

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

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

**0150 PMWeb Manual**

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## 0150 – PM Web Manual

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# General Information

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### 1.0 GENERAL INFORMATION

#### 1.1 Purpose of this Manual

This PMWeb Manual (the “Manual”) provides Department of Administrative Services (DAS) / Construction Services with a step by step guide to answer frequently asked questions (FAQ) on how to administer projects in PMWeb. For a general overview of PMWeb, refer to the [PMWeb Quick Start Guide](#) prepared by Saybrook Associates Inc. for DAS Construction Services.

#### 1.2 Manual Update

This Manual is not all inclusive and will be updated from time to time to respond to new FAQ's or reflect changes in DAS Construction Services policy and procedures that impact project administration in PMWeb. Updates will be posted in a Manual Notice as a preface to the Manual. Any questions, comments, or suggestions regarding this manual should be submitted to the DAS Office of Construction Support Services.

#### 1.3 Manual Organization

The body of this Manual is divided into seven (7) subsections, each representing a major milestone from the PMWeb Project Milestones Form. Within each of these subsections is a set of administrative tasks that are performed to achieve that major milestone. Each assigned task includes a simple set of instructions on how to perform said task in PMWeb. Some tasks require action under multiple major milestones and have been documented and referenced accordingly. Effort was made to list the tasks, in chronological order, in the subsection where the task is most frequently implemented.

#### 1.4 Abbreviations

BI	Business Intelligence
BIC	Ball In Court
CMR	Construction Manager at Risk
GC	General Contractor
SOV	Schedule of Values

**1.5 Definitions**

**Backspace Select.** The process in PMWeb for which the backspace key on a keyboard is used to clear the selected item from a drop-down, making the full list of options available from the drop-down list. This is the way to toggle between projects ([see Section 100.2, Viewing Project Assignments](#)).

**Company Record.** Company name, address, and list of contacts assigned to a project. These records are made available to the consultants, contractors, client agencies and the Department. A company record is required to create contract records and to invoice.

**Construction Value.** The estimated cost of construction for a project. The estimated cost of construction can be found in the Capital Project Initiation Request (Form 1105), Part 2, Section 9, Line Item 3.

**Contacts.** Contacts are listed within the Company Record in PMWeb. Contact information includes name, title, phone, and email. If a person moves from one company to another, a new contact record must be created for them at their new company.

**Cost Codes.** Cost codes are the DAS/CS categories for project funding and costs. Cost codes are listed, for each project, in the Cost Codes tool, in the Cost Management module.

**Contract Record.** A record in PMWeb of a commitment that requires payment on a project, i.e. formal contract, informal contract, purchase order (PO).

**Document Manager.** A tool in the Toolbox module of PMWeb that has a system of folders matching the standard DAS/CS file folder system.

**Dialogue Box.** A small window that communicates information to the user and prompts them for a response with options and controls for a particular function in PMWeb and other software.

**Line Item Transfers.** Transfer of funds from one cost code to another in the Project Financials.

**Major Milestone.** A major milestone is one of the seven (7) milestones in the PMWeb Project Milestones form ([see Section 120.2, Project Milestones](#)).

**Module.** The main subdivision of PMWeb functions, located in the lower left of the PMWeb screen.

**Name.** For purposes of this Manual, “Name” is the project title on the Project Portfolio Page.

**Notifications.** A PMWeb tool that functions like a transmittal ([see Section 100.5, Notifications](#)) or, a list of all the people who have been notified about the transmission of a document in PMWeb.

**Payment Application.** A PMWeb tool for invoicing on state construction projects.

**Program.** A category of projects, typically organized by client agency.

**Project ID.** The project number assigned by DAS.

**Project Portfolio Page.** The main project data page in PMWeb. The project portfolio page can be accessed by navigating to the Portfolio module, clicking on “Lists”, then “Projects” and selecting the project in question.

**Project Record.** Record data regarding a DAS/CS construction project in PMWeb.

**Status.** The position of something at a given time. The status fields in PMWeb are defined as follows:

- **Draft** – the status of an item prior to submission and review.
- **Submitted** – the status of an item put forward for review.
- **Returned** – the status of an item after review has been completed and given back to the sender.
- **Approved** – the status of an item that has been reviewed and accepted by the final authorizing authority.
- **Rejected** – the status of an item that has been reviewed and denied by the final authorizing authority.
- **Resubmitted** – the status of an item that was previously rejected and submitted again for review and approval after corrective action was taken.

**Toggle.** Changing your view between different options. For example, when you switch from viewing the data about one project to the data about another, you are said to be “togglng” between the projects.

**Tool.** This is the DAS/CS term given to the PMWeb functions that are listed in the upper left part of PMWeb. Tools are organized within PMWeb modules.

**User.** Also referred to as a “PMWeb user”, these are people who have PMWeb user access.

**User Access.** Also referred to as a “PMWeb user access”, user access is an account within PMWeb with a username and password for a particular person. User access is set to different permissions, based on the role of the user.

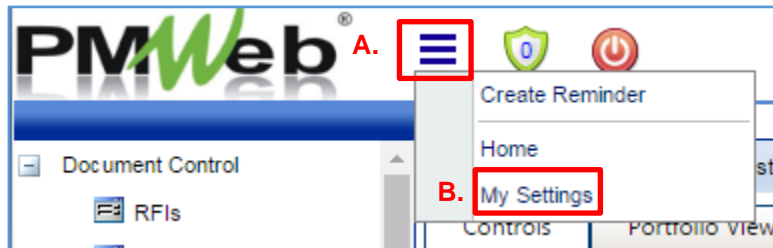
**2.0 PMWeb BASICS**

The PMWeb Basics section consists of instructions on how to perform basic tasks in PMWeb and provides instruction on how to perform administrative tasks that are performed throughout the life of a project.

**100.1 PASSWORD UPDATE**

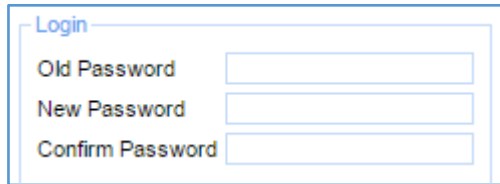
1. To modify your password, proceed as follows:
  - A. Click the Navigation button
  - B. Select “My Settings”.

**Figure 100.1.A**



When prompted, check the box entitled “Prompt to save when managing away from records.” Modify your password under the “Login” Section as shown below in Figure 100.1.B.

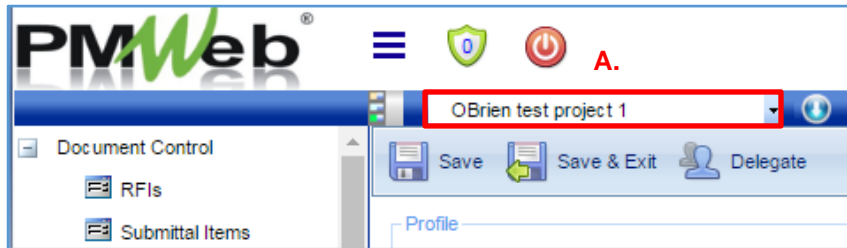
**Figure 100.1.B**



**100.2 VIEWING PROJECT ASSIGNMENTS**

1. To view a specific project assignment:
  - A. Enter the project name in the “Project Selection Box”, press the down arrow key and then press “Enter” on your keyboard.

**Figure 100.2.A**



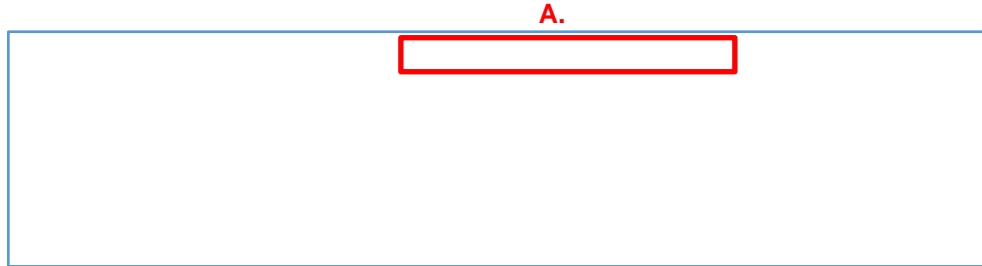


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2. To view all of your project assignments:
  - A. Clear the contents in the “Project Selection Box” and click the dropdown arrow.

Figure 100.2.B



### 100.3 CUSTOMIZING SCREEN VIEW IN PMWEB

PMWeb allows each user to customize the “layout” of any of the documents listed in the Document Control module. Customization features include the ability to: 1) Add and remove column headers from your screen view (see the PMWeb Quick Start Guide - Customizing Layouts, pg. 16); 2) Change the order of columns in your screen view; 3) Sort and filter data within a column; and 4) Organize data by grouping. Once the layout is customized and saved, the user can use the template to group, sort, and filter the data for other projects. Multiple layouts can be created by the user and the user has the ability to toggle between any of those layouts to view project data.

1. To create a layout:
  - A. Open the Project Assignment you want to view by following the steps described in Section 100.2 - Viewing Project Assignments.
  - B. Select the “Document Control” module.
  - C. From the list of Elements in the “Document Control” module, select the element you want to create a layout for (In the example below, Figure 100.3.A, Submittal Items was selected).

Figure 100.3.A

The screenshot displays the PMWeb interface for 'O'Brien test project 2'. The left sidebar, labeled 'B.', shows the 'Document Control' module selected. Within this module, 'Submittal Items' is highlighted, labeled 'C.'. The main area shows a data table with columns: Project Name, Project #, Record #, Phase, WBS, Description, and Category. The table contains 14 rows of data for various project records.

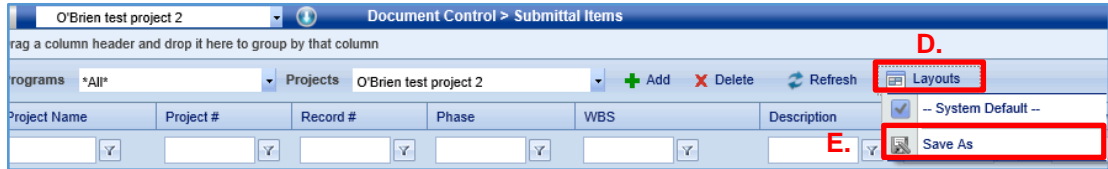
Project Name	Project #	Record #	Phase	WBS	Description	Category
O'Brien test project 2	TOB-002	000006	032000 - Concrete Rei		test 6	
O'Brien test project 2	TOB-002	000007	032000 - Concrete Rei		qqqqqqqqqq	
O'Brien test project 2	TOB-002	000008	032000 - Concrete Rei		test submittal 8	
O'Brien test project 2	TOB-002	000009	032000 - Concrete Rei		Test submittal 9	
O'Brien test project 2	TOB-002	000010	032000 - Concrete Rei		Submittal 10	
O'Brien test project 2	TOB-002	000001	042000 - Unit Masonry		test 1	
O'Brien test project 2	TOB-002	000001	053110 - Steel Deck			
O'Brien test project 2	TOB-002	000001	053110 - Steel Deck			
O'Brien test project 2	TOB-002	000002	053110 - Steel Deck			
O'Brien test project 2	TOB-002	000002	053110 - Steel Deck			
O'Brien test project 2	TOB-002	000001	057300 - Ornamental M		test edit attachments	
O'Brien test project 2	TOB-002	000001	062000 - Carpentry		test 1	

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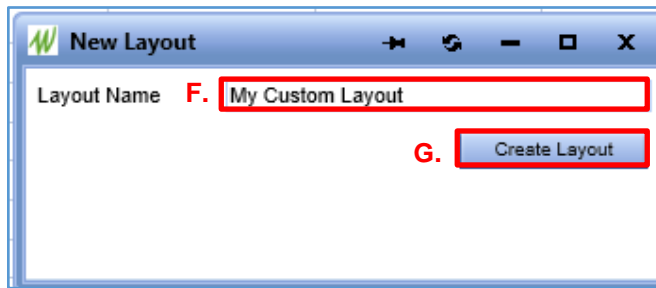
- D. Select the “Layouts” button at the top of your screen to begin the setup for your layout.
- E. Click “Save As” to open the “New Layout” dialogue box.

**Figure 100.3.B**



- F. Type a name for the new layout in the space provided.
- G. Click the “Create Layout” button to save the new layout template.

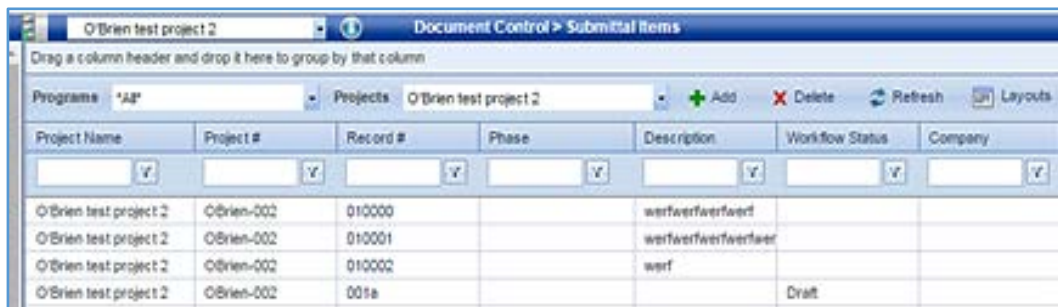
**Figure 100.3.C**



Once you have created the new layout template, you can move and organize the columns and their contents to suit your document tracking needs.

- 2. To change the order of the columns in the layout:
  - A. Hover over the column header that is to be moved. The addition sign (+) will appear over the subject column.
  - B. Click on the addition sign and drag the column header to the desired location on the screen.

**Figure 100.3.D**



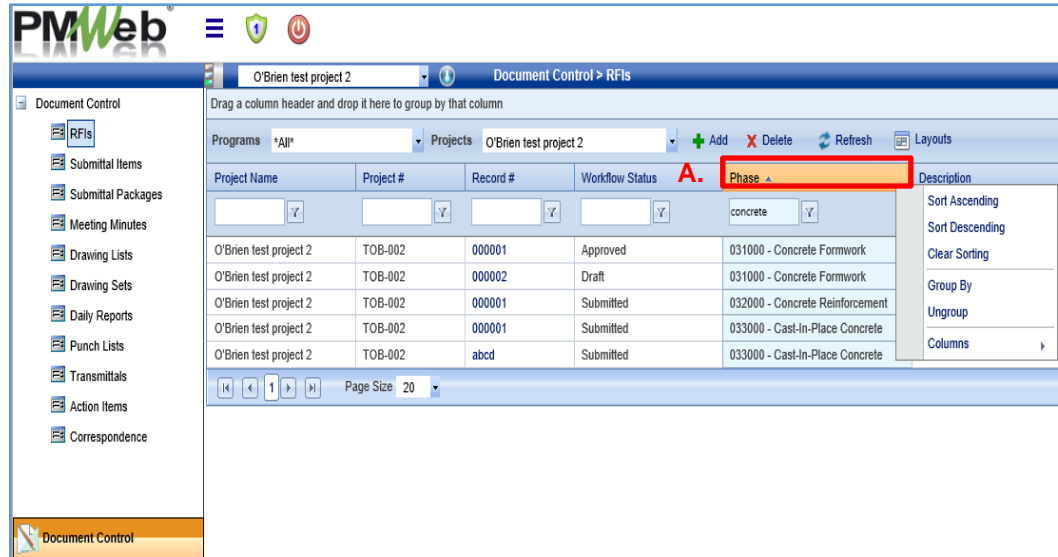
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3. To sort column records:
  - A. Click on the column header once to sort the column data in ascending order.
  - B. Click on the column header a second time to sort the column data in descending order.

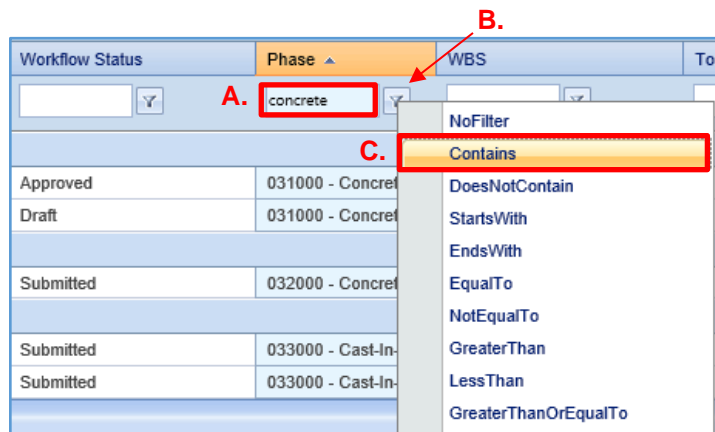
In the example provided below Figure 100.3.C, the Phase column is sorted in ascending order.

**Figure 100.3.E**



4. Records can also be sorted using a filter. To filter data:
  - A. Enter the data you want to filter in the "Filter Selection Box" (in the example provided in Figure 100.3.D, the data entered into the filter selection box was "Concrete").
  - B. Select the "Filter" icon under the column for which you want to filter data.
  - C. Select the filtering option you want to implement (in the example provided in Figure 100.3.D, the filtering option selected was "Contains");

**Figure 100.3.F**



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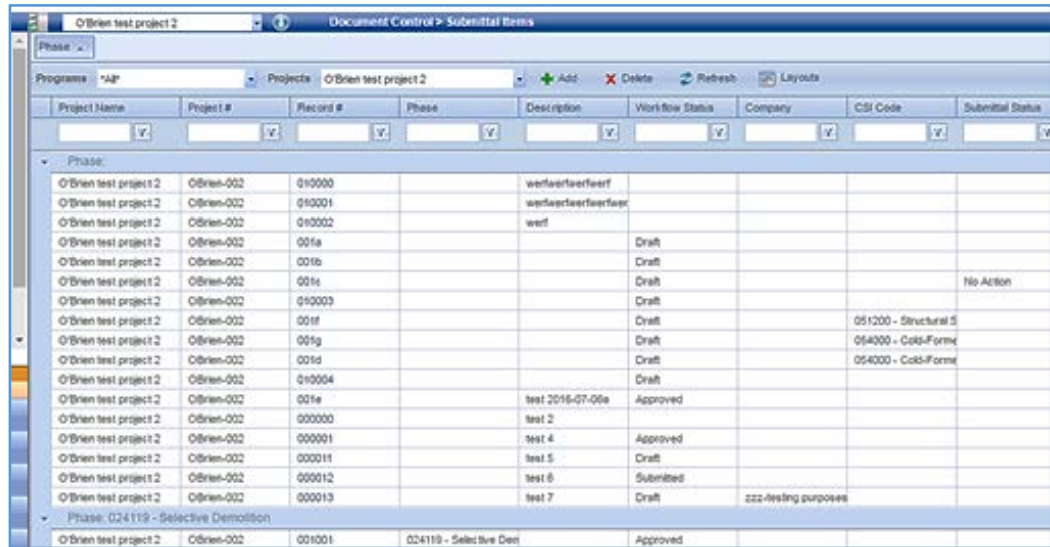
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Finally, records can be grouped by subject matter. Figure 100.3.E below, provides an example of Submittal Items grouped by project “Phase.”

5. To group records by subject matter, do the following:
  - A. Hover over the column header and the addition sign will appear.
  - B. Right click the addition sign and select “Group By.” The selected column will be arranged in a common grouping order.

Any one column or multiple columns can be organized by group.

**Figure 100.3.G**



The screenshot shows a web application window titled "Document Control - Submittal Items" for "O'Brien test project 2". The interface includes a search bar, a "Phase" dropdown menu, and a table of submittal items. The table columns are: Project Name, Project #, Record #, Phase, Description, Workflow Status, Company, CSI Code, and Submittal Status. The records are grouped under a "Phase" header, with sub-headers for "Phase: O'Brien test project 2" and "Phase: 024119 - Selective Demolition".

Project Name	Project #	Record #	Phase	Description	Workflow Status	Company	CSI Code	Submittal Status
Phase: O'Brien test project 2								
O'Brien test project 2	O'Brien-002	010000		verfaerfaerfaerf				
O'Brien test project 2	O'Brien-002	010001		verfaerfaerfaerf				
O'Brien test project 2	O'Brien-002	010002		wef				
O'Brien test project 2	O'Brien-002	001a			Draft			
O'Brien test project 2	O'Brien-002	001b			Draft			
O'Brien test project 2	O'Brien-002	001c			Draft			No Action
O'Brien test project 2	O'Brien-002	010003			Draft			
O'Brien test project 2	O'Brien-002	001f			Draft		051200 - Structural S	
O'Brien test project 2	O'Brien-002	001g			Draft		054000 - Coll-Forme	
O'Brien test project 2	O'Brien-002	001d			Draft		054000 - Coll-Forme	
O'Brien test project 2	O'Brien-002	010004			Draft			
O'Brien test project 2	O'Brien-002	001e		test 2016-07-00a	Approved			
O'Brien test project 2	O'Brien-002	000000		test 2				
O'Brien test project 2	O'Brien-002	000001		test 4	Approved			
O'Brien test project 2	O'Brien-002	000011		test 5	Draft			
O'Brien test project 2	O'Brien-002	000012		test 6	Submitted			
O'Brien test project 2	O'Brien-002	000013		test 7	Draft		zzz-testing purposes	
Phase: 024119 - Selective Demolition								
O'Brien test project 2	O'Brien-002	001001	024119 - Selective Dem		Approved			

### 100.4 ADDING PROJECT CONTACTS

1. To add people and companies to PMWeb as “Contacts” and to request PMWeb user access for project team members, please fill out, or have the project CA or someone else fill out, the [PMWeb Contacts Template](#).
2. Contacts may be entered by either unit secretaries or CSS.
3. To provide PMWeb user access to people, please contact Construction Support Services.

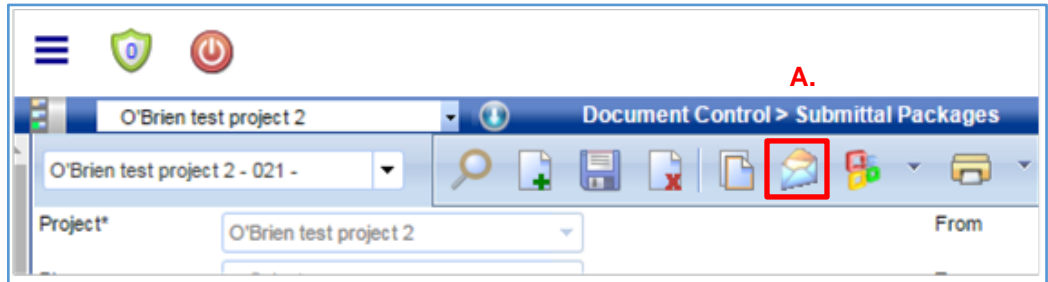
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### 100.5 NOTIFICATIONS

1. The PMWeb notifications tool allows for a structured, trackable way to send email messages in PMWeb. Notifications are not available in all PMWeb tools, but they are in some.
  - A. Notifications are accessed by pressing the Envelope Button.

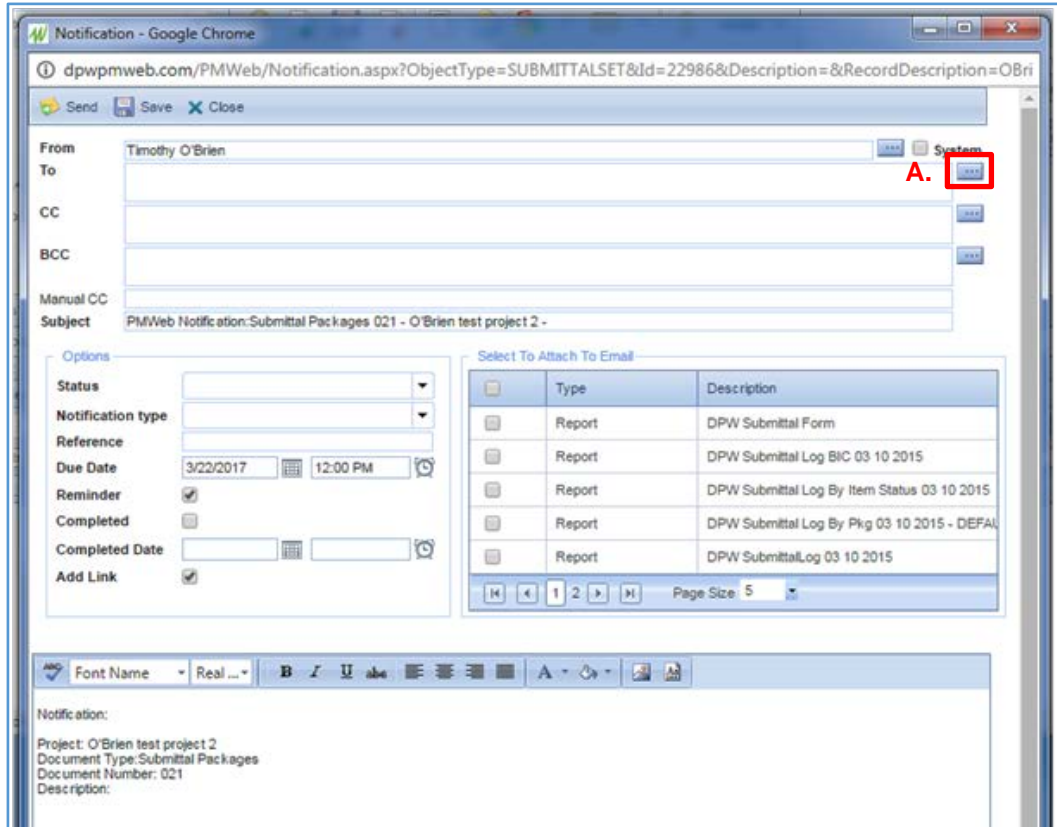
Figure 100.5.A



The Envelope Button will open a dialogue box like the one portrayed in Figure 100.5.B.

2. To access the distribution list of contacts in PMWeb:
  - A. Click on the ellipsis button (...) adjacent to the "To", "CC", or "BCC" field entry box.

Figure 100.5.B



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A list of project contacts, like the one shown in Figure 100.5.C, will be displayed after you click on the ellipsis.

3. To create a contact distribution list, do the following:
  - A. Enter relevant “search” data into the field box under the respective column. For example, if you know the name of the firm or the name of the contact you are looking for, you can enter the firm name under the “Company” column and / or the contact name under the “Contact” column.
  - B. Press the enter key on your keyboard or click on the filter button to sort the data based on your search criteria.

To select one or more people to receive the notification:

- C. Click on the box next to their name. If you are sending the notification to more than one person, follow the steps above to search for the rest of the people that will make up your distribution list and click on the box next to their names. If the same person appears more than one time, select one record with their name in it, regardless of the information in the other columns of the row you select.
- D. Click the “Save and Close” button.

Figure 100.5.C

The screenshot shows a web interface for creating distribution lists. At the top, there are tabs for 'Companies/Contacts' and 'Distribution Lists'. Below the tabs is a header area with a search prompt: 'Drag a column header and drop it here to group by that column'. Below this is a toolbar with buttons for 'Specs', '- Select -', 'D.', 'Save and Close', 'Save Layout', and 'Load Default Layout'. The main area is a table with columns: 'Company', 'Contact', and 'Email'. The 'Company' column has a search filter with 'DAS' entered. The 'Contact' column has a search filter with 'tim' entered. The table contains four rows of data, each with a checkbox in the first column. The first row is selected, and its checkbox is highlighted with a red box labeled 'C.'. Red arrows labeled 'A.' point from the search filters to the corresponding columns in the table.

	Company	Contact	Email
<input checked="" type="checkbox"/>	DAS Construction Services	Timothy Murphy	timothy.murphy@ct.gov
<input type="checkbox"/>	DAS Construction Services	Tim O'Brien as test Arch	OBrienPMWeb1DAS@ct.gov
<input type="checkbox"/>	DAS Construction Services	Tim O'Brien as test Arch	OBrienPMWeb1DAS@ct.gov
<input type="checkbox"/>	DAS Construction Services	Tim O'Brien as test CA	OBrienPMWeb2DAS@ct.gov

You will now be returned to the main notifications dialogue box.

4. To send the notification to a contact that is not listed in database:
  - A. Type the email of the individual you want to send the notification to in the “Manual CC” field box.

Figure 100.5.D

The screenshot shows a notification dialogue box with fields for 'CC', 'BCC', 'Manual CC', and 'Subject'. The 'Manual CC' field is highlighted with a red box and labeled 'A.'. The 'Subject' field contains the text: 'PMWeb Notification: Submittal Packages 001 - TOB-002 - O'Brien test project 2 - test items'.

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5. To complete and send the Notification do the following:

Under “Options”:

- A. Check the “Completed” box to automatically populate the “Completed Date” field with the current date, otherwise manually select the “Completed Date.”
- B. Keep the “Add Link” box selected to ensure that there is a link to the item you are sending in the notification email. In the example provided in Figure 100.5.E, the recipient(s) will receive the notification with a link to the subject matter Submittals.

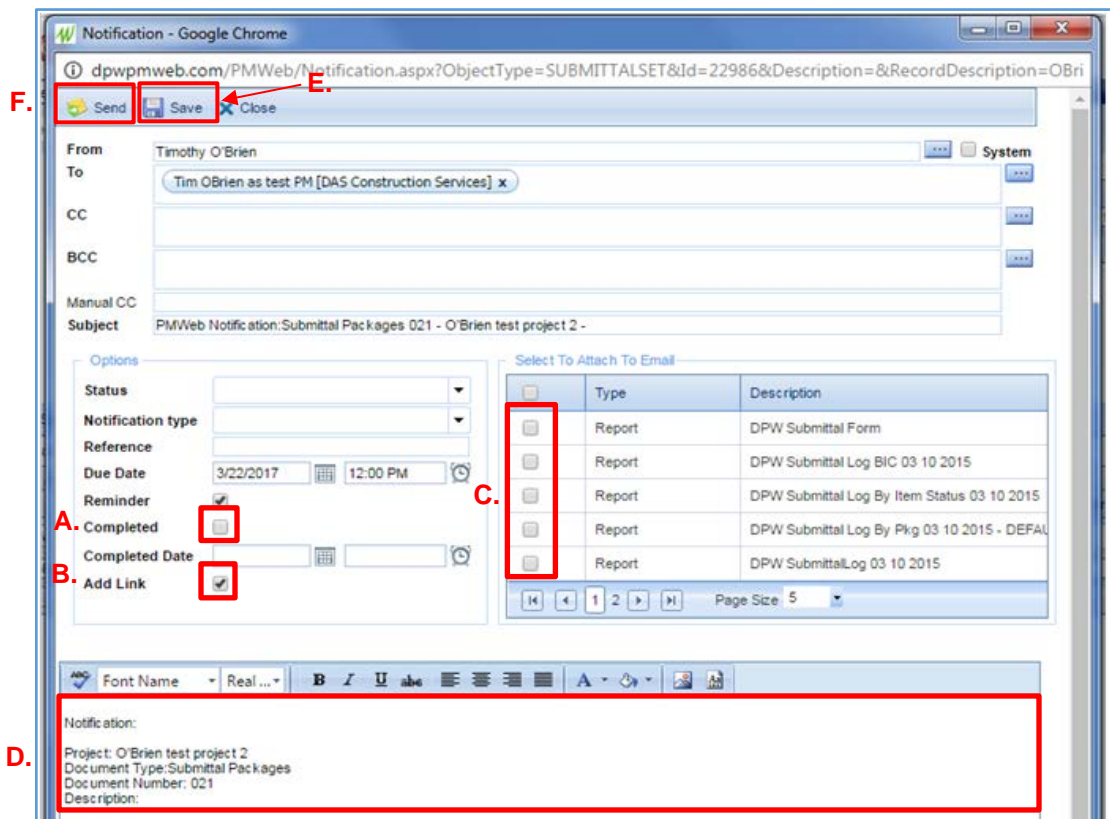
Under “Select to Attach to Email”:

- C. Select the report(s) and/or document(s) you want to attach to the notification from the list provided.

If you want to include a message with the notification:

- D. Type the message in the message box at the bottom of the page.
  - While the notification begins with a standard message in the text box, you can make whatever changes you would like to this text.
- E. Click the “Save” button to save the notification without sending it.
- F. Click the “Send” button to send the notification and exit out of the dialogue box.

Figure 100.5.E

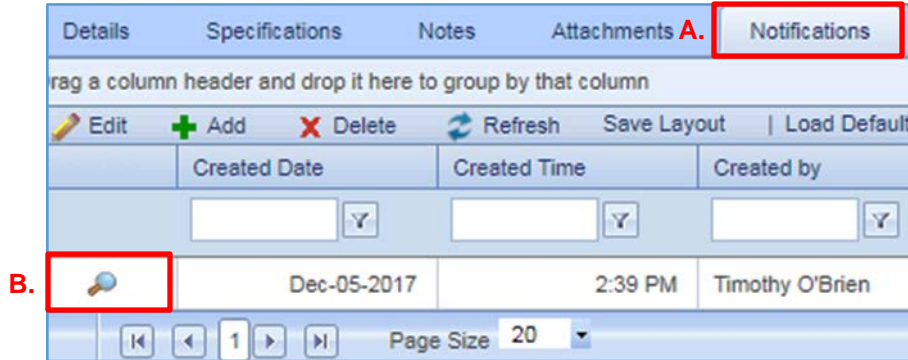


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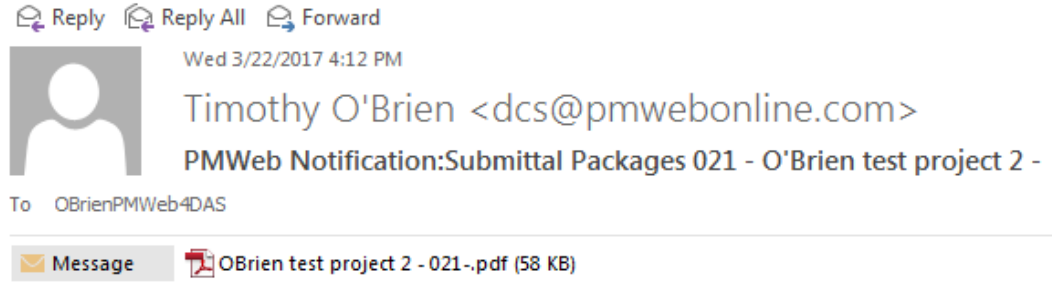
6. To view previously sent notifications:
  - A. Click on the “Notifications” tab within the section from which the notification was sent. In the example below, the notification was sent from Submittal Packages under the “Document Control” module.
  - B. Click on the “Magnifying Glass” button to view the email version of the notification sent.

**Figure 100.5.F**



7. The notification, above, produces an email that looks like this:

**Figure 100.5.G**



Click [here](#) to open the document.



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### 100.6 DOCUMENT MANAGER

Project Managers are required to maintain clear and accurate Project Record Documents related to the performance of the Work. Complete documentation supports the Department's position if a formal dispute or formal claim is made.

Project Record Documents that need to be maintained include, but are not limited to changes in the Work; project files and progress reports required to track, monitor, and administer the Contract Documents; the Contractor's applications for payment; and invoices paid through Core-CT.

Project Record Documents can be stored and managed using the Document Manager tool in PMWeb, which functions similarly to the Windows Explorer file storage system.

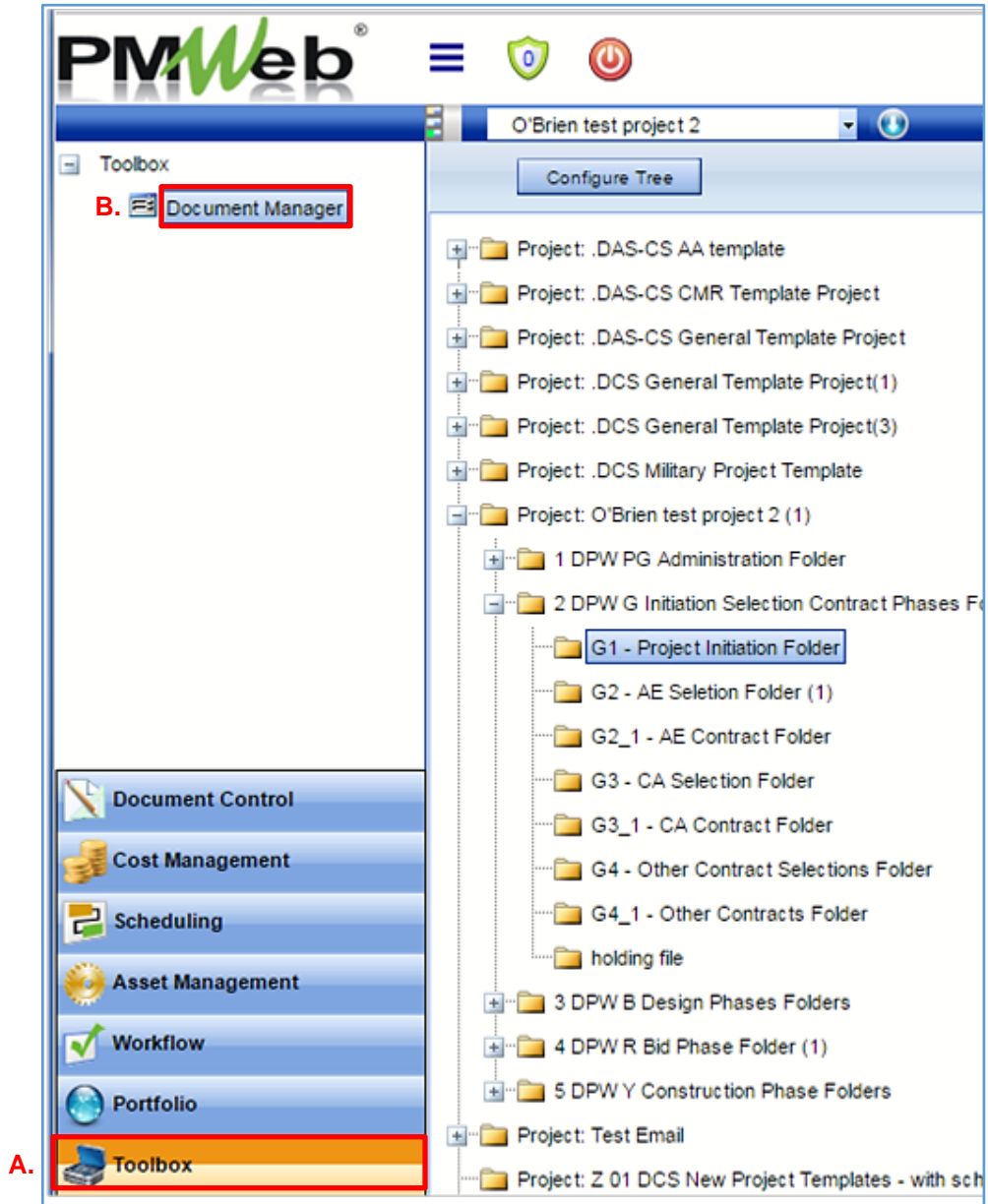
The default template should be used to manage Project Record Documents. This template was designed to mimic the Construction Services paper filing folder system (see Appendix I – File Folder Headings, a copy for which can be found in the DAS/CS Library, [Form 1110 – File Folder Headers](#)). Like the paper filing system, the digital filing system has primary file folders entitled "Administration, Initiation Selection, etc." and subfolders within the primary folder with the same name as those listed in the subsections below, e.g. Initiation Selection – Project Initiation, A/E Selection.

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1. To access a file folder system in Document Manager:
  - A. Select the “Toolbox” module.
  - B. Click on “Document Manager” to open the file system.
    - A list of all of your project file folders will appear below the Project Selection Box.

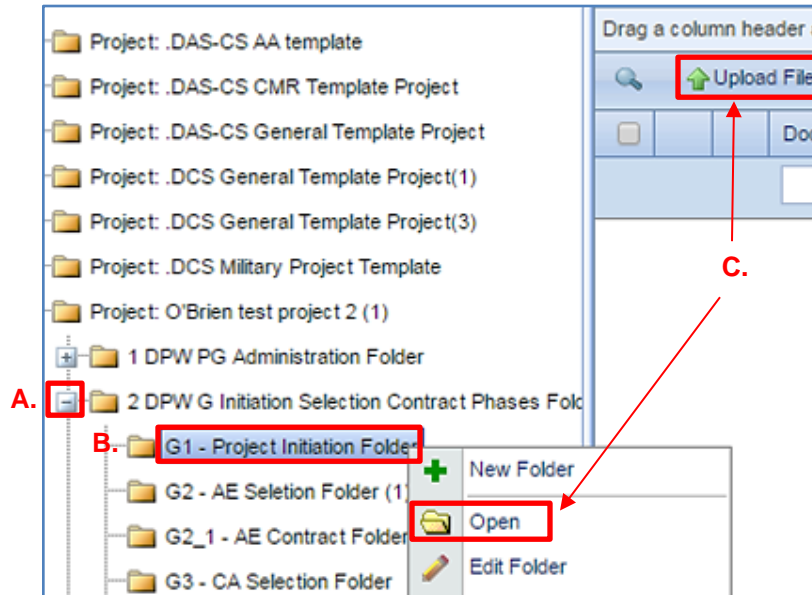
Figure 100.6.A



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2. To upload documents to a file folder, do the following:
  - A. Locate the project file folder you want to add files to and click the “+” to open the folder.
  - B. Select the subfolder where you want to store your documents and right click on the file folder.
  - C. Click “Open”, and then click the “Upload File” button.

**Figure 100.6.B**

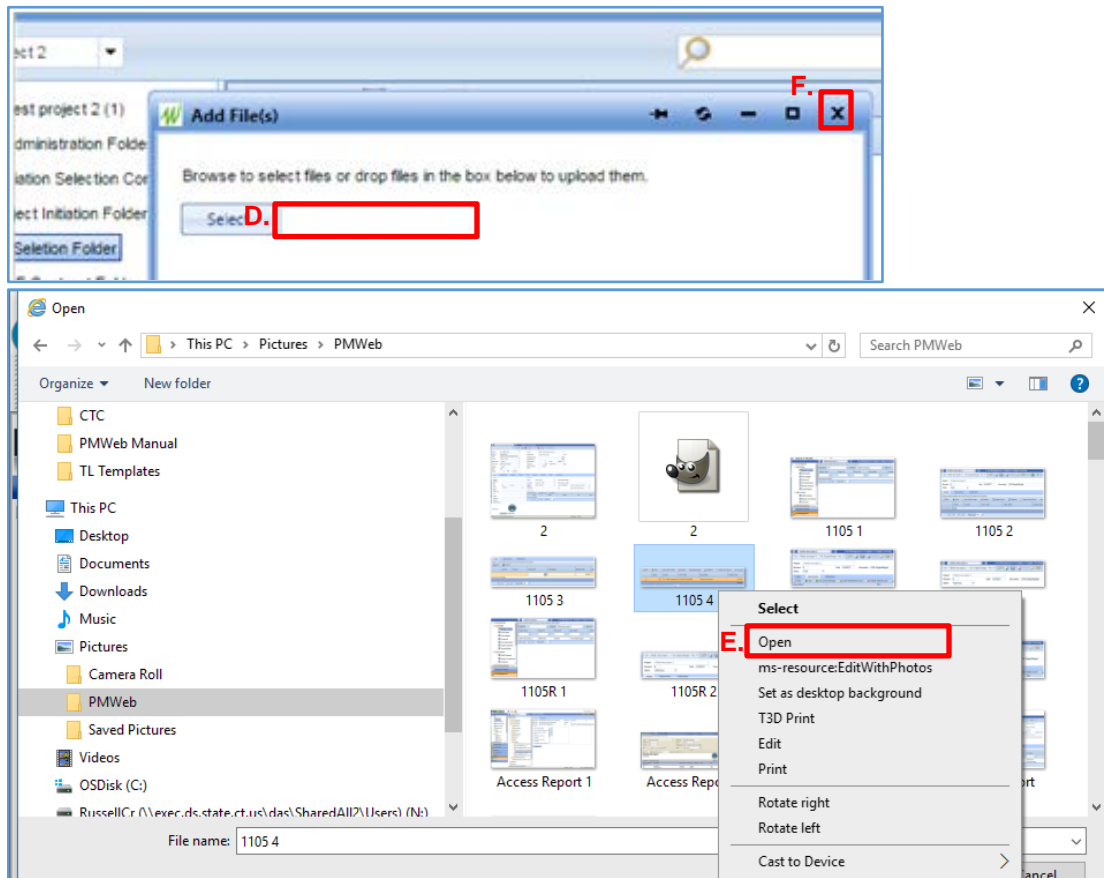


## Project Phases & Milestones 0150 – PM Web Manual

Once you have clicked “Upload File,” the Add File(s) dialogue box will appear.

- D. Click the “Select” button and search your local or network drive for the file you want to upload.
- E. Once you have found the file you want to upload, right click on the file and select “Open” or “OK” to upload the file to the designated file folder.
- F. After completing the upload, you have the option of adding more files to the file folder or you can close the “Add File(s)” dialog box by clicking the “x” in the upper right corner.

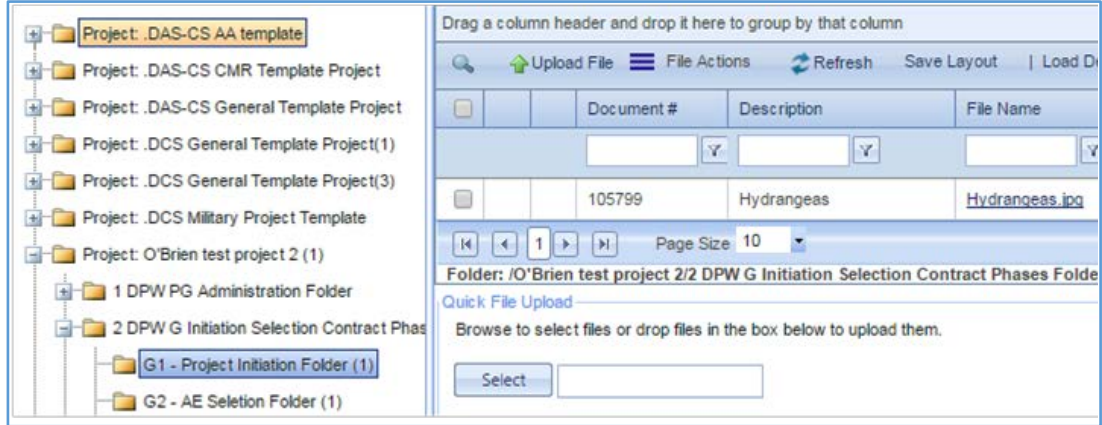
**Figure 100.6.C**



# Project Phases & Milestones 0150 – PM Web Manual

When the Add File dialogue box closes, the uploaded file will appear on the right side of the Files Lookup dialogue box. In the example below, a jpeg picture entitled “Hydrangeas.jpg” was uploaded to the “Project Initiation” File folder.

Figure 100.6.D

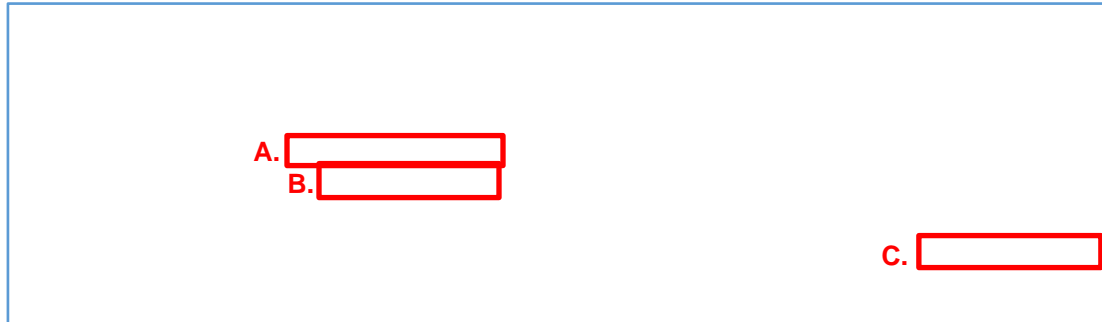


3. To access files that have already been uploaded to a project file:
  - A. Find the file folder / subfolder where the document is stored in Document Manager.
  - B. Click on the subfolder to open the file viewer.

From the list of files in the file viewer, find the document of interest. Once you have found the document of interest, you can do one of the following:

- C. Click on the link to the file to download it to your local drive,

Figure 100.6.E



## Project Phases & Milestones 0150 – PM Web Manual

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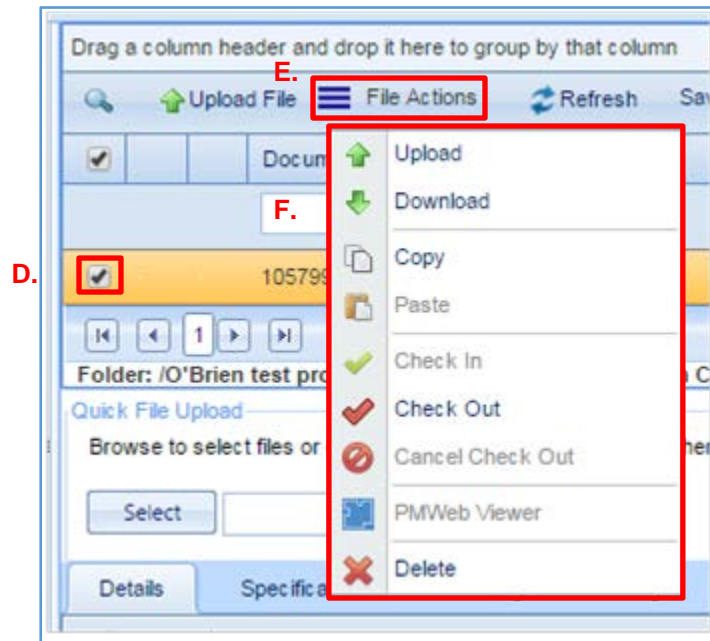
Or...

D. Check the line item box to select the file;

E. Click the “File Actions” button; and

F. Select the desired File Action – Upload, Download, Copy, etc.

**Figure 100.6.F**



# Project Phases & Milestones

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### 100.7 ATTACHMENTS – UPLOAD & LINK FILES IN THE ATTACHMENTS TABS

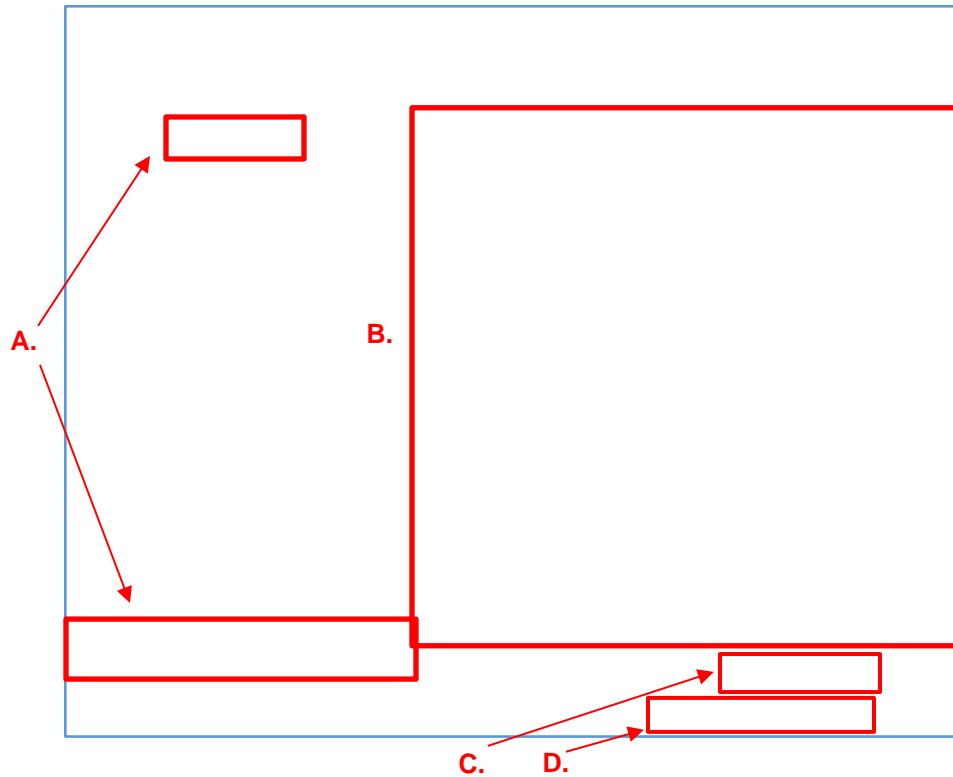
Attachments can be uploaded in many of the PMWeb tools. Attachments provide backup information for the record input. If there is an “Attachment” tab in the tool you are working in, you can upload an attachment to the record document. The following section outlines how to upload an attachment to the “Submittal Items” tool. Follow the same procedures to upload an attachment using any of the applicable tools.

1. To upload an attachment:
  - A. Select the tool for which you want to upload an attachment.
    - For Submittal Items, select the “Document Control” module and then the “Submittal Items” tool.
  - B. Create a document record and enter the required record document information.
    - [See Section 710.3, Individual Submittals.](#)

Once you have entered the required record document information and saved the new project record:

- C. Click on the “Attachments” tab.
- D. Click the “Document Manager” button to open the Document Manager dialogue box.

**Figure 100.7.A**



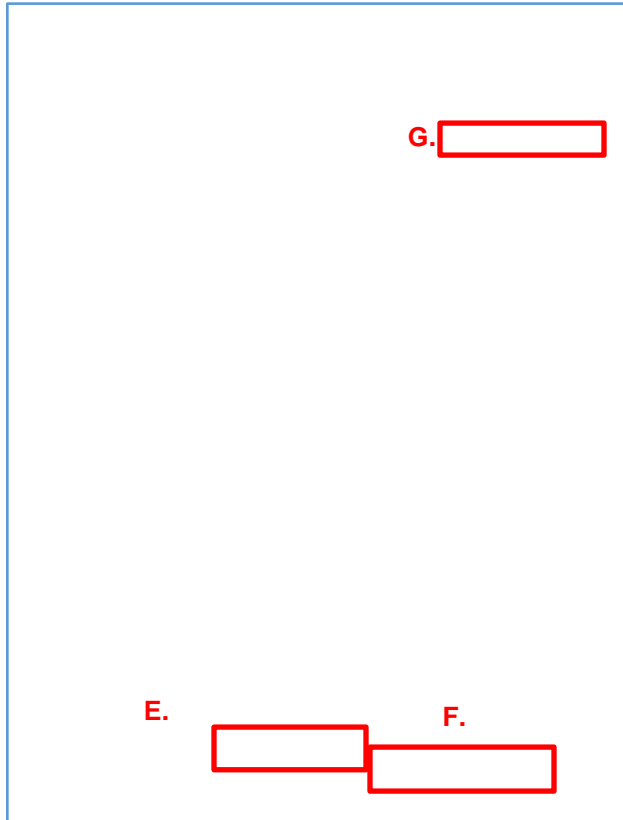
## Project Phases & Milestones 0150 – PM Web Manual

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After opening the Document Manager dialogue box:

- E. Locate the file folder / subfolder where you want to store the attachment. The folders in the PMWeb Document Manager are based on the DAS/CS paper filing folder system (see Appendix I – File Folder Headings, a copy for which can be found in the DAS/CS Library, [Form 1110 – File Folder Headers](#)).
- F. Right click the folder you would like to place the document into and click “Open”.
- G. Click “Upload File” button to open the “Add File(s)” dialogue box.

**Figure 100.7.B**





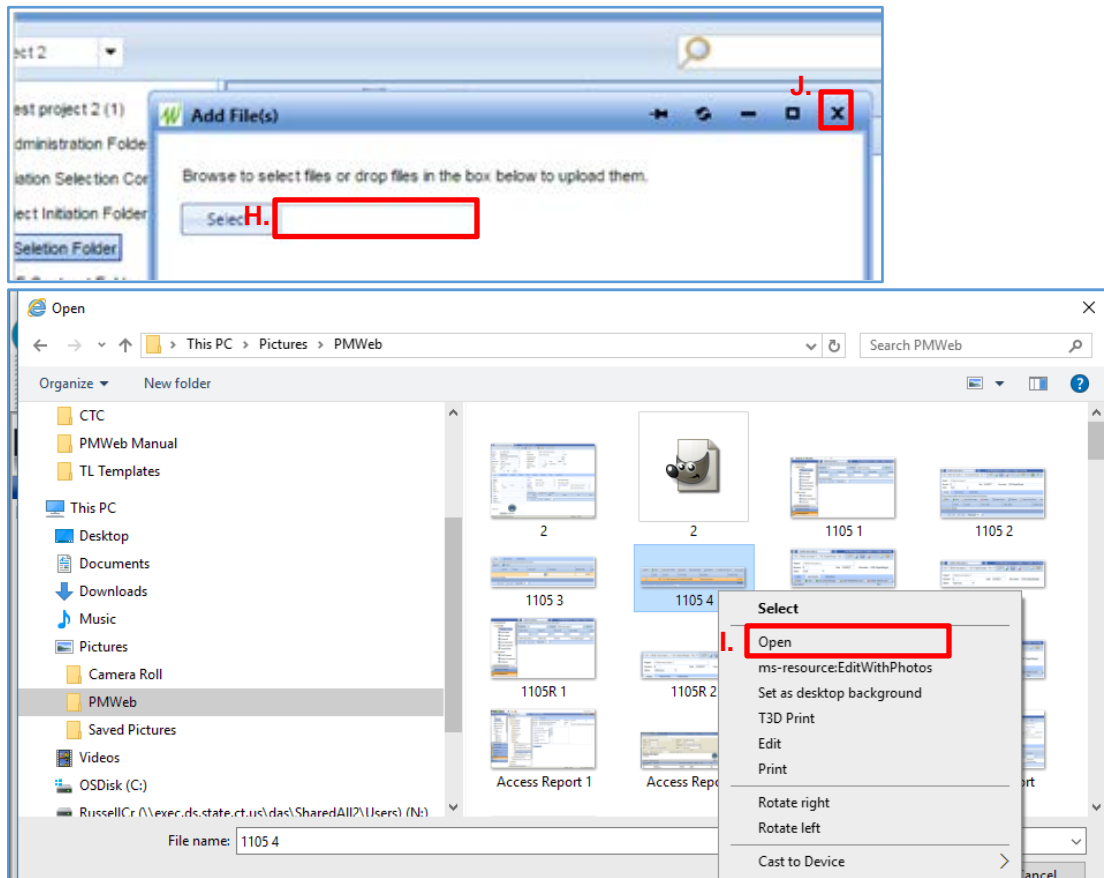
# Project Phases & Milestones

## 0150 – PM Web Manual

After opening the “Add File(s)” dialogue box:

- H. Click the “Select” button and search your local or network drive for the file you want to upload.
- I. Once you have found the file you want to upload, right click on the file and select “Open” or “OK” to upload the file to the designated file folder.
- J. After completing the upload, you have the option of adding more files to the file folder or you can close the “Add File(s)” dialog box by clicking the “x” in the upper right corner.

**Figure 100.6.C**

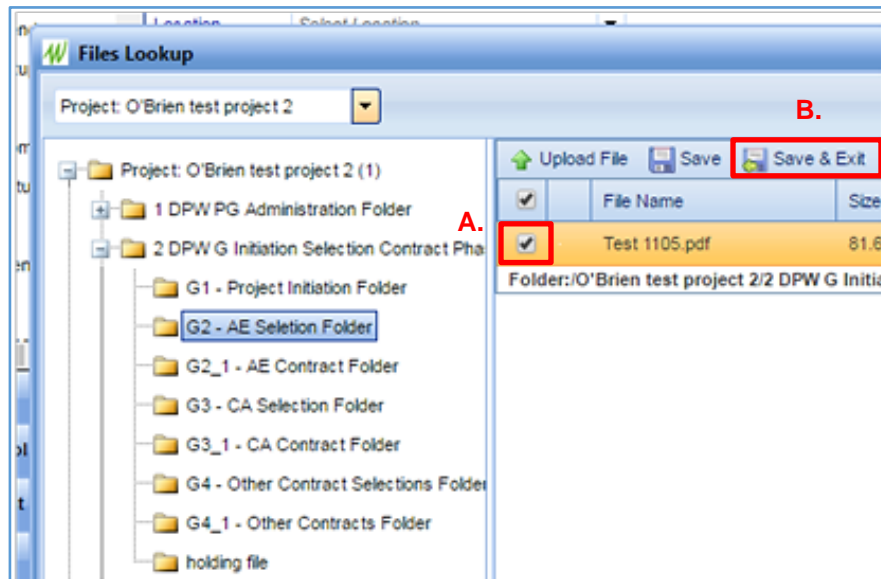


## Project Phases & Milestones 0150 – PM Web Manual

After the “Add File(s)” dialogue box closes, the uploaded file(s) will appear on the right side of the Files Lookup dialogue box.

2. To link the uploaded file(s) to the record document:
  - A. Check the file(s) you would like to link to the record document.
  - B. Click the “Save & Exit” button.

**Figure 100.7.D**



# Project Phases & Milestones

## 0150 – PM Web Manual

### 3.0 Project Phases and Milestones

#### 120.0 Project Initiation Phase - Approval of Capital Project Initiation Request, Form 1105

During the Project Initiation Phase, an Agency will submit a Capital Project Request (Form 1105/B100) for DAS review and approval. If approved, a project number is assigned to the project and the project is assigned to a DAS PM to administer. The DAS PM will begin project tracking in PMWeb at this time.

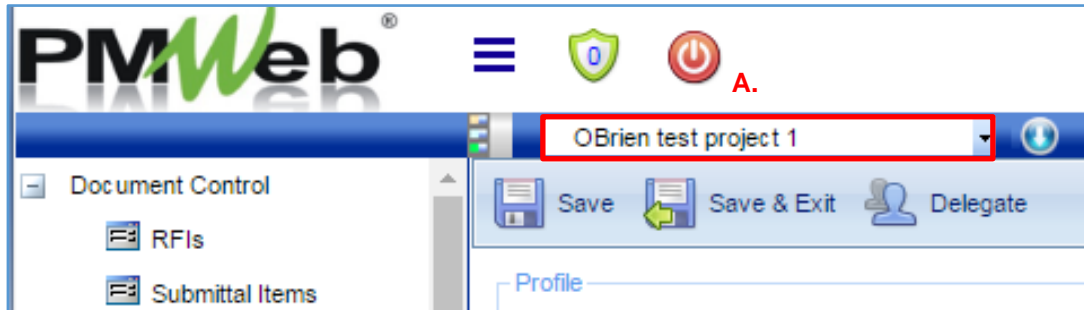
The following section outlines the tasks and processes performed to originate a project in PMWeb after the Capital Project Initiation Request has been approved.

#### 120.1 CREATING A NEW PROJECT RECORD

To start a project in PMWeb, a Project Record needs to be created. A Project Record can be created using one of several project portfolio templates. It is important to use the portfolio template because it includes pre-established user permissions, file and cost management systems and workflow structures to help properly administer the subject project by delivery method.

1. To create a Project Record using a project portfolio template, do the following:
  - A. Click on the “Project Selection Box” at the top of the screen and clear the content by using the delete or backspace keys.

Figure 120.1.A

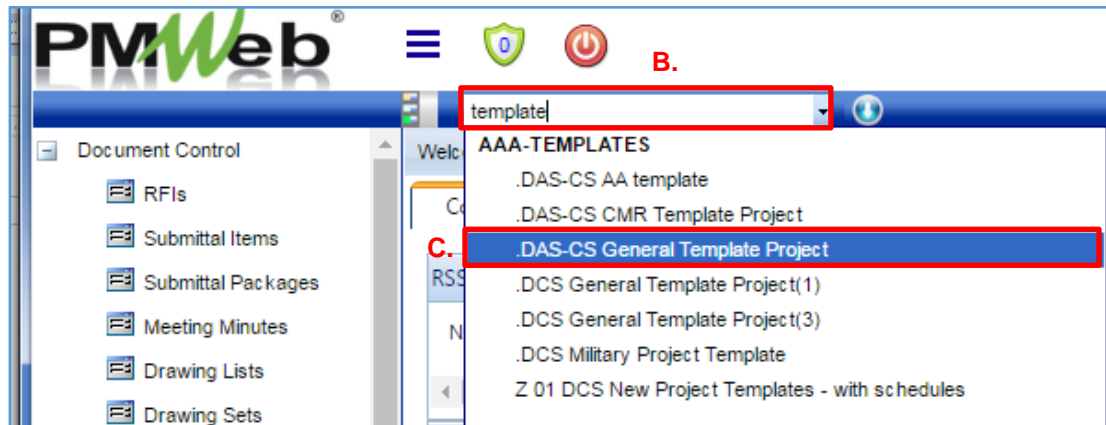


## Project Phases & Milestones

### 0150 – PM Web Manual

- B. Type the word “template” into the selection box to see the Project Record template, as shown below in Figure 120.1.B.
- C. Select the template labeled:
  - “.DAS-CS General Template Project” for projects using a General Contractor.

Figure 120.1.B



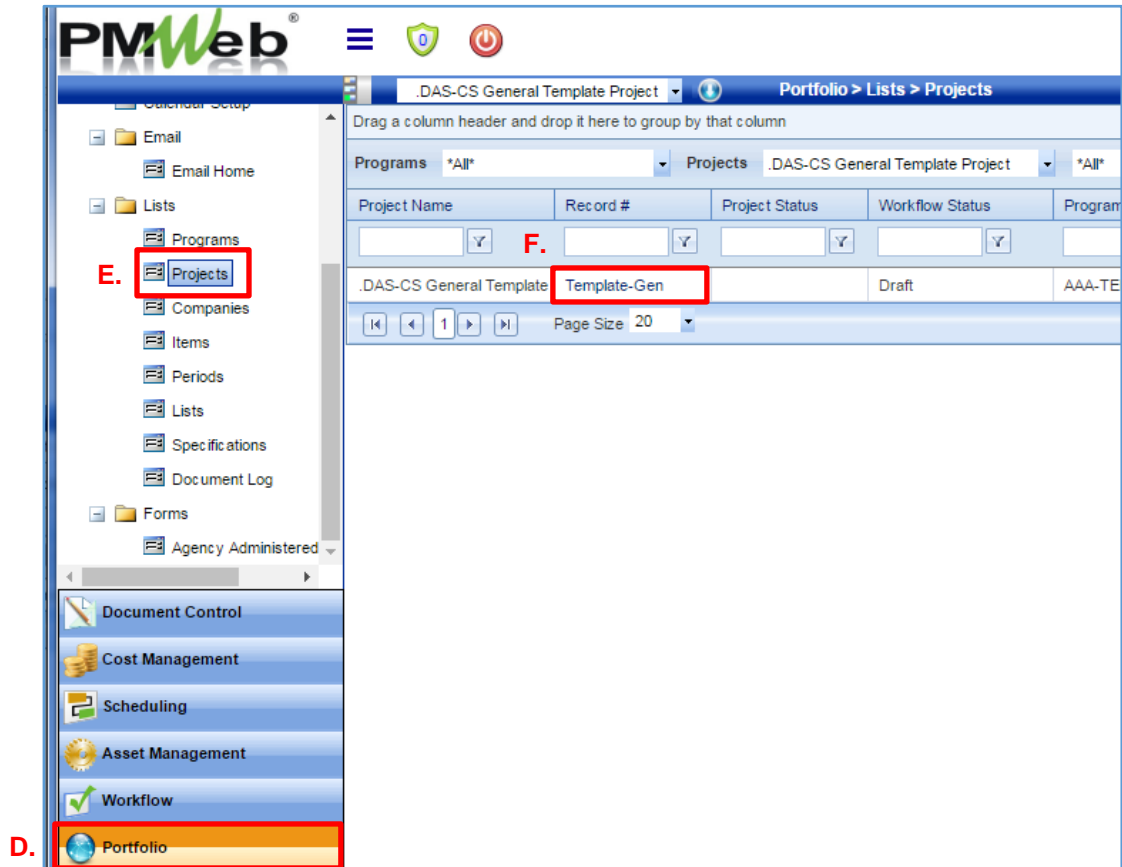
# Project Phases & Milestones

## 0150 – PM Web Manual

After selecting the template:

- D. Select the “Portfolio” module;
- E. Click on the “Projects” tool from the “Lists” file folder;
- F. Click on the template “Record #” to open the template.

Figure 120.1.C



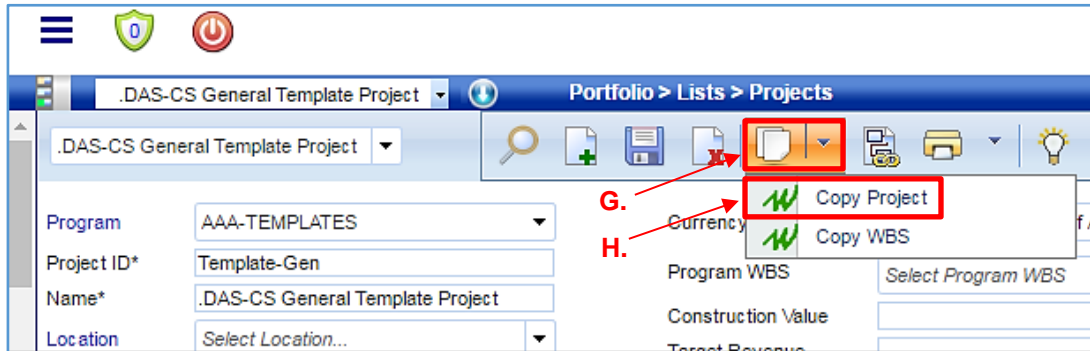
# Project Phases & Milestones

## 0150 – PM Web Manual

After opening the Project Record template:

- G. Click on the dropdown arrow to the right of the copy icon button; and
- H. Select “Copy Project” to open the Copy Project dialog box.

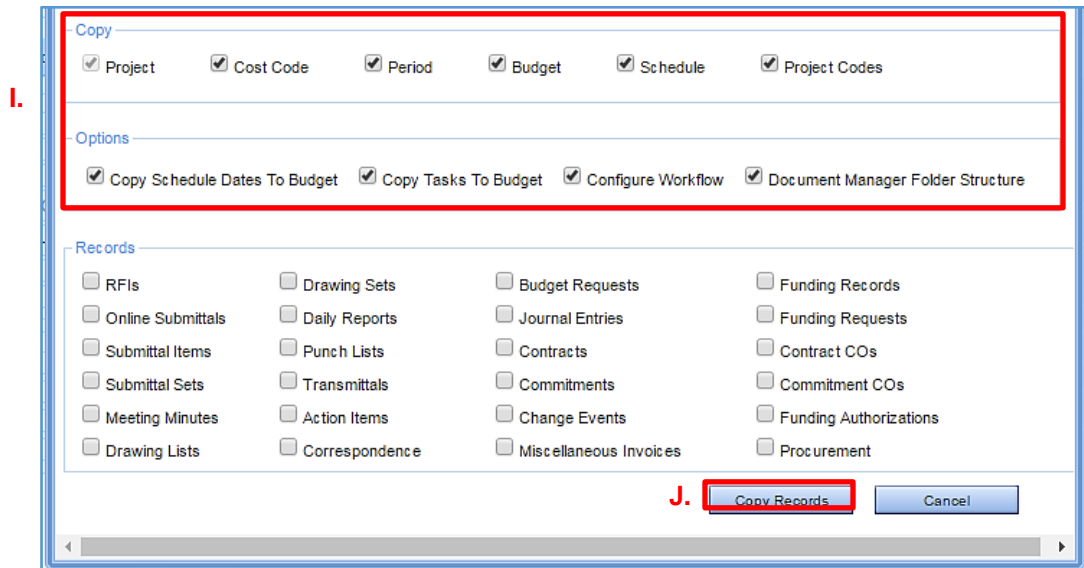
**Figure 120.1.D**



After opening the “Copy Project” dialog box:

- I. Check all of the boxes under the “Copy” and “Options” sections; and
- J. Click the “Copy Records” Button;
- K. When the dialogue box informs you that you are done copying, click “OK.”
- L. Click “X” to close the Copy Project dialogue box.

**Figure 120.1.E**



## Project Phases & Milestones 0150 – PM Web Manual

After closing the “Copy Project” dialogue box, you will receive a message stating that the “Project Copied Successfully.” The new project portfolio will now be visible and ready for editing.

2. To make the new portfolio project specific, proceed as follows:
  - A. Click the dropdown arrow next to the “Program” heading and select the appropriate Project Program.
  - B. Replace the template “Project ID” with the project number for the subject project (Form 1105, Part I, Section 6.1 or if a new project number, the number will be stamped on the top of Form 1105).
  - C. Replace the template project name with the standardized, official name of the project (Form 1105, Part I, Section 6.0 – Project Title).
  - D. Click the dropdown arrow from the “Project Status” heading and select the current status of the subject project.
  - E. Click the dropdown arrow from the “Project Type” heading and select the appropriate project type.
  - F. Click the dropdown arrow from the “Status” heading and change the status from “Draft” to “Approved” to record that the Capital Project Initiation Request was approved.

Figure 120.1.F

The screenshot shows the PM Web Manual interface for editing a project. The header displays the project name ".DAS-CS General Template Project" and the navigation path "Portfolio > Lists > Projects". The main form contains the following fields and values:

Program	A. AAA-TEMPLATES	Currency
Project ID*	B. Template-Geq	Program WBS
Name*	C. .DAS-CS General Template Project(1)	Construction Value
Location	Select Location...	Target Revenue
Project Status	D. -- Select --	Target Duration
Project Type	E. DBB-Design Bid Build	Target Start
Category	-- Select --	Percent Complete
Status	F. Draft	Scope
Revision	0	Date
		3/17/2017

At the bottom, there are tabs for "Details", "Specifications", "Locations", "Phases", "WBS", and "Contacts".

# Project Phases & Milestones

## 0150 – PM Web Manual

- G. Enter the estimated Construction Value of the project (Form 1105, Part II, Section 9, Line Item 3.0) next to the Construction Value heading.
- H. Click the dropdown arrow from the “Agency” Heading and select the appropriate client agency.
- I. Enter the assigned Assistant Director of Project Management (ADPM) in the DPW ADPM Field. Enter the last name first, first name last. It is important that the name be entered exactly as shown in sample below.

### Sample data entry format for ADPM

- a) Cavacas, John
- b) Ouillette, Don
- c) Pizzoferrato, Emilio

Any error in spelling and/or improper spacing of the name will not allow for the project data to be properly tracked.

- J. Enter the Project Manager in the DPW Project Manager Field, and enter the APM in the DPW Asst. on Project Field using the same format structure.
- K. Click on the “Save” icon to save the project record.

Figure 120.1.G

The screenshot displays the 'Portfolio > Lists > Projects' interface. The top toolbar contains a 'Save' icon (floppy disk) highlighted with a red box and labeled 'K.'. Below the toolbar, the 'Construction Value' field is highlighted with a red box and labeled 'G.', showing a value of '\$0.00'. The 'Agency' dropdown menu is highlighted with a red box and labeled 'H.', showing 'Select Agency...'. The 'DPW ADPM' field is highlighted with a red box and labeled 'J.', showing a redacted name. The 'DPW Project Manager' field is highlighted with a red box and labeled 'I.', showing a redacted name. The interface also includes fields for 'Currency', 'Program WBS', 'Target Revenue', 'Target Duration', 'Target Start', 'Target Finish', and 'Percent Complete'. A bottom section titled 'Personnel' contains fields for 'Agency', 'GC / CMR', 'Architect / Engineer', and 'DPW ADPM', each with a dropdown menu and a corresponding field for the assigned personnel name.



# Project Phases & Milestones

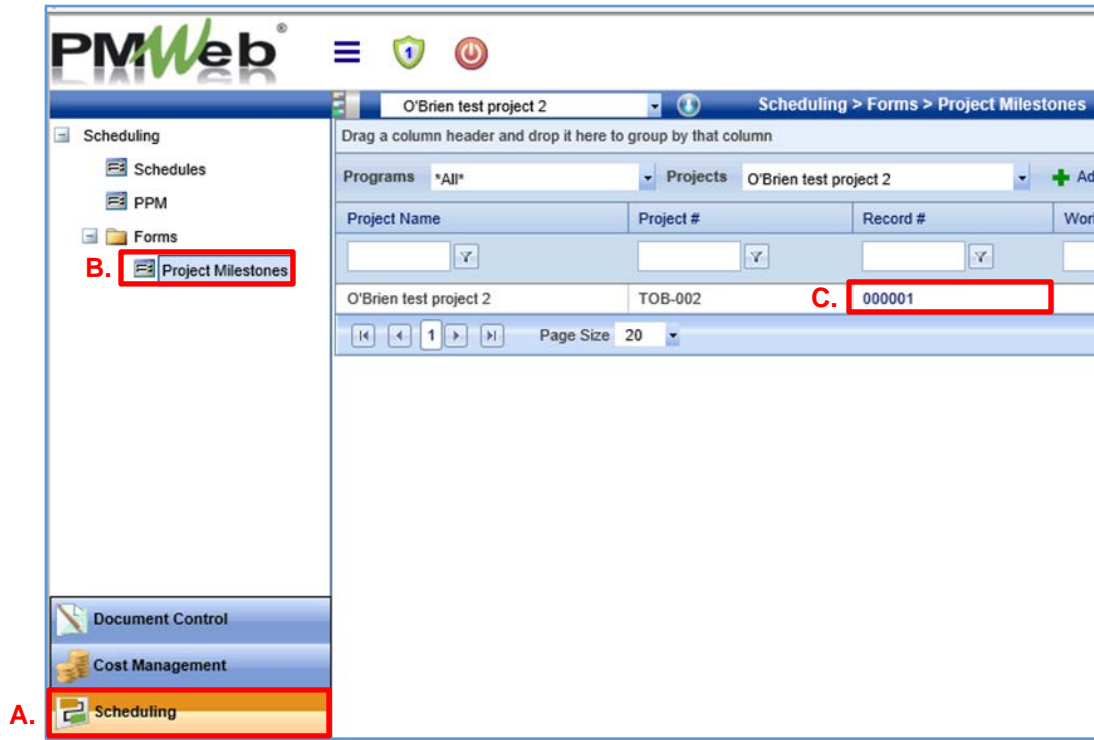
## 0150 – PM Web Manual

### 120.2 PROJECT MILESTONES FORM

The Project Milestones Form is used to monitor the status of critical tasks performed on State Construction Projects and the overall progress of that project.

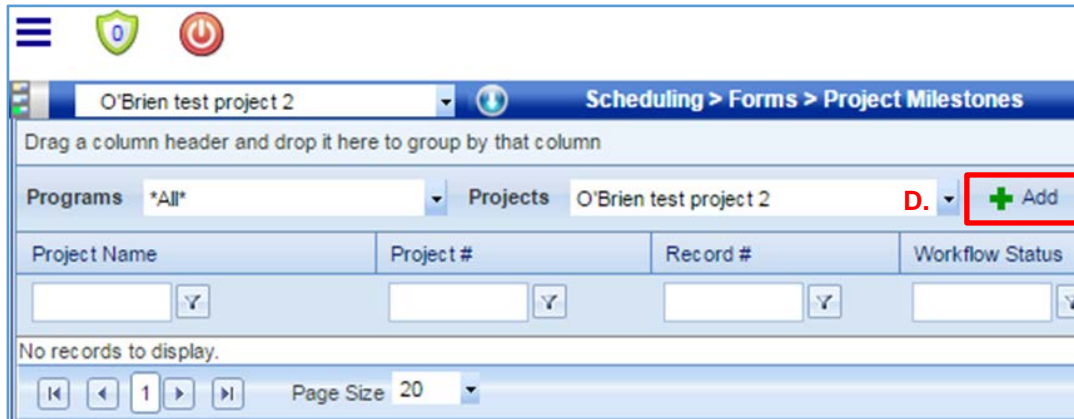
- To access the Project Milestones Form:
  - Click on the “Scheduling” module;
  - Select the “Project Milestones” tool from the “Forms” file folder; and
  - Click on the Record # to access the form.

Figure 120.2.A



- If no record is displayed, a new form can be created by clicking on the “Add” button.

Figure 120.2.B



To complete the creation of the new form:

- E. Click “Select Project” to view a list of your assigned projects and select the project for which you wish to create a new Project Milestones form; and
- F. Click the “Save” icon to save the Milestones Form for the specified project.

**Figure 120.2.C**

The screenshot shows a web application interface for project management. At the top, there is a navigation bar with a hamburger menu, a shield icon, and a power icon. Below this is a breadcrumb trail: "O'Brien test project 2" > "Scheduling > Forms >". A search bar contains "Select Custom Form ...". To the right of the search bar are icons for search, add, and save (labeled 'F.'). Below the search bar are tabs for "Details", "Notes", "Attachments", and "Notification".

The main content area features a "Select Project:" label with a dropdown menu containing "Select Project." (labeled 'E.'). Below this is a table with the following structure:

Milestone Descriptions:	Planned:	Actual:	R mile: bu
120. Approval of Capital Project Initiation Request, Form 1105	<input type="text"/>	<input type="text"/>	

## Project Phases & Milestones 0150 – PM Web Manual

Once the Project Milestones Form has been saved for a specified project, the form is ready to be populated.

2. To complete the Project Milestones, proceed as follows:
  - A. Note the column entitled “Milestone Descriptions” includes a list of the seven major milestones that need to be tracked on a State Construction Project. These include:
    - 120. Approval of Capital Project Initiation Request, Form 1105
    - 310. Design Development Phase – Design Kick-Off
    - 610. Contract Documents Phase – Documents to Bidding and Contracts
    - 651. Project Funding – Funding Request to Bond Commission
    - 710. Construction Phase – Notice to Proceed Issued
    - 760. Project Closeout - Substantial Completion
    - 850. Project Closeout - Financial Closeout, Project Complete
  - B. Enter the baseline date for each major milestone in the space provided under the “Planned” column.
  - C. Enter the date each major milestone is achieved in the space provided under the “Actual” column.
  - D. Check the box under the “Risk to milestone or budget”, if the major milestone may not be met by the “Planned” date of completion.
  - E. If the box is checked under the “Risk to milestone or budget”, then a brief description of that risk should be included in the “Description of risk to milestone or project budget” heading for the major milestone that is at risk.

Click the “Save” button any time you make changes to the Project Milestones Form.

**Figure 120.2.D**

Project Milestones				
Select Project: <span style="border: 1px solid gray; padding: 2px;">O'Brien test project 2</span>				
Milestone Descriptions:	Planned:	Actual:	Risk to milestone or budget:	Description of risk to milestone or project budget:
120. Approval of Capital Project Initiation Request, Form 1105	<b>B.</b> <input style="width: 100px;" type="text" value="May-07-2017"/>	<b>C.</b> <input style="width: 100px;" type="text"/>	<b>D.</b> <input type="checkbox"/>	<b>E.</b> <div style="border: 1px solid gray; height: 40px;"></div>
310. Design Development Phase - Design Kick-Off	<input style="width: 100px;" type="text"/>	<input style="width: 100px;" type="text" value="Aug-18-2017"/>	<input type="checkbox"/>	<div style="border: 1px solid gray; height: 40px;"></div>

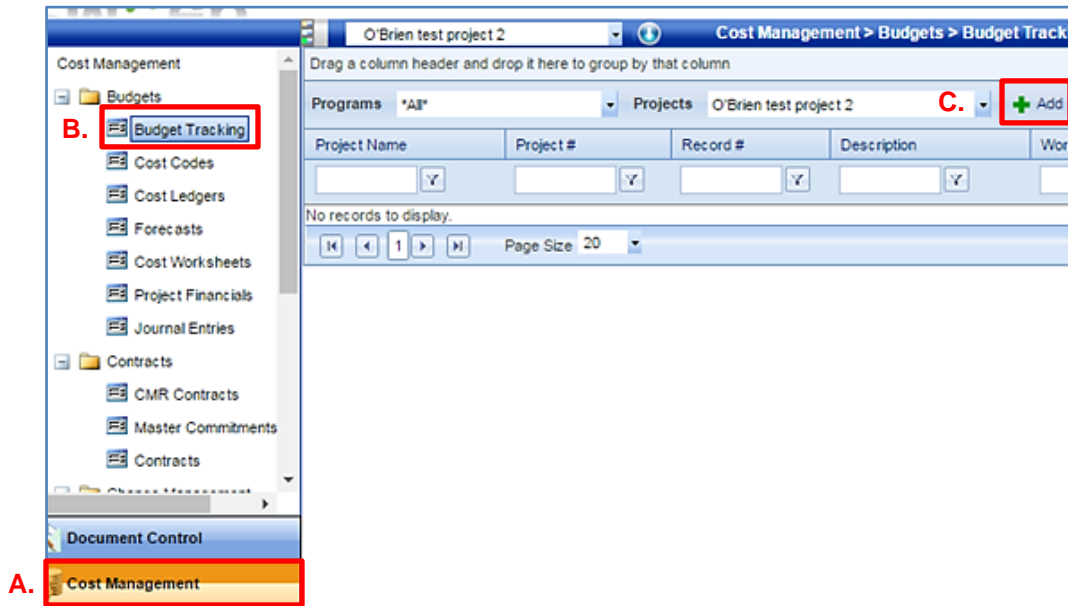
**120.3 BUDGET TRACKING**

The PMWeb Budget Tracking tool is used to track the project budget prior to the start of construction. Use the budget provided by the Client Agency in Part II, Section 9.0 of the Capital Project Initiation Request (Form 1105) as the base budget for Budget Tracking.

**120.4 BUDGET TRACKING – CREATING A BUDGET TRACKING RECORD**

1. To create a new Budget Tracking record, do the following:
  - A. Click on the “Cost Management” module;
  - B. Select the “Budget Tracking” tool from the “Budgets” file folder;
  - C. Click the “Add” Button.

**Figure 120.4.A**



# Project Phases & Milestones

## 0150 – PM Web Manual

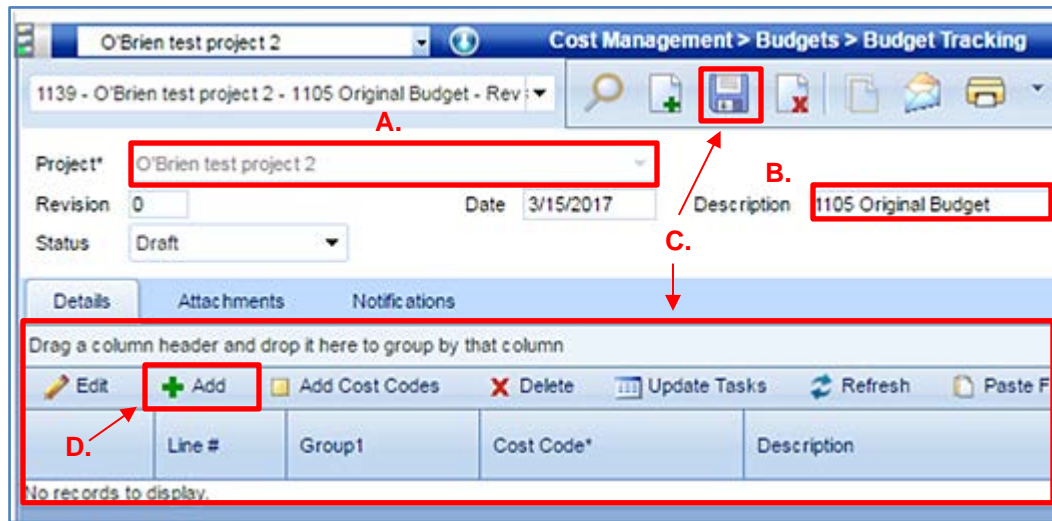
The new Budget Tracking record will now be visible.

2. To make the new Budget Tracking record project specific:
  - A. Select the project for which you want to track the budget from the “Project Selection Box” dropdown menu at the top of your screen.
  - B. Enter a budget description in the space provided;
  - C. Click “Save” and the control buttons will appear.

To add line items to the Budget Tracking record:

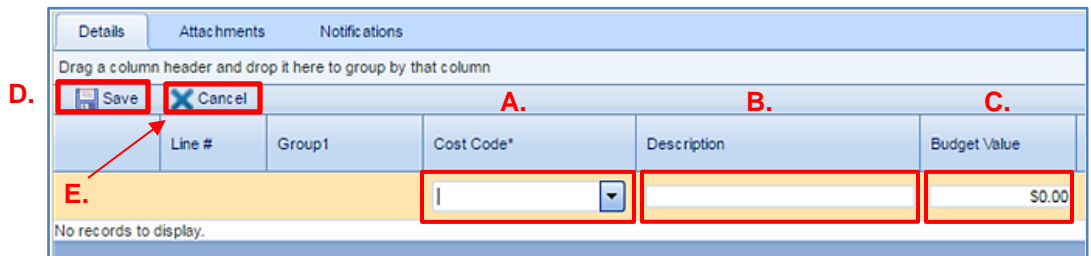
- D. Click the “Add” button for each line item you want to create. Only one line item can be created at a time. Follow the instructions in Step 4 below before proceeding to adding another line item.

**Figure 120.4.B**



3. For each line item created, do the following:
  - A. Select the appropriate Cost Code for the line item from the dropdown list.
  - B. The Description field will automatically populate after you select a Cost Code.
  - C. Enter the budget amount for that line item in the “Budget Value” field;
  - D. Click “Save” to record the budget line item, or
  - E. Click “Cancel” if you do not want to save the line item.

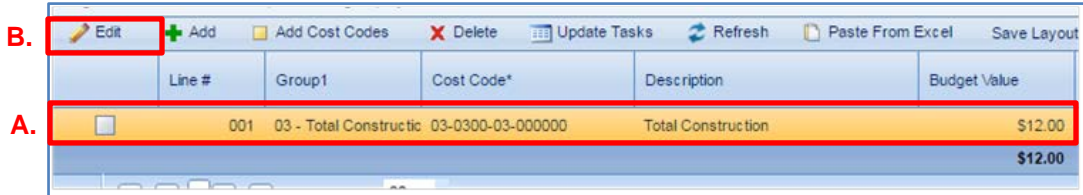
**Figure 120.4.C**



## Project Phases & Milestones 0150 – PM Web Manual

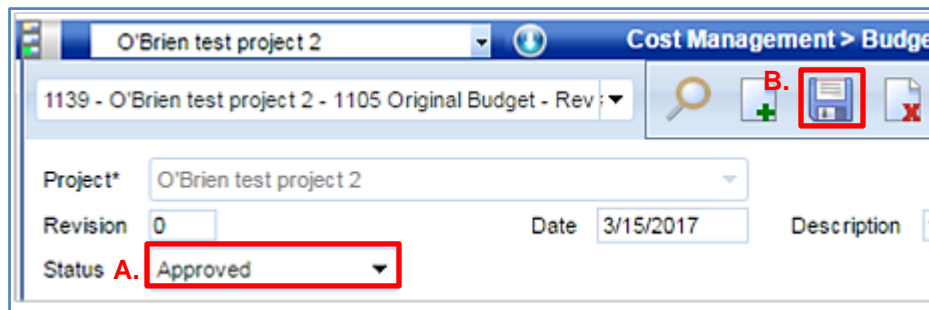
4. To make changes to budget line items that have already been saved:
  - A. Click on the row you wish to make changes, so that it is highlighted.
  - B. Click the “Edit” button and make the necessary changes;
  - C. Click the “Save” button to save the edits.

**Figure 120.4.D**



5. Once you have added all of the line items and finalized the budget:
  - A. Change the status of the budget to “Approved”;
  - B. Click the “Save” button.

**Figure 120.4.E**



Each time a new project budget is entered as a Budget Tracking Record, the approved Capital Project Initiation Request (Form 1105) is to be uploaded to the Attachments tab of that budget record ([See Section 100.7 Attachments – Upload & Link Files in the Attachments Tabs](#)).

# Project Phases & Milestones

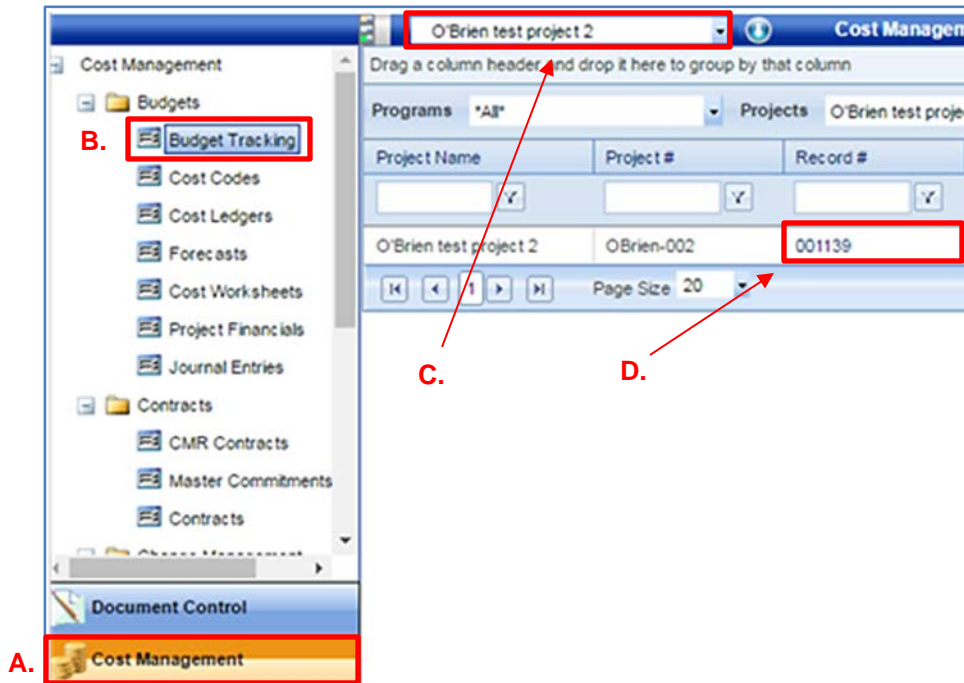
## 0150 – PM Web Manual

### 120.5 BUDGET TRACKING – REVISING A CAPITAL PROJECT BUDGET RECORD

If a Capital Project Initiation Request (Form 1105) is revised and resubmitted for approval, the revised Capital Project budget will need to be entered into PMWeb.

1. To revise a Capital Project (Form 1105) budget record:
  - A. Click on the “Cost Management” module;
  - B. Select the “Budget Tracking” tool from the “Budgets” file folder;
  - C. Select the project for which you want to enter the revised budget from the “Project Selection Box” dropdown menu at the top of your screen.
  - D. Click on the Record Number of the original budget entry (or double click on the row).

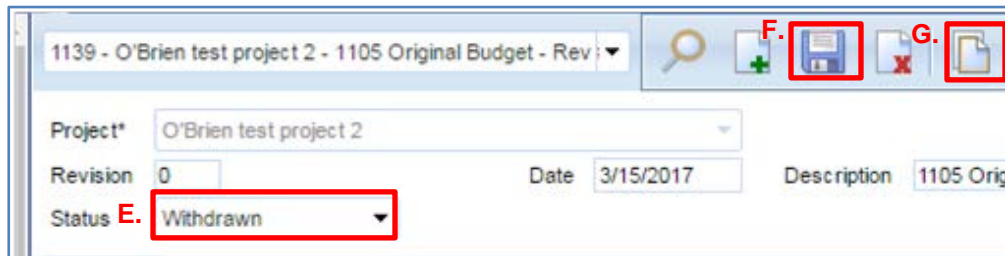
Figure 120.5.A



The original budget will now be visible.

- E. Change the Status of the original budget from “Approved” to “Withdrawn”;
- F. Click the “Save” button, then
- G. Click the “Create Revision” button.

Figure 120.5.B



## Project Phases & Milestones 0150 – PM Web Manual

This will open the original budget for editing.

2. To enter the revised budget:
  - A. Change the Description to reflect the revision being made.
  - B. Add, delete, or edit the budget line items as necessary ([See Section 120.4 Budget Tracking – Creating a Budget Tracking Record](#)).
  - C. When complete, change the Status from “Draft” to “Approved”;
  - D. Click the “Save” button.

**Figure 120.5.C**

The screenshot displays a web application interface for budget management. At the top, a dropdown menu shows '1139 - O'Brien test project 2 - 1105 Revised Budget - Rev'. Below this, a search bar and a toolbar with icons for search, add, save (D), delete, refresh, and print are visible. The main form contains fields for Project\* (O'Brien test project 2), Revision (1), Date (3/15/2017), Description (1105 Revised Budget), and Status (Approved). Below the form are tabs for Details, Attachments, and Notifications. A table with columns Line #, Group1, Cost Code\*, and Description is shown. The table contains two rows: Line # 001, Group1 03 - Total Constructic, Cost Code\* 03-0300-03-000000, Description Total Construction; and Line # 002, Group1 06 - Total A/E Fee, Cost Code\* 06-0600-06-000000, Description Total A/E Fee.

Line #	Group1	Cost Code*	Description
001	03 - Total Constructic	03-0300-03-000000	Total Construction
002	06 - Total A/E Fee	06-0600-06-000000	Total A/E Fee

Each time a new project budget is entered as a Budget Tracking Record, the approved Capital Project Initiation Request (Form 1105) is to be uploaded to the Attachments tab of that budget record ([See Section 100.7 Attachments – Upload & Link Files in the Attachments Tabs](#)).



# Project Phases & Milestones

## 0150 – PM Web Manual

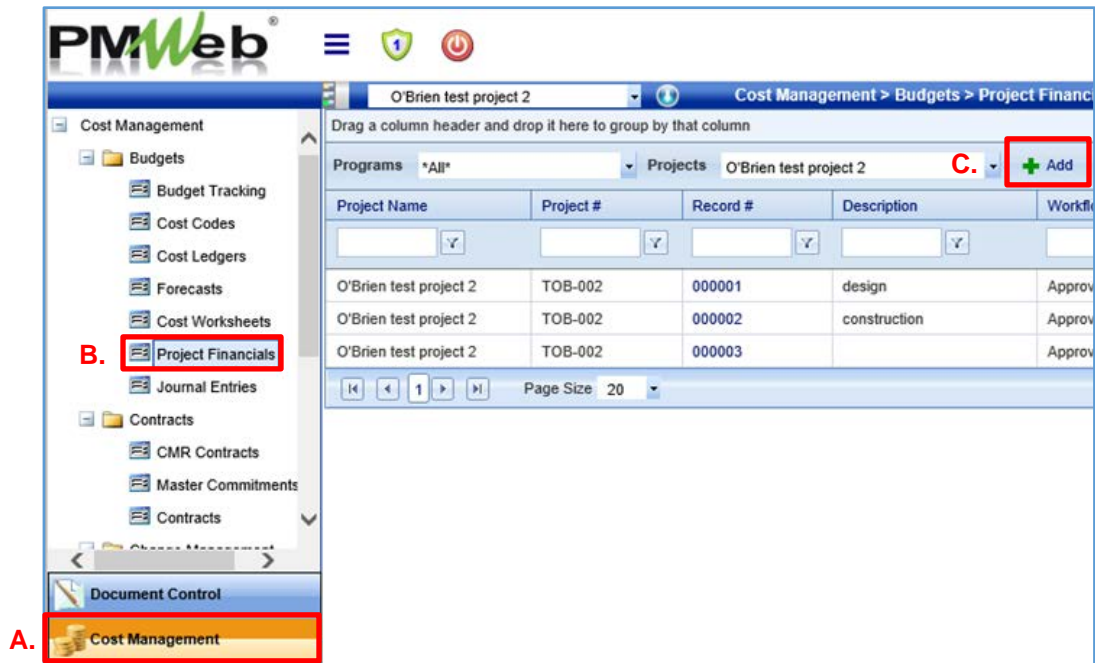
### 120.6 PROJECT FINANCIALS

The Project Financials tool is used to track funding allocations for a project, and to track funding allocations within a project. Items tracked using the Project Financials tool include those items that increase or decrease funding for a project, i.e. bond fund allocations, the transfer of funds from one project to another, the transfer of funds from an agency to a project, and line item transfers within a project.

### 120.7 PROJECT FINANCIALS - CREATING A PROJECT FINANCIAL RECORD

1. To create a Project Financials record:
  - A. Click on the “Cost Management” module;
  - B. Select the “Project Financials” tool from the “Budgets” file folder;
  - C. Click the “Add” button.

Figure 120.7.A



## Project Phases & Milestones 0150 – PM Web Manual

The new Project Financial record will now be visible (See Figure 120.7.B below).

2. To make the new Project Financial record project specific:
  - A. Select the project for which you want to track the budget from the “Project Selection Box” dropdown menu at the top of your screen.
  - B. Select the “Type” of funding/transaction that is being recorded:
    - “Design Bonding”
    - “Construction Bonding”
    - “Additional Funding”. This is generally to record new funding to the project that is separate from the Design Bonding and Construction bonding. However, it can also be used to record transfers of funding that have occurred between projects. If this is the case, one project should have new funding entered as an “Additional Funding” type Project Financials entry, while the other project should have a deduct entry for the same amount in “Additional Funding.”
    - “Line Item Transfer” ([See Section 120.8](#) below)
  - C. Write a description of the entry being recorded in the “Description” field.
  - D. Set the “Post As” field to “Original Budget”.
  - E. Set Category to “DCS”.
  - F. Click the “Save” button. After clicking Save, the control buttons will appear.

To add line items to the Project Financials record:

- G. Click the “Add” button for each line item you want to create. Only one line item can be created at a time. Follow the instructions in Step 3 below before proceeding to adding another line item.

**Figure 120.7.B**

The screenshot shows a web application interface for managing project financials. The main form is titled "001 - O'Brien test project 2 - Design Bonding". It contains several fields: "Project\*" (O'Brien test project 2), "Record #" (001), "Type" (-- Select --), "Description" (Design Bonding), "Status" (Draft), "Revision" (0), "Date" (3/15/2017), "Post As" (Original Budget), and "Category" (DCS). Below the form is a table with columns: Line #, Cost Code\*, Description, and UOM. The table contains one row with Line # 001, Cost Code\* 08-0800-08-000000, and Description Total A/E Fee. A red box highlights the "Add" button in the table's toolbar.

Line #	Cost Code*	Description	UOM
001	08-0800-08-000000	Total A/E Fee	

## Project Phases & Milestones 0150 – PM Web Manual

3. For each line item created, do the following:
  - A. Select the appropriate Cost Code.
  - B. After you select a Cost Code, the name of that Cost Code will automatically populate into the Description field, but you can change it, if appropriate.
  - C. Fill in the remainder of applicable fields in the line item.
  - D. Click the “Save” button to record the line item; or
  - E. Click “Cancel” if you do not wish to record the line item.

**Figure 120.7.C**

Line #	Cost Code*	Description	UOM	Quantity
000	Select Cost Code...		-- Select	1.00
001	03-0300-03-000000	Total Construction		1.00
				1.00

4. To make changes to Project Financial record line items that have already been saved:
  - A. Click on the row you wish to make changes, so that it is highlighted.
  - B. Click the “Edit” button and make the necessary changes;
  - C. Click the “Update Records” button to save the edits.

**Figure 120.7.D**

Line #	Group1	Cost Code*	Description	Budget Value
001	03 - Total Constructic	03-0300-03-000000	Total Construction	\$12.00
				\$12.00

5. Once you have added all of the line items and finalized the financial record:
  - A. Change the status of the record to “Approved”;
  - B. Click the “Save” button.

**Figure 120.7.E**

001 - O'Brien test project 2 - Design Bonding

Project\* O'Brien test project 2 Reference

Record #\* 001 Category DC

Type -- Select --

Description Design Bonding

Status A. Approved

# Project Phases & Milestones

## 0150 – PM Web Manual

Each time a new Project Financials record is created, it records new funding allocated for the project. Documentation of the funding allocation decision shall be uploaded under the Attachments tab of the financial record ([See Section 100.7 Attachments – Upload & Link Files in the Attachments Tabs](#)).

### 120.8 PROJECT FINANCIALS - LINE ITEM TRANSFERS

Line item transfers track line item funding increases and decreases within a project, i.e. an increase in funding to the construction line item is matched by a line item decrease to contingency. The net effect of a line item transfer should always be zero.

1. Follow the same steps outlined in Section 120.7 - Creating a Project Financial Record to create a line item transfer with the following exceptions:
  - A. Select “Line Item Transfer” in the “Type” field.
  - B. In the “Post As” field, select “Revised Budget”.
  - C. Create a pair of lines for each transfer, a cost code for the funding deduction (a negative unit cost) and a cost code for the funding addition (a positive unit cost).
    - The total amount of a line item transfer must always equal \$0.

Figure 120.8.A

The screenshot shows the 'Project Financials' interface for 'O'Brien test project 2'. The record number is 003. The 'Type' is 'Line Item Transfer' and 'Post As' is 'Revised Budget'. Below the form is a table with the following data:

Line #	Cost Code*	Description	UOM	Quantity	Unit Cost	Amount
001	04-0400-04-000000	Contingency		1.00	\$-1.00	\$-1.00
002	03-0300-03-000000	Total Construction		1.00	\$1.00	\$1.00
						2.00
						\$0.00

Please inform Glenn Knapsack about any transfers.

# Project Phases & Milestones

## 0150 – PM Web Manual

### 310.0 Design Development Phase – Design Kick-Off

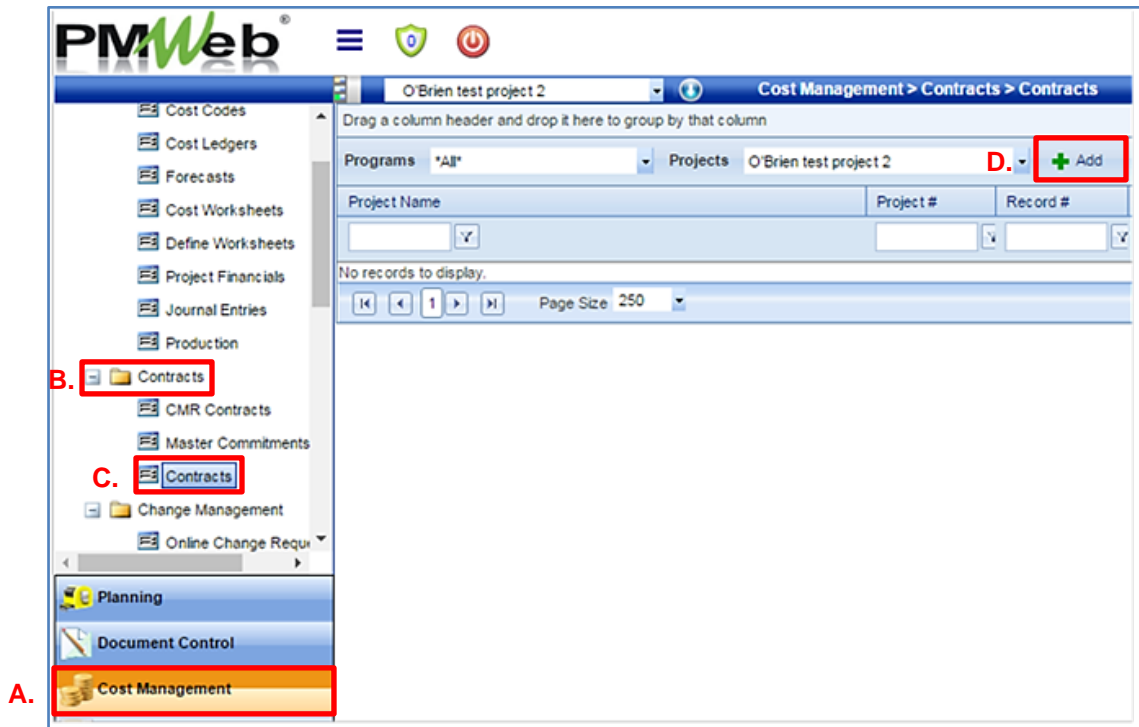
The following section outlines the tasks and processes performed in PMWeb during the Design Development Phase.

#### 310.1 CREATING A CONTRACT RECORD IN PMWEB

A contract record should be created as soon as an agreement is entered into with the Contractor or Consultant on a project.

1. To open the Contract Record screen in PMWeb:
  - A. Select the “Cost Management” module;
  - B. Open the “Contracts” file folder;
  - C. Select the “Contracts” tool;
  - D. Click the “Add” button.

Figure 310.1.A



## Project Phases & Milestones 0150 – PM Web Manual

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The Contract Record screen will now be visible.

2. To create a Contract Record:
  - A. Select your project name from the “Project\*” dropdown list;
  - B. Click the “Save” button to create a new project specific contract record.

**Figure 310.1.B**

Once the project specific contract record is created, the remainder of the form will need to be completed for either a formal or informal contract.

3. If the contract is formal, populate the Contract Record as follows (see Figure 310.1.C on the following page for image):
  - A. Select the “ID” field and type in the project number with the appropriate contract delivery method suffix (Contractor) or the appropriate contract type (Consultant).
    - CMR for Construction Manager at Risk
    - DB for Design Build
    - No Suffix for General Contractor
    - ARC for Architect
    - CA for Construction Administrator
    - MDE for Multidiscipline Engineer
  - B. Select the company that the contract is with from the “Company” dropdown list. If the company in question is not on the list, please contact Construction Support Services.
  - C. Enter a brief description of contract type in the “Description” field.
  - D. Select “Formal” from the “Category” dropdown list.
  - E. Enter the date of the Notice to Proceed in the “Effective Date” field.
    - No invoicing can be processed prior to this date. The “Effective Date” serves as the start date for compliance with the contracted timetables.
  - F. Enter the number of days of the contracted timetable in the “Days” field, if applicable.

# Project Phases & Milestones

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Figure 310.1.C

The screenshot shows the PMWeb interface for 'O'Brien test project 2' in the 'Cost Management' section. The form is titled '- 003 -'. The left sidebar contains a tree view with 'Cost Management' expanded, showing sub-items like 'Budgets', 'Contracts', and 'Document Control'. The main form fields are: Type (Subcontract), Project\* (O'Brien test project 2), ID\* (BI-DCS-100-ARC), Company (Christopher Williams Architects, LLC), Description (Standard Fixed Fee Architect), Reference (empty), Category (Formal), Revision (0), Date (Oct-19-2017), Status (Draft), Effective Date (Oct-12-2017), Days (0.00), Procurement # (empty), and Paid In Full (checkbox). Red boxes and letters A-F highlight specific fields: A (ID), B (Company), C (Description), D (Category), E (Effective Date), and F (Days).

4. For informal contracts, populate the contract record as follows (see Figure 310.1.D on the following page for image):

A. Select the "ID" field and type in the project number with the appropriate contract type (Consultant).

- ANLY for claims analysis
- ARC for architect
- AUD for claims auditor
- CA for construction administrator
- CIV for civil engineering
- CMR for Construction Manager at Risk
- ENGY for energy consultant
- ENV for environmental engineering
- EPA for Environmental Policy Act consultant
- HAZ for hazardous materials consultant
- MDE for multi-disciplined engineering consultant
- MEP for Mechanical Electrical Plumbing Engineer
- ROOF for roofing consultant
- SCHL for scheduling consultant
- STR for structural engineer
- VEH for vehicular parking consultant

B. Select the company that the contract is with from the "Company" dropdown list. If the company in question is not on the list, please contact CSS.

C. Enter the On-Call Contract Number and Task Assignment Number in the "Description" field.

## Project Phases & Milestones 0150 – PM Web Manual

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- D. Select “On Call” from the “Category” dropdown list if the contract record is for a task letter associated with an on-call contract.
- E. Enter the date of the Notice to Proceed in the “Effective Date” field.
  - No invoicing can be processed prior to this date. The “Effective Date” serves as the start date for compliance with the contracted timetables.
- F. Enter the number of days of the contracted timetable in the “Days” field, if applicable.
- G. Click the “Save” button to save your record.

**Figure 310.1.D**

The image shows a screenshot of a web form with several input fields highlighted by red boxes and labeled with letters A through G. Field A is a small rectangular box. Field B is a long horizontal rectangular box. Field C is a long horizontal rectangular box. Field D is a rectangular box. Field E is a small rectangular box. Field F is a rectangular box. Field G is a small square box.

The Contract Document shall be uploaded under the Attachments tab of the Contract Record ([See Section 100.7 Attachments – Upload & Link Files in the Attachment Tabs](#)).

- Notes:**
1. Do not create more than one contract in the same project for the same vendor.
  2. When a vendor has a contract that starts in the design phase of the project and extends into construction, their SOV should include their estimated costs for both design and construction, even if funding has not yet been provided for construction.
  3. If a vendor is working under an On-Call contract and has more than one task letter in the course of the project, enter the second and subsequent task letters as **change orders** to the first task letter, rather than as new contract records.
  4. All CMR Contracts are to be entered using the regular Contract Records tool. The CMR Contracts tool can no longer be used to enter Contracts.



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### 610.0 Contract Documents Phase - Documents to Bidding and Contracts

This section has been intentionally left blank for future development.

610.1

### 651.0 Project Funding – Funding Request to Bond Commission

This section has been intentionally left blank for future development.

651.1

# Project Phases & Milestones

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### 710.0 Construction Phase – Notice to Proceed Issued

The following section outlines the tasks and processes performed in PMWeb during the Construction Phase.

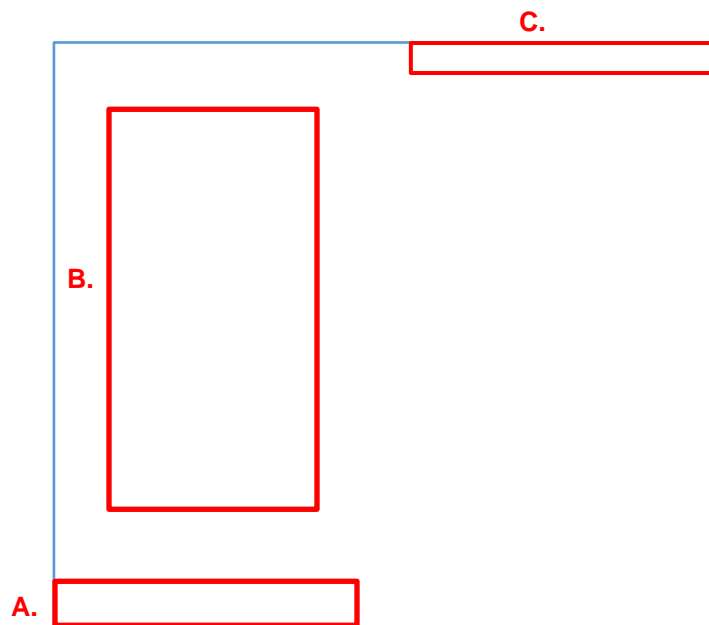
#### 710.1 WORKFLOW PROCESS

RFI's, Submittals, as well as other types of project records are processed in PMWeb through a Workflow. The Workflow establishes a flow chart for electronically routing documents for review and approval by the key people on a project. The Workflow templates are created by Construction Support Services (CSS). If you need a new Workflow template created, need a template revised, or have any questions regarding a Workflow template, please contact CSS.

For the purpose of this demonstration, we will show the Workflow process for those tools found in the Document Control module.

1. To submit a record into a Workflow:
  - A. Select the "Document Control" module;
  - B. Select the tool for which you want to enter into a Workflow, i.e. Submittal, RFI.
  - C. Enter the project name in the Project Selection Box at the top of the screen and press "Enter" on your keyboard.
  - D. Follow the instructions for creating the specified type of record as described in Sections 710.2 through 710.9. Save the record by Clicking on the "Save" button.

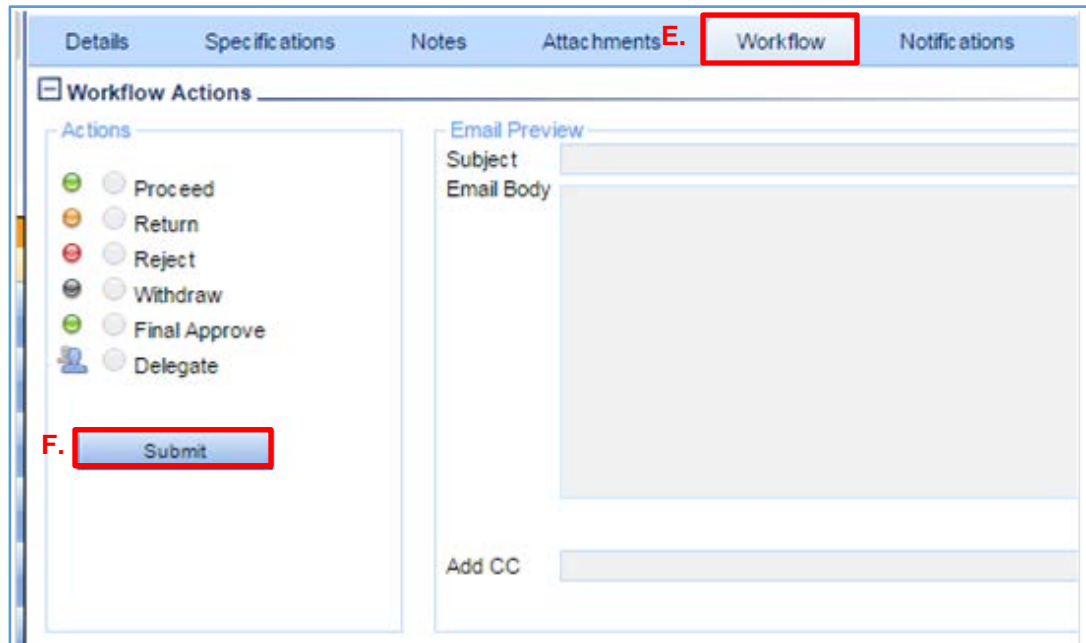
**Figure 710.1.A**



## Project Phases & Milestones 0150 – PM Web Manual

- E. Click on the “Workflow” tab on the middle of your screen.
- F. Click the “Submit” button to enter the line item into the Workflow.

Figure 710.1.B



The person sending the item into the Workflow is the “Submitter,” e.g. the GC on a DBB project for submittals. The submitter does not have the capability to take any action on the item being submitted. The submitter can only submit the item into the Workflow.

The person to receive the item is the first person listed in the “Business Process.” This person will be the first person to have access to the Workflow controls and the first eligible to take action. The available workflow Actions (not grayed out) are defined as follows:

- “Proceed” is the basic command that sends the item to the people at the next step in the workflow
- “Return” is an option that allows for a user to send the item back to the submitter, allowing the submitter the option to “Resubmit” it.
- “Reject” kills the item and locks it in workflow. If this option is chosen, this particular submittal, RFI, etc. cannot be approved.
- “Withdraw” also kills the item and locks it in workflow. If this option is chosen, this particular submittal, RFI, etc. cannot be approved.
- “Final Approve” is available to the people in the last step of the workflow, instead of “Proceed”. This option, as the name implies, ends the workflow in approval of the item.
- There are options, such as “Delegate” and “Team Input” that allow for the referral of an item to someone not in the structured workflow. Prior to using this option, contact CSS.

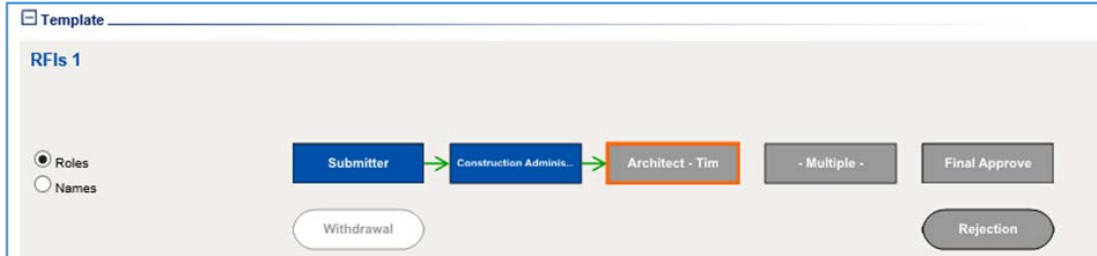
The person who has access to the Workflow controls at any point in the Workflow process is known as the person who has “Ball In Court” or BIC. The person with BIC must take action before the next person in the Workflow can take action.

# Project Phases & Milestones

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The person who has BIC can also see the Workflow template for the item under review. The current status of the Workflow is outlined in orange; steps that have been completed to date are filled with a blue background and steps to be completed are filled with a gray background (see Figure 710.1.B below).

Figure 710.1.C



### 710.2 REQUEST FOR INFORMATION (RFI)

For information on how to create a Request for Information (RFI), please see pages 19-20 of the PMWeb Quick Start Guide Contractor Edition prepared by Saybrook Associates Inc.

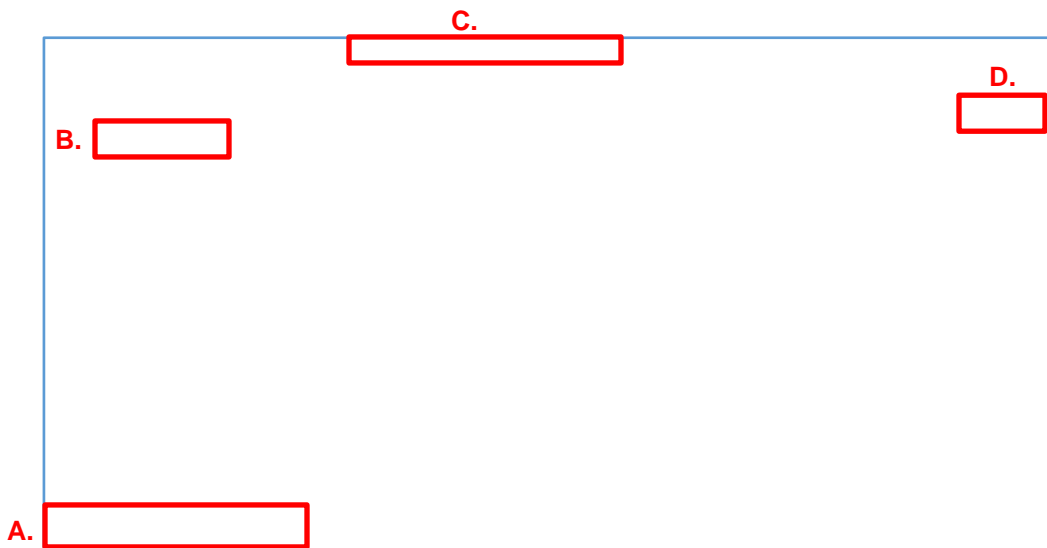
### SUBMITTALS

The Submittal Items and Submittal Packages tools are used to manage the Submittal process in PMWeb. The Contractor is responsible for creating Submittal Items (one detailed submittal at a time) and Submittal Packages (multiple submittal items at a time).

### 710.3 SUBMITTAL ITEM

- To create a Submittal Item:
  - Select the "Document Control" module;
  - Click on the "Submittal Items" tool.
  - Select the project from the "Project Selection" dropdown list;
  - Click the "Add" button.

Figure 710.3.A



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- E. Select the appropriate CSI Division from the “Phase” dropdown list.
- F. Select the Company Name from the “Company” dropdown list.
- G. Enter a “Description” for the Submittal Item in the space provided.
- H. The PM assigned to the project may also require that the Contractor provide the CSI Code, Start Date, Finish Date, Lead Time, Due Date, and Notes in the space provided under the Specifications tab.
- I. Click the “Save” button to save the Submittal. After having saved the Submittal, the Workflow tab will appear on your screen.
- J. Click on the “Workflow” tab and follow the instructions for submitting a record into Workflow ([see Section 710.1, Workflow](#)).

**Figure 710.3.B**

The screenshot shows a web application interface for managing submittals. On the left is a 'Document Control' sidebar with a tree view containing: RFIs, Submittal Items (highlighted), Submittal Packages, Meeting Minutes, Drawing Lists, Drawing Sets, Daily Reports, Punch Lists, Transmittals, Action Items, and Correspondence. The main area displays a form for '003 - O'Brien test project 2 - Steel Decking'. The form fields are: Project\* (O'Brien test project 2), Phase (E. -- Select --), ID\* (003), Submittal Set # (empty), Company (F. Select Company...), Description (G. Steel Decking), Category (-- Select --), CSI Code (053100 - Steel Decking), Mfr. # (empty), Status (Draft), Revision (0), and Submittal Status (-- Select --). At the bottom, there are tabs: Specifications, Notes, Attachments, and Workflow (J. Workflow, which is highlighted). A red box labeled 'I.' is positioned above the Save button icon in the top right corner of the form.

Supporting documentation for an individual Submittal should be uploaded to Submittal Items under the Attachments tab ([See Section 100.7 Attachments – Upload & Link Files in the Attachment Tabs](#)).

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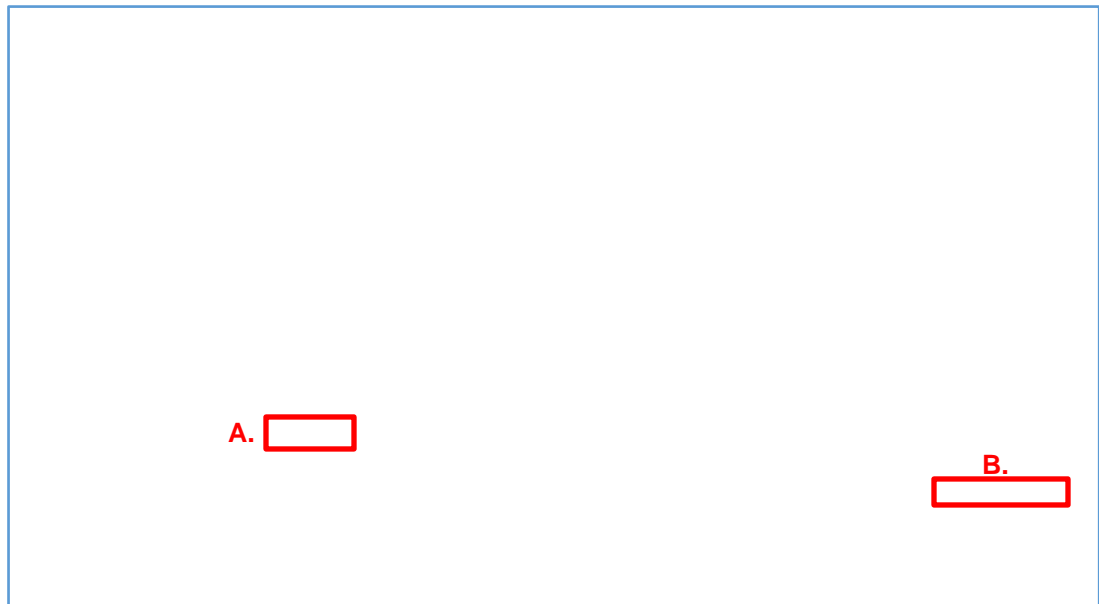
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### 710.4 SUBMITTAL PACKAGES

The standard method for managing the Submittal process is to use the Submittal Items tool in conjunction with the Submittal Packages tool. Submittal Items are linked to specified Submittal Packages. Submittal Packages are organized by CSI Division.

1. To create a Submittal Package, select the “Submittal Packages” tool from “Document Control” module and follow steps D-H\* from Section 710.3 above.
  - The list of fields provided under the Specifications tab in Submittal Packages is different than those listed in Section 1.E. above. Under Submittal Packages, the PM assigned to the project may require the Contractor to provide the CSI Code, Category, and Contact Information in the space provided under the Specifications tab.
2. After you save the Submittal Package, you can link Submittal Items to the Submittal Package by doing the following:
  - A. Select the Details tab in Submittal Packages.
  - B. Click the “Submittal Items” button to open the Submittal Items dialogue box.

**Figure 710.4.A**



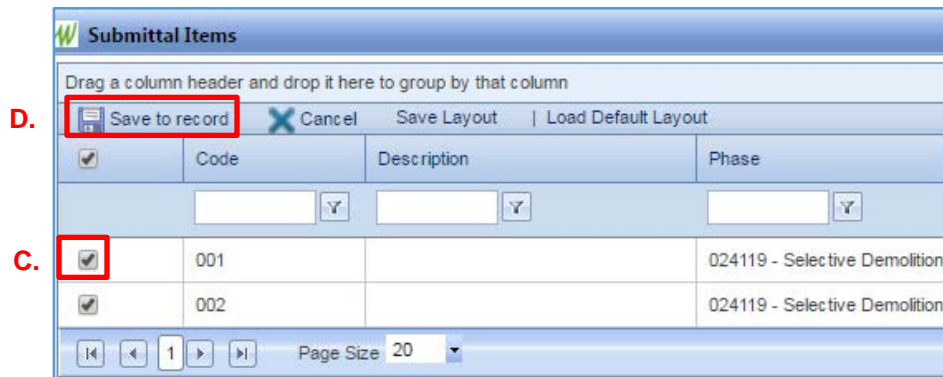
# Project Phases & Milestones

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The dialogue box will show a list of Submittal Items created by the Contractor. To add specific Submittal Items to the Submittal Package:

- C. Click the check box to the left of the specific Submittal Item. Do the same for all of the Submittal Items that you want to add to the Submittal Package.
- D. Click the “Save to Record” button to attach those items to the Submittal Package. After you saved the Submittal Item to the Submittal Package, the Workflow tab will appear on your screen
- E. Click on the “Workflow” tab and follow the instructions for submitting a record into Workflow ([see Section 710.1, Workflow](#)).

**Figure 710.4.B**



# Project Phases & Milestones

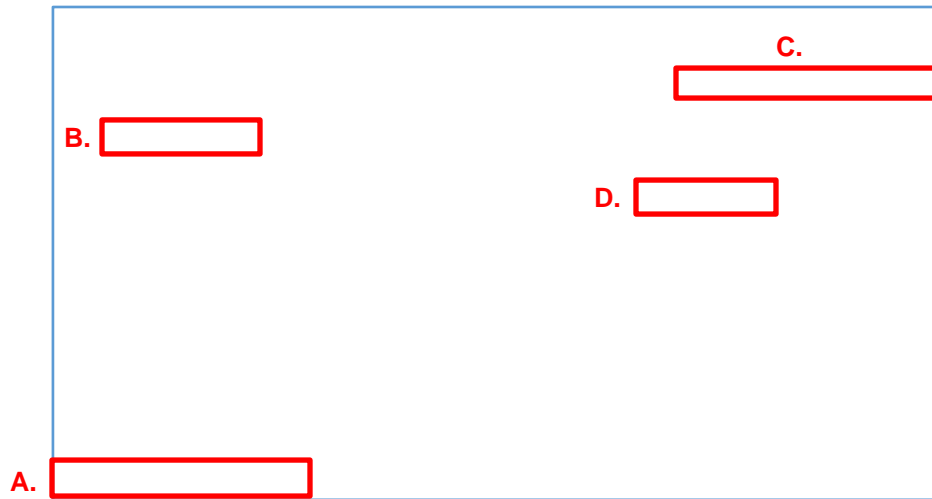
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### 710.5 SUBMITTAL RESPONSES

After a Submittal Item or Submittal Package has been entered into the Workflow, designated parties within the Workflow will be notified by email that the Submittal is ready for review. For purposes of this demonstration, we will document how to respond to a Submittal Package.

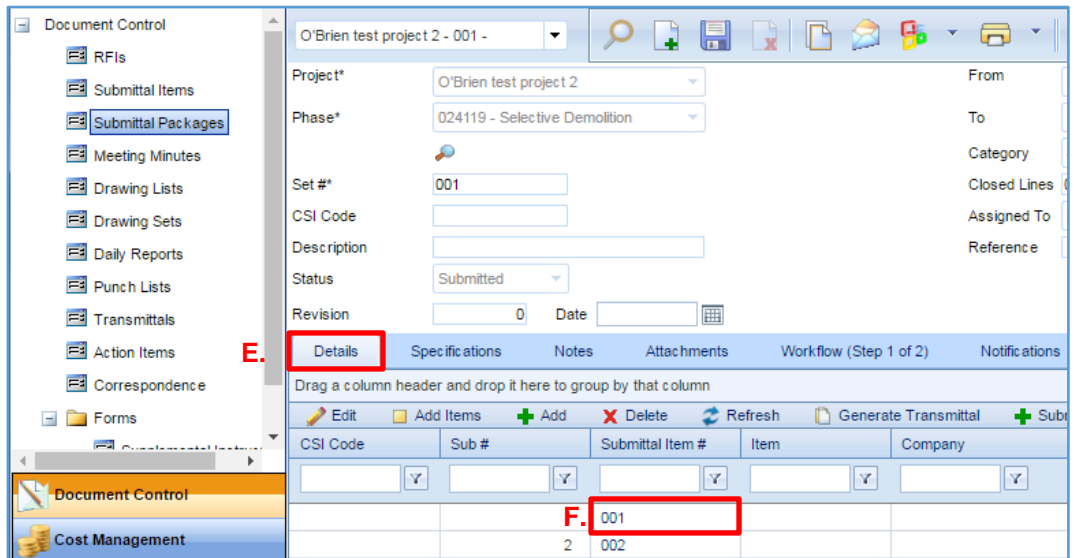
1. To review and respond to the Submittal Package notification:
  - A. Select the “Document Control” module;
  - B. Click on the “Submittal Packages” tool.
  - C. Select the project from the “Projects” dropdown list
  - D. Select the “Record #” for the specified Submittal Package to open the package.

**Figure 710.5.A**



- E. Select the Details tab in the Submittal Package.
- F. Click on the Submittal Item # to open the Submittal Item for response.

**Figure 710.5.B**





# Project Phases & Milestones

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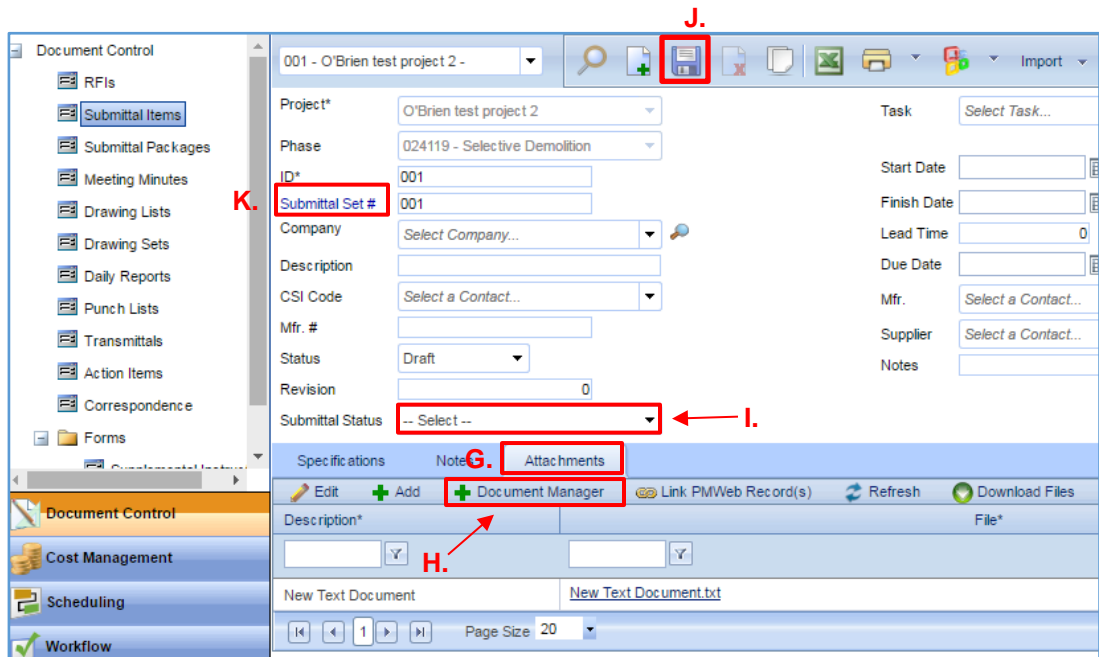
Once the Submittal Item is open:

- G. Select the “Attachments” tab.
- H. Click on the “+ Document Manager” button to attach the response ([See Section 100.7 Attachments – Upload & Link Files in the Attachment Tabs](#)) and corresponding back up.
- I. Change the “Submittal Status” to the appropriate setting, and
- J. Click the “Save” button.

If additional Submittal Items in a Submittal Package require a response, return to the Submittal Package, and proceed as follows:

- K. Click on the “Submittal Set #” and click on the “Details” tab to view the list of Submittal Items. Select the next “Submittal Item #” that requires a response and begin the Submittal response process again.

Figure 710.5.C



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### 710.6 CREATING A REVISED SUBMITTAL PACKAGE

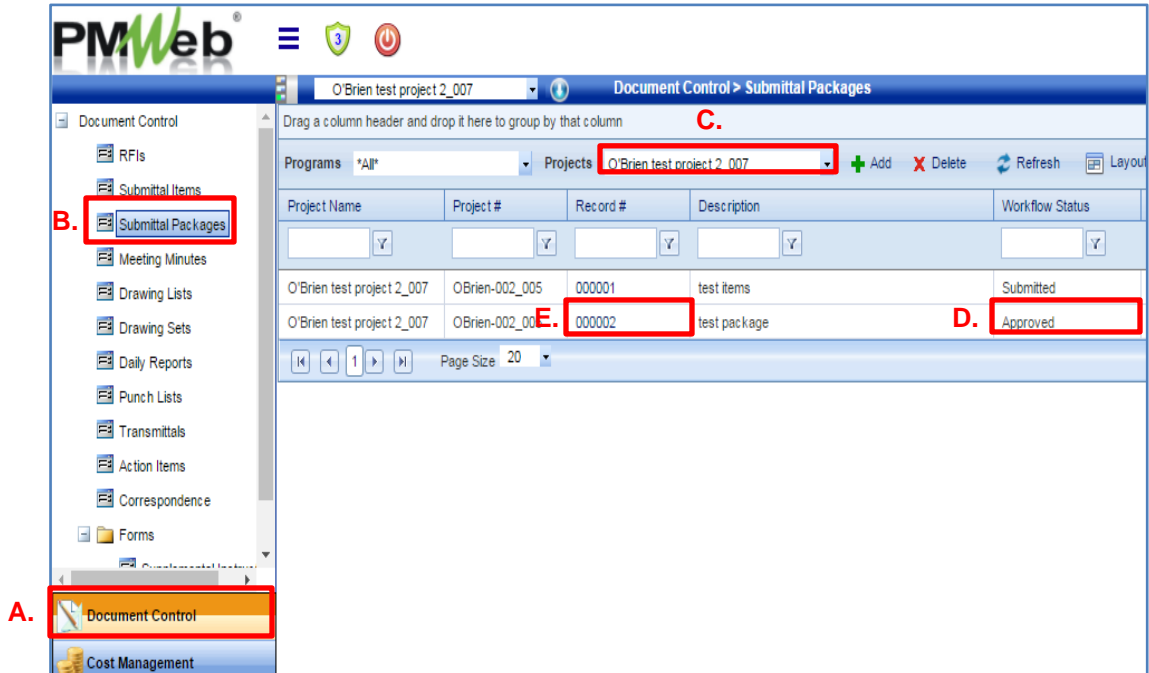
Once the final person in the Workflow has completed their review of the Submittal Package, they will mark the package as “Final Approved”, changing the Workflow Status in PMWeb to “Approved.” Although the Workflow Status is “Approved”, there may be Submittal Items within the Submittal Package that require additional action be taken. Submittal Items that require additional action will need to be revised and resubmitted in a Revised Submittal Package.

1. To determine whether a Submittal Package has completed the Workflow process with Submittal Items that require additional action:
  - A. Select the “Document Control” module;
  - B. Click on the “Submittal Packages” tool.
  - C. Select the project from the “Projects” dropdown list
  - D. Find the Submittal Package in question and check the Workflow Status column to see if the Submittal Package has been “Approved.” If “Approved” the package has completed the Workflow process.
    - Please note that when the Submittal Package is marked as “Final Approved” and email notification with a direct link to the approved Submittal Package will be sent to all individuals listed in the Workflow.

To determine if there are Submittal Items within the package that require additional action:

- E. Click on the “Record #” to open the Submittal Package.

Figure 710.6.A

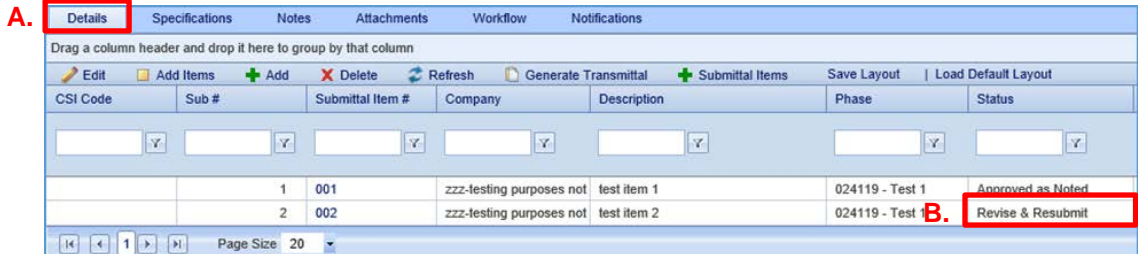


# Project Phases & Milestones

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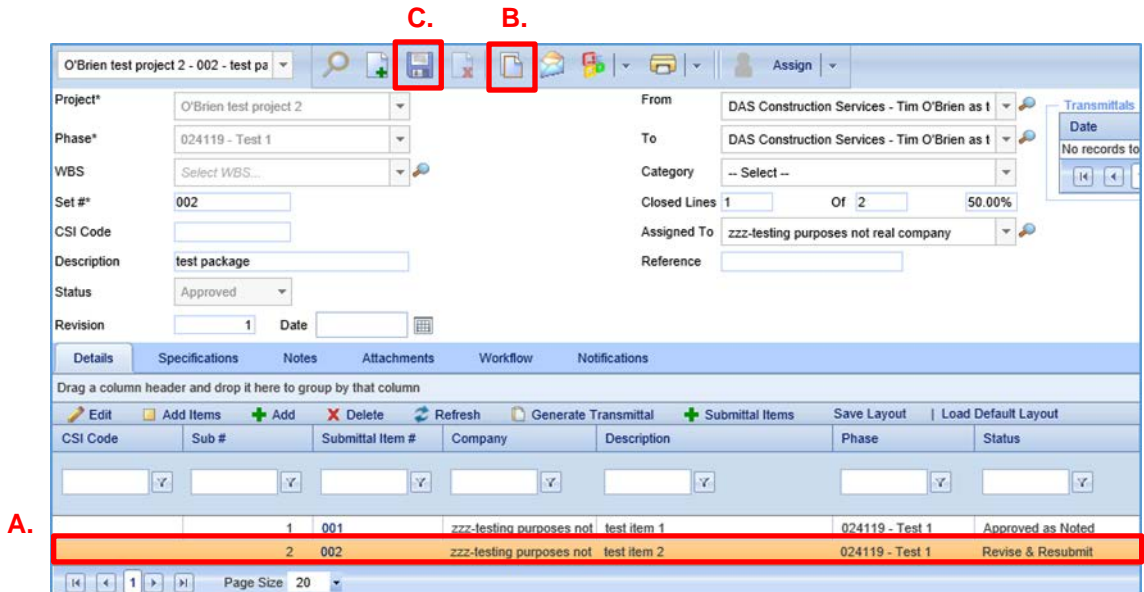
2. Once the Submittal Package is open:
  - A. Select the Details tab.
  - B. Review the “Status” column to identify which Submittal Items require additional action.

**Figure 710.6.B**



3. To create a Revised Submittal Package of those Submittal Items that were not approved:
  - A. Click on the row of the Submittal Item that requires additional action to highlight the row for inclusion in the Revised Submittal Package.
    - If there is more than one Submittal Item that requires additional action, hold down the “Ctrl” key on your keyboard and click on each Submittal Item that requires additional action to highlight each of those rows for inclusion in the Revised Submittal Package.
  - B. Click the “Create Revision” button to create a duplicate Submittal Package of only those Submittal Items that require additional action.
  - C. Click the “Save” button to open the Revised Submittal Package.

**Figure 710.6.C**



# Project Phases & Milestones

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- D. Note that the new Submittal Package has the same Submittal Set # as the original submission, and
- E. A new Revision # to identify the Submittal Package as a revision.
- F. Click on the “Submittal Item #” to open the Submittal Item for editing.

Figure 710.6.D

The screenshot displays the 'Document Control > Submittal Packages' interface. The top navigation bar shows 'O'Brien test project 2' and 'Document Control > Submittal Packages'. The main form contains the following fields:

- Project\*: O'Brien test project 2
- Phase\*: 024119 - Test 1
- WBS: Select WBS...
- Set #: 002 (highlighted with a red box and labeled 'D.')
- CSI Code: (empty)
- Description: test package
- Status: Draft
- Revision: 2 (highlighted with a red box and labeled 'E.')
- Date: Oct-31-2017

On the right side, there are additional fields:

- From: DAS Construction Services - Tim O'Brien as t
- To: DAS Construction Services - Tim O'Brien as t
- Category: -- Select --
- Closed Lines: 0 Of 1 0.00%
- Assigned To: zzz-testing purposes not real company
- Reference: (empty)

Below the form is a table with columns: CSI Code, Sub #, Submittal Item #, Item, Company, Description, and Phase. The table contains one row with the following data:

CSI Code	Sub #	Submittal Item #	Item	Company	Description	Phase
		002 (highlighted with a red box and labeled 'F.')		zzz-testing purposes not	test item 2	024119

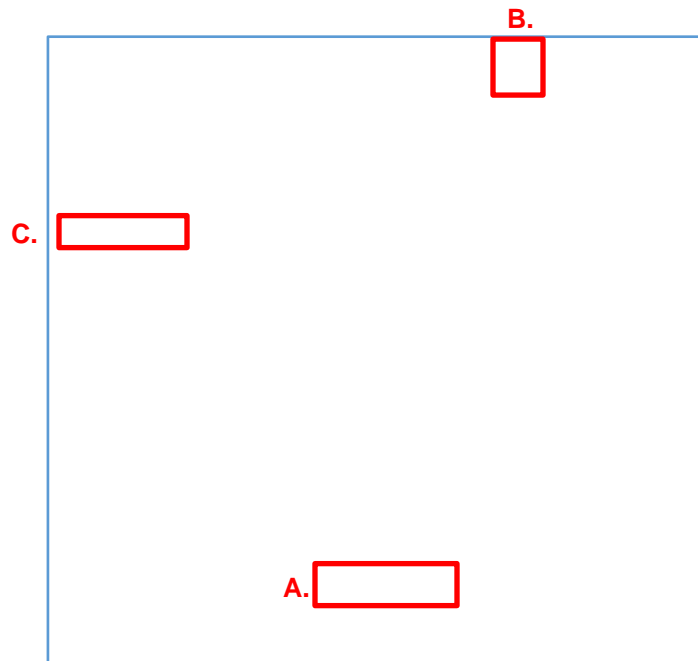
At the bottom of the interface, there are navigation controls and a 'Page Size' dropdown set to 20.

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4. After you have selected the “Submittal Item #”, you can edit the Submittal Item for the Revised Submittal Package by doing the following:
  - A. Select the “Attachments” tab and upload revised submittal materials in the same manner as was done for new Submittal Items ([see Section 710.5, Submittal Responses](#)).
  - B. Click the “Save” button.
  - C. Click on the “Submittal Set #” label to return to the Submittal Package and repeat this process for each Submittal Item in the Revised Submittal Package.
  - D.

**Figure 710.6.E**



Once all of the Submittal Items have been revised, the Revised Submittal Package is entered into Workflow ([see Section 710.1, Workflow](#)).

# Project Phases & Milestones

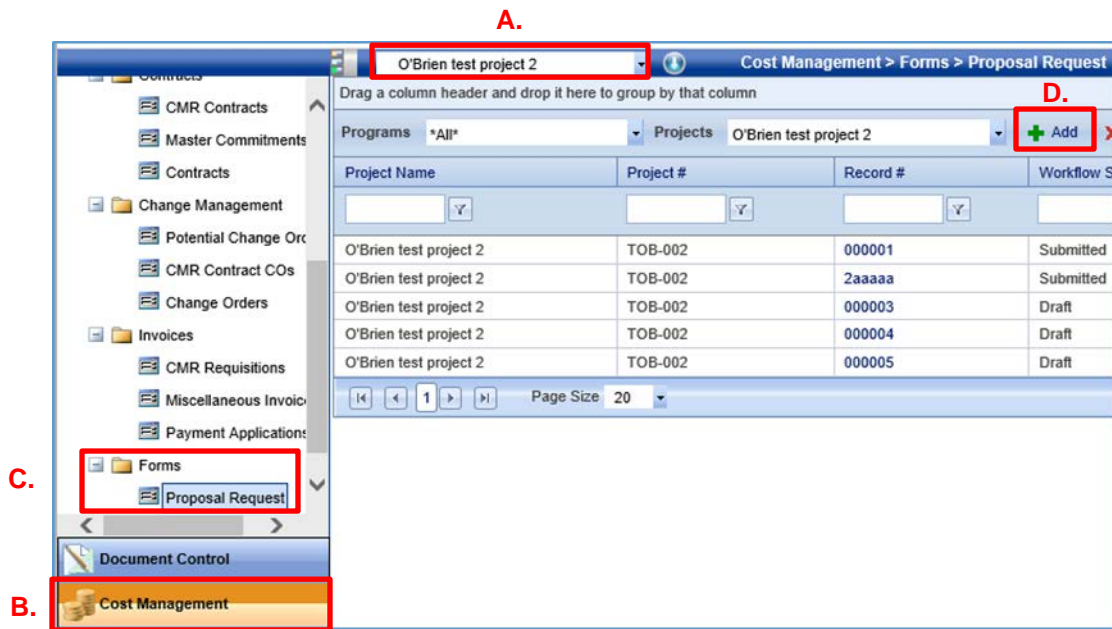
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### 710.7 PROPOSAL REQUEST FORM

Proposal Request can be used as a receptacle for Consultants and Contractors to upload documentation to process future PCO's and CO's in PMWeb.

1. To create a Proposal Request:
  - A. Select the project for which you want to create a Proposal Request form from the "Projects Selection Box" dropdown;
  - B. Select the "Cost Management" module;
  - C. Open the "Forms" file folder, and click on the "Proposal Request" tool.
  - D. Click on the "Add" button to open a new Proposal Request form

Figure 710.7.A



## Project Phases & Milestones 0150 – PM Web Manual

Once the form is open:

- F. Fill out the form in its entirety. The form cannot be saved unless all fields have been filled out.
- G. Click on the “Attachments” tab to upload relevant documentation ([See Section 100.7 Attachments – Upload & Link Files in the Attachment Tabs](#)).
- H. Click the “Save” button.

**Figure 710.7.B**

The screenshot displays a web form interface. At the top, there is a toolbar with several icons; the 'Save' icon (a floppy disk) is highlighted with a red box and labeled 'H.'. Below the toolbar, the form contains several input fields: Date (3/24/2017), Subject\*, Project\* (dropdown), Record #\*, Reference, Category (dropdown), Status (Draft), Budget Total (\$0.00), and Created By. The 'Attachments' tab is selected and highlighted with a red box, labeled 'G.'. Below the tabs, there are several rows of input fields: To:, From:, Description of Work, PCO No., Issued In Response to RFI No., Contract For:, Attachments (checkbox), Proposal Requested By:, CA/OR Copy, Architect Copy, Owner Copy, File Copy, and Other Copy.

If the Proposal Request has been set up to use in the Workflow, the Workflow tab will appear and the Proposal Request can be sent into the Workflow ([see Section 710.1, Workflow](#)).

# Project Phases & Milestones

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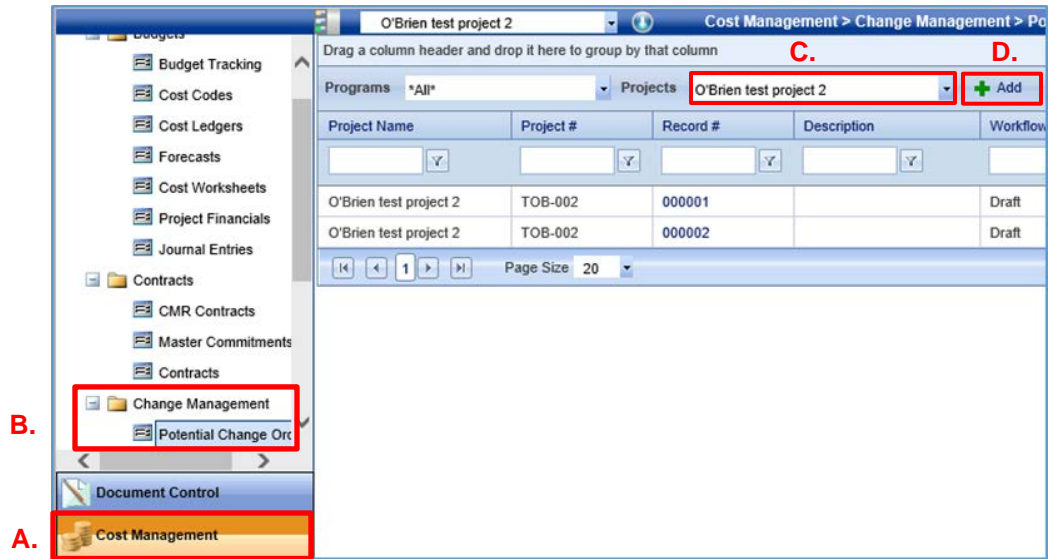
### CHANGE IN THE WORK

#### 710.8 POTENTIAL CHANGE ORDERS (PCO)

The Potential Change Orders (PCO) tool is used to document potential modifications to committed costs on a project.

1. To create a PCO:
  - A. Click on the “Cost Management” module;
  - B. Open the “Change Management” folder and click on the “Potential Change Orders” tool;
  - C. Select the project for which you want to create a PCO from the “Projects” dropdown list;
  - D. Click the “Add” button to open a new PCO form.

Figure 710.8.A





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2. To create a PCO record:
  - A. Select the project name from the “Project\*” dropdown list.
  - B. PMWeb will automatically assign a “Record #” and “Change Request #” for the PCO.
  - C. Enter a short description for the PCO in the “Description” field.
  - D. Select the consultant/contractor whose work the PCO pertains to from the “Company” dropdown list.
  - E. Select the “Cause” of the change from the dropdown list.
  - F. Select the party requesting the change from the “Requested” dropdown list.
  - G. Select whether the request is In Scope or Out of Scope from the “Category” dropdown list.
  - H. Click the “Save” button

Figure 710.8.B

**H.**

The screenshot shows the PM Web interface for creating a PCO record. The form is titled "Select Change Event...". The fields are as follows:

Project*	A. O'Brien test project 2	Company	D. zzz-testing purposes not real company
Record #	001	Cause	E. Field Condition (Construction)
Description	C. New thing	Requested	F. zzz-testing purposes not real company
Source Record		Category	G. Out of Scope
Revision	0	Reference	
Date		Change Request #	1
Status	Draft		
Change Request	Select Change Request...		
Risk Analysis	Select Risk Analysis...		
Effective Date			

# Project Phases & Milestones

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3. Once the PCO record has been created, line item detail is added by doing the following:
    - A. Select the “Details” tab;
    - B. Under the “Cost” Section, click the “Add” button to open the data entry for the PCO line item.
- \* Do not make any entries in the “Budget” section.

**Figure 710.8.C**

**A.**

The screenshot displays a web application interface with a top navigation bar containing tabs: Details, Adjustments, Specifications, Notes, and Attachments. The 'Details' tab is selected and highlighted with a red box. Below the navigation bar, there are two main sections: 'Budget' and 'Cost'. The 'Budget' section includes a table with columns: Line #, Status, Item, Description, Adjustment 1, Tax, and Adjustment. The table is currently empty, displaying 'No records to display.' Below the table is a pagination control showing 'Page Size 10'. The 'Cost' section also includes a table with columns: Line #, Status, Linked Budget Line, Item, Description, Ext. Cost, Commitment, and Cost. The 'Add' button in the 'Cost' section's toolbar is highlighted with a red box and labeled with a red 'B.'. The 'Cost' table is also empty, displaying 'No records to display.'

# Project Phases & Milestones

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4. The PCO line item is to be populated as follows:
  - A. The “Line #” will automatically populate when the PCO line item detail is filled in.
  - B. The “Status” will automatically populate as “Pending” and should never be changed to “Approved” using the PCO tool. The status will automatically change to “Approved” when the PCO is brought into an actual Change Order. If it is however determined that the PCO is no longer applicable, the status can be manually changed to “Void”.
  - C. Enter the name of the PCO line item in the “Description” field. The name entered into the “Description” field will ultimately appear in the details section of a Payment Application if this PCO line item is included as part of an approved Change Order. Any invoice line prefixes or other common protocol text should also be included in the PCO line at this stage.
  - D. Enter the proposed monetary change, if any, in the “Ext. Cost” field.
  - E. Select the name of the contractor/consultant from the “Commitment” dropdown list, whose contract may be affected by a Change Order from this PCO line.
  - F. Select the correct “Cost Code” for the PCO from the dropdown list.
    - \* For GCs and CMRs, Cost Code 03 is almost always used.
    - \* Cost Code – 04 – Contingency cannot be used for PCO’s.
  - G. Enter the proposed schedule change in days, if any, in the “Days” field.
    - \* Note that the proposed schedule change will not automatically populate into a Change Order. Schedule changes proposed in PCOs need to be manually entered into Change Orders in the header section of the Change Order form.
  - H. Click the “Save” button.
    - \* Note: Do not enter data or make changes in any fields other than those cited above.

Figure 710.8.D

H.

Line #	Status	Description	Ext. Cost	Commitment	Cost Code	Days
000	Pending		\$0.00	Select Commitm	Select Cost Code...	0.00

- Note:**
1. PCOs can be created in PMWeb before the contract record is created. However, COs require that a contract record exists.
  2. If the PCO is created first, it can be changed so that it names a commitment company once the contract is created and marked as approved in PMWeb. Thereafter, a CO can be created with that PCO linked to it.

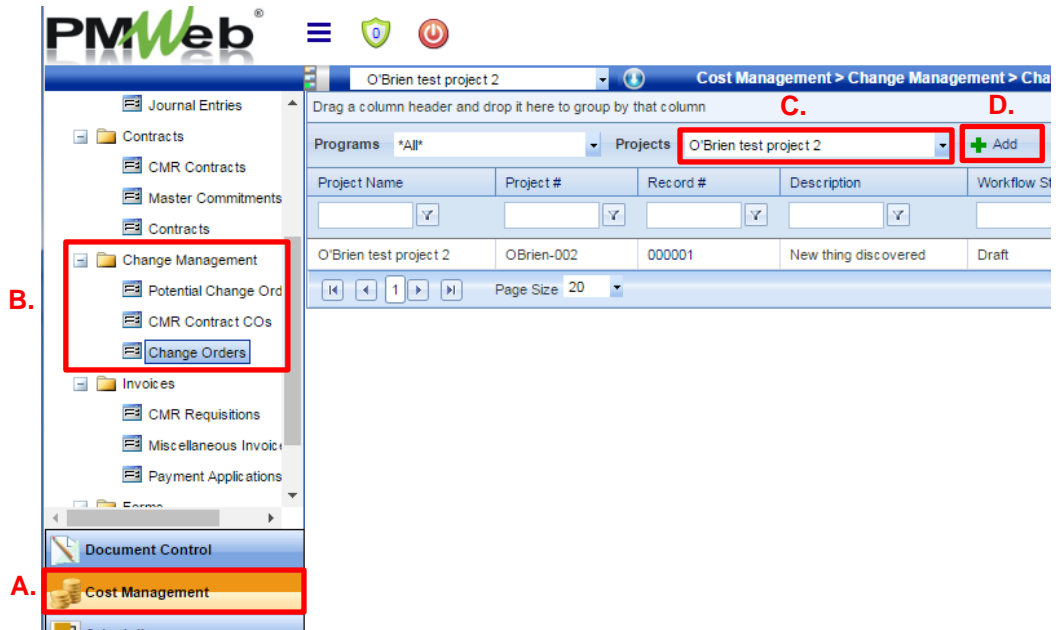
# Project Phases & Milestones

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### 710.9 CHANGE ORDERS

1. To create a Change Order (CO):
  - A. Click on the “Cost Management” module;
  - B. Open the “Change Management” folder, and click on the “Change Orders” tool;
  - C. Select the project for which you want to create a CO from the “Projects” dropdown list;
  - D. Click the “Add” button to open a new PCO form.

Figure 710.9.A



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2. To create a CO record:
  - A. Select the project name from the “Project\*” dropdown list.
  - B. Select the name of the contractor/consultant in whose Payment Application the CO is to appear from the “Commitment” dropdown list.
  - C. PMWeb will automatically assign a “Record #” for the CO.
  - D. Enter a short description for the CO in the “Description” field.
  - E. Select “Revised Scope” from the “Post As” dropdown list.
  - F. Select the “Cause” of the change from the dropdown list.
  - G. Select the party requesting the change from the “Requested By” dropdown list.
  - H. Select the “Category” of the change from dropdown list.
  - I. Enter the “Change Order Date” and the “Effective Date” of the CO in the space provided.
  - J. If the Change Order includes a project schedule change, enter the number of days the schedule is to change in the “Days” field.
    - \* Proposed schedule changes from a linked PCO will not automatically populate into the CO and must be manually entered into the CO.

Figure 710.9.B

The screenshot shows the 'Change Orders' form in the PM Web application. The form is titled 'O'Brien test project 2' and 'Cost Management > Change Management > Change Orders'. It contains various fields for project details, commitment, company, type, record number, description, post as, revision, status, cause, requested by, category, reference, assigned to, change order date, effective date, and days. Red boxes highlight specific fields: A. Project\*, B. Commitment\*, D. Description, E. Post As, F. Cause, G. Requested By, H. Category, I. Change Order Date, and J. Days.

CO line item detail can be added by linking a PCO to the CO or it can be manually added.

3. To add line item detail by linking a PCO to the CO:
  - A. Select the “Details” tab.
  - B. Click the “Link PCO” button to open the Link PCO dialogue box.

Figure 710.9.C

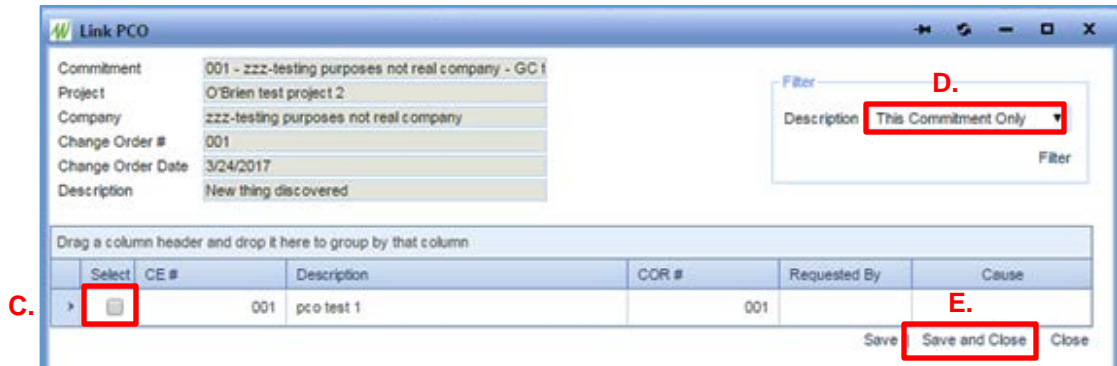
The screenshot shows the 'Details' tab of the 'Change Orders' form. The 'Details' tab is selected, and the 'Link PCO' button is highlighted. The table below the button is empty, with columns for Line #, Item, Description, Amount Requested, Adjustment 1, Adjustment 2, and Tax.

# Project Phases & Milestones

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- C. Click the check box from the “Select” column for any PCO(s) you wish to bring into this Change Order.
- D. If the PCO you are looking for is not listed, it may be because a commitment company was not selected in the PCO. If this is the case, select “All Commitments” from the “Description” dropdown list and click the “Filter” button beneath it. It may show the PCO.
- E. Click the “Save and Close” button.
  - \* A pop-up box may appear, reminding you to select a cost code. If the PCO already has the cost code selected, you can ignore this.

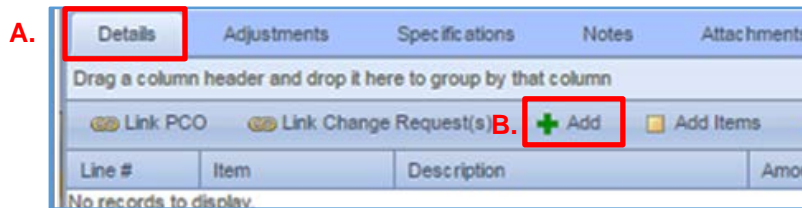
Figure 710.9.D



Once you have saved and closed the Link PCO dialogue box, you will be returned to the CO record form. All of the PCO's that were to be brought into the CO should be listed in the “Details” tab.

- 4. To manually enter line item detail into a CO:
  - A. Select the “Details” tab.
  - B. Click the “Add” button to open the CO line item detail for editing.

Figure 710.9.E



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- C. Enter a name for the new CO line item in the “Description” field.
- D. Enter the amount of the CO in the “Amount Requested” field.
- E. Select the correct “Cost Code” from the dropdown list.
  - \* Cost Code 04 – Contingency cannot be used for CO line items
- F. Click the “Save” button to save your work or click “Cancel” to delete the line item.

**Figure 710.9.F**

Line #	Item	Description	Amount Requested	Cost Code
			\$0.00	Select Cost Code...
001		test 1	\$5.00	03-0301-03-000010
			\$5.00	

- 5. To edit a Change Order line item that has already been entered:
  - A. Select the row you would like to edit and click Edit.
  - B. If you are editing the amount of a CO line item that came from a PCO, you will need to change the “Amount Approved” field, rather than the “Amount Requested” field.

**Figure 710.9.G**

Line #	Item	Description	Amount Requested	Cost Code	Amount Approved
001		test 1	\$5.00	03-0301-03-000010	\$5.00
			\$5.00		\$5.00

- 6. Before completing the CO entry:
  - A. Upload signed copies of the corresponding contract amendments and any other relevant documentation pertaining to the CO in the “Attachments” tab of the CO ([See Section 100.7 Attachments – Upload & Link Files in the Attachment Tabs](#)).

**Figure 710.9.H**

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7. After the CO has been signed and uploaded:
  - A. Change the Status of the CO to “Approved”, and
  - B. Click the “Save” button

**Figure 710.9.I**

The screenshot shows a web form for a Change Order. The title bar reads "001 - OBrien test project 1". The form fields are as follows:

Project*	OBrien test project 1	Cau
Commitment*	001 - zzz-test CMR sub - not a real company -	Req
Company	zzz-test CMR sub - not a real company	Cate
Type	Subcontract	Ref
Record #*	001	Assi
Description		Cha
Post As	Revised Scope	Effe
Revision	0	Date Jul-07-2017
Status	Approved	Day
Change Request	Select Change Request...	

**Note:** Any increase(s) or decrease(s) to the original contract amount should be listed individually as a Change Order rather than as a change to the SOV in the contract record. Work Authorization Orders (WAO) and Guaranteed Maximum Price (GMP) SOV lines are the exception to this rule. Please contact CSS for assistance in managing changes to WAOs and GMP SOV line.



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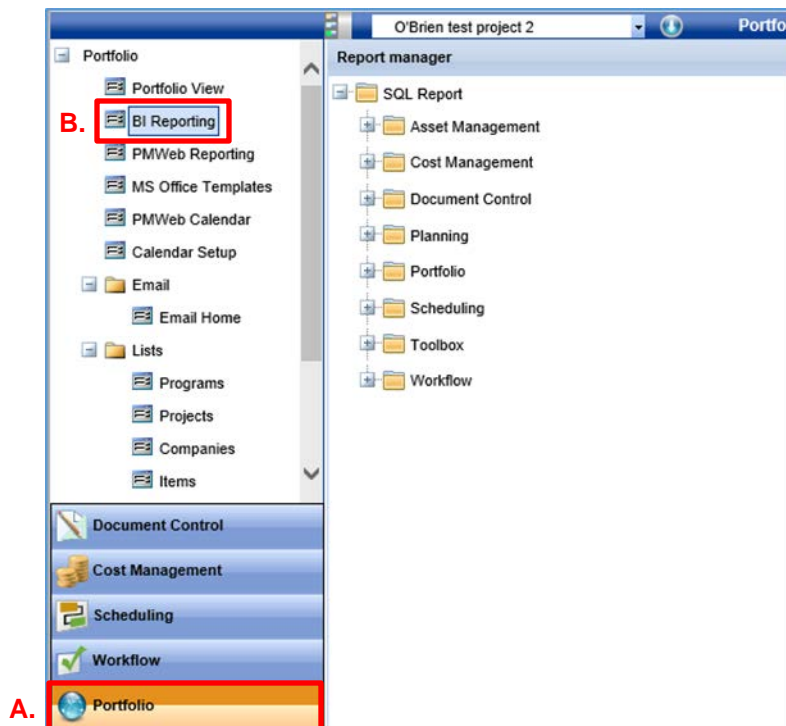
### 710.10 ACCESSING STANDARD REPORTS

PMWeb offers standardized reports to help manage project documents, e.g. RFI's, Submittals, etc.

1. To access the standard reports in PMWeb:
  - A. Select the "Portfolio" module;
  - B. Click on the "BI Reporting" tool to open the Report Manager.

Reports are organized into the following PMWeb categories: Asset Management, Cost Management, Document Control, Planning, Portfolio, Scheduling, Toolbox, and Workflow.

**Figure 710.10.A**



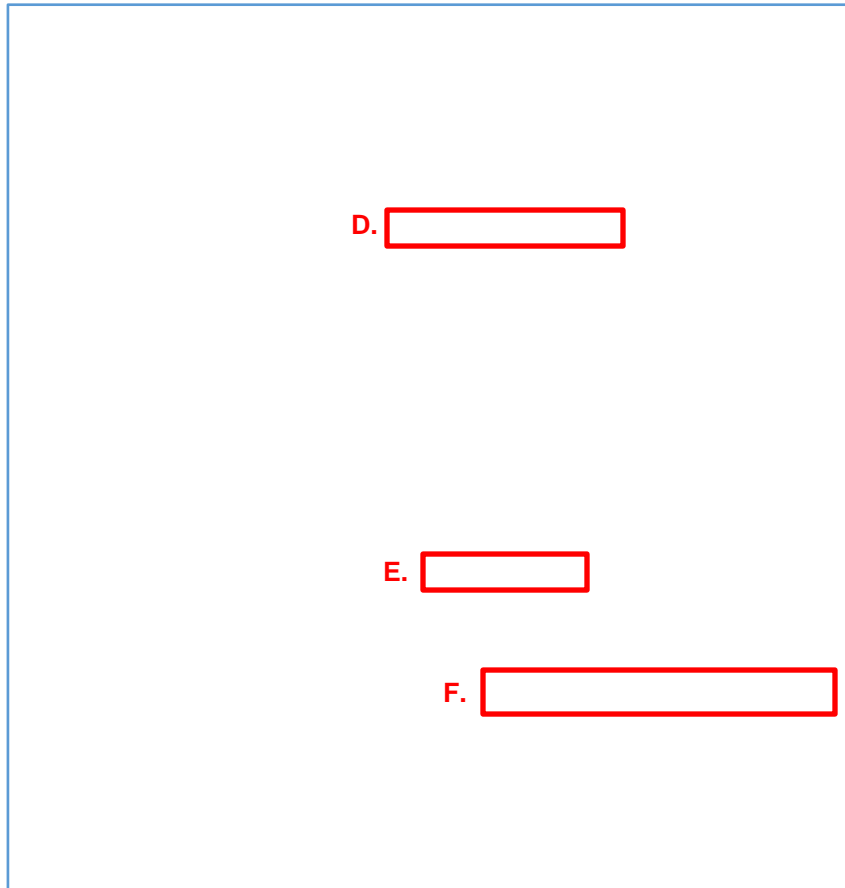
## Project Phases & Milestones 0150 – PM Web Manual

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To find a specific type of report, open the PMWeb file folder category that contains the type of report you want to view. For purposes of this manual, we will demonstrate how to view a Submittal Package report.

- D. Open the “Document Control” file folder:
- E. Open the “Submittals” subfolder.
- F. Click on the “DPW\_SubmittalLog\_By\_Pkg” Report to open the report profile.

**Figure 710.10.B**



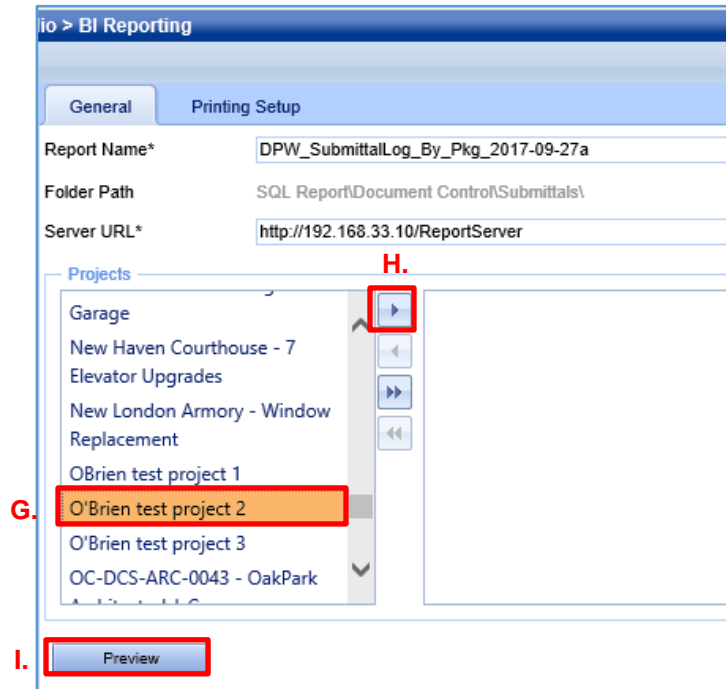
# Project Phases & Milestones

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After you open the report profile:

- G. Select the project for which you want to view the Submittal Package Report from the Projects section under the General tab to highlight that project.
- H. Click the ► button to move the selected project to empty box on the right.
- I. Click the “Preview” button to open the Report Viewer.

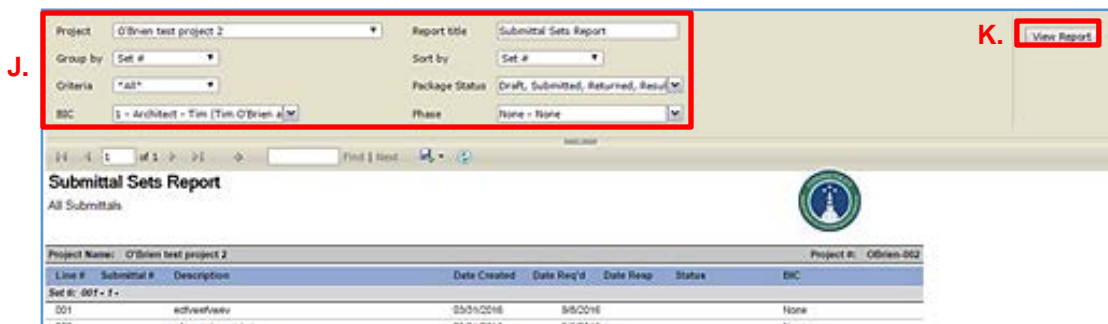
**Figure 710.10.C**



After you open the Report Viewer:

- J. Fill in the fields on the top of the screen to format the report.
- K. Click the “View Report” button to show the format you selected.
  - \* You can change your options & click “View Report” again to change the view.

**Figure 710.10.D**



# Project Phases & Milestones

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Once you have the report view that you like, you will need to save the report in an electronic format of your choosing:

2. To save the report:
  - A. Click on the “Output” button;
  - B. Click on the line with the electronic file type for which you want to save the report.

**Figure 710.10.E**

The screenshot shows a web application interface for generating and saving a report. The interface includes a header with project details, a table of report data, and a context menu for saving the report in various formats.

**Header:**

- Project: O'Brien test project 2
- Report title: Submittal Sets Report
- Set #: [Dropdown]
- Sort by: Set #
- Package Status: Draft, Submitted, Returned, Resul
- Phase: None - None

**Table:**

Submittal #	Description	Date Resp	Status
1	edfwefwefv	03/31/2016	9/8/2016
1	efwertghwretghrt	03/31/2016	9/8/2016

**Context Menu (Output):**

- XML file with report data
- CSV (comma delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file** (highlighted)
- Word

# Project Phases & Milestones

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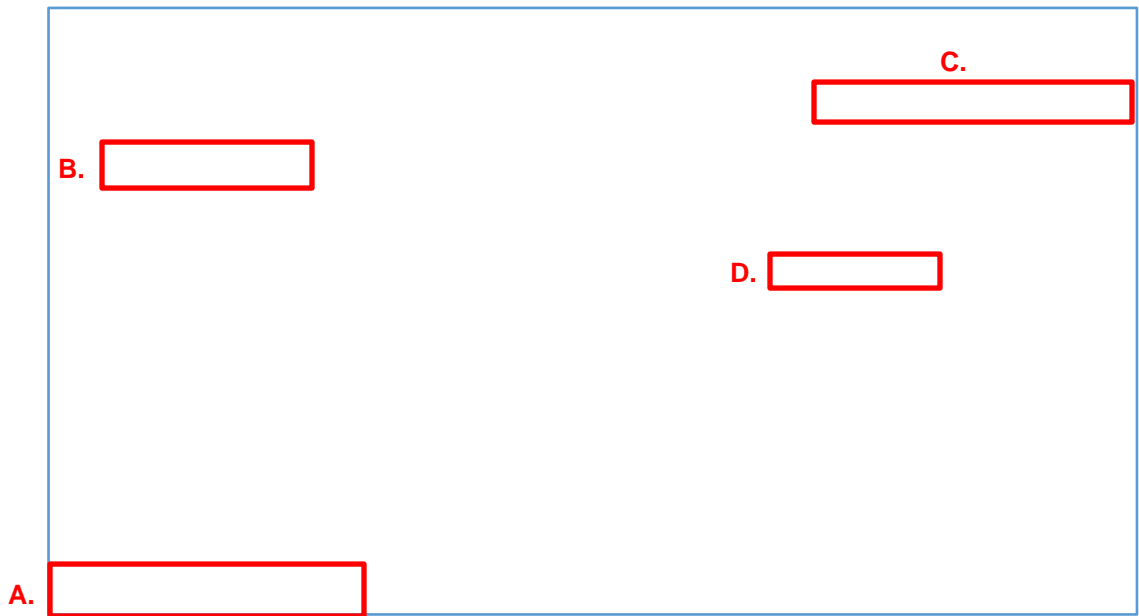
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### 710.11 ACCESSING REPORTS BY RECORD TYPE

Reports can also be accessed through the record document. For purposes of this manual, we will demonstrate how to access the Submittal Package Report through the Submittal record.

1. To access a report through a record:
  - A. Select the appropriate module, e.g. Document Control;
  - B. Select the appropriate document tool, e.g. Submittal Packages;
  - C. Select the project from the “Projects” dropdown list.
  - D. Select the “Record #” to open the Submittal Package record.

**Figure 710.11.A**



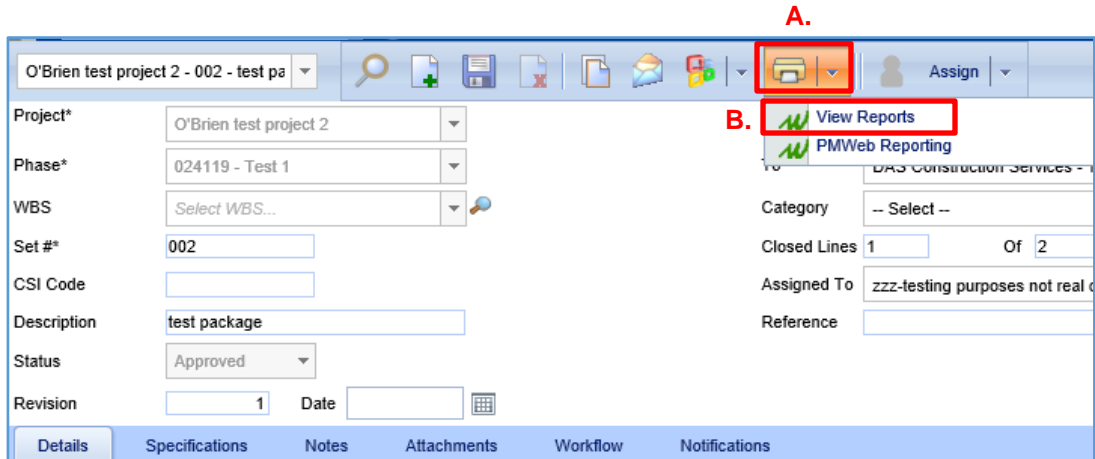
# Project Phases & Milestones

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After opening the Submittal Package record:

- F. Click the dropdown arrow next to the Printer icon.
- G. Select “View Reports” to open the “Reports Preview” dialogue box.

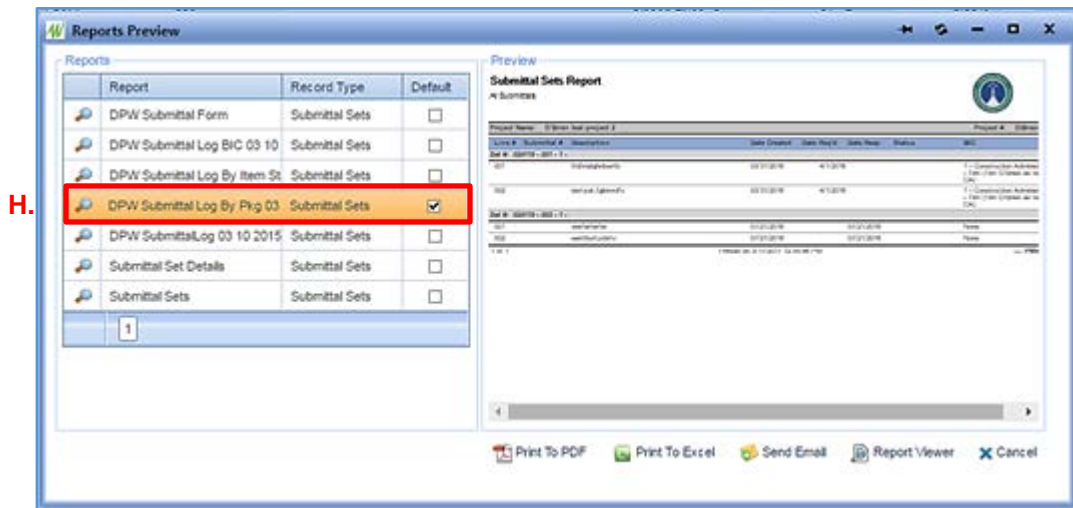
Figure 710.11.B



H. The Reports section of the dialogue box will show a listing of the types of reports that are available for that record type (Submittal). Since the Submittal Packages tool was used to access this record, the default report selected and highlighted is the Submittal Package Report.

- \* The report type can be changed by selecting the magnifying glass icon next to any one of the other report types listed.

Figure 710.11.C



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2. To save an electronic copy of the report with the pre-selected settings:
  - A. Click the “Print to PDF button”.

**Figure 710.11.D**



3. To edit the report format:
  - A. Click the “Report Viewer” button and follow the steps in Section 710 ... Accessing Standard Reports, 1. J-K above.

**Figure 710.11.E**



# Project Phases & Milestones 0150 – PM Web Manual

## CONSTRUCTION PHASE REPORTS

### 710.12 CREATING A DAILY REPORT IN PMWEB

For information on how to create a Daily Report in PMWeb, please see page 29 of the PMWeb Quick Start Guide Contractor Edition prepared by Saybrook Associates Inc.

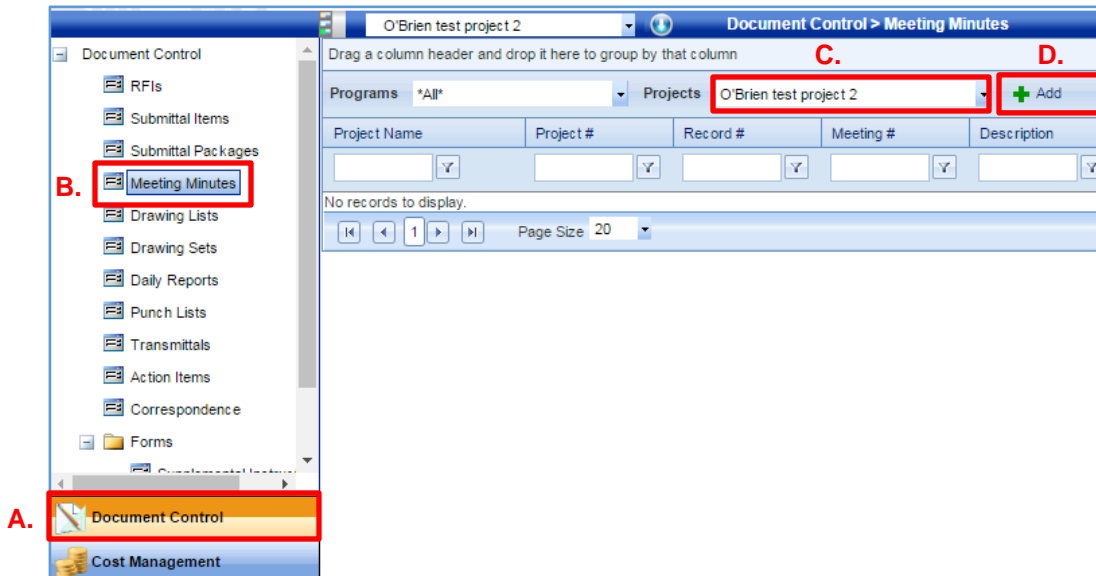
### 710.13 CREATING MEETING MINUTES & MEETING MINUTES SERIES

Project meetings are typically done in a series, meaning the topics of discussion for one meeting carry on to the next meeting until the subject matter is closed. Accordingly PMWeb developed their Meeting Minutes tool to allow for Meeting Minute line items to be tracked from one meeting to the next until such time that an issue is resolved or the item is complete.

The section that follows describes how to create Meeting Minutes and how to incorporate Meeting Minutes, for some meeting types, e.g. jobsite meetings, into a series.

1. To create Meeting Minutes:
  - A. Go to the “Document Control” module;
  - B. Select the “Meeting Minutes” tool,
  - C. Select the project for which you want to create a series of Meeting Minutes from the “Projects” dropdown menu.
  - D. Click the “Add” button to open the Meeting Minutes template form.

**Figure 710.13.A**





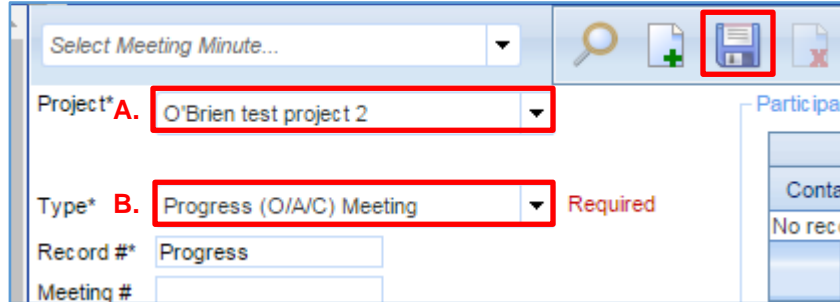
## Project Phases & Milestones 0150 – PM Web Manual

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2. Complete the new Meeting Minutes Form as follows:
  - A. Select the project for which you want to create Meeting Minutes for from the “Project\*” dropdown list.
    - The “Record #\*” field will automatically populate with a number in sequential order to the previous record. The Record # serves as the link between Meeting Minutes and cannot be changed.
  - B. Select the appropriate meeting “Type\*” from the dropdown list.
    - Once the meeting type is entered and saved it cannot be changed for the entire meeting series.
  - C. Click the “Save” button.

**Figure 710.13.B**

C.



The screenshot shows a web form for creating meeting minutes. At the top, there is a dropdown menu labeled "Select Meeting Minute...". Below this, there are three main sections: "Project\*" with a dropdown menu showing "O'Brien test project 2" (highlighted with a red box and labeled "A."); "Type\*" with a dropdown menu showing "Progress (O/A/C) Meeting" (highlighted with a red box and labeled "B.") and the word "Required" in red text; and "Record #\*" with a text input field containing "Progress". Below these is a "Meeting #" field. In the top right corner of the form, there is a toolbar with icons for search, add, save, and delete. The save icon (a floppy disk) is highlighted with a red box and labeled "C.".

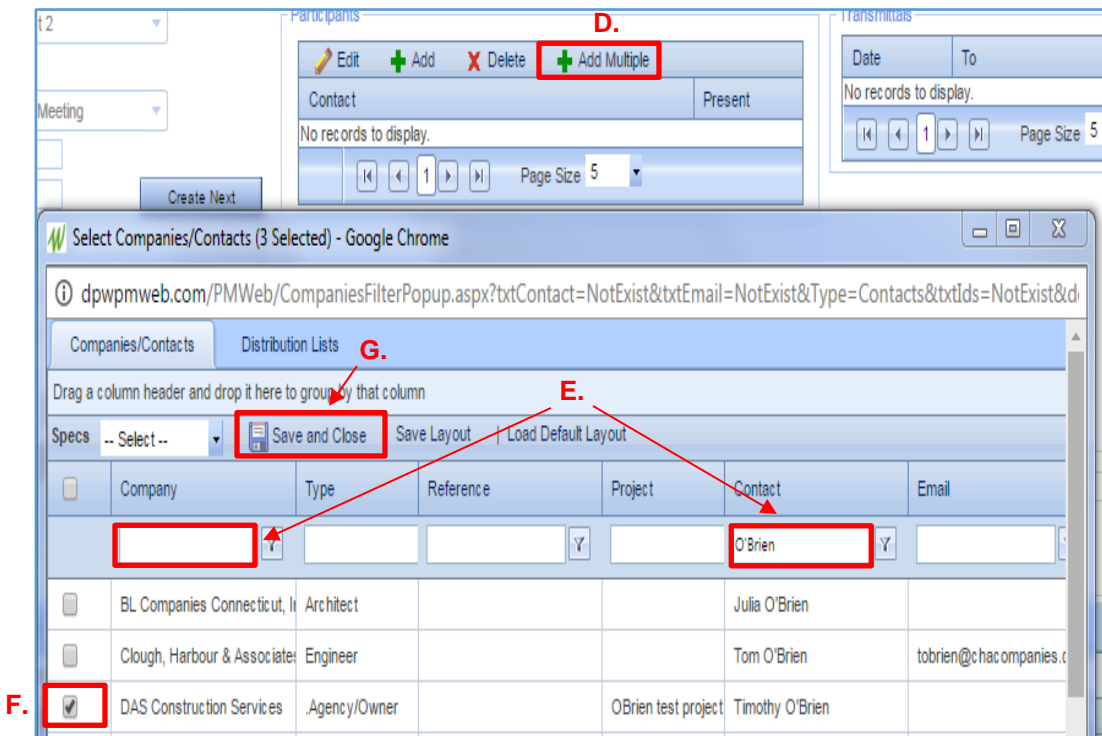
# Project Phases & Milestones

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Next, create the attendance list for the meeting by doing the following:

- D. Click the “Add Multiple” button under the “Participants” header to bring up the Select “Companies/Contacts” tab.
- E. To search for a specific Company or Contact, enter the search criteria in the “Company” or “Contact” field and click the Enter key on your keyboard to sort the data based on the search criteria entered.
- F. Once you have found the person you are searching for, click on the box next to their name to select that person, and then begin your search for the next person to be added to the list, click on the box next to their name to select that person, and so on until you have completed your list of attendees.
  - If the individual you are looking for cannot be found in the Company/Contacts list, please contact CSS.
- G. Once you have completed your attendance list click the “Save and Close” button.

Figure 710.13.C



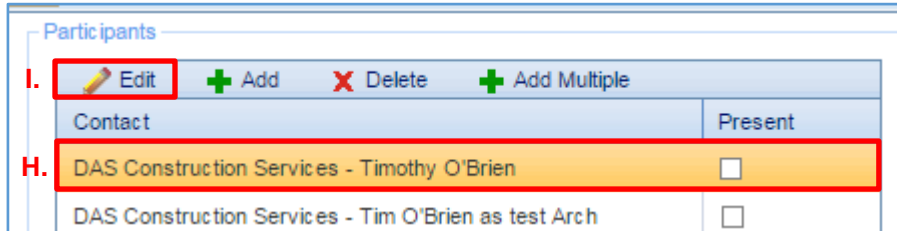
# Project Phases & Milestones

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To mark a contact as having been in attendance at a particular meeting:

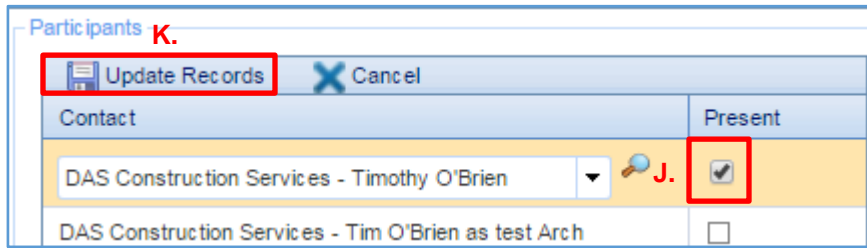
- H. Select the name of the individual you want to mark as “Present” so that their name is highlighted.
- I. Click the “Edit” button.

**Figure 710.13.D**



- J. Select the “Present” box next to their name.
- K. Click the “Update Records” button.

**Figure 710.13.E**



# Project Phases & Milestones

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Complete the rest of the form by doing the following:

- L. Type the meeting name in the “Description” field.
- M. Type the meeting location in the “Location” field.
- N. Enter the “Meeting Date”, “Start” and “End” times for the meeting in the respective fields.
- O. Select the Meeting Minute “Status” from the dropdown list.
  - The “Status” should remain in Draft format until all of the Meeting Minute Details have been added.

**Figure 710.13.F**

A diagram showing four red-outlined rectangular boxes representing form fields. To the left of each box is a red letter label: L. for the top box, M. for the second box, N. for the third box, and O. for the bottom box.

- P. Enter the “Location”, “Meet Date”, and “Start” time for the “Next Meeting” in the fields provided.
- Q. Click the “Save” button.

**Figure 710.13.G**

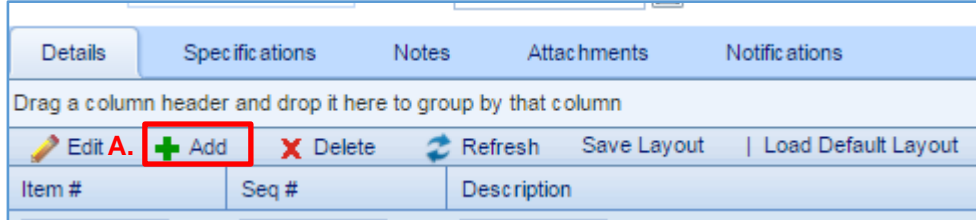
A screenshot of a web application interface. At the top left, a red box labeled 'Q.' highlights a 'Save' button icon. Below this, there are two data tables: 'Participants' and 'Transmittals', both showing 'No records to display.' At the bottom right, a section titled 'Next Meeting' contains three input fields: 'Location', 'Meet Date' (with a calendar icon), and 'Start' (with a clock icon). A red box labeled 'P.' highlights this entire 'Next Meeting' section.

# Project Phases & Milestones

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3. To start entering individual Meeting Minute line item details:
  - A. Click the “Add” button under the “Details” tab to open the line item Meeting Minute details for editing.

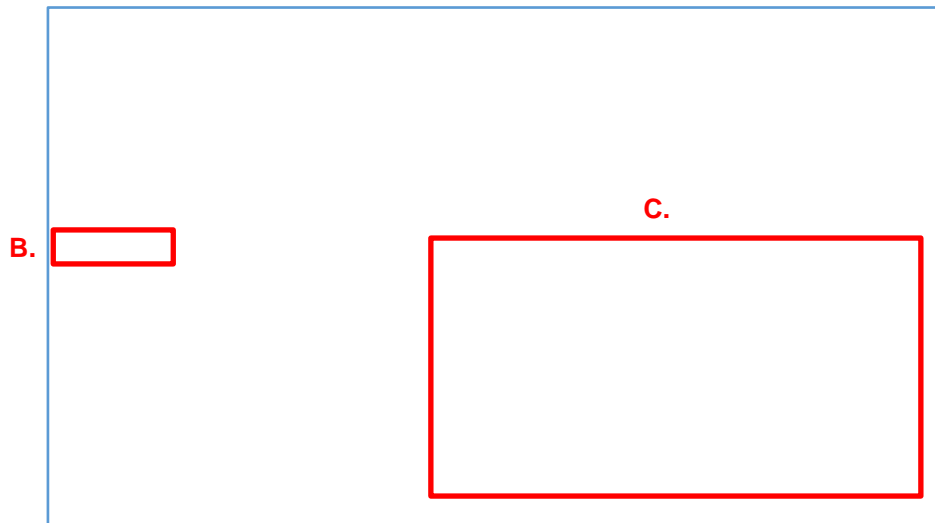
**Figure 710.13.H**



Populate the Meeting Minute fields as follows:

- B. The “Item #” field will automatically populate each time you enter a new line item.
  - The first number in the sequence identifies the meeting number. The second number in the sequence identifies the sequential order in which the item was discussed at the meeting.
- C. Enter a detailed description of the line item subject matter in the “Description” field.

**Figure 710.13.I**



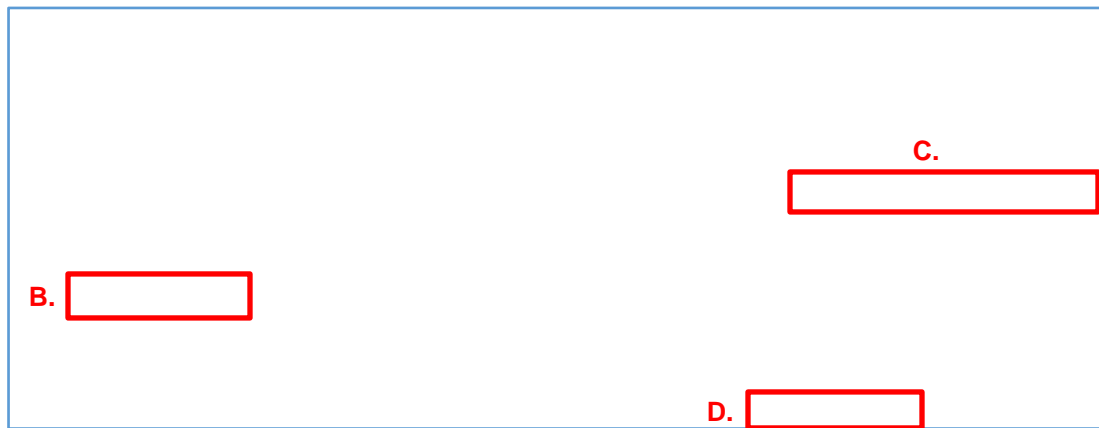


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5. To create the next set of Meeting Minutes in a series of Meeting Minutes, proceed as follows:
  - A. Go to the “Document Control” module;
  - B. Select the “Meeting Minutes” tool;
  - C. Select the project for which you want to create a series of Meeting Minutes from the “Projects” dropdown menu.
  - D. Click on the “Record #” of the Meeting Minutes for which you want to create a series to open the Meeting Minutes.
    - If you have already created a series of minutes, like the one in Figure 710... below (Record # 000001; Meeting #'s 1, 2, 3), click on the highest Meeting # (Meeting #3) to create the next set of Meeting Minutes in the series.

**Figure 710.13.L**



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- E. Click the Create Next button to create the next meeting in the series.
  - Note the new meeting record has the next Meeting # in the series, but the same Record #.
  - DO NOT use the Copy button in the Meeting Minutes tool.

To edit a minutes item carried forward from a previous meeting:

- F. Select the Meeting Minutes item, so that it is highlighted;
- G. Click the “Edit” button and populate the fields in the same way as described in #3, B-K above.

**Figure 710.13.M**

Item #	Seq #	Description
1.1		test
3.1		wewedwedwedwed
3.2	2343	Next line qwcqwdfr qcwedcw w cw cw w

New minute items may be created in the same way as described in #3, A-K above



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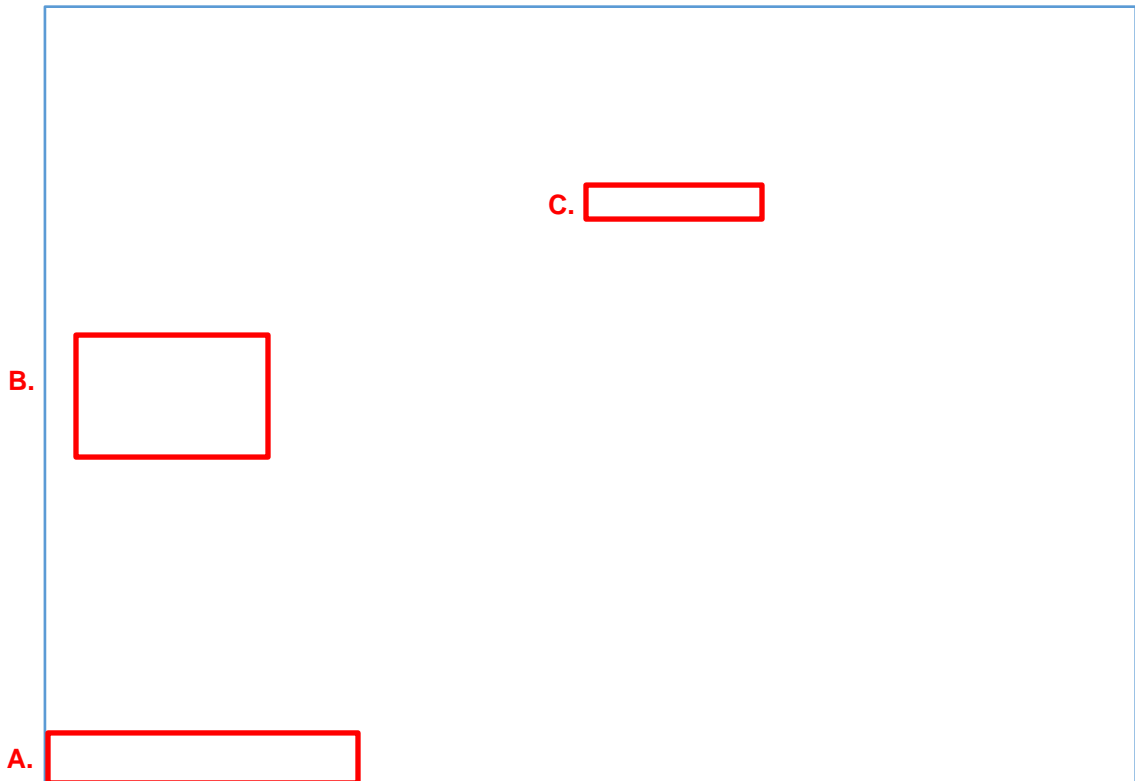
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### 710.14 CREATING A MONTHLY REPORT

The PM is required to submit a project report by the 15<sup>th</sup> of each month that includes updates to the project status and contractor information, project milestones, and project financials.

1. To update the project status and contractor information:
  - A. Select the “Portfolio” module;
  - B. Open the “Lists” file and click on the “Projects” tool, and select the project for which you want to create a Monthly Report from the “Projects” dropdown menu;
  - C. Click on the “Record #” for the subject project.

**Figure 710.14.A**

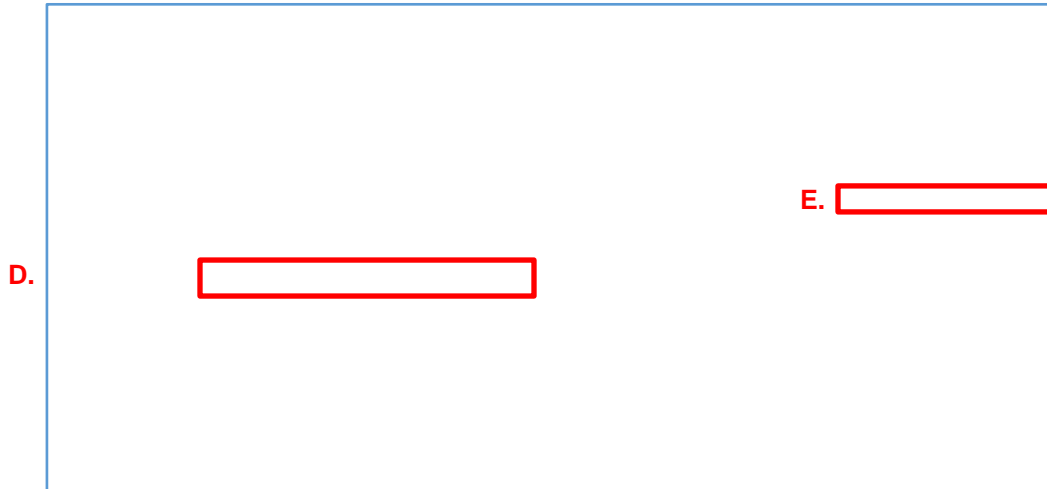


# Project Phases & Milestones

## 0150 – PM Web Manual

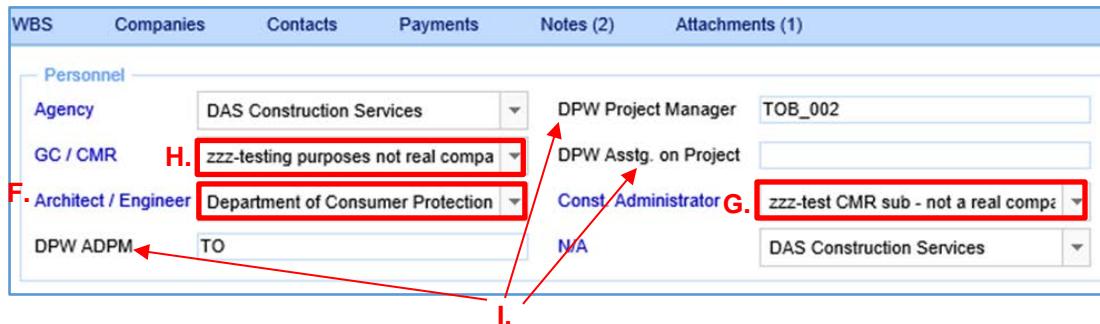
- D. Update the "Project Status" field with the appropriate "M" Code.
- E. Update the "Construction Value", if applicable.

Figure 710.14.B



- F. As soon as the A/E for the project is conditionally selected, select that firm in the "Architect/Engineer" field.
- G. As soon as the CA for the project is conditionally selected, select that firm in the "Construction Administrator" field.
- H. As soon as the GC for a DBB project is awarded the bid on the project, select that firm in the "GC/CMR" field. If project is a CMR project, select the CMR in this field as soon as a CMR is conditionally selected.
- I. Make sure the ADPM, PM and APM fields are accurate.

Figure 710.14.C

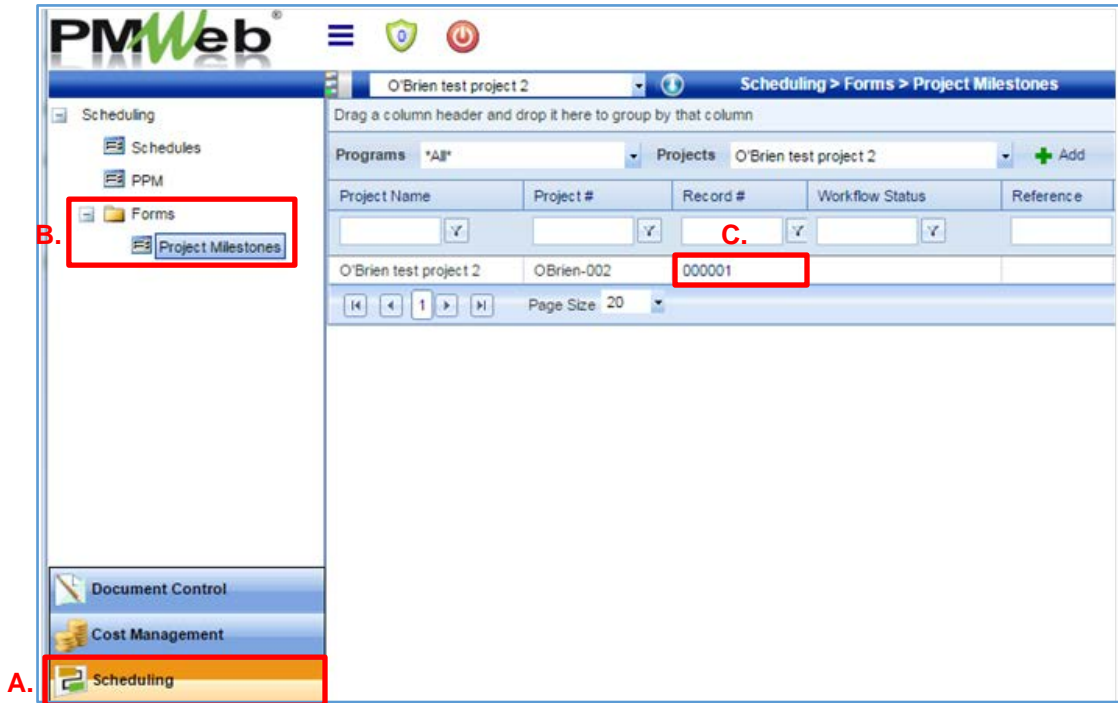


# Project Phases & Milestones

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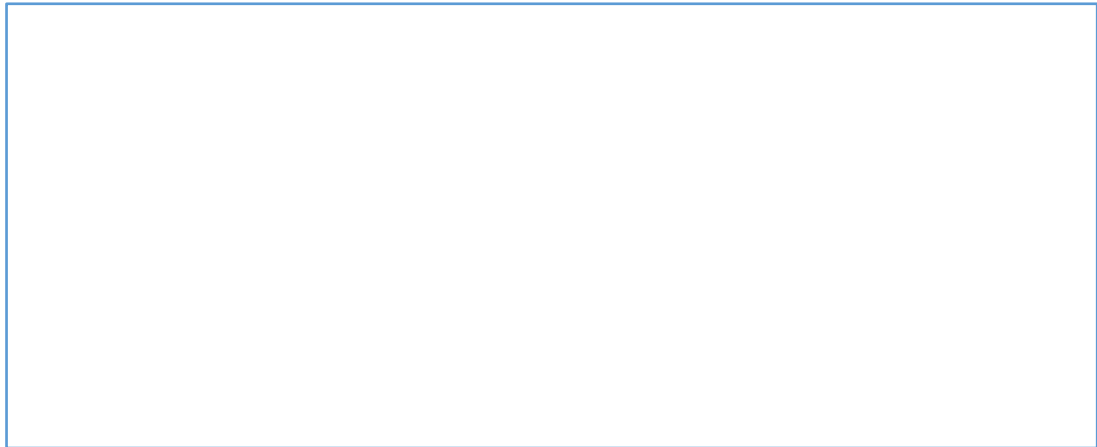
2. Next, update the Project Milestones by doing the following:
  - A. Select the “Scheduling” module;
  - B. Open the “Forms” file folder, and click on the “Project Milestones” tool;
  - C. Click on the “Record #” for the subject project.
    - If there is no Project Milestones record for the subject project, create a new one ([see Section 120.2 – Project Milestones](#)).

Figure 710.14.D



- E. Update the Milestone dates as applicable.

Figure 710.14.E

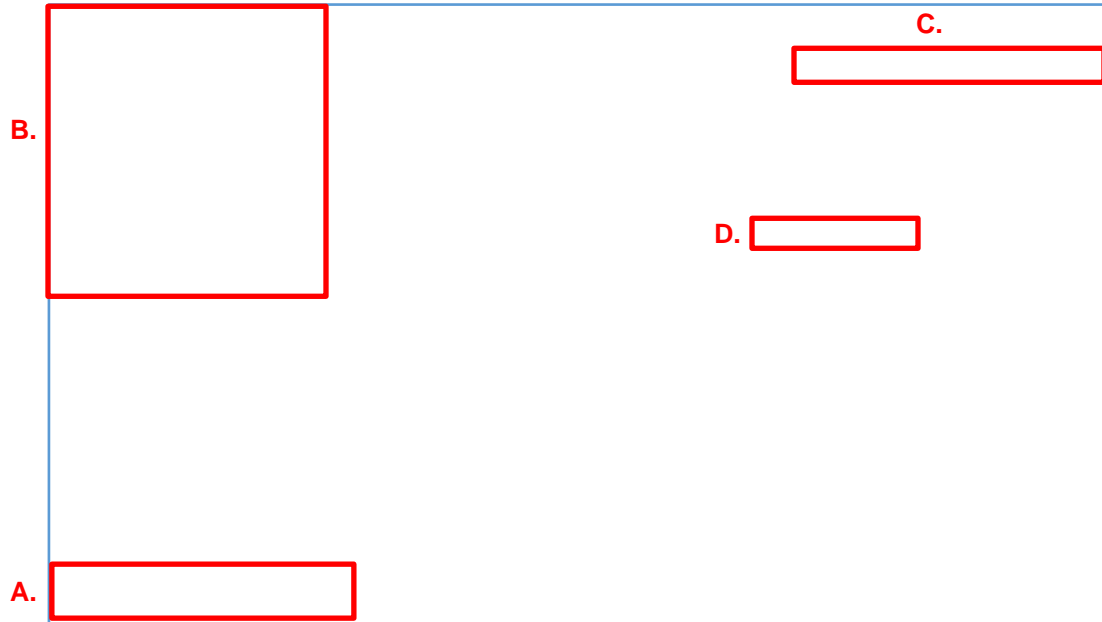


# Project Phases & Milestones

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3. Next, update the Project Financials to ensure that all of the cost codes are in balance.
  - A. Select the “Cost Management” module.
  - B. Open the “Budgets” file folder, and select the “Project Financials” tool.
  - C. Select the project for which you are updating Project Financials from the “Projects” dropdown list.
  - D. Select the “Record #” of the project financials that you want to update to open that record.

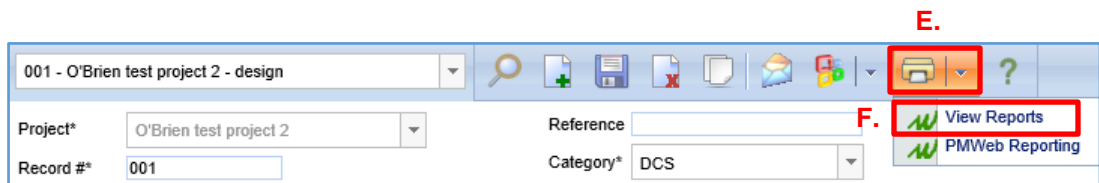
Figure 710.14.F



After opening the Project Financials record:

- E. Select the dropdown arrow next to the “Printer” button and
- F. Select “View Reports” to view the default report.

Figure 710.14.G



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- G. If the Projected (Over)/Under in this report shows a negative number for any cost code, the line item transfers for the subject project need to be updated ([see Section 310.8, Line Item Transfers](#)).

**Figure 710.14.H**

<b>Project Financial Summary</b>								
with Cost To Date								
Project 2	Status: M-2050-CMR Early Work Packages							
	Total Bonding	Total Adjusted Funding	Committed Costs	Pending Changes	Projected Cost	Projected (Over)/Under	Cost To Date	Balance To Complete
	\$0	\$0	\$10	\$0	\$10	G. (\$10)	\$0	\$1
	\$185	\$185	\$48	\$0	\$48		\$14	\$3
	\$9	\$9	\$0	\$0	\$0		\$0	\$
	\$0	\$0	\$0	\$0	\$0		\$0	\$
	\$13	\$13	\$0	\$0	\$0		\$0	\$
<b>Project Totals :</b>	<b>\$207</b>	<b>\$207</b>	<b>\$58</b>	<b>\$0</b>	<b>\$58</b>	<b>\$149</b>	<b>\$14</b>	<b>\$4</b>
<b>Grand Totals :</b>	<b>\$207</b>	<b>\$207</b>	<b>\$58</b>	<b>\$0</b>	<b>\$58</b>	<b>\$149</b>	<b>\$14</b>	<b>\$4</b>

4. Once you have completed all of your updates, update the "Project Status Updated On" field in the Portfolio module (see page 16 of the Quick Start Guide – Monthly Update Cycle).

# Project Phases & Milestones

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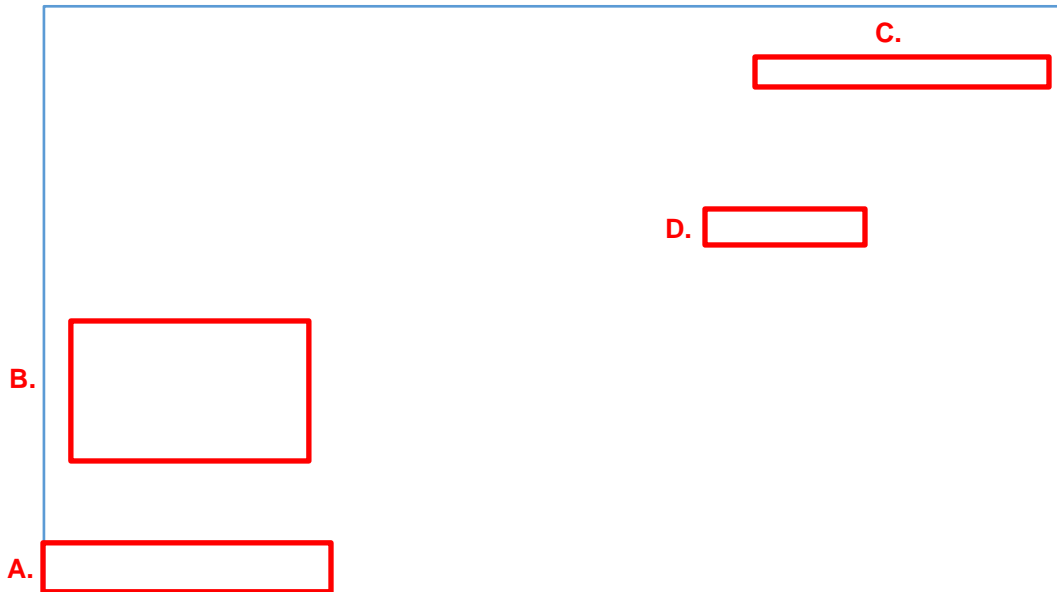
### PROJECT INVOICING & PAYMENTS

#### 710.15 UPDATING CONTRACT RECORDS (RETENTION & SOV)

Prior to the creation of the first Payment Application (invoice) in PMWeb, the retainage values need to be set and the Schedule of Values (SOV) needs to be uploaded to the Contract Record.

1. First open the subject Contract Record by doing the following:
  - A. Select the “Cost Management” module;
  - B. Open the “Contracts” file folder and select the “Contracts” tool;
  - C. Select the subject project from the “Projects” dropdown list.
  - D. Click on the “Record #” to open the Contracts form view.

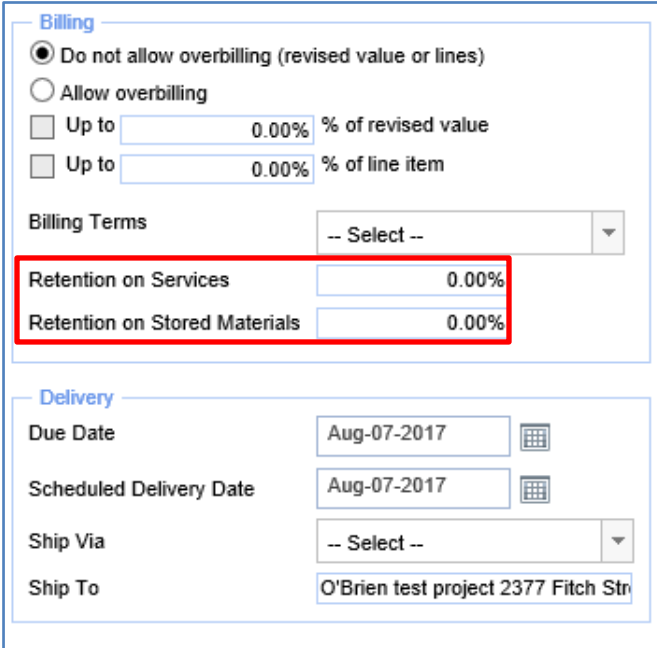
**Figure 710.15.A**



## Project Phases & Milestones 0150 – PM Web Manual

2. Next set the retainage values by doing the following:
  - A. Select the “Retention on Services” and “Retention on Stored Materials” fields and type in the correct percentages.
    - \* If the correct retainage percentages are not input, the Payment Application Retainage will be incorrect.
  - B. Click the “Save” button.

**Figure 710.15.B**

A. 

**Billing**

Do not allow overbilling (revised value or lines)  
 Allow overbilling

Up to  % of revised value  
 Up to  % of line item

Billing Terms: -- Select --

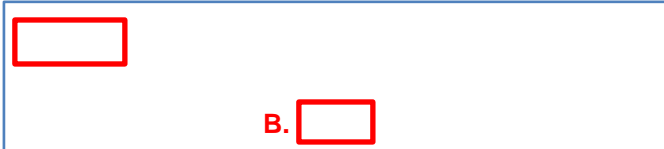
**Retention on Services**   
**Retention on Stored Materials**

**Delivery**

Due Date: Aug-07-2017  
Scheduled Delivery Date: Aug-07-2017  
Ship Via: -- Select --  
Ship To: O'Brien test project 2377 Fitch Str

3. Next, upload the Schedule of Values (SOV) to the Contract Record. The draft SOV submitted by the Consultant/Contractor can be directly uploaded to the Contract Record (Contact Construction Support Services for assistance with this process), or it can manually be entered by doing the following:
  - A. Select the “Details” tab; and
  - B. Click the “Add” button to open the SOV line item detail for editing.

**Figure 710.15.C**

A. 

B.

# Project Phases & Milestones 0150 – PM Web Manual

- C. Enter the billable SOV amount in the “Ext. Cost” field.
- D. Select the correct cost code from the “Cost Code” dropdown list.
  - Make certain the correct cost code entered. Once the first Payment Application is created, incorrect cost codes in the SOV will produce incorrect data in the project financial reports.
  - Once the cost code is selected, the “Description” field will populate automatically. If necessary, the “Description” field can be edited.
- E. Click the “Save” button and click the “Add” button again to create a new line, or Click the “Cancel” button if you do not wish to save your changes.

**Figure 710.15.D**

Line #	Description	Unit Cost	Ext. Cost	Total Cost	Cost Code
000		\$0.00	\$0.00	\$0.00	Select Cost Code

- 4. To edit a previously created SOV line item:
  - A. Click on the line item that you want to edit so that it is highlighted.
  - B. Click the “Edit” button. The SOV line item will open for editing.

**Figure 710.15.E**

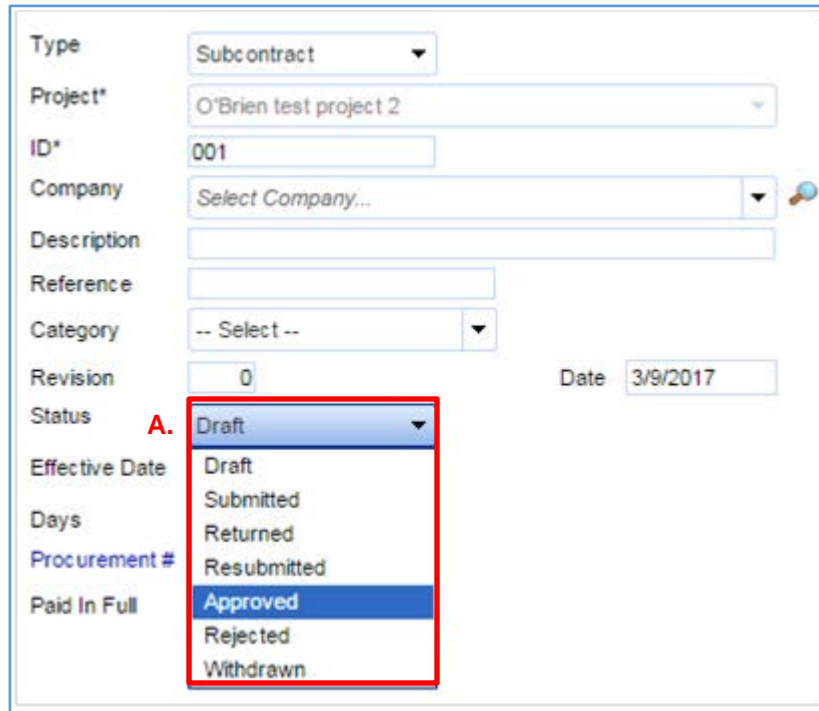
Line #	Description	Unit Cost	Ext. Cost	Total Cost	Cost Code
001	first 1	\$1.00	\$1.00	\$1.00	03-0300-03-00



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5. Upon completing the updates to the contract record and after entering the SOV:
  - A. Change the contract record “Status” from “Draft” to “Approved.”
  - B. Click the “Save” button to save your changes.

**Figure 710.15.F**



The screenshot shows a web form for a contract record. The form includes fields for Type (Subcontract), Project\* (O'Brien test project 2), ID\* (001), Company (Select Company...), Description, Reference, Category (-- Select --), Revision (0), Date (3/9/2017), Status (Draft), Effective Date, Days, Procurement #, and Paid In Full. A red box highlights the Status dropdown menu, which is currently set to "Draft". The dropdown menu options are: Draft, Submitted, Returned, Resubmitted, Approved, Rejected, and Withdrawn. A red letter "A." is placed to the left of the Status field.

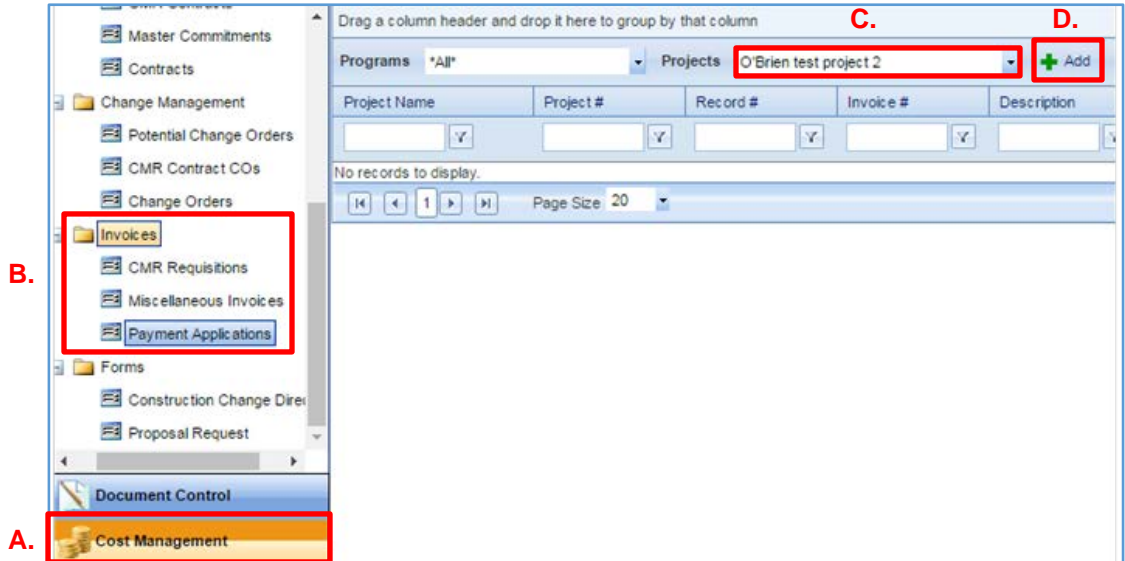
- Note:**
1. A contract record must only be used to record the original contract amount.
    - Any increase or decrease of the original amount, including a contract amendment or an additional task letter, is to be treated as a change order.
  2. The SOV cannot be altered after the Payment Application has been created.
    - \* The SOV for a CMR project crossing from the design to construction phase is the exception to this rule. Provide CSS with the construction phase SOV to update the contract record to allow for the next Payment Application to include the construction phase billable lines.
- Only contracts marked as approved can be invoiced against.
3. At the end of a project, the contract amount for each vendor should be equal to the actual payments.

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## 710.16 PAYMENT APPLICATIONS

1. To create a Payment Application:
  - A. Click on the “Cost Management” module;
  - B. Open the “Invoices” file folder and click on the “Payment Applications” tool;
  - C. Select the project for which you want to create a Payment Application from the “Projects” dropdown list; and
  - D. Click the “Add” button to open a new Payment Application form.

Figure 710.16.A



# Project Phases & Milestones

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2. To create the Payment Application record:
  - A. Select the project name from the “Project\*” dropdown list.
  - B. Select the name of the contractor/consultant whose invoice is being processed from the “Commitment” dropdown list.
    - \* If the consultant/contractor is not listed, it is likely that the contract record was not marked as “Approved”.
  - C. Enter a short description for the Payment Application in the “Description” field.
  - D. PMWeb will automatically assign an “Invoice #” and “Record #” for the Payment Application.
  - E. Select the “Cost Period” for the Payment Application.
  - F. Insert the “Invoice Date” in the space provided.
  - G. Select whether the “Invoice Type” is a “Progress Payment” or a “Final Invoice.”
  - H. Click the “Save” button to open the contract SOV in the “Details” tab.

Figure 710.16.B

The screenshot displays the 'Online Invoice' form in a web browser. The form is divided into two main sections: a left-hand section for project and invoice details, and a right-hand section for invoice-specific information. Red boxes highlight specific fields, each labeled with a letter from A to H. The 'Save' button in the top right toolbar is also highlighted with a red box and labeled H.

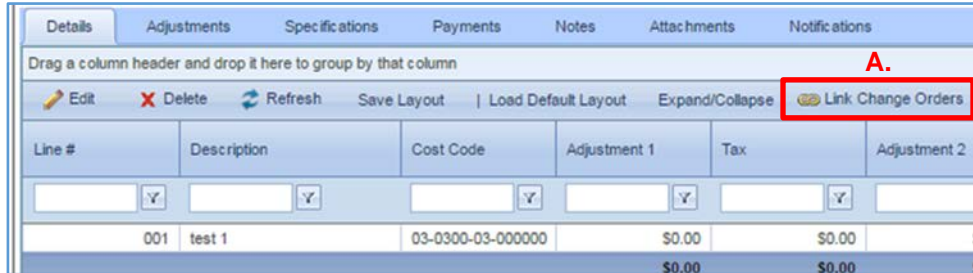
Label	Field	Value
A.	Project*	O'Brien test project 2
B.	Commitment*	001 - zzz-testing purposes not real company - t
C.	Description	Construction
D.	Invoice #	1
D.	Record #*	001
E.	Cost Period	Mar 2017
F.	Invoice Date	3/23/2017
G.	Invoice Type	Progress
H.	Save Button	Save

# Project Phases & Milestones

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3. To link CO's to the Payment Application:
  - A. Click on the "Link Change Orders" button to open the "Add Change Orders" dialogue box.

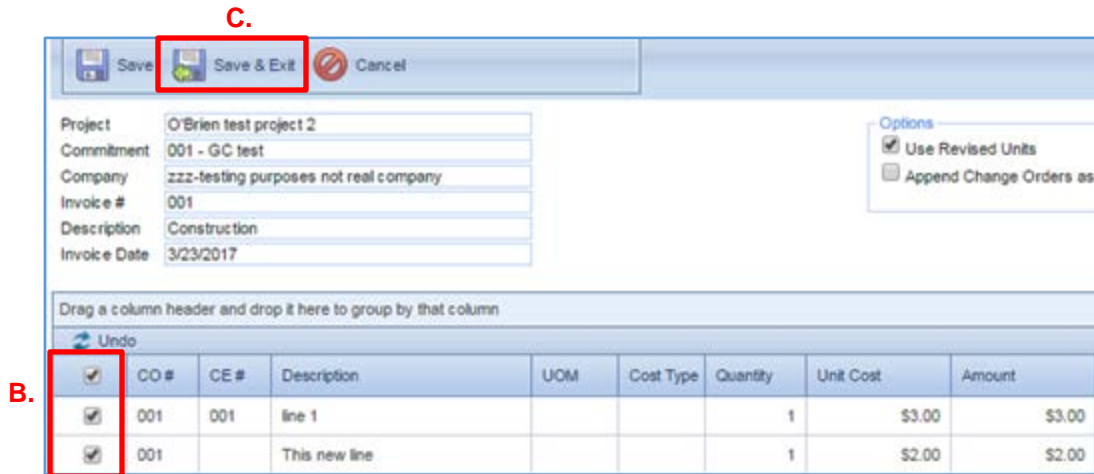
**Figure 710.16.C**



After opening the "Add Change Orders" dialogue box:

- B. Check the boxes next to the CO's you want to bring into the Payment Application.
  - \* If you do not see the CO's you are trying to link, check to make sure that those CO's are marked as "Approved".
- C. Click the "Save & Exit" button.

**Figure 710.16.D**



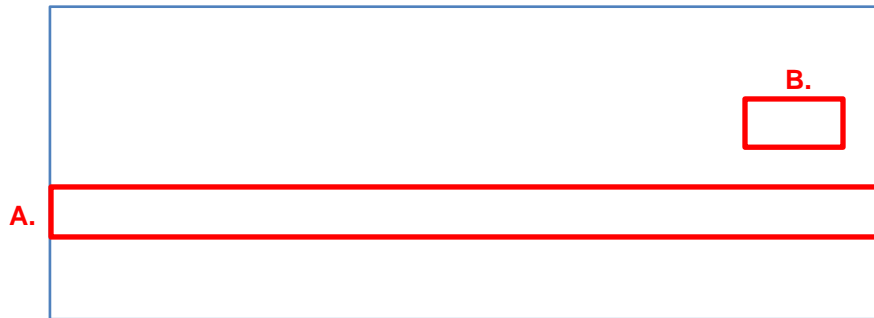
# Project Phases & Milestones

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Next you will enter invoice payment details for the subject Payment Application.

4. To enter the invoice amount to be paid for each line item in the Payment Application:
  - A. Click on the row that you want to enter the invoice amount so that the line item is highlighted.
    - \* If you want to select more than one row at a time, hold down the Ctrl key on your keyboard while clicking on each of the line items that you want to enter cost data so that all of the selected rows are highlighted.
  - B. Click the “Edit” button to open those line items for editing.

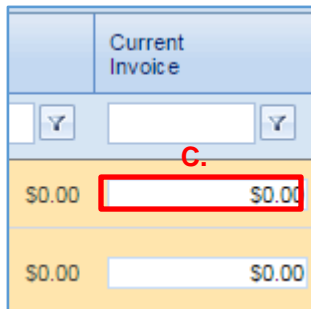
**Figure 710.16.E**



After opening the line items for editing:

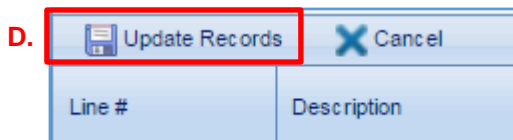
- C. Enter the billable amounts in the “Current Invoice” column for each of the line items in the Payment Application.

**Figure 710.16.F**



- D. Click the “Update Records” button.

**Figure 710.16.G**



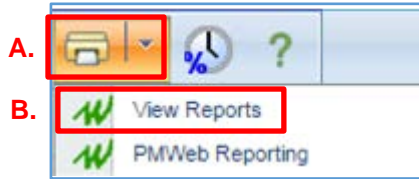
# Project Phases & Milestones

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The payment application is now ready for processing.

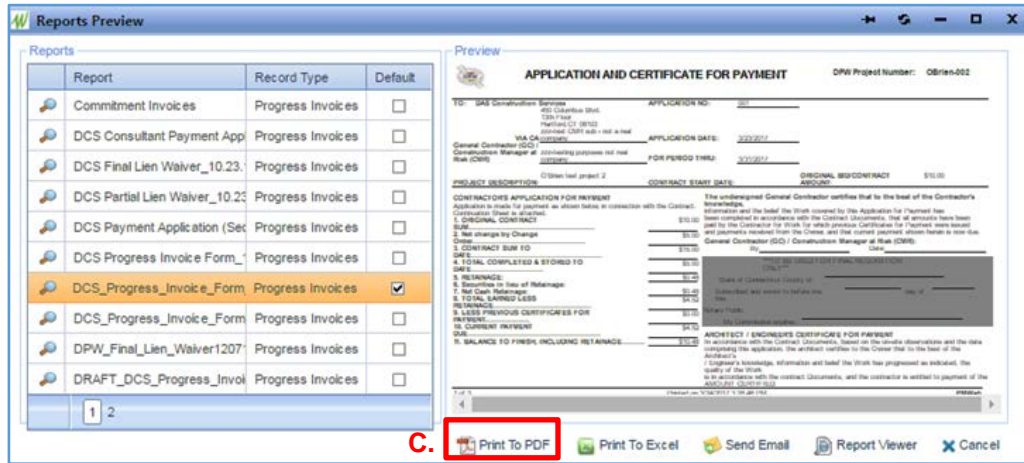
5. To print a hard copy of the Payment Application:
  - A. Click the dropdown arrow to the right of the print icon;
  - B. Click “View Reports” to open the “Reports Preview” dialogue box.

**Figure 710.16.H**



- C. Click the “Print to PDF” button to generate a copy of the Payment Application for printing.

**Figure 710.16.I**



After the Payment Application is signed it should be uploaded as an attachment to the Payment Application record ([See Section 100.7 Attachments – Upload & Link Files in the Attachment Tabs](#)).

# Project Phases & Milestones

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6. After a signed copy of the Payment Application has been uploaded:
  - A. Change the Status of the Payment Application to “Approved”.
  - B. Click the “Save” button.

Once a Payment Application is marked as “Approved”, the next Payment Application from that vendor can be created by:

- C. Clicking the “Create Next” button; and
- D. Click the “Save” button.

Figure 710.16.J

The screenshot shows a web application interface for creating a payment application. The top navigation bar includes a search icon, a save icon (labeled 'B.'), a delete icon, a refresh icon, and a help icon. The main form is divided into two columns. The left column contains fields for Project\* (O'Brien test project 2), Commitment\* (001 - GC test), Company (zzz-testing purposes not real company), Description (test Payment Application), Reference, Invoice # (4), Record #\* (004), Revision (0), Status (Approved, labeled 'A.'), Cost Period (Oct 2016), Category (-- Select --), and Paid In Full (checkbox). The right column contains fields for Invoice Date (Oct-27-2017), Billing Terms (-- Select --), Invoice Due, Invoice Type (-- Select --), Contact, and Comment. A 'Create Next' button is highlighted in red and labeled 'C.'. Below the form is a 'Print Lien Waiver' button and a checkbox for 'Signed Lien Waiver attached'. The bottom of the screen features a navigation bar with tabs for Details, Adjustments, Specifications, Payments, Notes, Attachments, and Notifications. A toolbar at the very bottom includes icons for Edit, Add, Document Manager, Link PMWeb Record(s), Delete Selected Line, Refresh, and Download.

**Note:** A Contract Record and Payment Application must be created for all Invoicing. The Miscellaneous Invoices Feature can no longer be used.

### 710.17 RETAINAGE REDUCTION

To implement an approved retainage reduction in a vendor’s Payment Application, please contact CSS.

# Project Phases & Milestones

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### 760.0 Project Closeout - Substantial Completion

The project closeout process begins in PMWeb once the DAS PM receives a signed certified copy of the Certificate of Substantial Completion. At this time, the DAS PM should access PMWeb Form 7990 – Construction Closeout Document Submission Checklist and begin recording the dates from which the required closeout documents are collected for submission to DAS Project Accounting and to the Office of Legal Affairs, Policy and Procurement.

This section of the manual will focus on how to create and complete a Form 7990 for a project entering the project closeout phase; how to collect and store project closeout documents in PMWeb; and how to closeout project financials in PMWeb.

#### 760.1 Construction Closeout Document Submission Checklist (Form 7990)

The Construction Closeout Document Submission Checklist (Form 7990) is a PMWeb based form that was created to track the status of a project during the closeout process so that Construction Support Services (CSS) can assist DAS PM's with some of the administrative functions of project closeout. Form 7990 contains a list of all project closeout documents and processes that are to be completed to issue the final payment; prepare a project for outside audit; and complete the project closeout process in PMWeb.

The DAS PM should begin filling out Form 7990 when the Certificate of Substantial Completion (Form 7810) has been executed and Substantial Completion Date has been established. Thereafter, any items listed in Form 7990 should be uploaded to the YH7 Project Close-Out file folder in PMWeb the date the document has been completed and signed, and the date the document was completed and signed should be entered into Form 7990.

1. To create a new Project Closeout Checklist:
  - A. Select the "Workflow" module.
  - B. Click on the 7990 Construction Closeout Checklist in the Forms File Folder.
  - C. Select the subject project from the "Projects" dropdown list.
  - D. Click the "Add" button to open Form 7990.

**Figure 760.1.A**





# Project Phases & Milestones

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- E. Select your "Project Name" from the dropdown list; and
- F. Click the "Save" icon to save the Checklist.

Figure 760.1.B

7990  
Construction Closeout  
For Project Accounting

Project Name:

Printed record version number:  Status of this version:

**Instructions:**

**For DAS Project Manager (DAS PM):**

1. Complete the following forms and tasks, as instructed.
2. Insert the date of issuance or completion in the space provided for each of the items listed below.
3. Obtain all required signatures as instructed on each subject Form.
4. Distribute hard and/or electronic copies of each of the Forms as instructed in the subject Form.

Upload a signed and/or completed copy of each of the items listed below to the PMWeb Project Closeout file folder prior to submitting the Final Requisition to CT DAS Project Accounting.

- 2. If a Project Closeout Checklist already exists for your project, it will appear near the top of your screen. To open an existing Form 7990:
  - A. Click on the "Record #" for the subject project.

Figure 760.1.C

Project Name	Project #	Record #	Workflow Status
CTHS - Wilcox Additions & Renovations	BI-RT-843	000001	Draft
O'Brien test project 2	T08-002	000001	Draft
DMHAS - CMHC, 184 Chiller Evaluation	BI-ABH-112A	000001	Draft
CTHS - FOG Separators - Bristol Tech 8	BI-RT-866	000001	Draft
WCSU - Renovations to Litchfield Reside	CF-RD-275	000001	Draft
DEEP - Hammonasset Beach SP - Com	BI-T-605	000001	Draft
O'Brien test project 2	T08-002	000002	Draft
DEEP - Hammonasset Beach SP - West	BI-T-603	000001	Draft

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3. To complete Form 7990:
  - A. Follow the Instructions provided at the top of the Form; and
  - B. Enter a date next to the respective Item No.; or

**Figure 760.1.D**

Project Name: <input type="text" value="Select Project"/>		Status of this version: <input type="text" value="Draft"/>		
PMWeb record version number: <input type="text"/>		(Please only mark one version as "Approved".)		
<b>Instructions:</b>	<b>For DAS Project Manager (DAS PM):</b>			
<b>A.</b>	<ol style="list-style-type: none"> <li>1. Complete the following forms and tasks, as instructed.</li> <li>2. Insert the date of issuance or completion for the final phase of the subject project in the space provided for each of the items listed below.</li> <li>3. Obtain all required signatures as instructed on each subject Form.</li> <li>4. Distribute hard and/or electronic copies of each of the Forms as instructed in the subject Form.</li> <li>5. When any of the items listed below has been completed and signed, upload a copy of said document to the YH7 Project Close-Out file folder in PMWeb and notify the Director of Construction Support Services (CSS), via email, that the document has been uploaded. Distribute hard copies of the required forms to DAS Project Accounting as instructed in Section 10.0 of the subject form</li> </ol>			
	<b>Item No.</b>	<b>Item Description:</b>		
<b>Date Issued or Completed</b>				
<b>B.</b>	<input style="border: 2px solid red;" type="text"/> <input type="text"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr style="background-color: #f2f2f2;"> <td style="width: 10%; text-align: center;">1.0</td> <td><b>Certificate of Compliance Part 2 – Construction Phase (7150):</b> Certification by the Consultant, the General Contractor (GC) / Construction Manager at Risk (CMR) / Design-Builder (D-B), and the CT DAS Commissioner that the "Completed Project" or the "Designated Portion of the Work", is in substantial compliance with the approved plans and specifications and the requirements of the Connecticut State Building Code and all other applicable codes as required by Chapter 541, Connecticut General Statutes.</td> </tr> </table>	1.0	<b>Certificate of Compliance Part 2 – Construction Phase (7150):</b> Certification by the Consultant, the General Contractor (GC) / Construction Manager at Risk (CMR) / Design-Builder (D-B), and the CT DAS Commissioner that the "Completed Project" or the "Designated Portion of the Work", is in substantial compliance with the approved plans and specifications and the requirements of the Connecticut State Building Code and all other applicable codes as required by Chapter 541, Connecticut General Statutes.
1.0	<b>Certificate of Compliance Part 2 – Construction Phase (7150):</b> Certification by the Consultant, the General Contractor (GC) / Construction Manager at Risk (CMR) / Design-Builder (D-B), and the CT DAS Commissioner that the "Completed Project" or the "Designated Portion of the Work", is in substantial compliance with the approved plans and specifications and the requirements of the Connecticut State Building Code and all other applicable codes as required by Chapter 541, Connecticut General Statutes.			

- C. Fill in the requested information in the space provided.

**Figure 760.1.E**

<b>Date Issued or Submitted</b>	17.0	<b>Other Closeout</b>				
	17.1	<b>Percent for Art Contract:</b>				
		The Art in Public Spaces program requires that not less than 1% of the cost of construction or renovation of publicly accessible state buildings be allocated for the commission or purchase of artwork for that building. With reference to the Percent for Art Program, please provide the following information:				
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Yes <input type="checkbox"/></td> <td style="width: 50%;">No <input type="checkbox"/></td> </tr> <tr> <td>Yes <input type="checkbox"/></td> <td>No <input type="checkbox"/></td> </tr> </table>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>		<ol style="list-style-type: none"> <li>1. Does the Percent for the Art Program apply to this project? If no, proceed to Section 17.2.</li> <li>2. Has an Artist been selected by the Department of Economic and Community Development (DECD) for this project?</li> <li>3. Has a contract been executed by and between the Artist, DECD, and DAS? If so, please provide the date of execution in the space provided.</li> <li>4. If a schedule has been established for the Percent for Art Project, please provide the estimated date of completion in the space provided.</li> </ol>
Yes <input type="checkbox"/>	No <input type="checkbox"/>					
Yes <input type="checkbox"/>	No <input type="checkbox"/>					
<input style="border: 2px solid red;" type="text"/> <input type="text"/>		<p>In the space below, please provide a brief summary of the status of the Percent for Art Project:</p> <div style="border: 2px solid red; height: 80px; width: 100%;"></div>				

Click the "Save" icon whenever any changes are made to the Checklist.

# Project Phases & Milestones

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Once the date issued or completed has been entered into Form 7990, the issued or completed document should be uploaded to the YH7 Project Close-Out File Folder.

1. To access and upload a closeout document to the YH7 Project Close-Out file folder:
  - A. Click on the “Project Selection Box” and select the project number from the dropdown list to open the project (if you are already in the project, proceed to the next step) for which you wish to upload closeout documents.
  - B. Select the “Toolbox” module.
  - C. Click on the “Document Manager” tool from the Toolbox.
  - D. Click on the “+” symbol to the left of the file folder to open the “Project” file folder.
  - E. Perform the same action to open file “5 DPW Y Construction Phase Folders,” and then open the “YH7 Project Close-Out” file folder.
  - F. Click on the file folder where you want to upload a project closeout form.

Figure 760.1.F



Follow the steps in Section 100.7, Attachments – Upload & Link Attachments in the Attachments tab for guidance on how to upload documents to the project closeout folders.

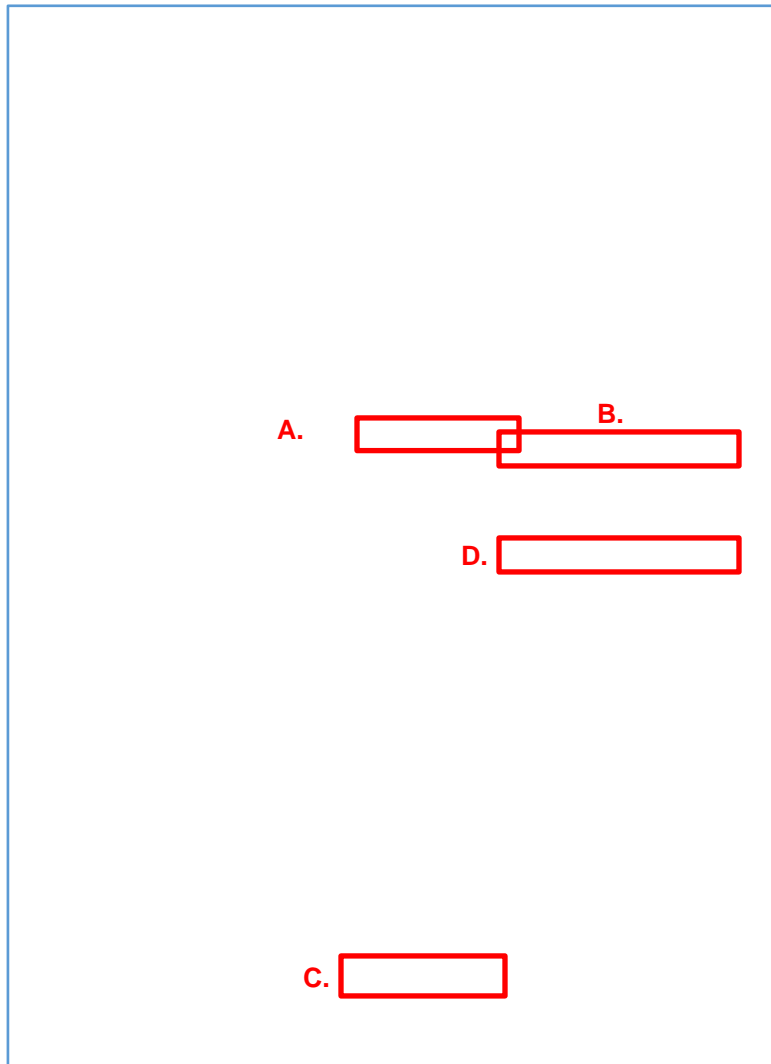
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A separate file folder should exist for each of the project closeout documents. If a project was created from a template that does not have a specified file folder for each project closeout document listed in Form 7990, a new subfolder will need to be created for that file in the “YH7 Project Close-Out” file folder.

2. To create and name a new subfolder within the “YH7 Project Close-Out” file folder, do the following:
  - A. Right click on the “YH7 Project Close-Out” file folder.
  - B. Click on “New Folder” from the menu to create a new file folder.
  - C. Find the “New Folder” within the list of file folders and right click on the file folder.
  - D. Click “Rename” from the menu to rename the new file folder.
  - E. Type the name you want for the new file folder (not depicted).

**Figure 760.1.G**



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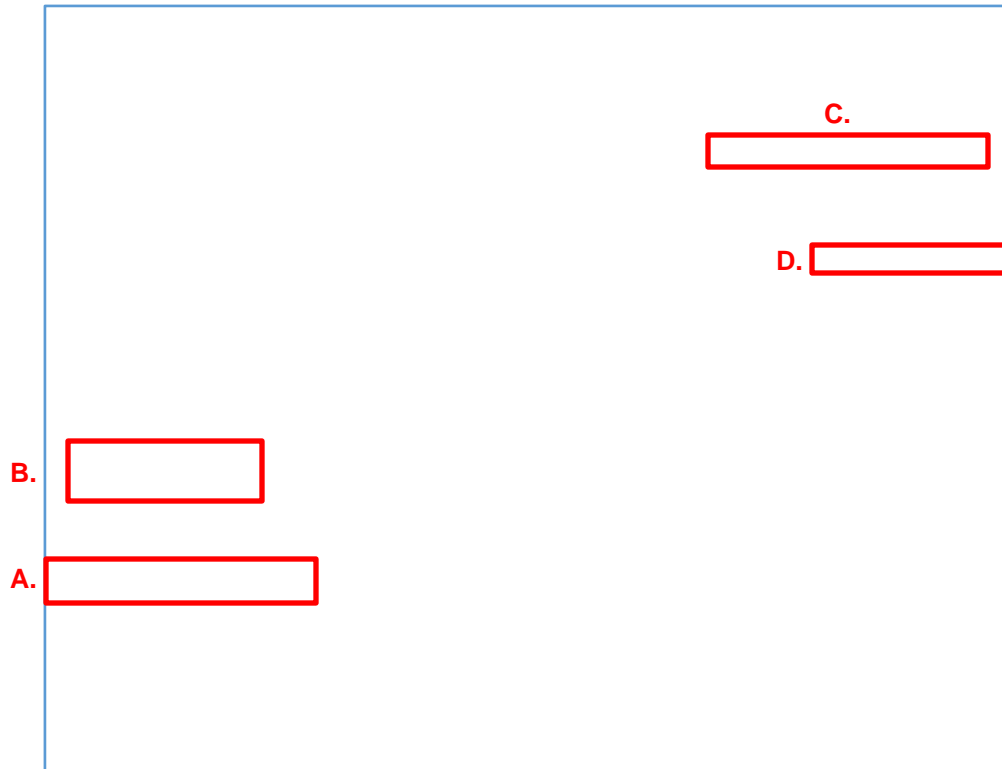
### 760.2 Financial Closeout, Project Complete

After final payment has been made on a project in CORE CT, the DAS PM shall notify the DAS/Construction Services Associate Accounts Examiner (AAE) to begin an internal audit of the project budget to ensure that all line item entries posted in CORE CT have correspondingly been posted in PMWeb.

Upon completion of the internal audit, the AAE will send an email notification to the PM through PMWeb, with a copy to the ADPM, that the financial records review is complete. The email will include a link to the “Review Items” form for the project in PMWeb, which is the document used to track the status of the project financial records, and an excel workbook with a detailed analysis of the financial records review. These items can also be accessed directly in PMWeb.

1. To access the Review Items directly in PMWeb, proceed as follows:
  - A. Select the “Cost Management” module.
  - B. Find the “Forms” file folder and Click on the “Review Items” tool.
  - C. Click on the “Projects” dropdown list and select the project for which you wish to see “Review Items.”
  - D. Click on the “Record #” for the subject project to open the Review Items for that project.

**Figure 760.2.A**



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See **Figure 760.2.B** below for a sample of the Review Items Form.

1. The Review Items form shall be completed as follows:

The top of the Review Items form will be filled out by the AAE.

A. The “Workflow Status” dropdown list will define the status of the item under review. The Workflow Status is updated throughout the review process. The following is a list of Workflow Status definitions and the required action to update the status:

- Draft – The item has not been reviewed by the AAE. No action has been taken.
- Submitted – AAE review of project financials is complete. AAE updates Workflow Status to “Submitted” and sends notification to PM/ADPM, through PMWeb, that review is complete. See Step 4 below to determine if corrective action is required.
- Returned – PM has taken action to resolve financial discrepancies, updates Workflow Status to “Returned”, and sends notification to ADPM, through PMWeb, of action taken. See Step 5 below for next steps.
- Approved or Rejected – ADPM approves or rejects the corrective action, updates Workflow Status to “Approved” or “Rejected”, and sends notification to PM and AAE, through PMWeb, of approval or rejection.
- Resubmitted – PM takes additional action to resolve rejected submission, updates Workflow Status to “Resubmitted” and sends notification to ADPM, through PMWeb, of action taken.

If there are any discrepancies between the record documentation in CORE CT and PMWeb, and / or any incomplete or missing records, the AAE will:

B. Make note, in the “Comments” section, that a detailed financial records analysis has been added as an attachment (A.1) to the Review Items form. The financial records analysis will list all items that require corrective action.

**Figure 760.2.B**

The diagram illustrates the layout of the Review Items Form. It consists of a large blue rectangular frame. Inside this frame, there are two red rectangular boxes. The first box, labeled 'A.', is a vertical rectangle positioned in the lower-left area. The second box, labeled 'B.', is a horizontal rectangle positioned below box 'A.', extending further to the right.

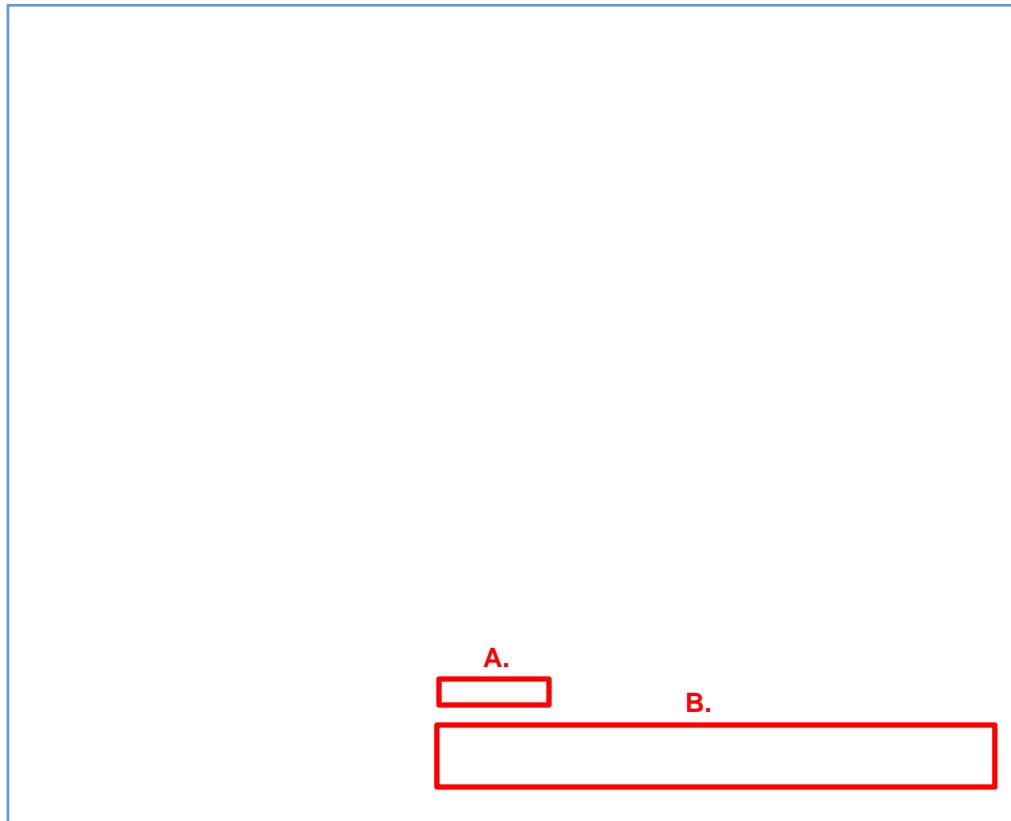
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**Findings from the analysis that require corrective action will need to be resolved before the project can be closed in PMWeb.**

2. The bottom of the Review Items form is filled out by the PM.
  - A. When the PM is ready to submit/resubmit a notification to the ADPM of the corrective action taken, he/she should enter the date of submission in the “Date PM Replied” field.
  - B. The corrective action taken should be listed in the “Corrective Action Taken” field, or if applicable, attach documentation of corrective action taken under the Review Items Attachments tab ([See Section 100.7 Attachments – Upload & Link Files in the Attachment Tabs](#)) and make reference to the attached documents in the “Corrective Action Taken” field.

**Figure 760.2.C**



Click the “Save” icon whenever any changes are made to Review Items.

Once all corrective actions have been updated to “Approved” in Workflow Status, the ADPM will send a notification to the PM and the AAE, through PMWeb, that the corrective action for all project financial records is complete and have been approved. The AAE will then conduct a final review of the financial records and if it is determined that no further action is required, the audit will be completed.

At this point, CSS can closeout the project in PMWeb and change the status of the project to “Inactive,” thus closing the project in PMWeb.

- 3.0** REFERENCE DOCUMENTS
- 3.1 [PMWeb Quick Start Guide](#)



## Appendix I – Form 1110, File Folder Headers

Pale Green (PG)	ADMINISTRATION	Green (G)	INITIATION / SELECTION / CONTRACT PHASES	Blue (B)	DESIGN PHASES	Red (R)	BID PHASE	Yellow (YH)	(Hartford) CONSTRUCTION PHASE	Yellow (YF)	(Field) CONSTRUCTION PHASE
	<b>Folder Title and Contents</b>		<b>Folder Title and Contents</b>		<b>Folder Name and Contents</b>		<b>Folder Name and Contents</b>		<b>Folder Name and Contents</b>		<b>Folder Name and Contents</b>
<b>PG1</b>	<b>Project Financials</b>	<b>G1</b>	<b>Project Initiation</b>	<b>B1</b>	<b>Pre-Design</b>	<b>R1</b>	<b>Permits / Approvals / Agreements Folder</b>	<b>YH1</b>	<b>Construction Reports / Meeting Minutes</b>	<b>YF1</b>	<b>Construction Reports / Meeting Minutes</b>
	Budget Spreadsheets Update		Bonding, Allotment Notices B100 Budget(s) (OPM & DCS) Project Work Plan Master PM Project Schedule Project Directory		Master Plan Feasibility Studies Program Traffic Studies Borings / Geo-technical Report Environmental Reports Hazardous Material Reports		Bid Data Form Bid Release Form Building Permit (As Applicable) Certificate of Compliance Code Modification Approvals Certificate of Occupancy Temporary Certificate of Occupancy Statement of Special Inspections Demolition Permits Environmental Permits Traffic Permits Easements / Right of Ways		Monthly Progress Status Reports / Logs Progress Photos Project Meeting Minutes Daily Field Reports		Monthly Progress Status Reports / Logs Progress Photos Project Meeting Minutes Daily Field Reports
<b>PG1.1</b>	<b>Project Tracking Folder</b>	<b>G2</b>	<b>A/E Selection</b>	<b>B2</b>	<b>Schematic-Design</b>			<b>YH2</b>	<b>Payment</b>	<b>YF2</b>	<b>Payment</b>
	Project Tracking Updates		RFQ Documents QBS Screening Documents QBS Interview Documents Formal QBS Submittal Booklet		A/E Submittals A/E Cost Estimate(s) DCS / CA / OSBI/ OSFM / Agency / Threshold / Misc. Reviews and A/E Responses				Monthly Applications Payment Certified Payrolls Monthly Lien Waivers Schedule of Values CPM Schedules Retainage Reductions		Monthly Applications Payment Certified Payrolls Monthly Lien Waivers Schedule of Values CPM Schedules Retainage Reductions
<b>PG2</b>	<b>A/E Invoice Folder</b>	<b>G2.1</b>	<b>A/E Contract Folder</b>	<b>B3</b>	<b>Design Development</b>	<b>R2</b>	<b>Bid Folder</b>	<b>YH3</b>	<b>Change / Clarification</b>	<b>YF3</b>	<b>Change / Clarification</b>
			Contract Scope Meeting Minutes Fee Proposal(s) Commission Letters Amendments Task Letters SPRB Submittal Packages		A/E Submittals A/E Cost Estimate(s) DCS / CA / OSBI/ OSFM / Agency / Threshold / Misc. Reviews and A/E Responses		Pre-Bid Conference Minutes Bid Addenda Bid Tabulation Form Bid Proposal Forms (3 Lowest Bidders) General Contractor Qualification Statements (3 Lowest Bidders) Named Sub-Contractors Qualification Statements (3 Lowest Bidders) Letter of Recommend		Supplemental Instructions Requests for Information Proposals Requests Change Order Proposals / Worksheets Change Orders Construction Change Directives Non-Compliance Notices		Supplemental Instructions Requests for Information Proposals Requests Change Order Proposals / Worksheets Change Orders Construction Change Directives Non-Compliance Notices
<b>PG2.1</b>	<b>A/E In - Correspondence</b>	<b>G3</b>	<b>CA Selection</b>	<b>B4</b>	<b>Construction Documents</b>	<b>R3</b>	<b>Contract Award Folder</b>	<b>YH4</b>	<b>Testing / Inspection Reports</b>	<b>YF4</b>	<b>Testing / Inspection Reports</b>
			RFQ Documents QBS Screening Documents QBS Interview Documents Formal QBS Submittal Booklet		A/E Submittals A/E Cost Estimate(s) DCS / CA / OSBI/ OSFM / Agency, Threshold, and Misc. Reviews and A/E Responses		Contract Award Meeting Minutes Contract Notice to Proceed Pre-Construction Meeting Minutes Misc. Reviews and A/E Responses		Special Inspections Site/Soils Systems Commissioning Alarm / Fire Protection Systems		Special Inspections Site/Soils Systems Commissioning Alarm / Fire Protection Systems
<b>PG2.2</b>	<b>A/E Out - Correspondence</b>	<b>G3.1</b>	<b>CA Contract Folder</b>					<b>YH5</b>	<b>Submittals</b>	<b>YF5</b>	<b>Submittals</b>
			Contract Scope Meeting Minutes Fee Proposal(s) Commission Letters Amendments Task Letters SPRB Submittal Packages						Submittal Log CSI Divisions 1 through 17		Submittal Log CSI Divisions 1 through 17
<b>PG3</b>	<b>CA Invoice Folder</b>	<b>G4</b>	<b>Other Contract Selections Folder</b>					<b>YH6</b>	<b>Issue File</b>	<b>YF6</b>	<b>Issue File</b>
			RFQ Documents QBS Screening Documents QBS Interview Documents Formal QBS Submittal Booklet						CSI Divisions 1 through 17		CSI Divisions 1 through 17
<b>PG3.1</b>	<b>CA In - Correspondence</b>	<b>G4.1</b>	<b>Other Contracts Folder</b>					<b>YF7</b>	<b>Project Close-Out</b>	<b>YF7</b>	<b>Project Close-Out</b>
			Contracts Scope Meeting Minutes Fee Proposals Commission Letters Amendments Task Letters SPRB Submittal Packages						Certificate of Substantial Completion Certificate of Compliance Certificate of Occupancy Certificate of Acceptance Certificate of Completion Insurance Letter to Agency Final Lien Waivers Warrantees Contractor's As-built Drawings Operation & Maintenance Manuals Misc. Reviews and A/E Responses		Certificate of Substantial Completion Certificate of Compliance Certificate of Occupancy Certificate of Acceptance Certificate of Completion Insurance Letter to Agency Final Lien Waivers Warrantees Contractor's As-built Drawings Operation & Maintenance Manuals Misc. Reviews and A/E Responses
<b>PG3.2</b>	<b>CA Out - Correspondence</b>										
<b>PG4</b>	<b>Other Contracts Invoices Folder</b>										
	Threshold Peer Invoices Special Inspections Invoices Other Invoices										
<b>PG4.1</b>	<b>Other Contracts In-Correspondence</b>										
<b>PG4.2</b>	<b>Other Contracts Out-Correspondence</b>										
<b>PG5</b>	<b>Agency In - Correspondence</b>										
<b>PG5.1</b>	<b>Agency Out - Correspondence</b>										
<b>PG6</b>	<b>Legal of In-Correspondence</b>										
<b>PG6.1</b>	<b>Legal of Out-Correspondence</b>										
<b>PG7</b>	<b>Evaluations Folder (Orange Sticker)</b>										
	A/E CA Contractor										