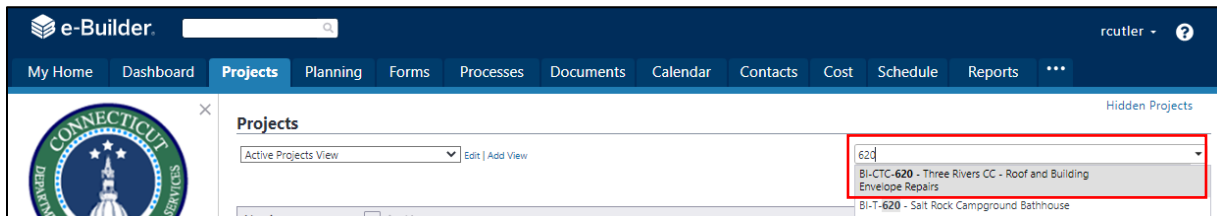
The CA will receive an email notification from eBuilder that an RFI is pending. To access the pending RFI, the CA can either click on the link in the email and the browser instance will appear as a pop-up; or

Process instance is in your court. To view details or take action [click here](#).

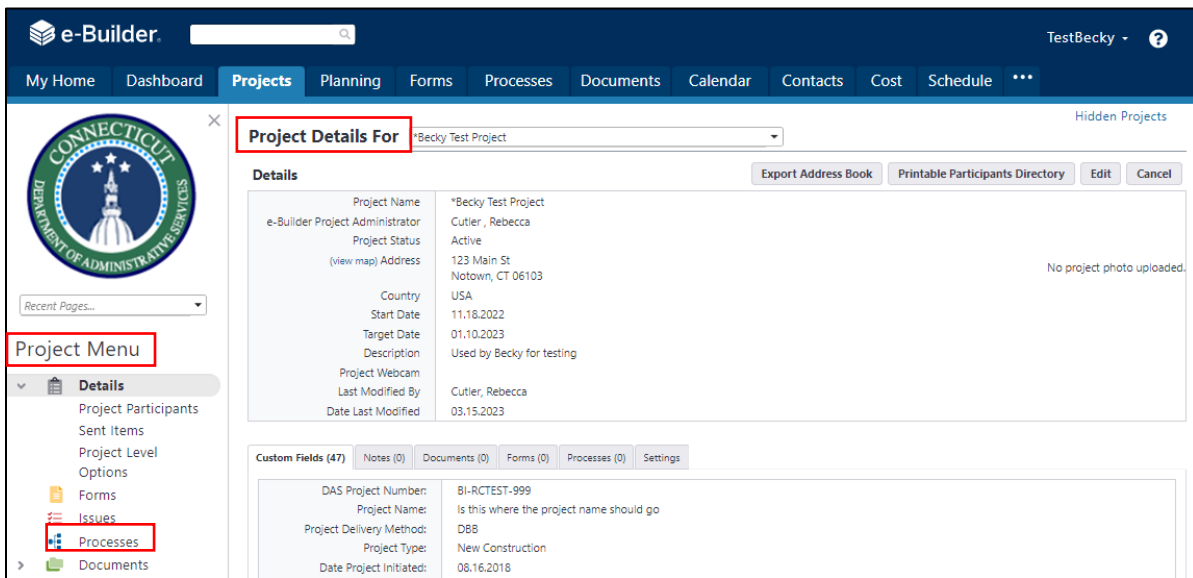
the CA can log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f> and click on the “Projects” tab to find the applicable project.



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



The “Project Details” page is your home page for your project. (Click “Edit” to edit info.). Under the “Project Menu” on the left, click on Processes to find project-specific processes.



Proceed as follows to change the Process filter settings to find the process instance you are looking for:

1. Select “7310 Request for Information (7310)” from the “Search Processes” dropdown menu. Select one or more of the following from the “Filter by” dropdown menu: “All Processes”, “Draft”, “Open”,



or “Finish”. “All Processes” will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.

- The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.

The screenshot shows the 'Processes For' interface for a project named '*Testing6723a Project Name'. It features a filter menu with options like 'In My Court', 'In Progress', and 'Status'. A table lists process instances with columns for Process, Subject, Step, In Step Since, Date Due, Status, and Requested Comment. A pop-up window titled 'Process' displays a list of process instances, including '7390 Application and Certifica...'. Red dashed boxes and arrows highlight the filter menu and the pop-up window.

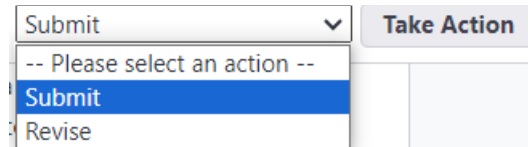
Once the process instance opens, the CA can review all of the information entered, including the files uploaded to the “Documents” tab, and any comments made regarding the RFI under the “Comments” tab. The CA will then return to the “Details” tab and provide a response to the editable questions. The CA has the option to “Save” its edits and return for further edits, if it so chooses, by clicking the “Save” button.

The screenshot shows the '7310 Request For Information (7310) - 3' form. The 'Details' tab is active, displaying a list of questions and their corresponding solutions. The questions include 'Is There a Potential Cost Impact?', 'Is There a Potential Time Impact?', and 'Is an Agency Change Request Needed?'. The 'Save' button is highlighted in red. The form also includes a 'Take Action' button and a 'Cancel' button.

At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take. “Submit” will forward the RFI to the A/E for review. “Revise” will return the



RFI to the GC/CMR for any corrections that are needed. Once the action to be taken is selected, click the "Take Action" button to complete the action.



If "Revise" was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click "Revise" to complete and send the comments.

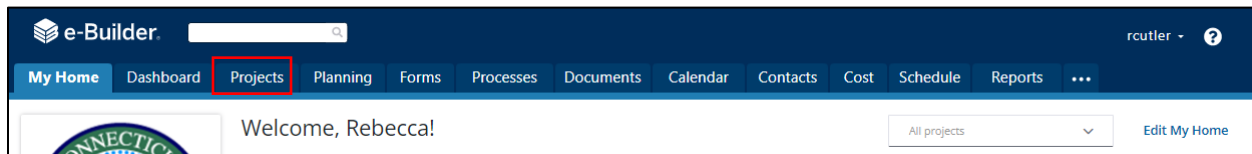


20.03 A/E RFI Review - Accessing the Process

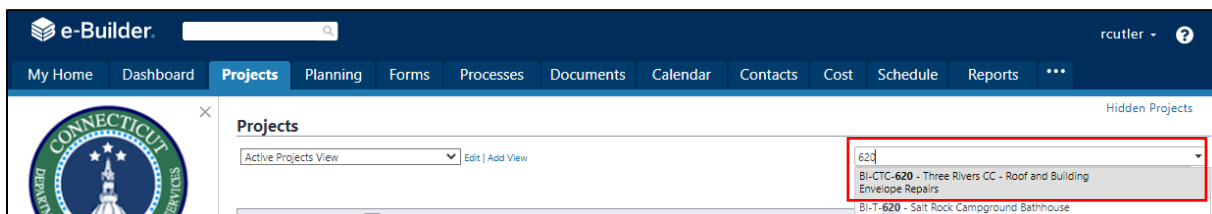
The A/E will receive an email notification from eBuilder that an RFI is pending. To access the pending RFI, the A/E can either click on the link in the email and the browser instance will appear as a pop-up; or

Process instance is in your court. To view details or take action [click here.](#)

the A/E can log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f> and click on the "Projects" tab to find the applicable project.

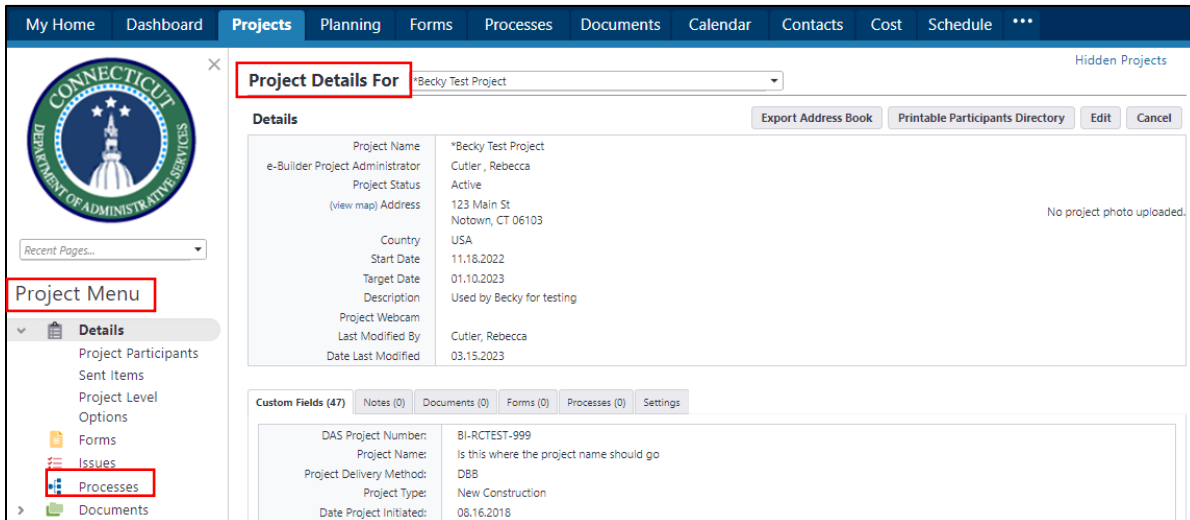


Search for your project by entering the project number. Click on your project to bring up the "Project Details" page.



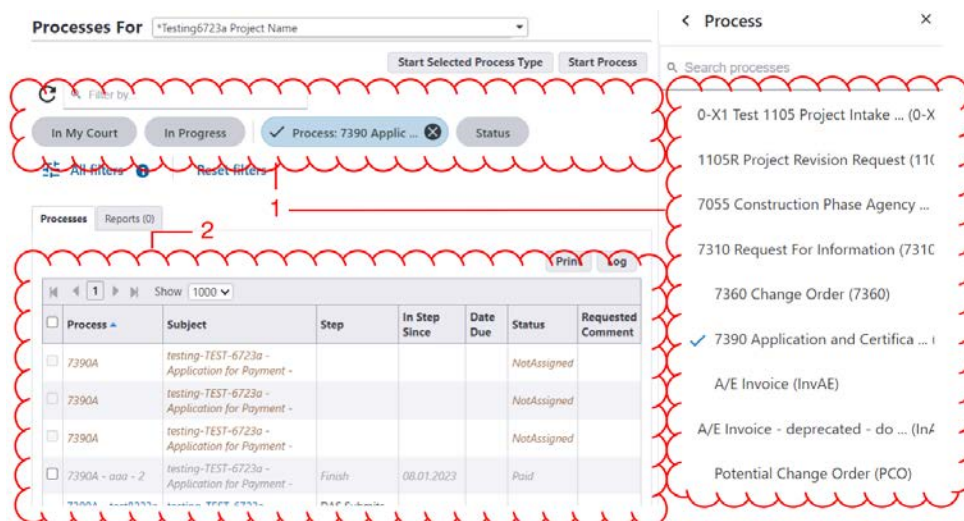


The “Project Details” page is your home page for your project. (Click “Edit” to edit info.). Under the “Project Menu” on the left, click on Processes to find project-specific processes.



Proceed as follows to change the Process filter settings to find the process instance you are looking for:

1. Select “7310 Request for Information (7310)” from the “Search Processes” dropdown menu. Select one or more of the following from the “Filter by” dropdown menu: “All Processes”, “Draft”, “Open”, or “Finish”. “All Processes” will show all process instances for the subject project, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.





Once the process instance opens, the A/E can review all of the information entered, including the files uploaded to the “Documents” tab, and any comments made regarding the RFI under the “Comments” tab. The A/E will then return to the “Details” tab and provide a response to the editable questions. The A/E has the option to “Save” its edits and return for further edits, if it so chooses, by clicking the “Save” button.

7310 Request For Information (7310) - 3 Workflow Override All Fields View Instructions

-- Please select an action -- Take Action Check Spelling Print Copy Delegate Save Cancel

Project: *Testing6723a Project Name		* Overall Due Date: 08.10.2023 05:00pm
Process Document: 7310 - 3	Show History Current Actors	
Current Workflow Step: CA Review & Action	Show Workflow Diagram	Step Due Date:
Subject: Timothy O'Brien		
Status: Submitted		

Details | Comments (2) | Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

Expand All | Collapse All

Question:	sdfvdsfvsvfg
Proposed Solution:	
Specification Section:	
Drawing Number:	
Is There a Potential Cost Impact?:	<input type="radio"/> Yes <input type="radio"/> No
Is There a Potential Time Impact?:	<input type="radio"/> Yes <input type="radio"/> No
Is an Agency Change Request Needed?:	<input type="text" value="No"/> <input type="text" value="Yes - Pending"/> <input type="text" value="Yes - Completed"/>

Note: Please hold Ctrl to select multiple items from the list.

-- Please select an action -- Take Action Check Spelling Print Copy Delegate Save Cancel

At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take. “Respond” will forward the RFI to for final determination. “Return” will return the RFI to the CA for any corrections that are needed. “Send to Sub” will forward the RFI to the sub for review and comment. Once the action to be taken is selected, click the “Take Action” button to complete the action.

-- Please select an action -- Take Action

-- Please select an action --

Respond

Return

Send to Sub

If “Return” was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click “Return” to complete and send the comments.

Add a comment.

*** Add Comment**

Private

Check Spelling
Return
Cancel



When the “Send to Sub” option is selected, a comment screen will appear, with an “Add Comment” for the A/E to give instructions to their subconsultants, and an “Add actors to the next step” to select the subconsultant(s) to which the RFI is to be referred.

To add a subconsultant to the next step, the A/E will select the subconsultant’s name from the list of “Available Users” column and then click the “>” to move that individual into the “Selected Users” column. After adding a comment and selecting the user, click “Send to Sub.”

7310 Request For Information (7310) - 3 Instructions

Add a comment.

*** Add Comment**

Private

Add actors to the next step

<p>Available Users</p> <div style="border: 1px solid gray; padding: 5px; min-height: 40px;"> <p>Jim Johnson</p> </div>	<p>></p> <p><</p>	<p>Selected Users</p> <div style="border: 1px solid gray; height: 40px;"></div>
--	-------------------------	---

As an alternative to the “Send to Sub”, it may be preferable to go to the “Comments” tab of the RFI instance and click the “Request Comment” button. Using this “Request Comment” method allows the A/E to maintain control of the item in workflow, rather than giving the subconsultant control in the workflow.

7310 Request For Information (7310) - 3 Workflow Override All Fields View Instructions

-- Please select an action --

<p>Project: *Testing6723a Project Name</p> <p>Process Document: 7310 - 3</p> <p>Current Workflow Step: AE Review & Response Show History Current Actors</p> <p>Subject: Timothy O'Brien</p> <p>Status: Submitted</p>	<p>* Overall Due Date: 08.10.2023 <input type="button" value="Calendar"/> 05:00pm <input type="button" value="Dropdown"/></p> <p>Step Due Date:</p>
--	---

Private Comment

Timothy O'Brien, Department of Administrative Services - Construction Services 08.03.2023 10:54 AM
Requested comment on step CA Review & Action from Timothy O'Brien (Department of Administrative Services - Construction Services).

[Make Private](#)

After clicking the “Request Comment” button, a pop-up will appear that allows the A/E to select their subconsultant users in the “To” field by selecting their names and pressing the arrow button to move



them to the right panel. The “Message” field allows the A/E user to provide instructions to the subconsultants. Then the “Request Comment” button sends a comment request notification to the subconsultant.

Request Comment

Request Comment Cancel

* To Select from Users on Project

All Users

Cardinale, Jaime (Department of Administrative Services)

Grab, Alexander (State of Connecticut)

Masson, Brianna (Department of Administrative Services)

O'Brien, Timothy (Department of Administrative Services)

Tim2, testing (Department of Administrative Services)

TOB, Testing1 (DAS)

Warren, Allen (DCS)

Tim2, testing (Department of Administrative Services)

TOB, Testing1 (DAS)

Enter External Users Email or Lookup

Type to search...

Allow external users to attach files

* Subject ACTION REQ'D - *Testing6723a Project Name - Timothy O'Brien

Respond By

Message

"Segoe UI", A... 12px B I U abc

Request Comment Cancel

Note - Participants accessing the process externally will see all comments and attachments.

When the subconsultant responds, their comments will be posted in the “Comments” tab of the RFI instance.



20.04 CA Determination

After the A/E completes their review, the RFI will be forwarded to the CA for final determination. To access the RFI instance, the CA should follow the steps outlined in Section 20.02 to open the process instance.

Once the process instance opens, the CA can review all of the information entered, including the files uploaded to the “Documents” tab, and any comments made regarding the RFI under the “Comments” tab. The CA will then return to the “Details” tab and provide a response to the editable questions.

7310 Request For Information (7310) - 3 Workflow Override | All Fields View | Instructions

-- Please select an action -- | Take Action | Check Spelling | Print | Copy | Delegate | Save | Cancel

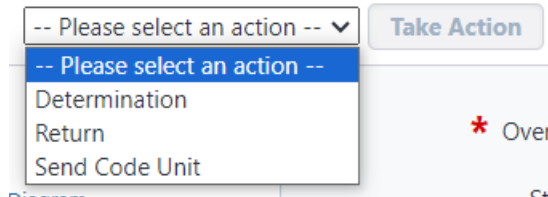
Project: *Testing6723a Project Name Process Document: 7310 - 3 Show History Current Actors Current Workflow Step: CA Determination Show Workflow Diagram Subject: Timothy O'Brien Status: Submitted	* Overall Due Date: 08.10.2023 05:00pm Step Due Date:
--	--

Details | Comments (2) | Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

Expand All | Collapse All

Question: Proposed Solution: Specification Section: Drawing Number: Is There a Potential Cost Impact?: Is There a Potential Time Impact?: Is an Agency Change Request Needed?: A/E Response: A/E Response Date: CA Comments:	sdfvdsfvsvfg <input checked="" type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> No <div style="border: 1px solid gray; padding: 2px;"> No Yes - Pending Yes - Completed </div> <small>Note: Please hold Ctrl to select multiple items from the list.</small> This is the A/E response. 11.22.2023 <div style="border: 1px solid gray; height: 30px; margin-top: 5px;"></div>
---	--

At the top and bottom of the form are pull-down menus that allow the CA to select the action they need to take. The CA can either select “Determination” or “Return”. “Send Code Unit” is also listed as an option, but should not be used at this time. After making a selection, click the “Take Action” button.



If the CA selects “Return”, the RFI will be returned to the A/E with instructions for correction

If the CA selects “Determination” and answered “Yes” to the “Is there a Potential Cost Impact” question, then the RFI workflow will generate a Proposal Request, as part of a “Potential Change Order (PCO)” process instance.

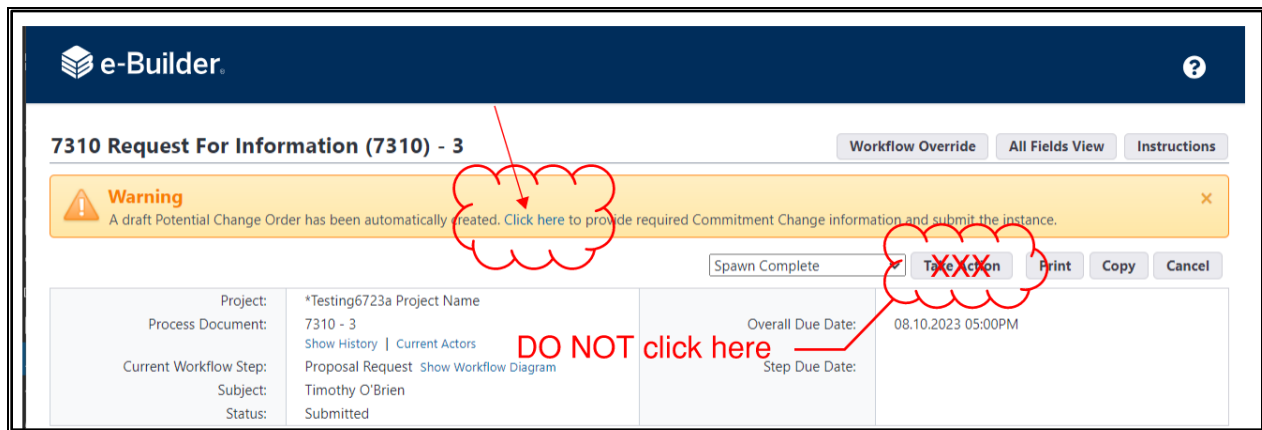


20.05 A/E Proposal Request Step

After the CA makes a final determination on an RFI that was identified as having a potential cost impact, the A/E will receive an email notification to that effect. To access the RFI instance, the A/E should follow the steps outlined in Section 20.03 to open the process instance.

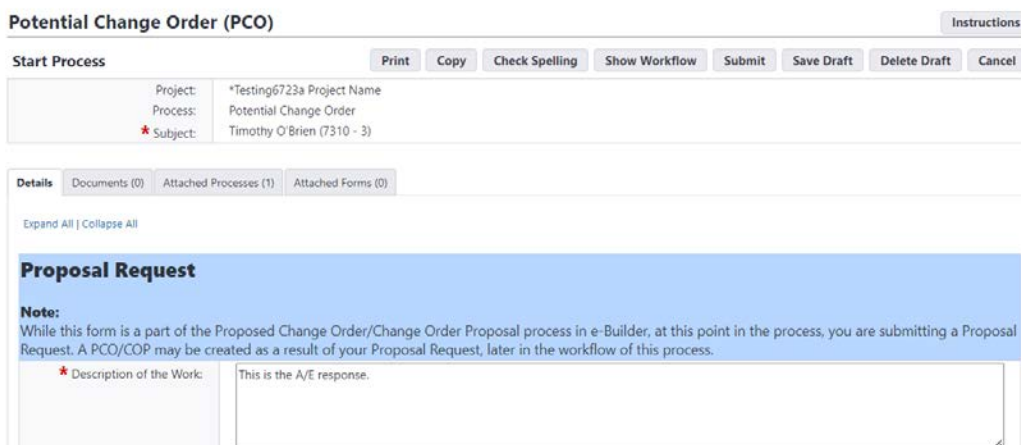
Once the process instance opens, the CA can review all of the information entered, including the files uploaded to the “Documents” tab, and any comments made regarding the RFI under the “Comments” tab. The CA will then return to the “Details” tab and provide a response to the editable questions.

The purpose of the RFI process instance at this step is to launch a Proposal Request instance. After opening the process instance, note the “Warning” banner at the top of the page. The only action the A/E should take is to click the “Click here” link in the banner. **DO NOT** click “Take Action” at this step.



After clicking “Click here,” an instance of the “Potential Change Order (PCO)” process type will be launched. This is an entirely new process type and an entirely new process instance. The “Potential Change Order (PCO)” is the umbrella name for a process that begins with Proposal Requests and may generate into CCDs and/or COPs. See the instructions for the “Potential Change Order (PCO)” process for how to proceed with this process.

Note that the RFI’s workflow process will be automatically completed when the Submit button is pressed by the A/E user in the Proposal Request part of the “Potential Change Order (PCO)” process, meaning that no further action needs to be nor should be taken by users on the RFI.





Section 21: Proposal Requests

21.01 Coming Soon



Section 22: CCDs

22.01 Coming Soon



Section 23: COPs

21.01 Coming Soon



Section 24: Change Orders

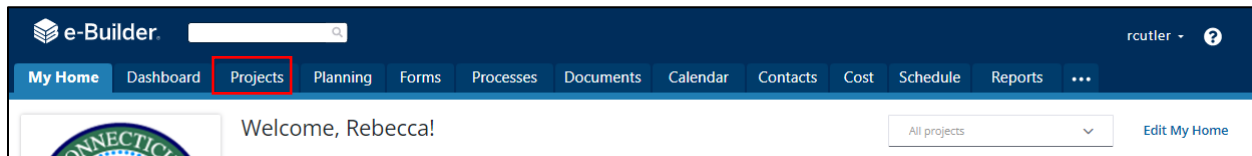
21.01 Coming Soon



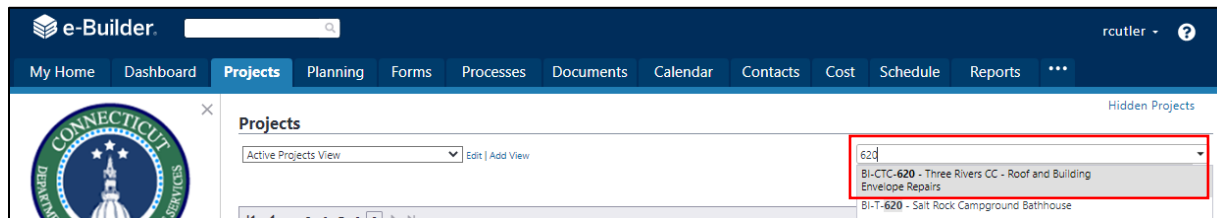
Section 25: Submittals

25.01 Accessing the Process

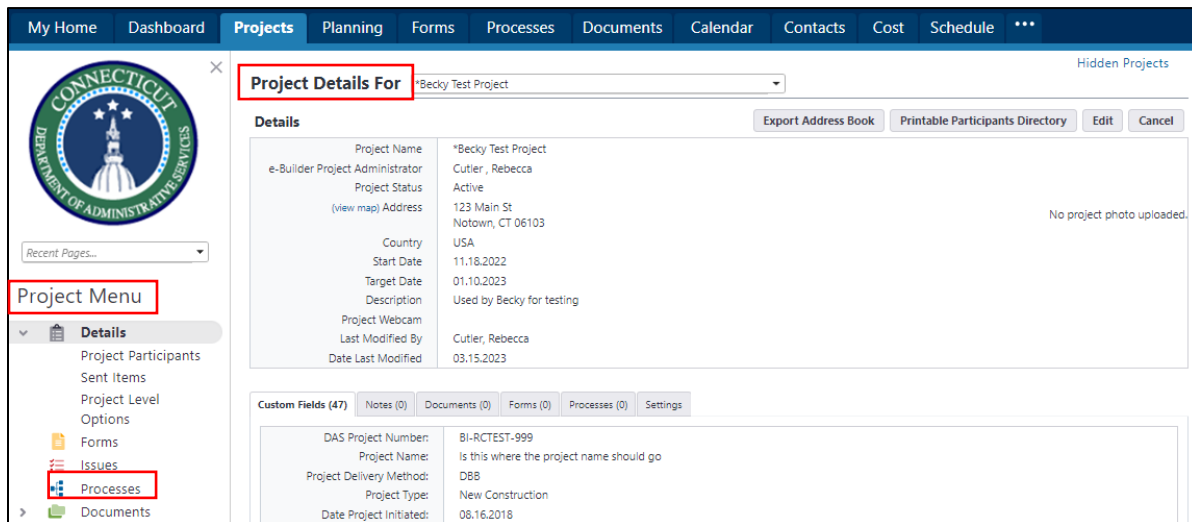
Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f> and click on the “Projects” tab to find the applicable project.



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



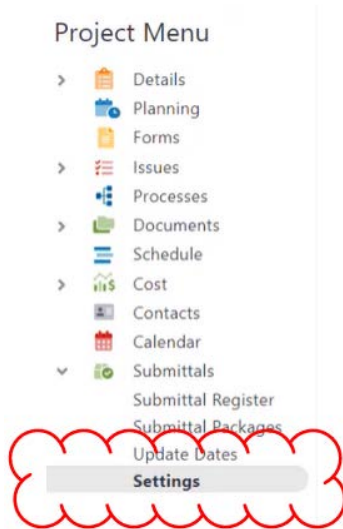
The “Project Details” page is your home page for your project. (Click “Edit” to edit info.). Under the “Project Menu” on the left, click on Processes to find project-specific processes.





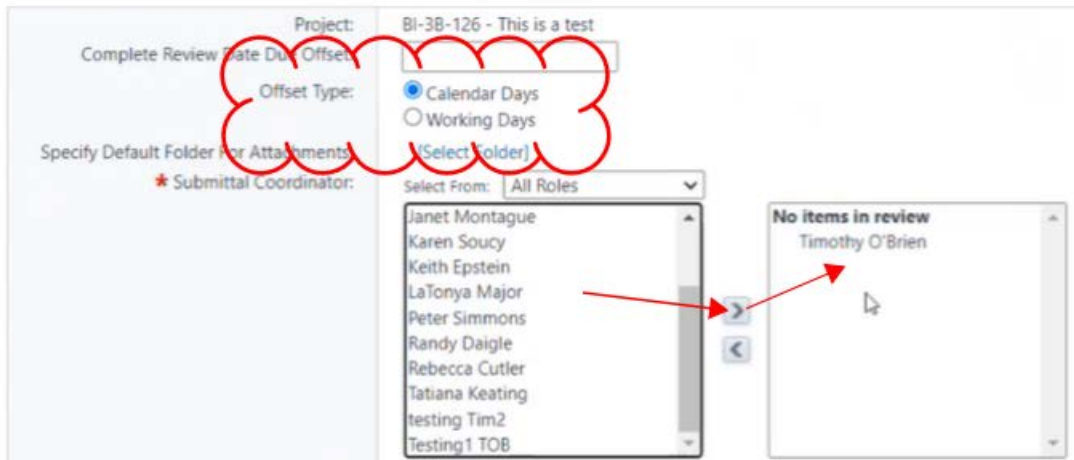
25.02 Submittals Settings (Project Manager or CA)

Before the Submittals begin on a project, click on the settings option for Submittals.



Ensure that the Offset Type setting is set to “Calendar Days.” Then select one or more CA staff as Submittal Coordinators by clicking on their names and then clicking the right arrow button.

Submittal Settings for BI-3B-126 - This is a test





Set “General Contractors for Submissions” to “GCs” or “CMRs”, ensure that the other settings are correct and click Save.

Submittal Package Options

Use CSI List: Yes
CSI List to Use: CSI MasterFormat 2012
Submittal Item Spec Section Populated by CSI Code:
Auto Numbering Packages: Per Code Per Project
Honor Auto-Close Status:
Allow items to be added after review starts:
Allow revision items to be added to existing packages:

Subcontractor Options

General Contractors for Submission: CMRs
GC Review Complete Due Date Offset:
Offset type: Calendar Days Working Days

Save Cancel

25.03 Filter Functionality

The processing of Submittals and Submittal Packages involves the changing of their status, as discussed, below. Users can filter the Submittal Register and the list of Submittal Packages using the eBuilder filters.

There are a number of filter criteria that are available. These include the ability to toggle different statuses. Select, for example, “Open” and “Draft” to filter only for submittals that have been submitted or have not been submitted yet; or select “Closed” to find items that have been marked as closed. When the filter selections are made, click the “Filter” button and the respective Submittals or Submittal Packages will appear in the grid, as shown below.

My Home Dashboard **Projects** Processes Documents Contacts Cost Schedule Reports Setup ...

CONNECTICUT DEPARTMENT OF ADMINISTRATIVE SERVICES

Recent Pages...

Project Menu

- Details
- Planning
- Forms
- Issues
- Processes
- Documents
- Schedule
- Cost
- Contacts
- Calendar
- Submittals
 - Submittal Register**
 - Submittal Packages

Submittal Register for 8I-38-126 - This is a test

Filter Submittal Items

Search in: All Pending my review

Title:

Status: Please select a status...

Number:

Revision:

Submittal Package #: - - Rev

Responsible Sub/Manufacturer:

Custom Field 1: Please select a custom field

Custom Field 2: Please select a custom field

Item Status: Open Closed Draft Overdue

Description:

Category: Please select a category

Priority: Please select...

Spec Section:

Sub Section:

Submittal Coordinator: Please select...

Reviewer:

Clear Filter

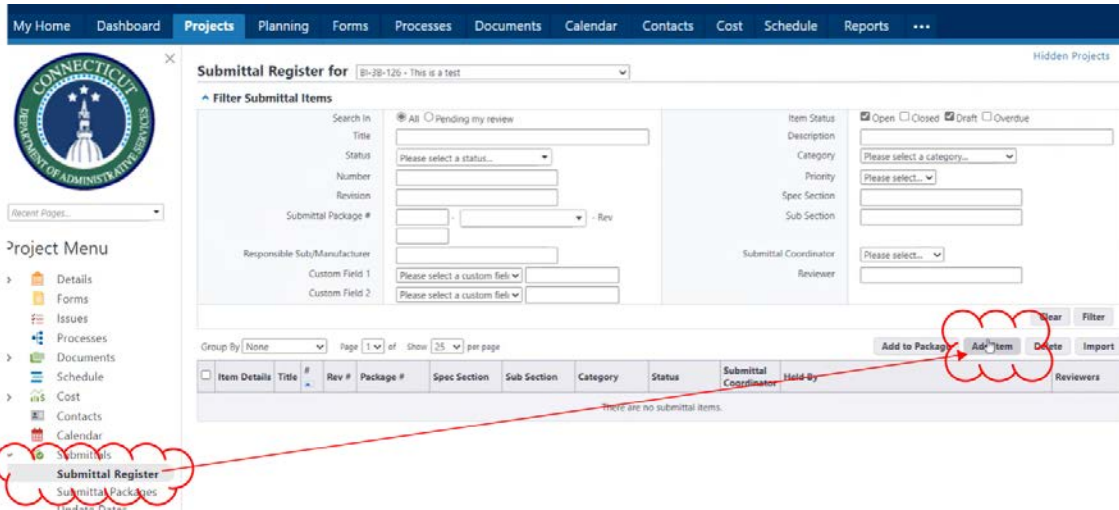
Add to Package Add Item Delete Import

Item Details	Title	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
There are no submittal items.										

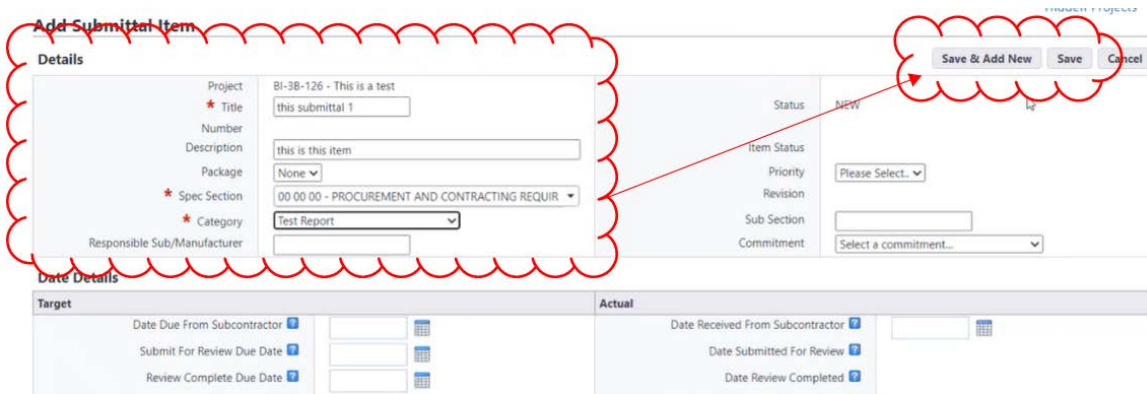


25.04 Creating Submittals in the Submittal Register (GC or CMR)

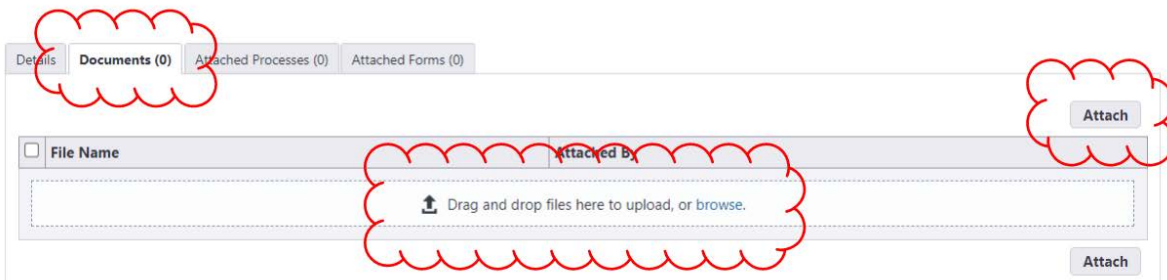
To create new submittals in the Submittal Register, click “Submittal Register” and then the “Add Item” button.



Then complete the required fields. Enter a Title and select the Specification Section and Category. Complete the other fields required by project procedures. Then click either “Save” to complete entering new submittals or “Save & Add New” to save and start another submittal.

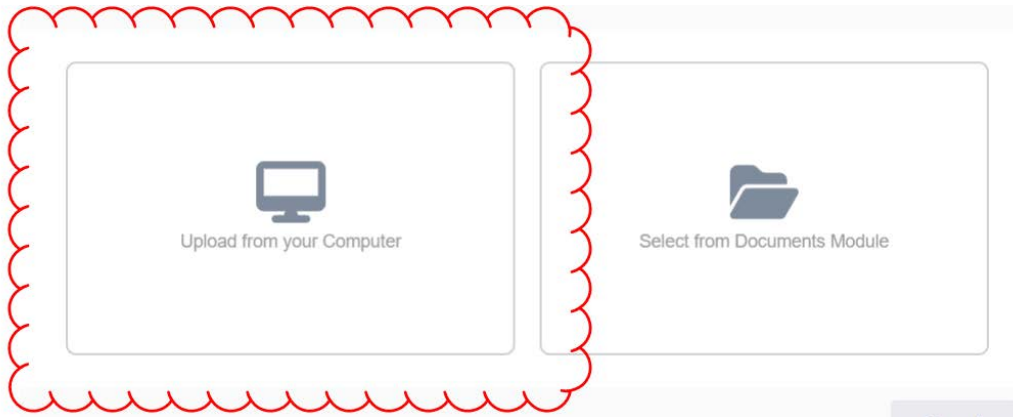


Once a submittal has been saved, the tools for uploading attachments become available. Documents can be uploaded by either using the “drag-and-drop” feature or by clicking the “Attach” button.

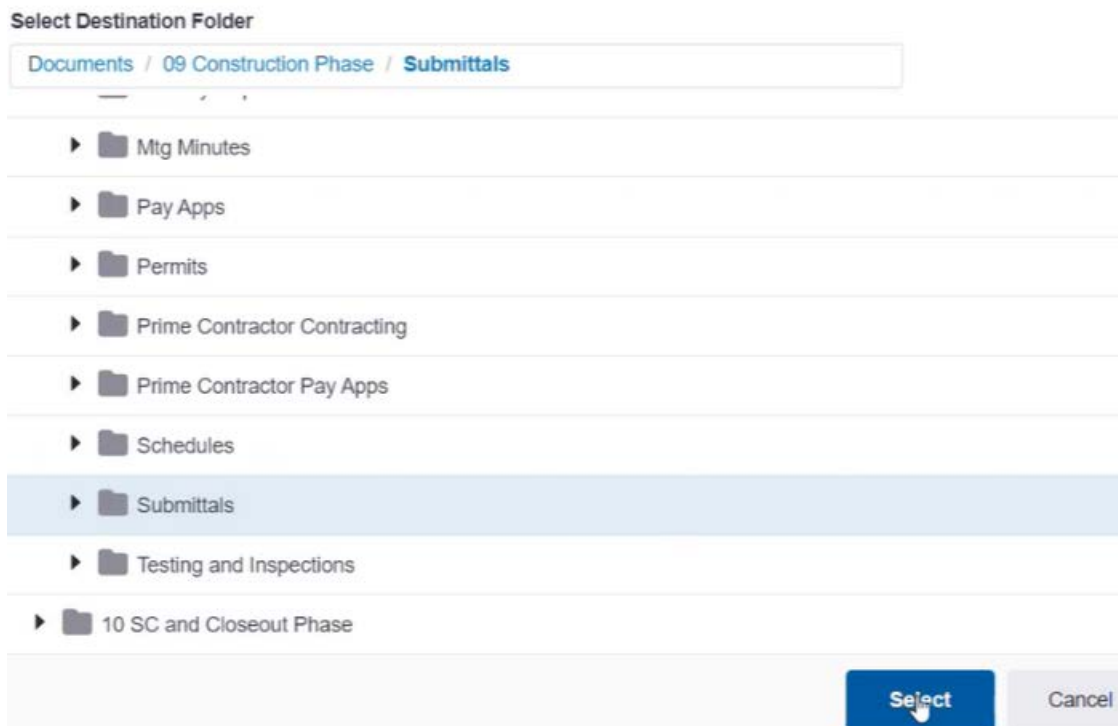




If the “Attach” button is clicked, a pop-up will appear. Click the “Upload from your Computer” button to locate a locally stored document.



When uploading, a dialogue box will appear for the user to select the applicable Submittals folder in the eBuilder Documents module. Click “Select” to use the pre-selected default folder (highlighted in blue font) as the destination folder in the eBuilder Documents module to upload the documents. If applicable, an alternate folder can be selected.





When the upload is completed, click “Done”.

The screenshot shows a file upload interface. On the left, a progress bar indicates '1 of 1 files uploaded successfully'. Below this, a folder icon labeled 'Submittals' shows '100% of 33 KB uploaded'. A file named 'supporting test 1.pdf' is listed with the status 'Uploaded successfully'. On the right, there is a section for 'Properties for all files' with a description text area. At the bottom, there is a 'Drag & drop files here or browse' area and a blue 'Done' button.

The file is then attached to the submittal and can be viewed in a pop-up window by clicking on its filename.

The screenshot shows the 'e-Builder' interface. The top navigation bar includes 'My Home', 'Dashboard', 'Projects', 'Planning', 'Forms', 'Processes', 'Documents', 'Calendar', 'Contacts', and 'Cost'. The 'Projects' tab is active. On the left is a 'Project Menu' with options like 'Details', 'Forms', 'Issues', 'Processes', 'Documents', 'Schedule', 'Cost', 'Contacts', 'Calendar', and 'Submittals'. The main content area is titled 'Submittal Item Details' and shows a table of project information. Below this is a 'Documents (1)' section with a table of attached files. The file 'supporting test 1.pdf' is highlighted with a red dashed circle.

File Name	Attached By	Date Attached
supporting test 1.pdf Version (2)	TOB, Testing1	11.21.23 11:57AM



Saving the submittals causes them to appear in brown italic as drafts in the Submittal Register. (Note that this list shows drafts because it is set to include Drafts in the Filter.)

Submittal Register for BI-38-126 - This is a test

Filter Submittal Items

Search In: All Pending my review

Item Status: Open Closed Draft Overdue

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	this submittal 1	1	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			
	this submittal 2	2	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			

The buttons in the “Item Details” column of the Submittal Register allow users to interact with certain details of the submittals without reopening the records.

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	this submittal 1	1	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			

For example, the paperclip button allows users to bring up a dialogue box allowing users to view or add attachments to the submittal.

Attached Documents - this submittal 2 - #2

File Name	Attached By
supporting test 1.pdf (version 2) Properties Download (33.6KB) Redline Stamp Remove	TOB, Testing1

Buttons: Add, Remove, Download, Close



A submittal may be re-opened by clicking on its Title.

Group By: None Page 1 of 1 Show 25 per page

Buttons: Send to Sub, Add to Package, Add Item, Delete, Import, Submit to GC

Item	Details	Title	#	Rev	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>		this submittal 1	1	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			
<input type="checkbox"/>		this submittal 2	2	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			

25.05 Creating Submittal Packages (GC or CMR).

Submittal packages can be created by clicking on Submittal Packages and then clicking the “Create Package” button.

Submittal Packages For: BI-3B-126 - This is a test

Filter Submittal Packages

Search In: All Pending My Review

Package Status: Open Closed Draft Overdue

Table Headers: Title, Description, Package #, Revision Number, Trade, Status, Date Created, Last Modified By, Held By

Table Content: There are no Submittal Packages.

Select the specification section of the package in the “Submittal Package Number” field, enter its “Submittal Package Name” and any other relevant information and click the Save button.

Create Submittal Package

Details

Project: BI-3B-126 - This is a test

Submittal Package #: 1 - 00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS - 0

Submittal Package Name: This package number 1

Description: [Empty]

Trade: PROCUREMENT AND CONTRACTING REQUIREMENTS

Custom Fields: There are no custom fields for this submittal package.

Buttons: Save, Cancel



25.06 Adding Submittals to Submittal Packages (GC or CMR).

Once a submittal package is saved, submittals can be added to it by clicking the “Add Items” button.

Submittal Package Details

Submittal Package Overview | History

Request Comment | Update Dates | Generate Transmittal | Delete | Edit

Project	BI-38-126 - This is a test	Status	Draft
Title	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Description		Created By	TOB, Testing1
Submittal Package #	1-00 00 00-0	Baseline Finish Range	
Date Created	11.21.2023 12:01 PM		
Items Held By			
Baseline Start Range			

Items (0) | Documents (0) | Comments (0) | Custom Fields (0) | Revisions (0)

Group By: None | Page 1 of 1 | Show 10 per page

Add Items | Remove Items

<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
--------------------------	--------------	-------	---	-------	--------------	-------------	----------	--------	-----------------------	---------	-----------

The user will be able to create new submittals, but keeping the setting to “Add Existing Items” & clicking “Add” will allow submittals that are in the Submittal Register to be added to the submittal package.

Add Items | Rem

Add to Package

Add Existing Items
 Add New Items

Add | **Cancel**

In the pop-up box that appears, mark the check boxes next to the submittals to be linked to the submittal package and click the “Add to Package” button. (Note that the top of the pop-up box has filters that allow the user to find submittals more easily in the Submittal Register, if there are many.)

Add Items to This package number 1

Filter Submittal Items | Clear | Filter

Description: [] | Category: Please select a category...
 Title: [] | Spec Section: []
 Number: [] | Sub Section: []
 Responsible Sub/Manufacturer: [] | Priority: Please select...
 Custom Field 1: Please select a custom field... | Custom Field 2: Please select a custom field...

Group By: None | Page 1 of 1 | Show 25 per page | 2 item(s) selected

Add to Package

<input type="checkbox"/>	Title	#	Spec Section	Sub Section	Category	Status
<input checked="" type="checkbox"/>	Submittal 1	1	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW
<input checked="" type="checkbox"/>	Submittal 2	2	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW



After clicking “Add to Package”, the user will be asked to confirm the addition, and then the submittals will be added to the submittal package.

Submittal Package Details

Submittal Package Overview | History

Request Comment | Update Dates | Generate Transmittal | Edit

Project Title	BI-38-126 - This is a test	Status	Draft
Description	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB, Testing1
Date Created	11.21.2023 12:01 PM	Baseline Finish Range	
Items Held By			
Baseline Start Range			

Items (2) | Documents (0) | Comments (0) | Custom Fields (0) | Revisions (0)

Send for Review | Submit to GC | Send to Sub | Add Items | Remove Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			
<input type="checkbox"/>	this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			

Note that the submittals brought into the submittal package now appear in the Submittal Register as “Open”, rather than “Draft”, and show what submittal package they are in.

Submittal Register for BI-38-126 - This is a test

Filter Submittal Items

Search in: All Pending my review

Title:

Status:

Number:

Revision:

Submittal Package #: - - Rev

Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Item Status: Open Closed Draft Overdue

Description:

Category:

Priority:

Spec Section:

Sub Section:

Submittal Coordinator:

Reviewer:

Clear | Filter

Group By: None | Page: 1 of 1 | Show: 25 per page

Send to Sub | Add to Package | Add Item | Delete | Import | Submit to GC

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	this submittal 1	1	0	1-00 00 00-0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			
<input type="checkbox"/>	this submittal 2	2	0	1-00 00 00-0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			



25.07 Sending the submittal package to the CA (GC or CMR).

Click on "Submittal Packages" to see the list of submittal packages, then click the check box next the submittal package to be sent to the CA, and then click "Send for Review."

Submittal Packages For BI-38-126 - This is a test

Filter Submittal Packages

Search In: All Pending My Review

Package Status: Open Closed Draft Overdue

Title	Description	Package #	Revision Number	Trade	Status	Date Created	Last Modified By	Created By
<input checked="" type="checkbox"/>	This package number 1	1-00 00 00-0	0	PROCUREMENT AND CONTRACTING REQUIREMENTS	Draft	11.21.2023	Testing1 TOB	

Buttons: **Send for Review**, **Create Package**, **Clear**, **Filter**

A pop-up box will open after clicking "Send for Review". The Submittal Coordinator(s) will be pre-populated, but the user will be required to enter a "Review Complete Due Date" and will have the option to cc others, either by user role or by name. In addition, the user can add a message regarding the submittal package in the "Message" box. Upon completion, click the "Send for Review" button.

Send for Review

* Submittal Coordinators: Timothy O'Brien (Department of Administrative Services - Con...)

* Review Complete Due Date: 11.22.2023

CC Roles: A/E's/Architects, Administrative Support, ADPM, Agency, Agency_AA, Architects/Engineers, Auditors, Business Office, Business Office Management, CAs

CC Users: Barkin, David (Department of Administrative Services - Con...), Cutler, Rebecca (Department of Administrative Services - Con...), Daigle, Randy (Department of Administrative Services - Con...), Epstein, Keith (CT State Colleges and Universities - Con...), Keating, Tatiana (Department of Administrative Services - Con...), Kulas, Alison (Department of Administrative Services - Con...), Major, LaTonya (Department of Administrative Services - Con...), Montague, Janet (Department of Administrative Services - Con...), O'Brien, Timothy (Department of Administrative Services - Con...), Phelps, Cathy (Department of Administrative Services - Con...)

Buttons: **Send for Review**, **Cancel**



25.08 Sending a submittal package for A/E review (CA).

When the GC or CMR has sent a submittal package to the CA (as Submittal Coordinator), the CA will be able to see, in the Submittal Register, the “Held By” field populated with whoever holds the submittals at the moment and will also see the Status field values for each submittal as toggleable. It is the CA, as Submittal Coordinator, who marks the Status of submittals in the system, based on the A/E’s communication after their review. (See below.)

Submittal Register for BI-38-126 - This is a test

Filter Submittal Items

Search In: All Pending my review

Item Status: Open Closed Draft Overdue

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	this submittal 1	1	0	1-00 00 00-0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Review	Timothy O'Brien	Timothy O'Brien	Reviewers
<input type="checkbox"/>	this submittal 2	2	0	1-00 00 00-0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Review	Timothy O'Brien	Timothy O'Brien	Reviewers

To send submittals to the A/E, the CA will locate the applicable submittal package from the Submittal Packages list and open the submittal package. In the submittal package, the CA marks the check box next to the submittals and clicks “Forward for Review.”

Submittal Package Details

Submittal Package Overview | History

Project: BI-38-126 - This is a test
 Title: This package number 1
 Description: This package number 1
 Submittal Package #: 1-00 00 00-0
 Date Created: 11-21-2023 12:00 PM

Status: Open
 Trade: PROCUREMENT AND CONTRACTING REQUIREMENTS
 Created By: TOB, Testing1
 Submittal Coordinator: Timothy O'Brien
 Items Held By: Timothy O'Brien
 Baseline Start Range: 11.22.2023 - 11.22.2023
 Baseline Finish Range: 11.22.2023 - 11.22.2023

Request Comment | Generate Transmittal

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Review	Timothy O'Brien	Timothy O'Brien	Reviewers
<input checked="" type="checkbox"/>	this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Review	Timothy O'Brien	Timothy O'Brien	Reviewers

A pop-up box will appear that requires a “Respond By” date to the selected or entered. The “Forward To” box is where the CA enters the A/E users to whom the submittals will be sent for review.



To select users, locate and click on their name(s) and click the right arrow button. There are optional boxes to cc others, either by user role or by name and a message box to add a text message. (Note that there is also a "Notify Only" optional choice, as opposed to the "Action Required" option.) To complete the send action, click the "Forward for Review" button.

Forward For Review

Project: BI-38-126 - This is a test

Forward To: Keating, Tatiana (Department of Administrative Services), Kulas, Alison (Department of Administrative Services - Cc), Major, LaTonya (Department of Administrative Services), Montague, Janet (Department of Administrative Services), Phelps, Cathy (Department of Administrative Services - Cc), Russell, Craig (Department of Administrative Services - Cc), Sullivan, Peter (Department of Administrative Services), Soucy, Karen (Department of Administrative Services), Tim2, testing (Department of Administrative Services), TOB, Testing1 (DA*)

Respond By: 11.22.2023

CC Roles: A/E's sub-consultants, Administrative Support, ADPM, Agency, Agency Payor, Agency Signatory, Agency_AA, Architects/Engineers, Architects/Engineers-billing, Auditors

CC Users: Barkin, David (Department of Administrativ...)

Buttons: Forward for Review, Cancel

The links in the Reviewers column show who the reviewers are.

Submittal Package Details

Submittal Package Overview | History

Request Comment | Generate Transmittal

Project Title	BI-38-126 - This is a test	Status	Open
Description	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB, Testing1
Date Created	11.21.2023 12:01 PM		
Submittal Coordinator	Timothy O'Brien		
Items Held By	testing Tim2		
Baseline Start Range	11.22.2023 - 11.22.2023	Baseline Finish Range	11.22.2023 - 11.22.2023

Items (2) | Documents (0) | Comments (0) | Custom Fields (0) | Revisions (0)

Group By: None | Page: 1 of 1 | Show: 10 per page

Update Status | Send to Contractor | Forward for Review | Add Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Review	Timothy O'Brien	testing Tim2	Reviewers
<input type="checkbox"/>	this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Review	Timothy O'Brien	testing Tim2	Reviewers

Reviewers for this submittal 1

Reviewer	Requested By	Date Requested	Date Due	Review Completed Date
testing Tim2	Timothy O'Brien	11.21.2023	11.22.2023	



The "Held By" column, shown here in Submittal Packages, identifies who has the item, ball-in-court.

The screenshot shows the 'Submittal Packages' page for project BI-38-126. A table lists submittal packages. The 'Held By' column for the first package is 'testing Tim2', which is circled in red. Other columns include Title, Description, Package #, Revision Number, Trade, Status, Date Created, and Last Modified By.

Title	Description	Package #	Revision Number	Trade	Status	Date Created	Last Modified By	Held By
This package number 1		1-00 00 00-0	0	PROCUREMENT AND CONTRACTING REQUIREMENTS	Open	11.21.2023	Testing1 TOB	testing Tim2

25.09 Submittal Review by A/E Users (A/E)

When the CA has sent a submittal package to the A/E, the A/E will be able to see, in Submittal Packages, the "Held By" field populated with whoever holds the submittals at the moment. The A/E user clicks on the Package # to go into the package.

This screenshot is similar to the previous one but includes a red arrow pointing from the 'Submittal Packages' menu item in the left sidebar to the table. The 'Held By' column is again circled in red.

In the Submittal Package, individual submittals can be opened by clicking on the Title or # of the submittal.

The screenshot shows the 'Submittal Package Details' page. It includes a 'Submittal Package Overview' section with project details and a table of individual submittals. A red arrow points from the 'Submittal Packages' menu item in the sidebar to the 'Submittal 1' entry in the table.

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	Submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	IR	Timothy O'Brien	testing Tim2	Reviewers



In the submittal records, under the “Documents” tab, (A) click on the file name to open a viewer to see the file and (B) click the “Download” link below the file name to download the file. Additional files can be attached by (C) clicking the “Attach” button and (D) click the Comments tab to add or request a comment. In addition to noting the A/E marking/stamp when sending the package back to the CA, the A/E should also note the marking in the comments of each submittal.

Submittal Item Details

Note: The item is pending review or has been approved by the coordinator or has been closed. It cannot be edited at this time.

Submittal Item Overview		Date Details	History
Project	BI-38-126 - This is a test		
Title	this submittal 1		
Number	1		
Description	this is this item		
Package #	1-00 00-0-0		
Spec Section	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		
Category	Test Report		
Responsible Sub/Manufacturer			
Item Held By	testing Tim2		
Status	In Review		
Item Status	Open		
Submittal Coordinator	Timothy O'Brien		
Priority			
Revision	0		
Sub Section			
Commitment			

Documents (1) | Comments (2) | Custom Fields (0) | Revisions (0)

File Name	Attached By	Date Attached
Supporting File - 0175 Version (2)	TOB, Testing1	11.21.21 12:00PM

Status: Submitted

Details | **Comments (2)** | Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

Request Comment | Comment

Private | Comment v

Timothy O'Brien, Department of Administrative Services - Construction Services 08.03.2023 10:54 AM

After clicking “Request Comment”, a pop-up will appear that allows the A/E to select their subconsultant users in the “To” field by selecting their names and pressing the “>” to move them to the right panel. The “Message” field allows the A/E user to provide instructions to the subconsultants. Upon completion, click the “Request Comment” button to send the notification to the subconsultant.

Request Comment

Request Comment | Cancel

To: Select from Users on Project

- All Users
- Cardinale, Jaime (Department of Administrative Services)
- Grab, Alexander (State of Connecticut)
- Masson, Brianna (Department of Administrative Services)
- O'Brien, Timothy (Department of Administrative Services)
- Tim2, testing (Department of Administrative Services)
- TOB, Testing1 (DAS)
- Warren, Allen (DCS)

Enter External Users Email or Lookup

Type to search...

Allow external users to attach files

Subject: ACTION REQ D - *Testing6723a Project Name - Timothy O'Brien

Respond By: [User Selection]

Message: "Segoe UI", A., 12px

Note - Participants accessing the process externally will see all comments and attachments.

Request Comment | Cancel



When the subconsultant responds, their comments will be in the Comments tab of the submittal instance.

To complete the review and return the submittals to the CA, the A/E goes into the Submittal Package, (A) selects the applicable submittals and then (B) clicks "Review Complete".

Submittal Package Details

Submittal Package Overview | History

Request Comment | Generate Transmittal

Project	BI-38-126 - This is a test	Status	Open
Title	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Description		Created By	TOB, Testing1
Submittal Package #	1-00 00 00-0	Baseline Finish Range	11.22.2023 - 11.22.2023
Date Created	11.21.2023 12:01 PM		
Submittal Coordinator	Timothy O'Brien		
Items Held By	testing Tim2		
Baseline Start Range	11.22.2023 - 11.22.2023		

Items (2) | Documents (0) | Comments (0) | Custom Fields (0) | Revisions (0)

Group By: None | Page 1 of 1 | Show 10 per page | 2 item(s) selected

Forward for Review | Review Complete | Add Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	IR	Timothy O'Brien	testing Tim2	Reviewers
<input checked="" type="checkbox"/>	this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	IR	Timothy O'Brien	testing Tim2	Reviewers

A pop-up screen will appear to allow confirmation.

Very important: (A) The A/E needs to note, for each of the submittals being sent back to the CA, what their marking is. The CA controls the toggle on the Status column for submittals, so this message is important to inform the CA what the A/E stamp says. Then, (B) click "Review Complete".

e-Builder

Review Complete Submittal Items

Review Complete | Cancel

Comment:

A

Selected submittal items

Title	#	Package	Status	Reply To
this submittal 1	1	1-00 00 00-0	IR	Timothy O'Brien
this submittal 2	2	1-00 00 00-0	IR	Timothy O'Brien

B

Review Complete | Cancel



25.10 Return of submittals to GC/CMR (CA)

When the A/E has returned a submittal package, the CA will click on the “Comments” tab to review the comments left by the A/E. Click the “+” sign to the left of the submittal name, as shown below, to open the comments. The comments will also appear in the submittal items, themselves.

Submittal Package Overview History

Request Comment Generate Transmittal Re-Open

Project Title	BI-3B-126 - This is a test This package number 1	Status	Closed
Description		Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB, Testing1
Date Created	11.21.2023 12:01 PM	Baseline Finish Range	11.22.2023 - 11.22.2023
Items Held By			
Baseline Start Range	11.22.2023 - 11.22.2023		

Items (2) Documents (0) **Comments (0)** Custom Fields (0) Revisions (1)

Expand All | Collapse All

Comments for Submittal Package Add Comment

There are no comments for this submittal package.

Comments for Submittal Item #1: this submittal 1

Timothy O'Brien, Department of Administrative Services - Construction Services, 11.21.2023 12:20 PM

This need to the changed to...

testing Tim2, Department of Administrative Services, 11.21.2023 12:17 PM

1 is revise and resubmit and 2 is approved.

testing Tim2, Department of Administrative Services, 11.21.2023 12:12 PM

This is revise and resubmit.

While in the submittal package, click on the “Items” tab, then click the arrow in the Status field in the row of a submittal, and then select the marking indicated by the A/E.

Submittal Package Overview History

Request Comment Generate Transmittal

Project Title	BI-3B-126 - This is a test This package number 1	Status	Open
Description		Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB, Testing1
Date Created	11.21.2023 12:01 PM	Baseline Finish Range	11.22.2023 - 11.22.2023
Submittal Coordinator	Timothy O'Brien		
Items Held By	Timothy O'Brien		
Baseline Start Range	11.22.2023 - 11.22.2023		

Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 10 per page

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Created By	Contractor	Forward for Review	Add Items	Reviewers
<input type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Text Report	In Review	Timothy O'Brien				Reviewers

Prefix Status

- APP Approved
- AAN Approved As Noted
- FRO For Record Only
- IR In Review**
- ONH On Hold
- REJ Rejected
- RAR Revise & Resubmit
- WDN Withdrawn

This will prompt the CA to enter a comment about the action.



Update Status - this submittal 1 (#1)

New Status: Revise & Resubmit

Add Comment

Comment: [Empty text box]

Private:

In the submittal package, after (A) updating the statuses of the submittal items, the CA then (B) selects all of the submittal items and (C) clicks “Send to Contractor.”

Submittal Package Details

Submittal Package Overview History

Request Comment Generate Transmittal

Project: BI-38-126 - This is a test
Title: This package number 1
Description: This package number 1
Status: Open
Submittal Package #: 1-00 00 00-0
Date Created: 11.21.2023 12:01 PM
Trade: PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Coordinator: Timothy O'Brien
Items Held By: Timothy O'Brien
Created By: TOB, Testing1
Baseline Start Range: 11.22.2023 - 11.22.2023
Baseline Finish Range: 11.22.2023 - 11.22.2023

Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 10 per page 2 Item(s) selected

Update Status Send to Contractor Forward for Review Add Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	Revise & Resubmit	Timothy O'Brien	Timothy O'Brien	Reviewers
<input checked="" type="checkbox"/>	this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	Approved	Timothy O'Brien	Timothy O'Brien	Reviewers

A pop-up will appear. The CA can provide a comment in the message box if applicable, then click “Send to Contractor.”

Send to Contractor

Send to Contractor Cancel

Project: BI-38-126 - This is a test
Title: This package number 1
* Send To: Testing1 TOB

CC Roles: Chief Architect, CMRs, CMRs-billing, Code Unit, Commissioning Agent, Commissioning Agent-billing, DAS General, DAS-RECS Project Managers, Deputy Commissioner, DPM

CC Users: Barkin, David (Department of Administrative Services), Cutler, Rebecca (Department of Administrative Services), Daigle, Randy (Department of Administrative Services), Epstein, Keith (CT State Colleges and Universities), Keating, Tatiana (Department of Administrative Services), Kulas, Alison (Department of Administrative Services), Major, LaTonya (Department of Administrative Services), Montague, Janet (Department of Administrative Services), Phelps, Cathy (Department of Administrative Services), Russell, Craig (Department of Administrative Services)

CC External Users Via Email: Type to search... Lookup [Select folder]

** Select folder for external user to attach files Message



25.11 Closing Returned Submittals (GC or CMR)

The GC or CMR will receive notification that the submittal package has been returned and can find the submittal package in the Submittal Packages list. Noting that (A) the submittal package is now held by them, as users, (B) the GC or CMR click on the submittal package title or package number.

The screenshot shows the 'Submittal Packages' page in the e-Builder system. The page title is 'Submittal Packages For BI-3B-126 - This is a test'. There are filter options for 'Filter Submittal Packages' including search criteria and status filters. A table lists the submittal packages. A red circle labeled 'A' highlights the 'Clear' and 'Filter' buttons. Another red circle labeled 'B' highlights the 'Title' and 'Package #' columns of the table, with an arrow pointing to the first row.

Title	Description	Package #	Revision Number	Trade	Status	Date Created	Last Modified By	Held By
This package number 1		1-00 00 00-0	0	PROCUREMENT AND CONTRACTING REQUIREMENTS	Open	11.21.2023	Testing1 TOB	Testing1 TOB

After opening the package, click on a submittal's title or # to open the submittal, or open the submittal from the Submittal Register.

The screenshot shows the 'Items (1)' view of a submittal. It includes navigation buttons like 'Update Status', 'Send to Contractor', and 'Forward for Review'. A table displays the submittal details. A red circle highlights the first row of the table.

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	this submittal 1	1	1	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Rev	Timothy O'Brien	Timothy O'Brien	Reviewers



If the submittal is approved, it can be marked by the GC or CMR as closed by clicking the “Close” button. (Note that the “Close” button then changes to a “Re-Open” button, allowing for the submittal to be re-opened.)

Submittal Item Details

Note
The item is pending review or has been approved by the coordinator or has been closed. It cannot be edited at this time.

Submittal Item Overview | Date Details | History

Send to Sub | **Close** | Submit to GC

Project	BI-3B-126 - This is a test	Status	APP - Approved
Title	this submittal 2	Item Status	Open
Number	2	Priority	
Description	this is the other one	Revision	0
Package #	1-00 00 00-0	Sub Section	
Spec Section	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS	Commitment	
Category	Test Report		
Responsible Sub/Manufacturer			
Item Held By	Testing1 TOB		

Refer to Section 25.03 for instructions on how to use filtering to list submittals that are Draft, Open and Closed.

25.12 Revision Submittals

If a submittal package contains one or more submittals that have a “RAR” (Revise and Resubmit) Status, check the box(es) to the left of the submittal(s) and then click the “Create Revision” button.

Submittal Package Overview | History

Request Comment | Update Dates | Generate Transmittal | Close | Edit

Project	BI-3B-126 - This is a test	Status	Open
Title	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Description		Created By	TOB, Testing1
Submittal Package #	1-00 00 00-0	Baseline Finish Range	11.22.2023 - 11.22.2023
Date Created	11.21.2023 12:01 PM		
Items Held By	Testing1 TOB		
Baseline Start Range	11.22.2023 - 11.22.2023		

Items (2) | Documents (0) | Comments (0) | Custom Fields (0) | Revisions (0)

Group By: None | Page 1 of 1 | Show 10 per page | 1 item(s) selected

Send for Review | Submit to GC | Send to Sub
Create Revision | Add Items | Remove Items

<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>		this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	RAR		Testing1 TOB	Reviewers
<input type="checkbox"/>		this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	APP			Reviewers



That brings up a screen for the creation of a revised submittal package. The revised package (A) has the same package number as the package being revised, except that the revision number is incremented up by 1; (B) contains a newly created revised submittal (or multiple revised submittals, if multiple submittals require revision); and (C) the revised submittal, itself, is identified by an increased revision number, incremented up by 1. If is all correct, (D) click Save.

Create Revision Package

Details Save Cancel

Project: BI-38-126 - This is a test
 Submittal Package #: 1 - 00 00 00 **A**
 * Submittal Package Name: This package number 1
 Description:
 Trade: PROCUREMENT AND CONTRACTING REQUIREMENTS

Custom Fields
 There are no custom fields for this submittal package.

Page 1 of 1 Show 25 per page

Title	#	Rev #	Spec Section	Sub Section	Category	Status
B this submittal 1	1	C 1	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	RAR

D Save Cancel

The default views in the Submittal Packages list and the Submittal Register will now only show the revised version of each. The original version can still be seen, using the filter controls. For example, (A) in the Submittal Packages list, (B) select the filter options for Open, Closed and Draft to (C) make both the revised and original submittal package visible. The (D) Status of each option will be displayed.

My Home Dashboard **Projects** Planning Forms Processes Documents Calendar Contacts Cost ...

CONNECTICUT DEPARTMENT OF ADMINISTRATIVE SERVICES

Recent Pages...

Project Menu

- Details
- Forms
- Issues
- Processes
- Documents
- Schedule
- Cost
- Contacts
- Calendar
- Submittals
 - Submittal Register
 - Submittal Packages** **A**
 - Update Dates

Submittal Packages For BI-38-126 - This is a test Hidden Projects

B

Filter Submittal Packages

Search In: All Pending My Review

Package Status: Open Closed Draft Overdue

Description:
 Priority: Please Select...

Clear Filter

Page 1 of 1 Show 10 per page Create Package Send for Review

	Title	Description	Package #	Revision Number	Trade	Status	Date Created	Last Modified By	Held By
<input type="checkbox"/>	This package number 1		1-00 00 00-1	1 C	PROCUREMENT AND CONTRACTING REQUIREMENTS	Draft D	11.21.2023	Testing1 TOB	Testing1 TOB
<input type="checkbox"/>	This package number 1		1-00 00 00-0	0	PROCUREMENT AND CONTRACTING REQUIREMENTS	Closed	11.21.2023	Testing1 TOB	



The GC or CMR can access the revised submittal package and upload attachments and comments to the revised submittal, which is now linked to the submittal package. Upon completion, the GC or CMR would follow the steps outlined in Section 25.07 to send the submittal package to the CA.

Submittal Package Details

Submittal Package Overview
History

Request Comment Update Dates Generate Transmittal Edit

Project	BI-38-126 - This is a test	Status	Draft
Title	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Description		Created By	TOB, Testing1
Submittal Package #	1-00 00 00-1	Baseline Finish Range	
Date Created	11.21.2023 12:25 PM		
Items Held By	Testing1 TOB		
Baseline Start Range			
Original Submittal Package #	1-00 00 00-0		

Items (1) Documents (0) Comments (0) Custom Fields (0) Revisions (1)

Group By None Page 1 of 1 Show 10 per page

Send for Review Submit to GC Send to Sub Add Items Remove Items

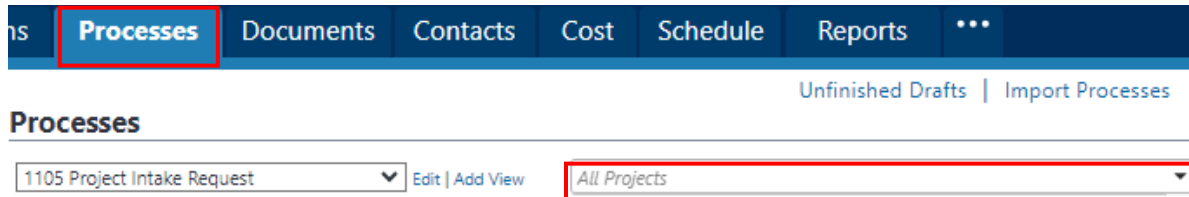
<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>		this submittal 1	1	1	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW		Testing1 TOB	



Section 26: 7989 AA Project Closeout

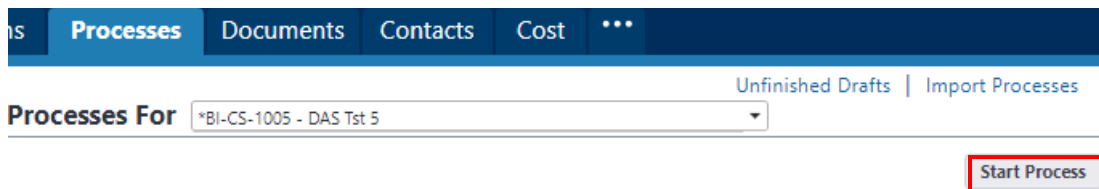
26.01 Accessing the Process

Log in to [e-Builder](#). On your homepage, Go to the “Processes” tab and select the AA Project you want to closeout from the “All Projects” dropdown list.



26.02 Form 7989 – AA Project Closeout (Process Initiator)

Click the “Start Process” button.



Click on the link entitled “7989 AA Project Closeout (7989)”.

Start a process on *BI-CS-1005 - DAS Tst 5

Process Name	Description
1105R Project Import (SRPI) (5R-PI)	For DAS USE ONLY. Process for importing original 1105 submission from an eBuilder report to allow for the Client Agency to prepare a revised 1105.
1105R Project Revision Request (1105R)	Process for submitting a revised Capital Project Initiation Request.
1135 - Task Letter (TL)	This process is used for the creation of the task letters for On-Call contracts.
6010 Bid Release Form (6010)	The “6010 Bid Release Form” process is used as follows: (1) for the DAS/CS Project Manager to submit Bid Files, Bid Information, and Pre-Bid Meeting Information to the DAS/CS Procurement Unit; (2) for the DAS/CS Procurement Unit, the ADPM, and Chief Architect to review and approve the Bid Release; (3) to generate and email an approved 6010 Bid Release Mail Merge; and (4) for the DAS/CS Procurement Unit to document the request for Prevailing Wages, the Bidding Process, and the Construction Contract Award process.
7310 Request For Information (7310)	The RFI process is used for the submission and routing of requests for information. If there is a cost impact, it may spawn a proposal request.
7360 Change Order (7360)	This Process has the code step built in to bundle and approve PCOs.
7390 Application and Certification for Payment (7390A)	
7805 Substantial Completion (7805)	
7989 AA Project Closeout (7989)	Closeout process for Agency Administered Projects.

Read the “General Instructions” and fill in the applicable fields under “Project Information”.

Project Information

DAS Project Number: _____

Project Name: _____

Construction Start Date:

Acceptance Date:

Final Project Cost:



Complete the section entitled "Consultant/Contractor/Supplier Information" under "Add New Item for Consultant/Contractor/Supplier Information". The first vendor input should be the project On-Call Consultant. To add a vendor, click on the "Lookup" link in the Vendor field to find the project On-Call Consultant. Then, provide the "On-Call Contract No." and "Task Number" and click the "Add" button.

Next, click on the "Lookup" link in the "Vendor" field to select any other Contractors that provided services on the subject project, the Contract Number and PO Number for the subject Contractor. If the Contractor is not listed in "Lookup", provide the name of the Contractor in the "Other Vendor" field and click the "Add" button upon completion. Repeat this process for each Contractor having performed Work on the project.

Consultant/Contractor/Supplier Information

Show Filter | Select All Row Height: 1X

Download Template Import Delete

If more than one Consultant/Contractor/Supplier was used on the above referenced project, please provide the requested information below for each. Subcontractor information is not required.

#	Vendor	Other Vendor	On-Call Contract No.	Task Number	State Contract Number	PO Number
Grand Totals (0 items)						

Add New Item for Consultant/Contractor/Supplier Information

Vendor [Lookup](#)

Other Vendor

On-Call Contract No.

Task Number

State Contract Number

PO Number

Clear Add

Complete the section entitled "Project Closeout Supporting Documentation". Drag and drop executed copies of the requested forms into their respective fields.

Project Closeout Attachments

The following documents shall be completed, signed, & uploaded as attachments to this form upon completion of the Project. The required documents can only be marked as N/A if the project scope of work does not include the construction, repair, alteration or addition to any state building or any other public works of the state. Once complete, select "Submit" from the dropdown list at the bottom of the page and press the "Take Action" button.

7150 Certificate of Compliance: [Drag and drop file here](#) or [Browse Computer](#) [Browse e-Builder](#)

7810 Certificate of Substantial Completion: [Drag and drop file here](#) or [Browse Computer](#) [Browse e-Builder](#)

Substantial Completion: If the Substantial Completion Form for this project was completed in eBuilder, click the "Lookup" link to find the process instance of the completed Substantial Completion Form and click on the instance link to add the Substantial Completion Form to the AA Project Closeout Process. [\[Lookup\]](#)

7820 Certificate of Acceptance: [Drag and drop file here](#) or [Browse Computer](#) [Browse e-Builder](#)

7987 - Request to Terminate Task Assignment: [Drag and drop file here](#) or [Browse Computer](#) [Browse e-Builder](#)

7988 - Notice of Project Cancellation: [Drag and drop file here](#) or [Browse Computer](#) [Browse e-Builder](#)

7995 Archival Data for Project Documents: [Drag and drop file here](#) or [Browse Computer](#) [Browse e-Builder](#)

745 Contractor Evaluation: [Drag and drop file here](#) or [Browse Computer](#) [Browse e-Builder](#)

Closeout Documents - Not Applicable:

Form 745 - Contractor Performance Evaluation

Form 7150 - Certificate of Compliance

Form 7810 - Certificate of Substantial Completion

Form 7820 - Certificate of Acceptance

Form 7987 - Request to Terminate On-Call Assignment

Form 7988 - Notice of Project Cancellation.

Form 7995 - Archival Data for Project Documents



If the form submission is not applicable to this project (the project scope of work does not include the construction, repair, alteration or addition to any state building or any other public works of the state), then check the appropriate “Closeout Documents – Not Applicable” field.

- * Note that there is a field to upload “Form 7810 – Certificate of Substantial Completion”, as well as a field entitled “Substantial Completion”. If you have a paper copy of the substantial completion form, it should be uploaded to the respective field.

If the substantial completion form was completed in eBuilder, click on the “Lookup” link in the “Substantial Completion” field to open the “Filter Processes” page for the subject project.

7810 Certificate of Substantial Completion:

Substantial Completion:

If the Substantial Completion Form was completed outside of eBuilder, upload a copy of the signed Form here.
Drag and drop file here or

If the Substantial Completion Form for this project was completed in eBuilder, click the “Lookup” link to find the process instance of the completed Substantial Completion Form and click on the instance link to add the Substantial Completion Form to the AA Project Closeout Process.
[Lookup]

Make sure both the “Open” and “Finished” boxes are checked and click the “Filter” button. The process link to the subject project’s substantial completion form will appear in the process table. Click on the link in the “Process” column for the subject substantial completion form to be added to the closeout supporting documents.

Filter Processes

Status: Open Finished

Step Name:

Containing Text:

Filter

Page 1 of 1 Show 25 per page

Process	Subject	Step	In Step Since	Date Due	Status
7805 -	B-C-S-1005 - DAS Tst 5 Substantial Completion	Finish	11.27.2023		Submitted

Project Closeout Supporting Documentation

The following documents shall be completed, signed, & uploaded as attachments to this form upon completion of the Project. The required documents can only be marked as N/A if the project scope of work does not include the construction, repair, alteration or addition to any state building or any other public works of the state. Once complete, select “Submit” from the dropdown list at the bottom of the page and press the “Take Action” button.

7150 Certificate of Compliance: Drag and drop file here or

7810 Certificate of Substantial Completion: Drag and drop file here or

Substantial Completion: If the Substantial Completion Form for this project was completed in eBuilder, click the “Lookup” link to find the process instance of the completed Substantial Completion Form and click on the instance link to add the Substantial Completion Form to the AA Project Closeout Process.
7805 -

Upon completion, scroll down to the bottom of the page and click the “Take Action” button to submit your project closeout documentation. If the project closeout submission is considered incomplete, the submission will be returned to the Process Initiator to provide additional information. Instructions for the additional information required will be noted under the “Comments” tab. If the project closeout submission is complete, no further action is necessary.



26.03 Closeout Package Review (CSS)

CSS will receive an email from eBuilder as notification that a Project Closeout Package has been submitted for review.

To access the project process, click on the link provided in the email.

*BI-CS-1010 - DAS Test Project

Process instance is in your court. To view details or take action, [click here.](#)

After opening the process instance, review the Form 7989 submission for completeness. Thoroughly review the "Project Closeout Supporting Documentation" section to ensure all applicable documents have been attached and signed by the respective authorized signatories, and all documents that are not applicable have been checked off accordingly.

Project Closeout Supporting Documentation

The following documents shall be completed, signed, & uploaded as attachments to this form upon completion of the Project. The required documents can only be marked as N/A if the project scope of work does not include the construction, repair, alteration or addition to any state building or any other public works of the state. Once complete, select "Submit" from the dropdown list at the bottom of the page and press the "Take Action" button.

3150A - Certificate of Compliance (AA Pre-Con):	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
7150A Certificate of Compliance (AA Construction):	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
7810 Certificate of Substantial Completion:	If the Substantial Completion Form was completed outside of eBuilder, upload a copy of the signed Form here.			
	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
Substantial Completion:	If the Substantial Completion Form for this project was completed in eBuilder, click the "Lookup" link to find the process instance of the completed Substantial Completion Form and click on the instance link to add the Substantial Completion Form to the AA Project Closeout Process.			
	[Lookup]			
7820 Certificate of Acceptance:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
7987 - Request to Terminate Task Assignment:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
7988 - Notice of Project Cancellation:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
7995 Archival Data for Project Documents:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
745 Contractor Evaluation:	<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
Closeout Documents - Not Applicable:	Please check the box for each form that is considered not applicable to this project.			
	<input type="checkbox"/> Form 3150A - Certificate of Compliance (AA Pre-Con)			
	<input type="checkbox"/> Form 745 - Contractor Performance Evaluation			
	<input type="checkbox"/> Form 7150A - Certificate of Compliance (AA Construction)			
	<input type="checkbox"/> Form 7810 - Certificate of Substantial Completion			
	<input type="checkbox"/> Form 7820 - Certificate of Acceptance			
	<input type="checkbox"/> Form 7987 - Request to Terminate On-Call Assignment			
	<input type="checkbox"/> Form 7988 - Notice of Project Cancellation.			
	<input type="checkbox"/> Form 7995 - Archival Data for Project Documents			

If all required documents are complete with the appropriate signatures and all questions have been appropriately answered, select "Approve" from the dropdown list below and press the "Take Action" button.

If any items are incomplete or missing from the project closeout submission, select "Return" from the dropdown list at the bottom of the page and press the "Take Action" button. You will then be prompted to provide a comment where you should note the incomplete or missing information. After entering the comment, press the "Return" button.



26.04 Closeout Package Revision (Agency PM)

If the project closeout package submitted is deemed incomplete, the Project PM will receive an email from eBuilder as notification that the Project Closeout Package requires additional information.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

Process instance is in your court. To view details or take action, [click here](#)

My Home Projects Forms Processes Documents Contacts Cost

Welcome, Craig!

My Processes

Project	Instance	Subject	Step
*BI-CS-1005 - DAS Tst 5	7989 - 4	*BI-CS-1005 - DAS Tst 5 - Project Closeout Package	Agency Revision

Announcements
Welcome, State of

After opening the Project instance, refer to the "Comments" tab for specific requirements needed to complete the submission. Ensure these requirements are met before proceeding.

Details **Comments (0)** Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

After addressing all requirements, click the "Take Action" button. This will prompt you to respond to any previous comments and confirm that the submission is now complete, then click "Submit".

26.05 Closeout Package Review (DAS/RECS PM)

After the Agency PM has submitted all of the required closeout documents for an AA Project and after CSS has approved the submission as complete, the DAS/RECS PM assigned to the project will receive an email notification from eBuilder to take action.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

Process instance is in your court. To view details or take action, [click here](#)



My Home Projects Forms Processes Documents Contacts Cost

Welcome, Craig!

My Processes

Project	Instance	Subject	Step
*BI-CS-1005 - DAS Tst 5	7989 - 4	*BI-CS-1005 - DAS Tst 5 - Project Closeout Package	PM Closeout Review

Announcements
Welcome, State of

The PM should scroll down to the section entitled “DAS Fees” and answer the question accordingly. If DAS Fees have been paid in full, click the “Take Action” button.

DAS Fees

* DAS Fees paid in full?: Check this box if DAS Fees are no longer being charged to the Project. DO NOT SUBMIT until such time that DAS Fees have been paid in full.
 DAS Fees Paid in Full

Submit **Take Action** Check Spelling Print Copy Delegate Save Ca

26.06 Reconciliation Review (Accounts Examiner)

The Accounts Examiner will receive an email notification from eBuilder as notification that the project is ready for internal audit after the client agency has submitted the required closeout documentation and after the DAS/RECS PM assigned to the project has confirmed that DAS Fees are no longer being charged to the project.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

Process instance is in your court. To view details or take action, [click here](#)

My Home Projects Forms Processes Documents Contacts Cost

Welcome, Craig!

My Processes

Project	Instance	Subject	Step
*BI-CS-1005 - DAS Tst 5	7989 - 4	*BI-CS-1005 - DAS Tst 5 - Project Closeout Package	Project Reconciliation

Announcements
Welcome, State of



The Accounts Examiner should now conduct its review of the project financials to reconcile with CORE CT to formally close out in eBuilder. After completing the review, if it is determined that additional input is required from the DAS/RECS PM and/or the Business Office (BO) to complete the reconciliation, the Accounts Examiner should return to the process instance to send it to either the "PM" or the "BO" for the required information. To include documentation for the PM or BO to review as part of this process, click on the "Documents" tab, and drag and drop said documentation to the space provided. Then, click on the "Details" tab to return to the closeout application process.

The screenshot shows a navigation bar with tabs: Details, Comments (0), Documents (0), Attached Processes (0), Attached Forms (0), and Attached To (0). The 'Documents (0)' tab is highlighted with a red box. Below the navigation bar, there is a sub-navigation bar with tabs: Details, Comments (3), Documents (0), Attached Processes (0), Attached Forms (0), and Attached To (0). The 'Details' tab is highlighted with a red box. To the right of the sub-navigation bar are checkboxes for 'Show Thumbnails' and a button for 'Attach Documents'. Below this is a table with columns: File Name, Attached By, Date Attached, Seq # - Step Name, and Attached To. A large dashed box below the table contains the text 'Drag and drop files here to upload, or browse.' with a red box around it. At the bottom right of the dashed box is another 'Attach Documents' button.

To forward the process instance to the PM or BO, scroll down to the bottom of the page and either select "PM" or "BO" from the dropdown list next to the "Take Action" button and click "Take Action". A prompt will then appear so that you can add a comment. In the comment box, provide a description of what information and/or documentation is required to complete the reconciliation. After adding the comment, click the "PM" or "BO" button to send the process instance to the respective party.

Add Comment

The screenshot shows the 'Add Comment' section. It starts with a checkbox labeled 'Private'. Below this is a large, empty text input area for the comment, which is highlighted with a red box.

If the reconciliation is complete and the project can be closed in eBuilder, upload a copy of the final reconciliation to the "Final Reconciliation" field in the "Final Reconciliation" section, select "Complete" from the dropdown list, and click "Take Action".

Final Reconciliation

The screenshot shows the 'Final Reconciliation' section. It features a label 'Final Reconciliation:' followed by a dashed box containing the text 'Drag and drop file here' with a red box around it. To the right of this box is the text 'or' followed by two buttons: 'Browse Computer' and 'Browse e-Builder'. Below these elements is a dropdown menu with the text '-- Please select an action --' and a downward arrow, highlighted with a red box. To the right of the dropdown menu is a button labeled 'Take Action', also highlighted with a red box. Further to the right is a button labeled 'Check Spelling'.

If the process instance has been returned by either the PM or the BO, refer to the "Comments" tab to see comments provided by previous actors and refer to the "Documents" tab to see additional documents that have been uploaded. Proceed with the steps above until the process is complete.



26.07 PM Reconciliation Review (PM)

The PM assigned to an Agency Administered project will receive an email notification from eBuilder if the Accounts Examiner requires additional information and/or documentation to reconcile the project financing.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

Process instance is in your court. To view details or take action, [click here.](#)

The screenshot shows the eBuilder interface. At the top, there is a navigation bar with tabs: "My Home", "Projects", "Forms", "Processes", "Documents", and "Contact". The "My Home" tab is selected and highlighted with a red box. Below the navigation bar, there is a "Welcome, Craig!" message and a "My Processes" section. On the left, there is a "Announcements" widget. The "My Processes" section contains a table with the following data:

Project	Instance	Subject
*BI-CS-1005 - DAS Tst 5	7989 - 4	*BI-CS-1005 - DAS Tst 5 - Project Closeout Package

The "Instance" column value "7989 - 4" is highlighted with a red box.

After opening the process instance, click on the "Comments" tab to review comments provided by the Accounts Examiner and to get direction on what information and/or documentation is required to complete the reconciliation process. If additional documentation is required, upload said documentation to the documents tab. Upon completion, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click "Take Action". A prompt will then appear to provide a comment response to the Accounts Examiner regarding the submission. Click "Submit" after providing your response.

Details **Comments (0)** Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Drag and drop files here to upload, or browse.

* Add Comment

Private

Check Spelling **Submit** Cancel



26.07 BO Reconciliation Review (BO)

The Business Office (BO) will receive an email notification from eBuilder if the Accounts Examiner requires assistance in completing the financial reconciliation of an Agency Administered Project.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

Process instance is in your court. To view details or take action, [click here.](#)

Project	Instance	Subject
*BI-CS-1005 - DAS Tst 5	7989 - 4	*BI-CS-1005 - DAS Tst 5 - Project Closeout Package

After opening the process instance, click on the "Comments" tab to review comments provided by the Accounts Examiner regarding what is required to complete the reconciliation process. To review related reconciliation documents, click on the "Documents" tab. After completing your review, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click "Take Action". A prompt will then appear to provide a comment response to the Accounts Examiner regarding the submission. Click "Submit" after providing your response.

Drag and drop files here to upload, or browse.

* Add Comment

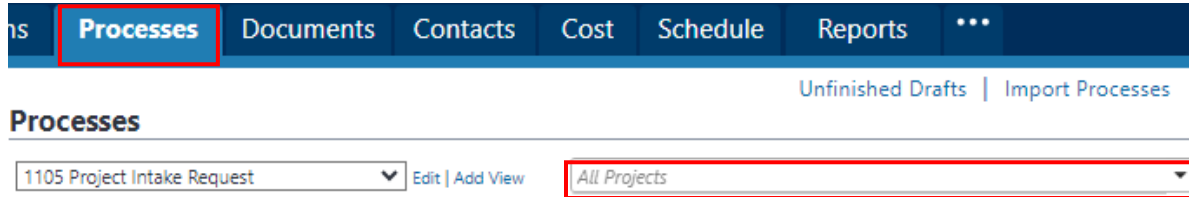
Private



Section 27: 7990 Project Closeout

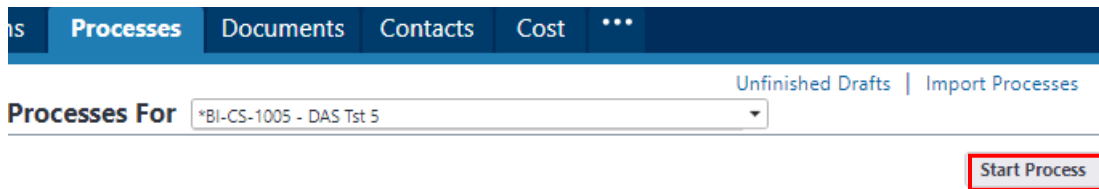
27.01 Accessing the Process

Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>. On your homepage, Go to the "Processes" tab and select the Project you want to closeout from the "All Projects" dropdown list.



27.02 Form 7990 – Project Closeout (PM)

Click the "Start Process" button.



Select "7990 Closeout (7990)" from the list of processes and click the "Start 7990" button.

Begin by filling out the "Subject" line with "Project # - Closeout Package." Follow the instructions provided and ensure that all sections are completed.

Check off each relevant document that is being submitted for project closeout from the list provided in the "Project Closeout Documents" section and upload a copy of each of those documents to the "Documents" tab. If the Substantial Completion Form was completed within eBuilder, follow the guidance in the "Substantial Completion" field to include it in the project closeout package. After completing these steps, return to the "Details" tab to complete the remainder of Form 7990.

Project Closeout Documents

Check off each of the applicable documents that are to be submitted for project closeout from the "Project Closeout Documents" list below and upload each of the respective documents to the "Documents" tab. If the Substantial Completion Form was completed within eBuilder, follow the instructions in the "Substantial Completion" field to add it to the project closeout package. Upon completion, return to the "Details" tab to complete the remainder of Form 7990.

7990 Document Checklist:	<input type="checkbox"/> 7150 Certificate of Compliance <input type="checkbox"/> 7810 Certificate of Substantial Completion <input type="checkbox"/> 7840 Transfer of Custody and Insurance to Agency <input type="checkbox"/> 7820 Certificate of Acceptance <input type="checkbox"/> 7950 Asset Valuation Memo <input type="checkbox"/> 7825 Contractor Reporting Form <input type="checkbox"/> 7860 Liquidated Damage Assessment <input type="checkbox"/> 7870 Project Summary Report <input type="checkbox"/> Consent of Surety <input type="checkbox"/> 7910 Consultant Evaluation <input type="checkbox"/> 7180 Temporary Certificate of Occupancy <input type="checkbox"/> 7190 Certificate of Occupancy (Threshold Projects Only) <input type="checkbox"/> 7995 Archival Data for Project Documents <input type="checkbox"/> 745 Contractor Performance Evaluation
7810 Substantial Completion:	<p>If the Substantial Completion Form was completed in eBuilder, click the "Lookup" link to find the process instance and click on the instance link to add the completed form to the closeout package.</p> <p>Lookup</p>



Once finished, click the "Submit" button to proceed.

Note that during this process, the Final Payment Application will be initiated, and all project closeout documents that have been uploaded will be stored in the subject project Closeout Phase file folder.

27.03 Closeout Package Review (CSS)

CSS will receive an email from eBuilder as notification that a Project Closeout Package has been submitted for review.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

*BI-CS-1010 - DAS Test Project

Process instance is in your court. To view details or take action, [click here.](#)

The screenshot shows the eBuilder interface with a dark blue navigation bar containing tabs: Processes, Documents, Contacts, Cost, Schedule, Reports, and Setup. Below the navigation bar, a white sidebar contains a 'Welcome, Craig!' message and a 'My Processes' section. The 'My Processes' section features a table with the following data:

Project	Instance	Subject
BI-Q-733 - Aircraft Maintenance Hangar ADD/ALT (MILCON)	5R-PI - 4	1105R BI-Q-733
*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

After opening the process instance, review the "7990 Document Checklist" to make sure that all of the required documents have been checked off. Then click on the "Documents" tab to make sure that all of the 7990 Checklist Documents have been uploaded to the tab, the document submissions are filled out in their entirety and have the required authorized signatures.

The screenshot shows a row of tabs for document management: Details, Comments (0), Documents (0), Attached Processes (0), Attached Forms (0), and Attached To (0). The 'Details' and 'Documents (0)' tabs are highlighted with red boxes.

Upon completion, return to the "Details" tab and review the "Percent for Art" and the "CHRO Contract Compliance" sections, to verify that all of the question have been fully answered.

If all necessary documents are complete with the appropriate signatures, and all questions are answered as required, proceed to the bottom of the page and select "Approve" from the dropdown list, next to the "Take Action" button and then press the "Take Action" button. If any items are found to be incomplete or missing from the project closeout submission, select "Revise" from the dropdown list and press the "Take



Action" button. You will be prompted to provide a comment detailing any incomplete or missing information. Click the "Revise" button after providing your comment.

Add Comment

Private

27.03 Closeout Package Revision (PM)

If the project closeout package submitted is deemed incomplete, the Project PM will receive an email from eBuilder as notification that the Project Closeout Package requires additional information.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

*BI-CS-1010 - DAS Test Project

Process instance is in your court. To view details or take action, [click here.](#)

- Processes
- Documents
- Contacts
- Cost
- Schedule
- Reports
- Setup

Welcome, Craig!

My Processes

Project	Instance	Subject
BI-Q-733 - Aircraft Maintenance Hangar ADD/ALT (MILCON)	5R-PI - 4	1105R BI-Q-733
*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

After opening the Project instance, refer to the "Comments" tab for specific requirements needed to complete the submission. Ensure these requirements are met before proceeding.

- Details
- Comments (0)
- Documents (0)
- Attached Processes (0)
- Attached Forms (0)
- Attached To (0)



After addressing all requirements, click the "Take Action" button. This will prompt you to respond to any previous comments and confirm that the submission is now complete, then click "Submit".

Add Comment

Private

27.04 Closeout Package Review (ADPM)

If the project closeout package is deemed complete by CSS, the Project ADPM will receive an email from eBuilder as notification that the Project Closeout Package is ready for their review.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

*BI-CS-1010 - DAS Test Project

Process instance is in your court. To view details or take action, [click here.](#)

- Processes
- Documents
- Contacts
- Cost
- Schedule
- Reports
- Setup

Welcome, Craig!

My Processes

Project	Instance	Subject
BI-Q-733 - Aircraft Maintenance Hangar ADD/ALT (MILCON)	5R-PI - 4	1105R BI-Q-733
*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

After opening the Project instance, refer to the "Comments" tab to review previous correspondence regarding the submission.

- Details
- Comments (0)
- Documents (0)
- Attached Processes (0)
- Attached Forms (0)
- Attached To (0)



Then, return to the “Details” tab to conduct your own review to verify that the project closeout package is indeed complete and ready for final payment processing. To review the Project Closeout Package in its entirety, double click on the PDF in the “Closeout Package” field in the “Project Closeout Documents” section.

Project Closeout Documents

7990 Document Checklist:	
7810 Substantial Completion:	If the Substantial Completion Form was completed in eBuilder, click the “Lookup” link to find the process instance and click on the instance link to add the completed form to the closeout package.
Closeout Package:	<div style="border: 1px solid red; padding: 2px;"> 7990-00003 - BI-CS-1010 - Closeout Package.pdf (version 1) <small>Properties Download (519KB) Redline Remove</small> </div>

If everything is in order, scroll to the bottom of the page and select "Approve" from the dropdown list. Then, press the "Take Action" button to proceed. If any items are found to be incomplete or missing, select "Revise" to return the package to the Project PM for further action. If the revisions require additional review by CSS, select "CSS" for further review.

If either "Revise" or "CSS" is selected, you will be prompted to provide a comment where you can provide additional direction. Once you have entered your comment, click the "Revise" or "CSS" button respectively to forward the submission package to the appropriate party.

Add Comment

Private

27.05 Final Payment Application (GC/CMR)

Refer to [Section 19F - 7390 Application and Certification for Payment](#) – Final Payment Application.

27.06 Final Payment (BO)

If the project closeout package is deemed complete and the final payment has been submitted for processing, the Business Office (BO) will receive an email from eBuilder as notification to confirm the final payment has been made.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

***BI-CS-1010 - DAS Test Project**

Process instance is in your court. To view details or take action, [click here.](#)



- Processes
- Documents
- Contacts
- Cost
- Schedule
- Reports
- Setup

Welcome, Craig!

My Processes

Project	Instance	Subject
BI-Q-733 - Aircraft Maintenance Hangar ADD/ALT (MILCON)	5R-PI - 4	1105R BI-Q-733
*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

After opening the Project instance, go to the "Final Payment" section and input the date the "Final Payment" was made in the field with the same name. Upon completion, click the "Take Action" button.

Final Payment

* Final Payment:

Submit

27.07 Fee Confirmation (PM)

After the Final Payment Application has been processed and the fee paid, the PM will receive an email from eBuilder as notification that the final payment has been made.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

After opening the process instance, scroll down to the "Fee Confirmation" section and complete the section in its entirety. Upon completion, click the "Take Action" button to submit to the BO to close all Project POs.

Fee Confirmation

* Have all DAS and Vendor Fees been paid in full?:
If no, provide a list of Vendors and fees still being charged to this project.:

* Has the business office been notified that all PO's for the subject project can be closed?:

-- Please select an option --

-- Please select an option --

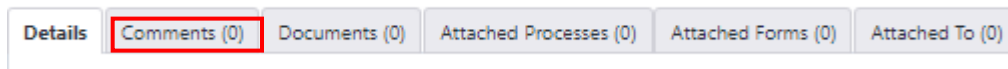


27.08 Close POs (BO)

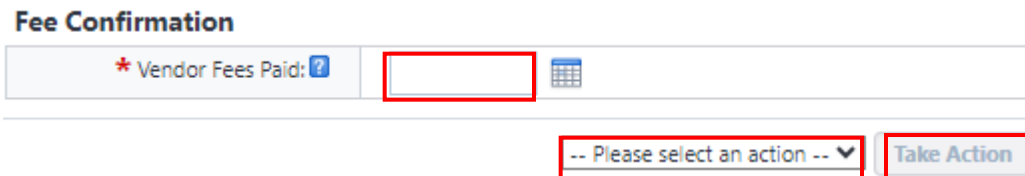
After the PM has confirmed that all Vendor Fees and all DAS Fees have been paid in full, the BO will receive an email from eBuilder as notification that the BO can proceed to close all vendor Purchase Orders (POs) associated with the project.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

Prior to reviewing the Project Payment Schedule in CORE to ensure that all Vendor and DAS Fees have been paid in full and before all POs are closed, click on the "Comments" tab to review previous comments regarding the Project Closeout Submission Package, which may be of use in closing the subject POs.

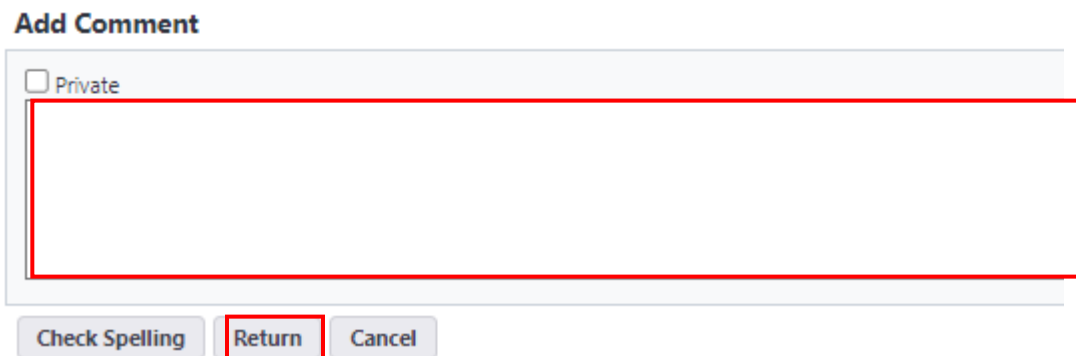


If all vendors have been paid and all POs can be closed, input the date the last vendor payment was made in the "Fee Confirmation" section to certify that all POs have been closed. Once this is done, scroll to the bottom of the page and select "Submit" from the dropdown list and click the "Take Action" button to forward the submission to DAS Accounting for project reconciliation.



If after review of the Project Payment Schedule in CORE, it is determined that there are any outstanding fees to be paid or there is some other reason that a PO cannot be closed, scroll down to the bottom of the page and select "Return" from the dropdown list next to the "Take Action" button, and then click "Take Action" to return the submission package to the Project PM.

After clicking "Take Action", a prompt will appear to allow you to provide direction to the Project Manager on what is required to close the associated POs. Click the "Return" button, after adding comments, to process the submission.



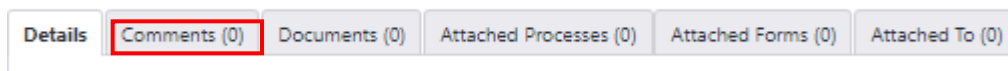


27.09 Fee Confirmation Revision (PM)

If the Business Office (BO) determined that all Project POs cannot be closed, the PM will receive an email from eBuilder as notification that additional information is required to close the POs.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

After opening the process instance, click on the “Comments” tab for direction from the BO regarding what is required to closeout all POs.



After reviewing the comments provided by the BO and, if applicable, after uploading any additional documentation required by the BO, click the “Take Action” button to return the Project Closeout Package to the BO. A prompt will appear, after you click “Take Action”, to allow you to respond to the BO’s comment with your own comment. Click the “Submit” button after adding your comment.

Add Comment

Private

27.10 Final Reconciliation (The Accounts Examiner)

Once all of the required documents have been submitted and reviewed for project closeout, the final payment application has been processed and paid, all DAS and Vendor fees have been paid in full, and the Business Office has closed all Vendor PO's on the project, The Accounts Examiner will receive an email from eBuilder as notification that the Project is ready for financial review and internal audit.

To access the project process, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

*BI-CS-1010 - DAS Test Project

Process instance is in your court. To view details or take action, [click here.](#)



Processes Documents Contacts Cost Schedule Reports Setup

Welcome, Craig!

My Processes

Project ↑	Instance ↑	Subject ↑
BI-Q-733 - Aircraft Maintenance Hangar ADD/ALT (MILCON)	5R-PI - 4	1105R BI-Q-733
*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

After opening the process instance, click on the "Comments" tab to review all previous correspondence regarding the subject Project Closeout Package. Once complete, begin working on the final reconciliation.

Details Comments (0) Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

If the reconciliation cannot be finalized, scroll down to the bottom of the page and either select "Revise" from the dropdown list next to the "Take Action" button, to return the closeout submission to the PM to request additional information and/or documentation to complete the financial review, or select "BO" if you require Business Office input prior to completing the reconciliation. If the reconciliation is complete and the project can be closed in eBuilder, upload a copy of the final reconciliation to the "Final Reconciliation" field, select "Approve" from the dropdown list and click the "Take Action" button.

Final Reconciliation

Final Reconciliation: or

-- Please select an action --

If "Revise" or "BO" was selected, a prompt will appear to allow you to add comments regarding the financial review and/or provide direction on the requirements to complete your review. Once you have entered your comment, click the "Revise" or "BO" button respectively to forward the submission package to the appropriate party.

Add Comment

Private

27.11 Reconciliation Review (PM)

If The Accounts Examiner is unable to complete the final reconciliation for the subject Project, the PM will receive an email from eBuilder as notification that additional information is required to complete the final reconciliation.



To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

After opening the process instance, click the "Comments" tab to review the requirements to complete the project reconciliation process. Once you have completed the required revisions, click the "Take Action" button. You will then be prompted to provide a comment where you can provide an explanation of the corrective actions taken to complete the project reconciliation process.

27.12 Reconciliation Review (BO)

If The Accounts Examiner is unable to complete the final reconciliation for the subject Project, the Business Office (BO) will receive an email from eBuilder as notification that The Accounts Examiner requires assistance from the BO to complete the reconciliation process.

To access the project process, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

After opening the process instance, click the "Comments" tab to get direction from The Accounts Examiner regarding the assistance needed to complete the reconciliation process. Once you have completed your review, and are ready to respond, scroll down to the bottom of the page and click the "Take Action" button. You will then be prompted to provide a comment where you can respond to The Accounts Examiner.