

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

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

**eBuilder - Trimble Unity Construct
Guidance Manual
Volume IV**

eBuilder User Guide – Volume IV – Revisions and Additions

Section 1: Basic User Navigation - Includes additional instructions on accessing Processes.

Section 7A (New): General Instructions on Document Uploads in the Processes Module - Provides information for how to upload files in the Processes module.

Section 7B (New): General Instructions on Comments and Requested Comments in Processes - Provides information on entering comments and requesting comments in the Processes module.

Section 7C (New): Processes Notification E-Mails - Provides additional information on email notifications from Process instances.

Section 10: 1135 On-Call Selection - Task Letter Approval – Detail added on adding a task letter commitment to the project budget. Steps added to the process for the solicitation of proposals from multiple On-Call Consultants if the estimated Consultant Fee is greater than or equal to \$300,000.

Section 13B (New): Filing Environmental Reports - Describes how to use the Process for filing environmental reports.

Section 15A (New): 3050 Delegated Design - Describes how to use the 3050 Delegated Design process. Replaces the 3050 Delegated Design form on the DAS Forms Library.

Section 17: Schedule of Values - Contains additional instructions for consultant contingency SOV line creation, as part of the SOV breakdown for consultant commitments.

Section 17A (New): Consultant Contingency Transfer (CntTr) - Describes the process for proposing, reviewing and approving transfers of funds from a consultant contingency SOV line to a new SOV line.

Section 17B (New): Retainage Reduction - Describes how to implement an approved retainage reduction in the e-Builder commitment. Note that this should be done prior to the submission of any new 7390 Application and Certification for Payment process instance.

Section 17C (New): Retainage Release - Describes how to populate retainage release amounts in the Retainage Upload step of the 7390 Application and Certification for Payment process.

Section 19A: 7390 Application and Certification for Payment - GC and CMR Users - Changed to reflect new workflow steps for retainage release. (See Section 17C, as well.) Describes how to note a payment application as being at substantial completion or being Final payment.

Section 19B: 7390 Application and Certification for Payment - CA Users - Removes the question of which agency pays for the invoice, as part of process streamlining.

Section 19C: 7390 Application and Certification for Payment - A/E Users - Removes the question of which agency pays for the invoice, as part of process streamlining.

Section 19D: 7390 Application and Certification for Payment – PMs - Removes the question of which agency pays for the invoice, as part of process streamlining, and adds instructions for configuring a project and commitment for CHEFA projects.

Section 19F: 7390 Application and Certification for Payment - Final Payment Application - Reflects changes in how final payment applications are processed in workflow.

Section 20: 7310 Request for Information - Changed to reflect process streamlining, especially the use of file fields to be the attachments to the PDF created for the record instead of using all files in the Documents tab of the process instance.

Section 20A (New): Agency Change Requests - Process for Agency Change Requests that replaces forms 3055 and 7055 on the DAS Forms Library. The 7055 branch of the process spawns a Proposal Request, similar to RFI process.

Section 21: Proposal Requests - Updated to reflect process streamlining, especially the removal of fields not needed at the Proposal Request part of process. Agency Change Request information was also added.

Section 22 (New): CCDs - New instructions for the CCD branch of the “PCO” process. Reflects updates to the approval process.

Section 23 (New): COPs - New instructions for the COP part of the “PCO” process. Reflects updates to the approval process and the use of file fields to be the attachments to the PDF created for the record instead of using all files in the Documents tab of the process instance.

Section 24 (New): Change Orders - New instructions for the Change Orders process. Reflects streamlining of the process, including removal of unneeded file uploads, adding Agency Change Request information and a refinement to remove a GC/CMR process step. Reflects the use of file fields to be the attachments to the PDF created for the record instead of using all files in the Documents tab of the process instance.

Section 26: 7989 AA Project Closeout – Fee confirmation section added. Workflow steps added for BO Accounting and Purchasing to close POs. Collection of the Asset Value Memo moved to the end of the closeout process. Steps added for the PM and BO to complete the Asset Value Memo.

Section 27: 7990 Project Closeout - Workflow steps added for BO Accounting and Purchasing to close POs.

Section 27A (New): 7995 Archival Data for Project Documentation - Replaces to the 7995 Archival Data for Project Documentation form on the DAS Forms Library.

Section 28 (New): Reports - Describes, in general, how to access e-Builder Reports.



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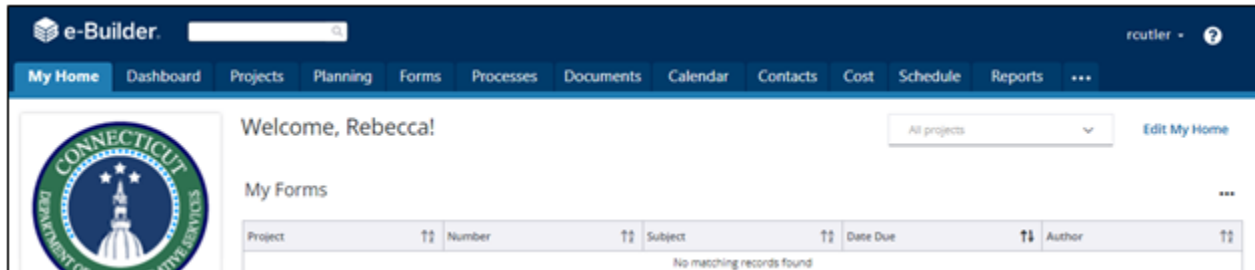
PART I: PROJECT SET UP



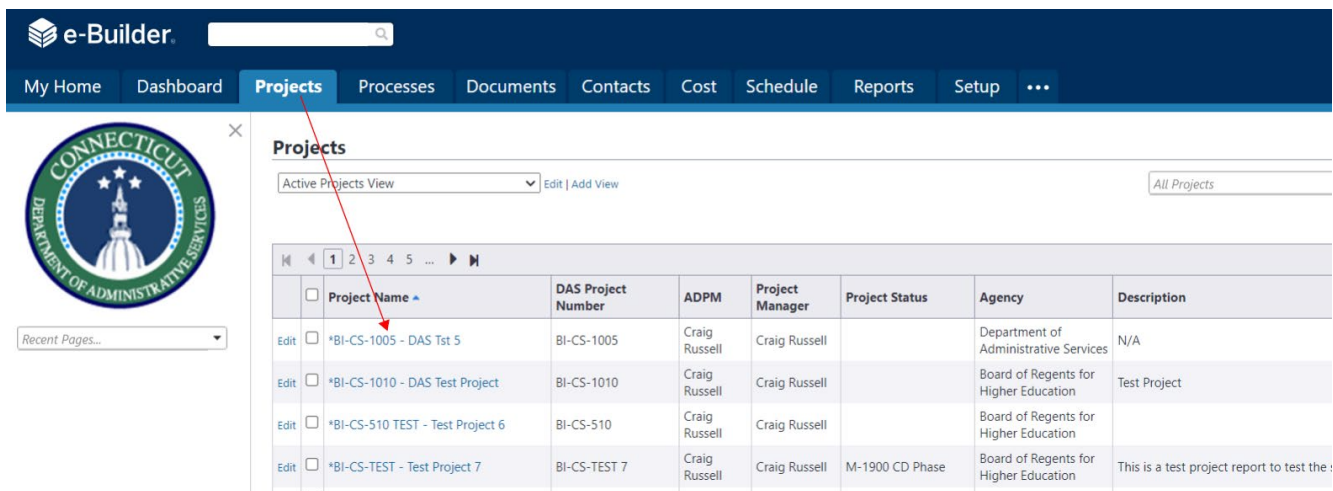
Section 1: Basic User Navigation

1.01 Accessing the project

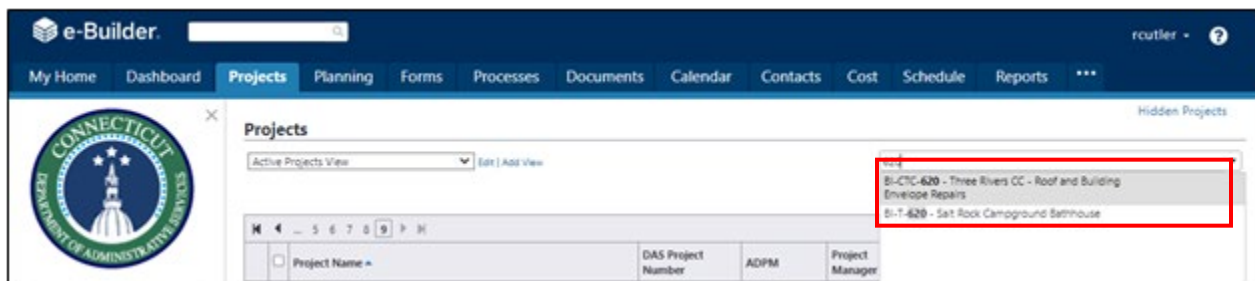
Log in to e-Builder: <https://gov.e-builder.net>.



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



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





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

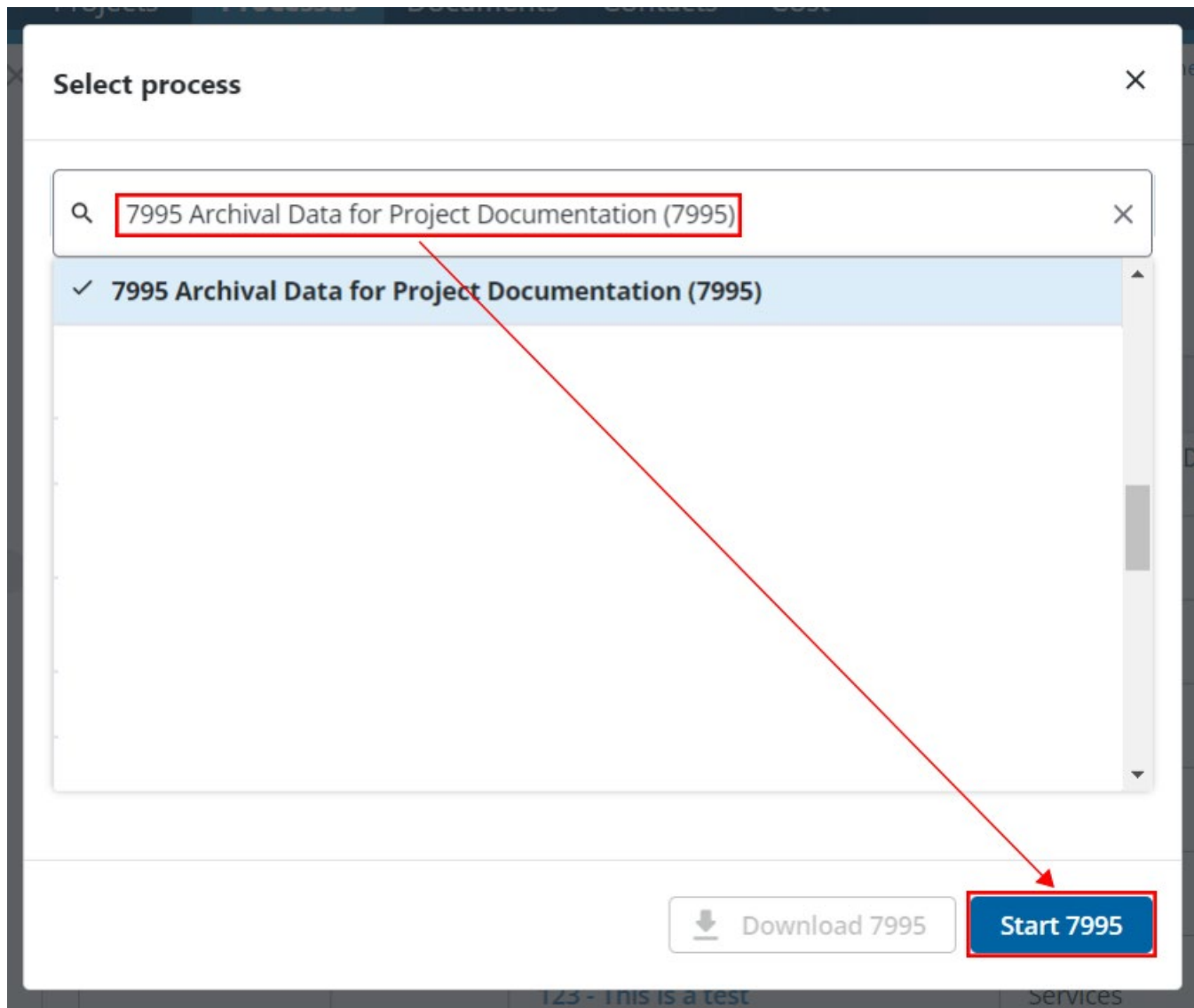
1.02 Navigating to the Project Processes Module and Initiating a Process Instance

In the Project Menu in the left panel. Click “Processes.” Then, to the upper right, click “Start process.”



In the “Select process” pop up window, search for and select the name of the Process type needed. Then click the blue button in the lower right that says “Start [process prefix]”.

See more details on how to use the Processes module, starting at [Section 7](#).





Section 2: Project User Access

2.01 For DAS Project Managers:

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

2.02 For Agency Users:

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

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

2.03 For Consultants and Contractors

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

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

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



Section 3: (Reserved for future use)

3.01 Coming Soon



Section 4: Add Funding Sources

4.01 Accessing the Project

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

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

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



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

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

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

Edit Commitment

Commitment Overview

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

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

Other Details

Commitment Date: [Calendar]
Scope of work: [Text Area]
* Default Retainage Percent: 0.00
Notice to Proceed Date: [Calendar]
Retainage amount: [Input] Support manual entry

Commitment Items

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



Section 5: Edit Budget Details

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

5.01 Accessing the project

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

5.02 Creating a new Budget Change entry

After accessing the project, under the Project Menu:

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

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

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

Status: Approved
 Budget Control: Controlled Total

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

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

Show: All Show Filter Export Mail Merge Add

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

Mail Merge Add



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

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

Add Change Details

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

On the next screen, click, “Continue.”

Add Change Details

Confirm Add All Budget Items

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

Continue Go Back



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

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

Edit Change Details

F Save Cancel

Project Name:	BI-2B-127 - This is a test		Status:	Draft	
* Budget Change Number:	<input type="text" value="002"/>		* Date Of Change:	<input type="text" value="12.18.2023"/>	
* Reason Code:	Original Budget (Original)				
* Description:	<input type="text" value="Completing the budget for the test project"/>				

Budget Change Items

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



5.03 Navigating back to a draft budget change

To access a previously saved budget change entry:

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

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

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

Status: Approved
 Budget Control: Controlled Total

Quick Cost Summary

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

Budget Line Items (8) Budget Changes (2) Custom Fields (0) Notes (0) Documents (0) Forms (0) Processes (0)

Show: All Show Filter

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

5.04 Approving a budget change

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

Budget Change Details

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

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

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

Quick Cost Summary

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

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

Confirm approval

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

Approval date: 12.19.2023

Note:

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

Check spelling Approve Cancel



5.05 Budget should reflect all approved changes.

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



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

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

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

Status: Approved
 Budget Control: Controlled Total

Quick Cost Summary

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

Budget Line Items (18)

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



Section 5A: Tracking DAS Fees

5A.01 Accessing the project

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

5A.02 Creating a Commitment Record for DAS Fees

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

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

The screenshot shows the 'Commitments For' page for project BI-3B-126. The 'Project Menu' on the left includes 'Commitments' (circled in red). The main content area features a 'Commitment Summary' table with the following data:

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

Below this is a 'Quick Cost Summary' table:

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

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

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

The 'Add Commitment' form is shown with three red boxes highlighting specific areas:

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



A. Add Commitment

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

Commitment Overview Save

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

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

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

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

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

B. Add New Commitment Item

Under the “Add New Commitment Item” section:

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

Add New Commitment Item

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

Add



B.2. Click on Cost Code 12.000.

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

Clear Selection Close

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

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

Add



C. Commitment Items

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

Commitment Items

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

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

Add Commitment

Commitment Overview

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

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

[Save](#) [Cancel](#)

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

Commitment Details

Commitment Overview | Other Details | Financial Summary

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

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

Status: Draft
 Company: Department of Administrative Services
 Company Number: DAS001
 Contact:

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

Show Filter | Export

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

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



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

Commitment Details

Confirm Approval

Are you sure you want to approve the commitment?

Approval Date
 [12.12.2023]

Add a note:

5A.03 Entering DAS Fees Actual Costs

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

Commitments For BI-38-126 - This is a test

Original Commitments:	10.00	Pending Commitment Changes:	0.00
Approved Commitment Changes:	0.00	Projected Commitment Changes:	0.00
Non-commitment Costs:	0.00		
Current Commitments Value:	10.00	Projected Commitments Value:	10.00

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

#	Description	Company	Date	Status	Commitment Type	Commitment Amount	Current Commitment	Projected Commitment	Actuals Approved	Remaining Balance
DAS5001-38126	DAS Fees on project 38-126	Department of Administrative Services	12.12.2023	Approved	DAS Fees	10.00	10.00	10.00	0.00	10.00
Totals						10.00	10.00	10.00	0.00	10.00



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

The screenshot shows the 'Commitment Details' page in e-Builder. The 'Actual Costs (0)' tab is highlighted with a red cloud. Below the tab, there is a table with columns for Invoice #, Description, Date Received, Status, and Invoice Amount. A red cloud highlights the 'Add' button in the bottom right corner of the table area.

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

The screenshot shows the 'Add Invoice' page. In the 'Invoice Overview' section, the 'Status' dropdown is set to 'Approved' (highlighted with a red cloud). The 'Date Received' field contains '12.12.2023' (highlighted with a red cloud). The 'Description' field contains 'DAS fees from ___ to ___' (highlighted with a red cloud). In the 'Invoice Items' table, the 'Invoice Amount' for the first item is '1.00' (highlighted with a red cloud).

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

The screenshot shows a confirmation dialog titled 'Are you sure you want to approve the invoice?'. It includes an 'Approval Date' field with the value '12.12.2023' (highlighted with a red cloud). At the bottom, there are two buttons: 'Yes, Approve the Invoice' (highlighted with a red cloud) and 'No, Cancel'.

- [Deprecated step.]



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

Commitment Details

Commitment Overview | Other Details | Financial Summary

Project: 8I-38-126 - This is a test
Commitment Type: DAS Fees
Commitment Number: DAS001-38126
Unit Cost Options: Lump Sum Amount
Description: DAS Fees on project 38-126
Commitment Control: Controlled By Line Item
Created: 12.12.2023 (Timothy O'Brien)

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

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

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



5A.04 Manually Entering a Commitment Change

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

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

The screenshot shows the e-Builder interface. On the left, the 'Project Menu' has 'Commitments' highlighted with a red circle. The main area shows 'Commitments For BI-38-126 - This is a test'. Below this is a 'Commitment Summary' table and a 'Quick Cost Summary' table. A table below these shows commitment details with columns for #, Description, Company, Date, Status, Commitment Type, Commitment Amount, Current Commitment, Projected Commitment, Actuals Approved, and Remaining Balance. The row for 'DAS001-38126 DAS Fees on project 38-126' is circled in red.

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

The screenshot shows the 'Commitment Details' screen. The 'Commitment Overview' tab is active, showing project and commitment information. Below this, the 'Commitment Changes' tab is selected, showing a table with columns for Description, Reason For Change, Applies To, Status, Date Of Change, and Change Amount. The 'Add' button at the bottom right is circled in red.

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

The screenshot shows the 'Add Change Details' page. It contains fields for Project Name, Commitment, Commitment Change Number, Date Of Change, and Description. The 'Reason Code' dropdown menu is set to 'Admin Correction (Original)'. The 'Save and Add All Items' button is circled in red.



- On the next screen, click "Continue."

Add Change Details

Confirm Add

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

Continue **Go Back**

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

Edit Change Details

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

Status: Draft
 * Reason Code: Admin Correction (Original)

Save **Cancel**

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

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

Commitment Change Details

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

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

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

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

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

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

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



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

Commitment Change Details

Approve Commitment Item(s)

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

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

Approval Date: [12.12.2023]

Add a note:

Click continue to change the status to Approved.

Check Spelling Continue No, Cancel

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

Commitment Change Details

Project: 81-38-126 - This is a test	Status: Approved
Commitment: DAS001-38126 - DAS Fees on project 38-126	Company: Department of Administrative Services
Change Number: 001	Date of Change: 12.12.2023
Reason Code: Admin Correction	Created: 12.12.2023 (Timothy O'Brien)
Applies To: Original Commitments	Approved: 12.12.2023 (Timothy O'Brien)
Description: This DAS fees change	

Quick Cost Summary

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

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

Show Filter Export

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



Section 5B: PM Creation of Other Commitments

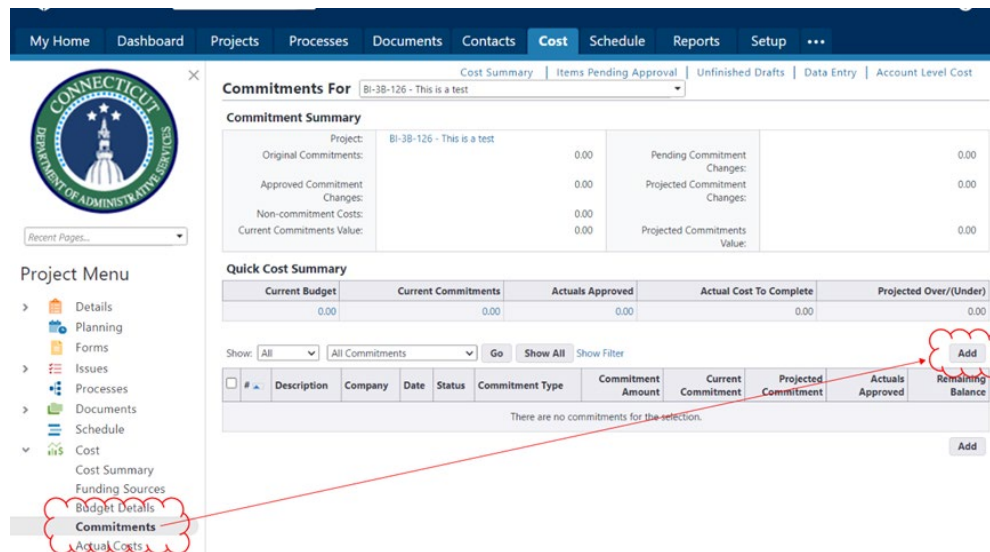
Generally, commitments are by Construction Support Services as part of established procedures. There are some circumstances, such as for purchase orders or when the commitment was approved prior to the migration into e-Builder, when a commitment record may need to be entered manually. PMs are encouraged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

5B.01 Accessing the project

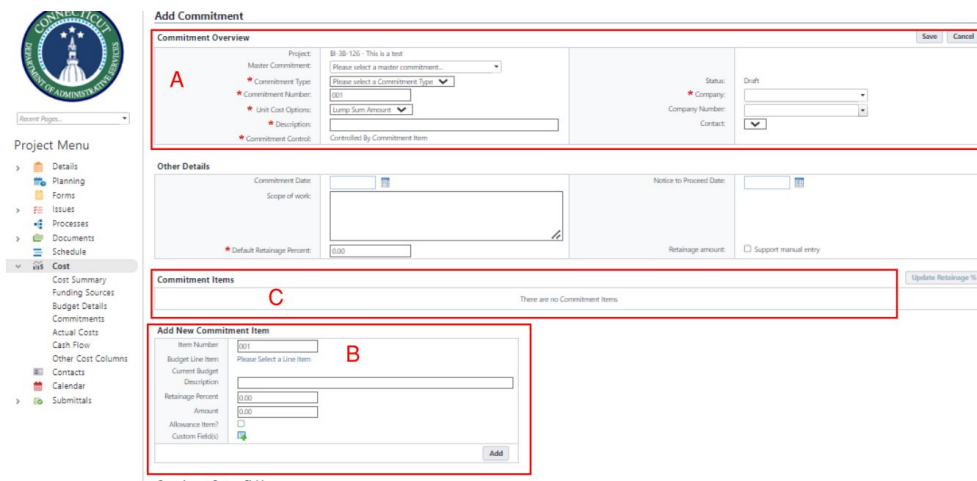
Follow the instructions provided in [Section 1](#) to Access the Project.

5B.02 Creating a Commitment Record

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



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





A. Add Commitment

- A.1. Enter the “Commitment Type” field. Where appropriate for older commitments not already in e-Builder, ensure that “CMR GMP” is selected for CMR GMP commitments, and that “Prime Contractor Contract” is selected for DBB GC commitments. The other options are for consultants and other commitments.

Commitment Overview Save

Project:	BI-38-126 - This is a test	Status:	Draft
Master Commitment:	Please select a master commitment...	* Company:	Department of Administrative Service
* Commitment Type:	DAS Fees	Company Number:	DAS001
* Commitment Number:	DAS001-3B126	Contact:	Select a contact...
* Unit Cost Options:	Lump Sum Amount		
* Description:			
* Commitment Control:	Controlled By Commitment Item		

- A.2. In the “Company” field, start to type the name of the company until you see it in the drop-down menu that appears, and click on the correct company name. Note that the Company Number will populate automatically. If the company does not appear on the list, contact Construction Support Services.
- A.3. Delete the value that auto populated into the Commitment Number field and enter a new value, using the following format. Start with the five-digit “company number”, then type one dash and then type a unique indicator for this particular commitment, such a “01”. So, the format will be 00000-00.
- A.4. In the “Description” field, type a prose description, such as, “DAS Fees on project 3B-126.” The “Unit Cost Options” field should not be changed.

B. Add New Commitment Item

Under the “Add New Commitment Item” section:

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

Add New Commitment Item

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

Add

- B.2. Click on the applicable Cost Code.

Budget Line Items

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



B.3. Enter the Amount to be committed.

Add New Commitment Item

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

B.4. If the “Funding Rule” option appears, click on the arrow next to this and select the correct funding source, such as “State Bond Funds”.

Add New Commitment Item

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

Add

B.5. Click add to cause the entered information to appear in the Commitment Items section of the form.

Add New Commitment Item

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

Add

C. Commitment Items

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

Commitment Items

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



C.1. If the information is correct, click "Save."

Add Commitment

Commitment Overview

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

Master Commitment: Please select a master commitment...

* Commitment Type: DAS Fees

* Commitment Number: DAS001-38126

* Unit Cost Options: Lump Sum Amount

* Description:

* Commitment Control: Controlled By Commitment Item

Status: Draft

* Company: Department of Administrative Services

Company Number: DAS001

Contact: Select a contact...

Save **Cancel**

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

a. To approve the DAS fees commitment, click, "Approve."

Commitment Details

Commitment Overview | Other Details | Financial Summary

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

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

Commitment Type: DAS Fees

Commitment Number: DAS001-38126

Unit Cost Options: Lump Sum Amount

Description: DAS Fees on project 38-126

Commitment Control: Controlled By Line Item

Created: 12.12.2023 (Timothy O'Brien)

Status: Draft

Company: Department of Administrative Services

Company Number: DAS001

Contact:

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

Show Filter | Export

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

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

Commitment Details

Confirm Approval

Are you sure you want to approve the commitment?

Approval Date: [12.12.2023]

Add a note:

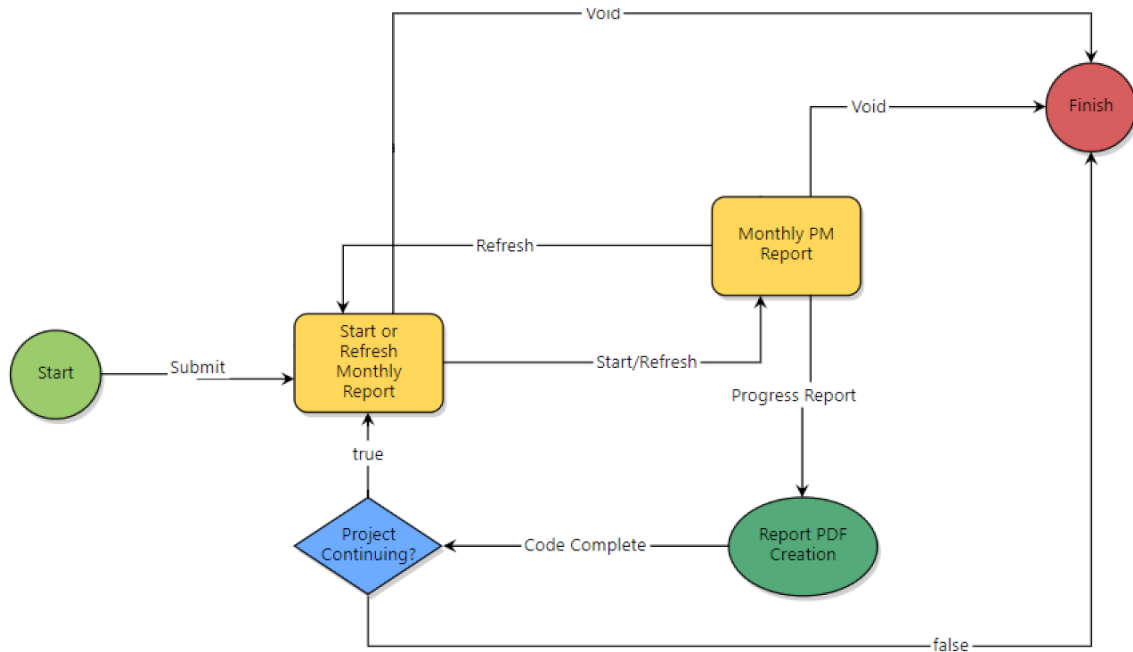
Check Spelling **Yes, Approve the Commitment** **No, Cancel**



Section 5C: Cost To Date Report

5C.01 Coming Soon

Section 6: Project Manager Monthly Reports



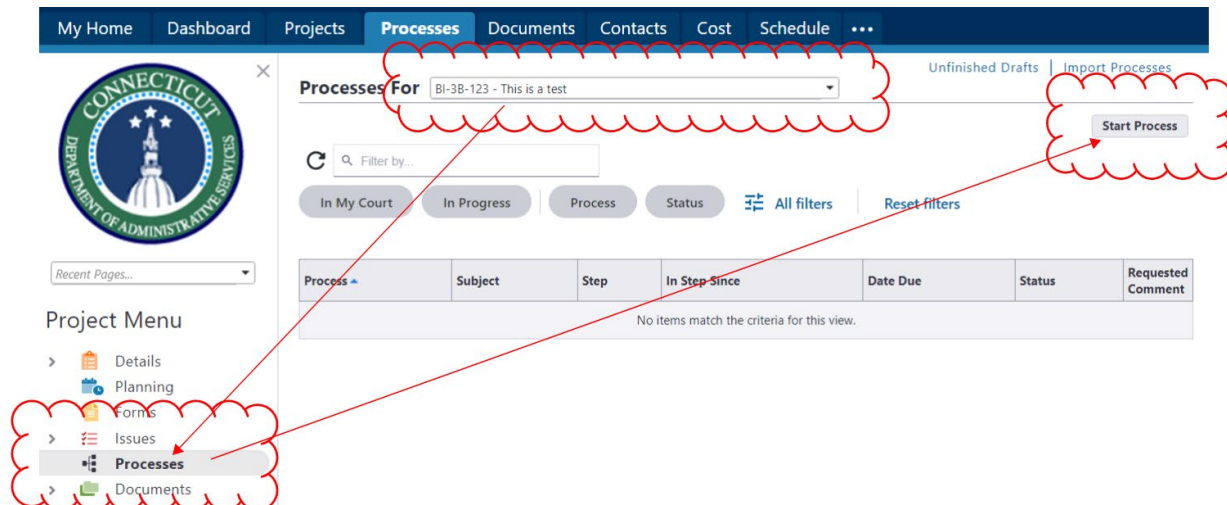
6.01 Accessing the project

Follow the instructions provided in [Section 1](#) to access the project.

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

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

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



Note: If you do not see all of your projects, contact Tim O’Brien to gain access to them in e-Builder.



Click on the "Project Manager Monthly Status Report (PMrep)" process.

Start a process on BI-3B-123 - This is a test

Process Name	Description
Project Manager Monthly Status Report (PMrep)	

Click Submit, then proceed to Section 6.03.

Project Manager Monthly Status Report (PMrep)

Start Process [Print] [Check Spelling] [Submit] [Save Draft] [Cancel]

Project: BI-3B-123 - This is a test
Process: Project Manager Monthly Status Report

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

Expand All | Collapse All

One-Time Per Project Step

Clicking "Submit" will start a new instance of the Project Manager Monthly Report process for this project. If there have been no Project Manager Monthly Reports done for this project yet, this is the correct step.

However, if there already was a Project Manager Monthly Report started at any time on this project, there should already be an instance of the report for this project.

PLEASE DO NOT CLICK "SUBMIT", HERE, IF THERE ALREADY HAS BEEN A REPORT DONE FOR THIS PROJECT.

Instead, look in the Processes instances for this project for the report instance used previously. It will have an instance number such as "PMrep - 1". Opening that allows the Project Manager to update the existing report and file it again, with any changes that are needed.

[Print] [Check Spelling] [Submit] [Save Draft] [Cancel]

6.03 The Start/Refresh Monthly Report step.

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

Processes For BI-3B-123 - This is a test [Unfinished Drafts] [Import Pr]

[Start Selected Process Type] [Star]

Filter by...

In My Court In Progress Process: Project Man ... Status [All filters 1] [Reset filters]

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

Project Menu

- Details
- Planning
- Forms
- Issues
- Processes**
- Documents



Enter the due date of the current report and check to see if any of the attached files are no longer relevant to the monthly report you are working on. If they are not, click the “Remove” link below them to remove them.

Current Workflow Step:	Start or Refresh Monthly Report Show Workflow Diagram	Step Due Date:
Subject:	BI-38-125 - This is a test - 04/01/2024	
Status:	Pending	

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

Expand All | Collapse All

If this is a new monthly report, change this date.
 If you are refreshing or redoing this month's report, this can be left the same.
 Report Due Date:

Are these files relevant to this month's report?
 If a file is not relevant to this month's report, click the "Remove" link under its file name.

Supporting Document 1: <input type="button" value="Help"/>	supporting test 1b1a.pdf (version 1) Properties Download (33.6KB) Redline Remove
Supporting Document 2: <input type="button" value="Help"/>	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Supporting Document 3: <input type="button" value="Help"/>	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Supporting Document 4: <input type="button" value="Help"/>	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Supporting Document 5: <input type="button" value="Help"/>	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>

Then select “Start/Refresh”. (The option to “Void” is also available, of there is another instance of the Project Manager Monthly Report that you are working with, and you wish to close this one.) When “Take Action” is clicked, the process instance will close again. If “Start/Refresh” was selected, proceed to Sec. 6.04.

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

Expand All | Collapse All

If this is a new monthly report, change this date.
 If you are refreshing or redoing this month's report, this can be left the same.
 Report Due Date:

Are these files relevant to this month's report?
 If a file is not relevant to this month's report, click the "Remove" link under its file name.

Supporting Document 1: <input type="button" value="Help"/>	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Supporting Document 2: <input type="button" value="Help"/>	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Supporting Document 3: <input type="button" value="Help"/>	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Supporting Document 4: <input type="button" value="Help"/>	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Supporting Document 5: <input type="button" value="Help"/>	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>

-- Please select an action --

Start/Refresh

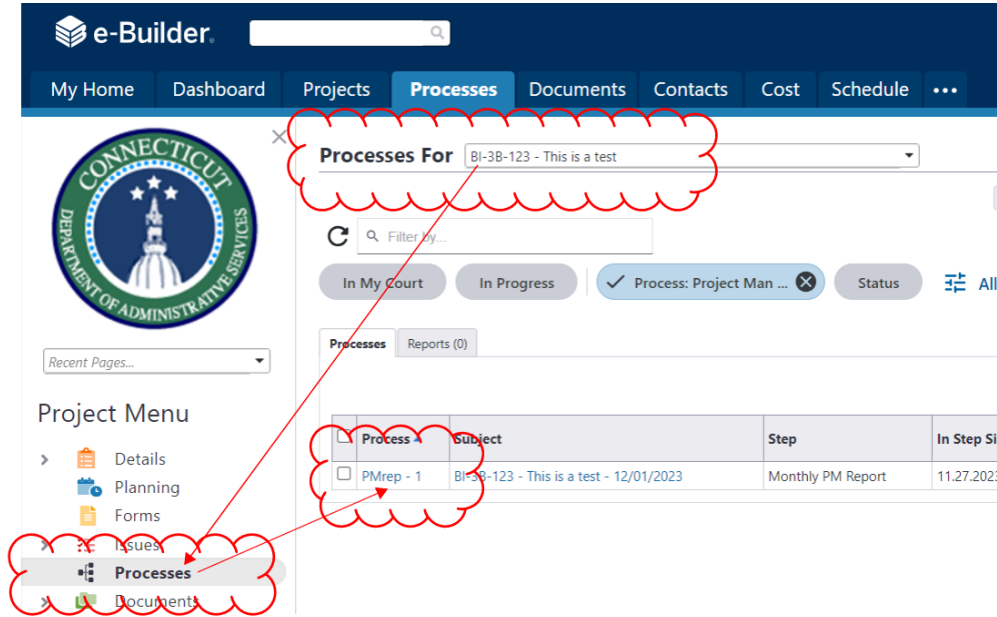
Void

-- Please select an action --



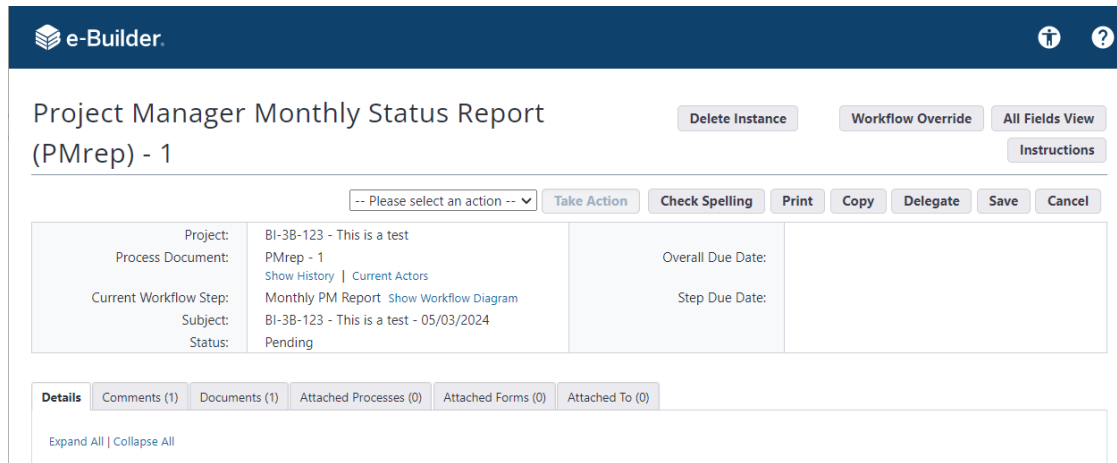
6.04 Completing the monthly report form

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



Complete the monthly update form.

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



In the “Project Team” section of the form:

- “Report Due Date” is the same field available for entry in the previous workflow step, but it can be corrected, here. It refers to the date the current report is due. It will also cause e-Builder to generate a PDF file that is saved separately from other months reports, with the date entered, here, appearing in the file name. For example 05/01/2024 will appear at the end of the filename as “05012024”.



- “DAS Project Manager 1” is the main DAS Project Manager for the project. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “DAS Project Manager 2” can be used to note an Associate or Assistant Project Manager working on the project or a second Project Manager, if two are assigned. This is kept in the Project Manager Monthly Report, but is not updated to the Project Details page.
- “Client Agency Name”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “Agency PM”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, and if changed to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- “A/E - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will not update in the Project Details page for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.
- “CA - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will not update in the Project Details page for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.
- “CMR - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will not update in the Project Details page for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.
- “GC - Firm”. This is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project. However, since changes in this field will not update in the Project Details page for the project, make sure to manually enter this in the project's Project Details page, as well as here. If this is left blank in the Project Details page, any entry made in the previous Project Manager Monthly Report will be deleted.

Project Team

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

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



In the “Project Description” section:

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

Project Description

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

DAS Project Status:	M-2910 Claim Phase
Project Description:	<p>fqwrefqwrqwrfg wrqfwer gweg wegweg wrgherhnrth ntyrhnrth hn rthn rthn thn trhn thn thnrth nrthn rthnt hnfqwrqwrqwrfg wrqfwer gweg wegweg wrgherhnrth ntyrhnrth hn rthn rthn thn trhn thn thnrth nrthn rthnt hnfqwrqwrqwrfg wrqfwer gweg wegwegddff</p>
Most Recent Report:	<p> PMrep-00001 - BI-3B-123 - This is a test - 05022024.pdf (version 2) Properties Download (84.3KB) Redline</p>

In the “Financial” section:

- “Total 1105 Authorized Project Budget” is the total project budget on the most current approved 1105. This is manually updated by the PM. However, this is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a “Progress” Action is taken.
- "Manually Entered Total Project Expenditures" will override the value of “Total Project Expended” to what the Project Manager enters, here. Any data entered here will populate into the “Total Project Expended” field, instead of the total approved invoices (actuals) in the Cost module for the project, when the Project Manager refreshes the Project Manager Monthly Report process. The project manager can cause what is entered, here, to appear in the “Total 1105 Authorized Project Budget” by using the “Refresh Current” workflow action and then using the “Start/Refresh” workflow action in the “Start/Refresh Monthly Report” step (see Sec. 6.03) to return to the "Monthly PM Report" step. However, if the expenditures recorded in the Cost module of e-Builder are accurate, the “Manually Entered Total Project Expenditures” should be left blank or its contents should be deleted.
- “Total Project Expended” should automatically update, based on the total approved invoices (actuals) in the Cost module for the project.
- “Total Expended as % of Total Project Budget” will automatically calculate, based on the previous two values. If the PM makes changes to “Total Project Budget”, the project manager can cause e-Builder to recalculate this value by using the “Refresh Current” workflow action and then using the “Start/Refresh” workflow action in the “Start/Refresh Monthly Report” step (see Sec. 6.03) to return to the "Monthly PM Report" step.
- “Construction Allocated Budget”. This is manually input and updated by the PM. However, this is a field that should automatically refresh when the PM starts each month’s report to what is in the Project Details page



for the project, and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a "Progress" Action is taken.

- "Construction Cost to Date" should automatically update, based on the total approved contractor Payment Applications. However, the PM should check to ensure that it is correct, and may change this value, if it is incorrect. Note that this is the approved invoice amount, after retainage.
- "Construction Expended as % of Construction Budget" will automatically calculate, based on the previous two values. If the PM makes changes to either of those two values, the project manager can cause e-Builder to recalculate this value by using the "Refresh Current" workflow action and then using the "Start/Refresh" workflow action in the "Start/Refresh Monthly Report" step (see Sec. 6.03) to return to the "Monthly PM Report" step.
- "DAS-RECS Fees Budget from 1105" is the amount of cost code 12 on the current approved 1105. This is manually updated by the PM. However, this is a field that should automatically refresh when the PM starts each month's report to what is in the Project Details page for the project and, if changes to it are made in the Project Manager Monthly Report, it should also update the change in the Project Details page, when a "Progress" Action is taken.
- "DAS RECS Fees Expended from Stars Report" is the current total amount of cost code 12 fees charged against the project and is manually updated by the PM.
- "DAS RECS Fees Expended as % of Fees Budget" will automatically calculate, based on the previous two values. If the PM makes changes to either of those two values, the project manager can cause e-Builder to recalculate this value by using the "Refresh Current" workflow action and then using the "Start/Refresh" workflow action in the "Start/Refresh Monthly Report" step (see Sec. 6.03) to return to the "Monthly PM Report" step.
- "Contingency" is the current unexpended 04 Contingency, and is manually updated by the PM.
- "Committed CO Total" should automatically update, based on the net of approved Change Orders. However, the PM should check to ensure that it is correct, and may change this value, if it is incorrect.
- "Proposed COPs Total" is manually updated by the PM.
- "Commentary / Risks to Budget" is manually updated by the PM.

Financial - Total Project			
Total 1105 Authorized Project Budget: ?	<input type="text" value="40"/>	Manually Entered Total Project Expenditures: ?	<input type="text"/>
Total Project Expended: ?	35		
Total Expended as % of Total Project Budget: ?	87		
Financial - Construction			
Construction Allocated Budget: ?	<input type="text" value="30"/>		
Construction Cost to Date: ?	<input type="text" value="25"/>		
Construction Expended as % of Construction Budget: ?	83		
Financial - DAS/RECS Fees			
DAS-RECS Fees Budget from 1105: ?	<input type="text" value="10"/>		
DAS RECS Fees Expended from Stars Report: ?	<input type="text" value="1.00"/>		
DAS RECS Fees Expended as % of Fees Budget: ?	10		
Financial - Other			
Contingency: ?	<input type="text" value="11"/>		
Committed CO Total: ?	<input type="text" value="10"/>		
Proposed COPs Total: ?	<input type="text" value="2"/>		



Commentary / Risks to Budget

Commentary / Risks to Budget:	<p>fqwrefqwrqwrfg wrqfwer gweg wegweg wrgherfhnrt hntyhrnt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrqwrfg wrqfwer gweg wegweg wrgherfhnrt hntyhrnt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrqwrfg wrqfwer gweg wegwegddffqwrefqwrqwrfg wrqfwer gweg wegweg wrgherfhnrt hntyhrnt hn rthn rthn thn trhn thn thnrt hnrthn rthnt hnfqwrefqwrqwrfg wrqfwer gweg wegwegddff</p>
-------------------------------	---

In the "Schedule Status" sections:

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

Schedule Status - Design

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

Schedule Status - Construction

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



Notes

Notes: ?

Supporting Document 3: ? or

Supporting Document 4: ? or

Supporting Document 5: ? or

If the report is the final report at the time that the project is closing, select “Project Closed” next to “Option on Project Closeout”. Please note that this will permanently close this Monthly Project Manager Report instance.

Other

Option on Project Closeout:

- Please select an option --
- Project Continuing
- Project Closed**

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

Upon completion of the monthly report, the PM should scroll down to the bottom of the page and select “Progress Report” or “Refresh Current” from the dropdown list next to the “Take Action” button and click the “Take Action” button. The option to “Void” is also available, if there is another instance of the Project Manager Monthly Report that the PM working with and wishes to close this one.

- Please select an action --
- Progress Report**
- Refresh Current
- Void
- DontUseThis

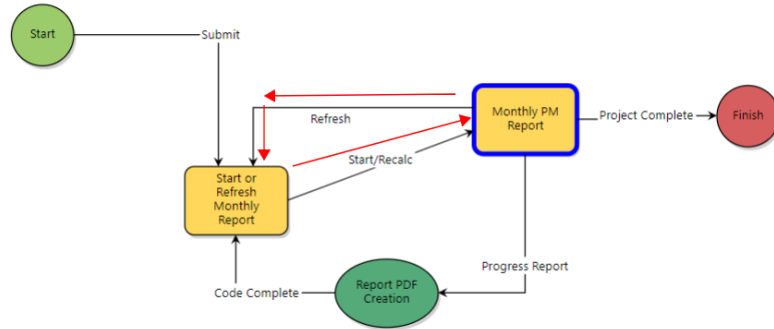
The “Refresh Current” option initiates a “refresh cycle” in which the PM should expect the process instance to close and for the PM to open it, again, twice.

The “Refresh Current” option has the effect of:

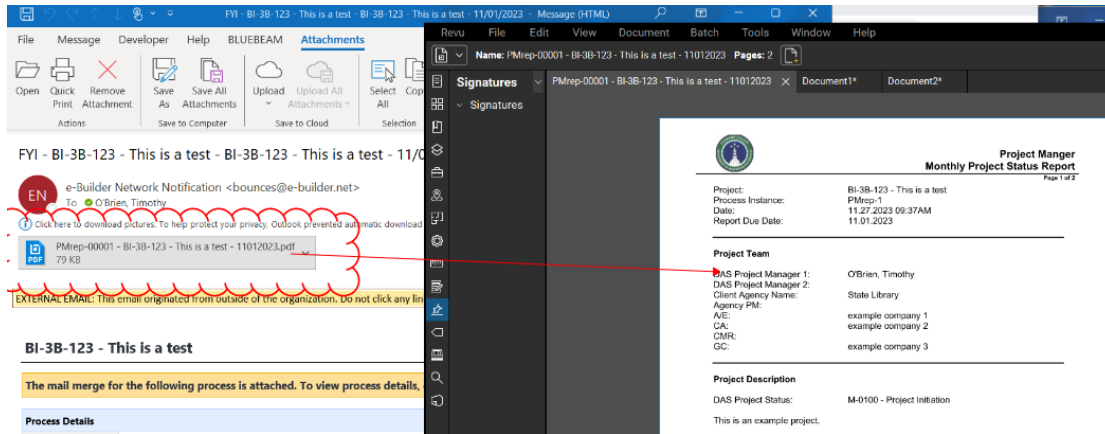
1. Sending the workflow back a step, from the “Monthly PM Report” step, where the PM report form is filled out, to the “Start or Refresh Monthly Report” step. The process instance will then close.
2. Refer, here to Section 6.03. When the PM re-opens the process instance from the Processes module in the project, it will be in the “Start or Refresh Monthly Report” step. When the PM takes the “Start/Recalculate” Action, the workflow will recalculate calculated fields and refresh certain other fields. The process instance will close again.



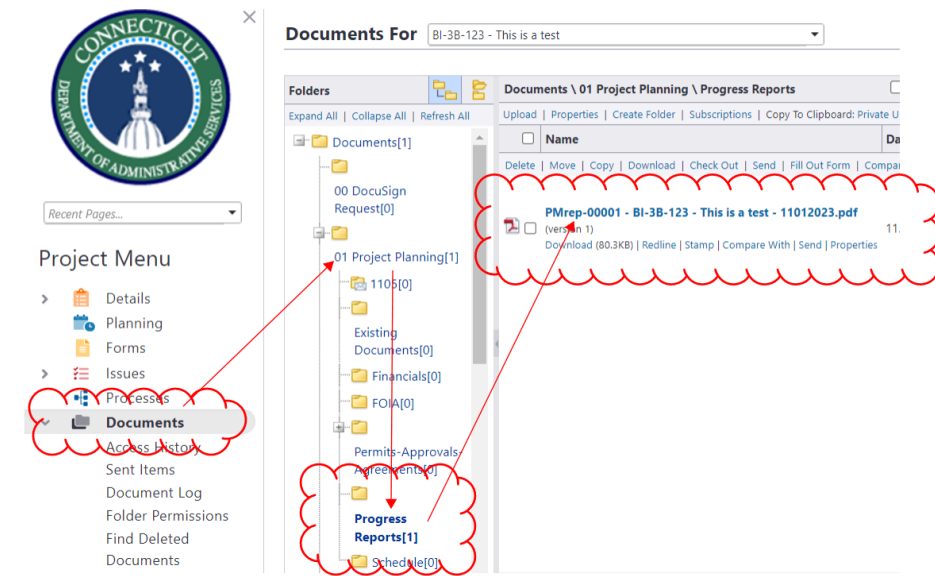
- 3. Refer to section 6.04. When the PM re-opens it in the Processes module for the project, the instance will be in the “Monthly PM Report” step, with all of the report fields updated. This “refresh cycle” can be performed as many times as the PM requires.



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



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





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

The screenshot shows the e-Builder interface. At the top, there is a navigation bar with 'My Home', 'Dashboard', 'Projects', 'Processes', 'Documents', 'Contacts', 'Cost', and 'Sch'. The 'Projects' tab is active. On the left, there is a sidebar with the Connecticut Department of Administrative Services logo and a 'Project Menu' containing options like 'Details', 'Apply Templates', 'Project Participants', etc. The main content area is titled 'Project Details For BI-3B-123 - This is a test'. It features a 'Details' section with a table of project information and a 'Custom Fields (75)' section with a table of specific project data. A summary table on the right shows 'Total Project Cost: 11.25', 'Construction Budget: 9.83', and 'DCS Fee:'. Red callouts highlight the 'Project Menu', the 'Custom Fields' table, and the summary table.

Details	
Project Name	BI-3B-123 - This is a test
e-Builder Project Administrator	O'Brien, Timothy
Project Status	Active
(view map) Address	
Country	USA
Start Date	09.11.2023
Target Date	09.11.2023
Description	This is an example project.
Project Webcam	
Last Modified By	O'Brien, Timothy
Date Last Modified	11.27.2023

Custom Fields (75)	
DAS Project Number:	
Project Name:	BI-3B-123 - This is a test
DAS Project Status:	M-0100 - Project Initiation
Project Delivery Method:	
Project type:	

Total Project Cost:	11.25
Construction Budget:	9.83
DCS Fee:	
Date of Scope Review:	



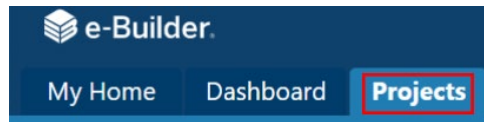
PART II: PROCESSES



Section 7: Process Filter

7.01 Navigating to the Project Processes Module

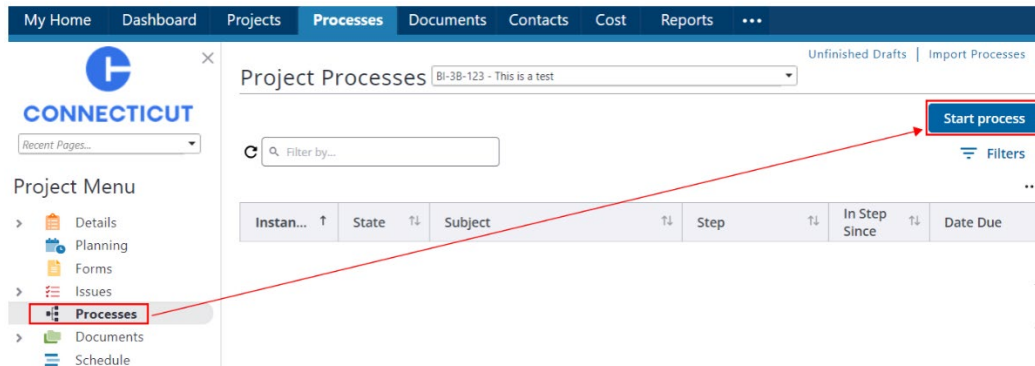
Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for “Projects”:



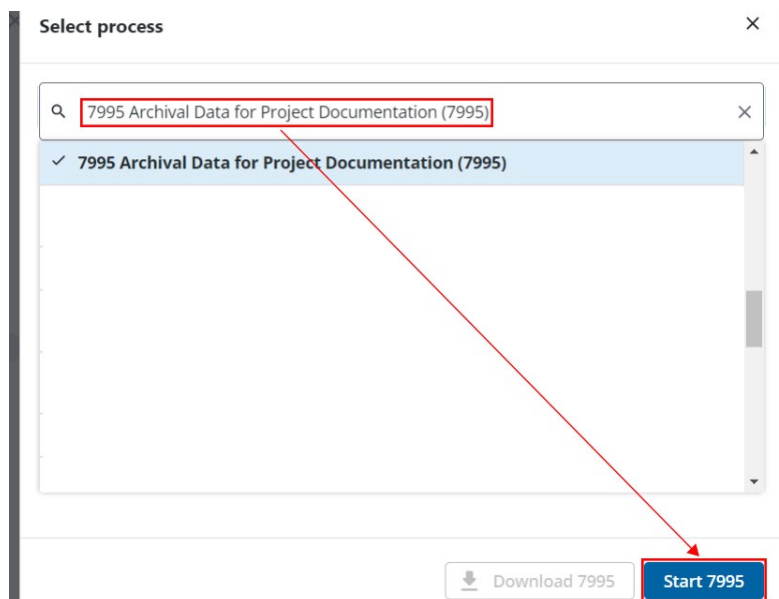
In the list that appears, click on the name of the project you would like to access:



The Project Menu will appear in the left panel. Click “Processes.” Then, click “Start process.”



In the “Select process” pop up window, search for and select the name of the Process type needed. Then click the blue button in the lower right that says “Start [process prefix]”.





7.02 Using the Processes Filter

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

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

The screenshot shows the 'Processes' interface in eBuilder. At the top, there is a search bar for 'Processes For' with the value '*Testing6723a Project Name'. Below this are buttons for 'Start Selected Process Type' and 'Start Process'. A 'Filter by...' section is highlighted with a red dashed border and contains filters for 'In My Court', 'In Progress', 'Process: 7390 Applic...' (which is checked), and 'Status'. Below the filters are 'All filters' and 'Reset filters' buttons. A red line labeled '1' points from the filter section to the list of processes. The list of processes is also highlighted with a red dashed border and contains the following items:

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

Below the list, there is a table of process instances. A red line labeled '2' points from the filter section to the table. The table has columns for Process, Subject, Step, In Step Since, Date Due, Status, and Requested Comment. The data in the table is as follows:

Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
7390A	testing-TEST-6723a - Application for Payment -				NotAssigned	
7390A	testing-TEST-6723a - Application for Payment -				NotAssigned	
7390A	testing-TEST-6723a - Application for Payment -				NotAssigned	
7390A - aaa - 2	testing-TEST-6723a - Application for Payment -	Finish	08.01.2023		Paid	
7390A - test6723a	testing-TEST-6723a -	DAC Submit				

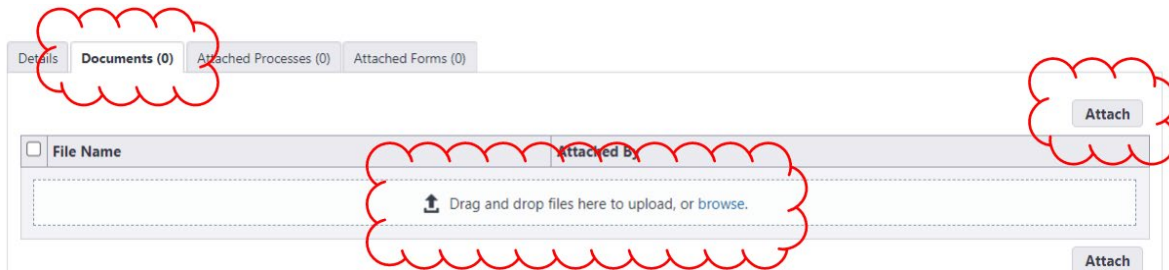


Section 7A: File Attachments in Processes Instances

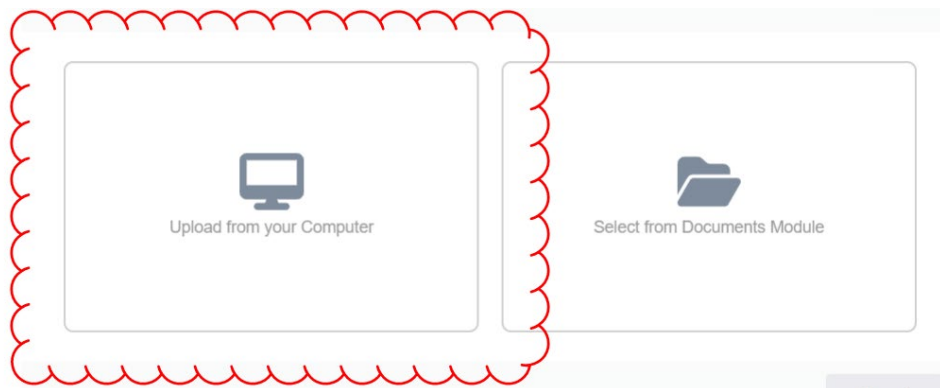
7A.01 Uploading File Attachments in the Documents Tab of Processes Instances

Note: In the case of many Processes types, the files that are merged together into the official documentation are entirely from “file fields” attached to the Details page of the Process instance. (See step [7A.02](#), below.) In these cases, documents can still be uploaded into the Documents tab so that those documents are in the Process instance but not in the final official document. In the case of other Processes types, the Documents tab is where the official documentation is uploaded. See the instructions for the particular Processes type to determine which is the case or ask Construction Support Services.

To upload a file attachment in the Documents tab of a Processes instance, first open the Processes instance. Then click on the “Documents” tab header to open the tab. Upload documents to the Documents tab by either using the “drag-and-drop” feature or by clicking the “Attach” button.



If the “Attach” button is clicked, a pop-up will appear. Click the “Upload from your Computer” button to locate a locally stored document.

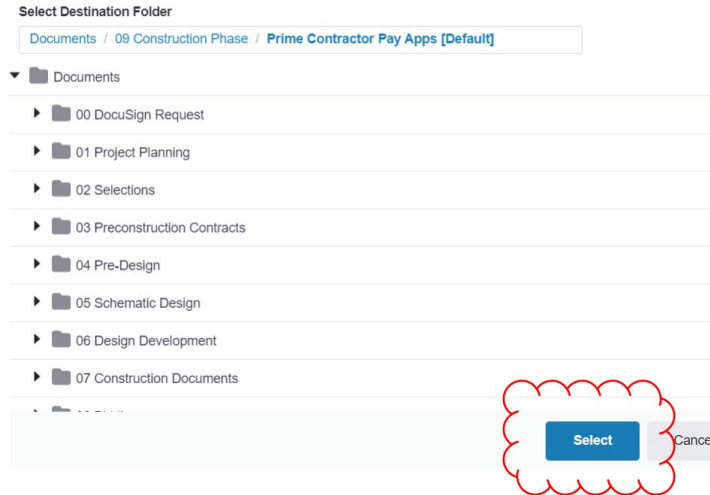


The user may then be brought to a screen to select the project Documents folder where the uploaded file will be placed, in addition to being linked to the Processes instance.

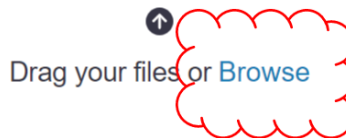
At the top of this screen there may be a default folder, in blue text, with the path to that folder, followed by “[Default]”. If this is the case, and the user wishes to upload into the default folder, click “Select” to use this pre-selected default folder.



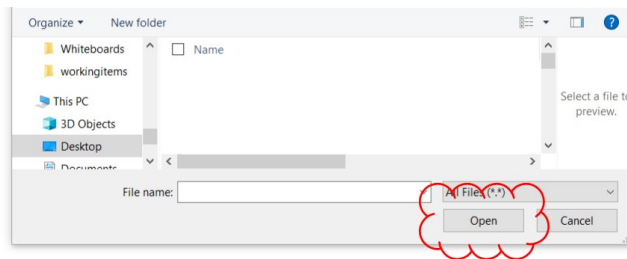
If there is no default folder, or the user wishes to select a different folder, the user may click the arrows to the left of the folders to locate nested folders within other folders. When the user locates the desired folder, the user clicks on it. The user then clicks “Select” to use the selected folder.



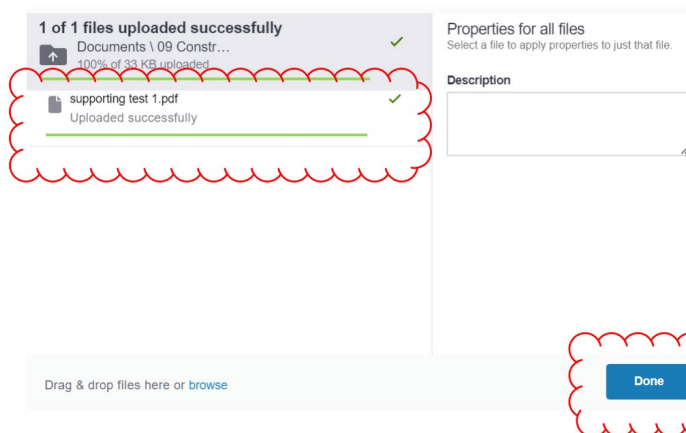
Then click “Browse”.



Then the user selects the file(s) they wish to upload and click “Open”.



If this worked properly, the user should see a green line under where the file name is, as shown, and a check mark. Then click “Done.”





The uploaded document should then appear in the Documents tab of the Processes instance. Also note the number in parentheses next to the “Documents” tab title, indicating the number of files linked to the Processes instance.

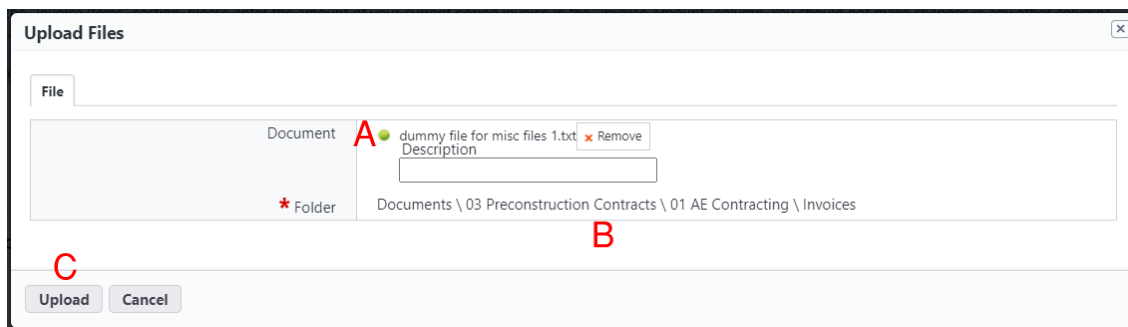


7A.02 Uploading File Attachments into Processes Instance File Fields

To upload a file attachment into “file fields” in the main Details tab of a Processes instance, first open the Processes instance. A file field appears as part of the main form of the Process in the Details tab. The file field, when it is available to the use to upload, will appear with three options for uploading: (A) a drag-and-drop block, (B) a “Browse Computer” button to upload from the user’s computer or network and (C) a “Browse e-Builder” button to allow the user to locate the file in the project’s e-Builder Documents folders.

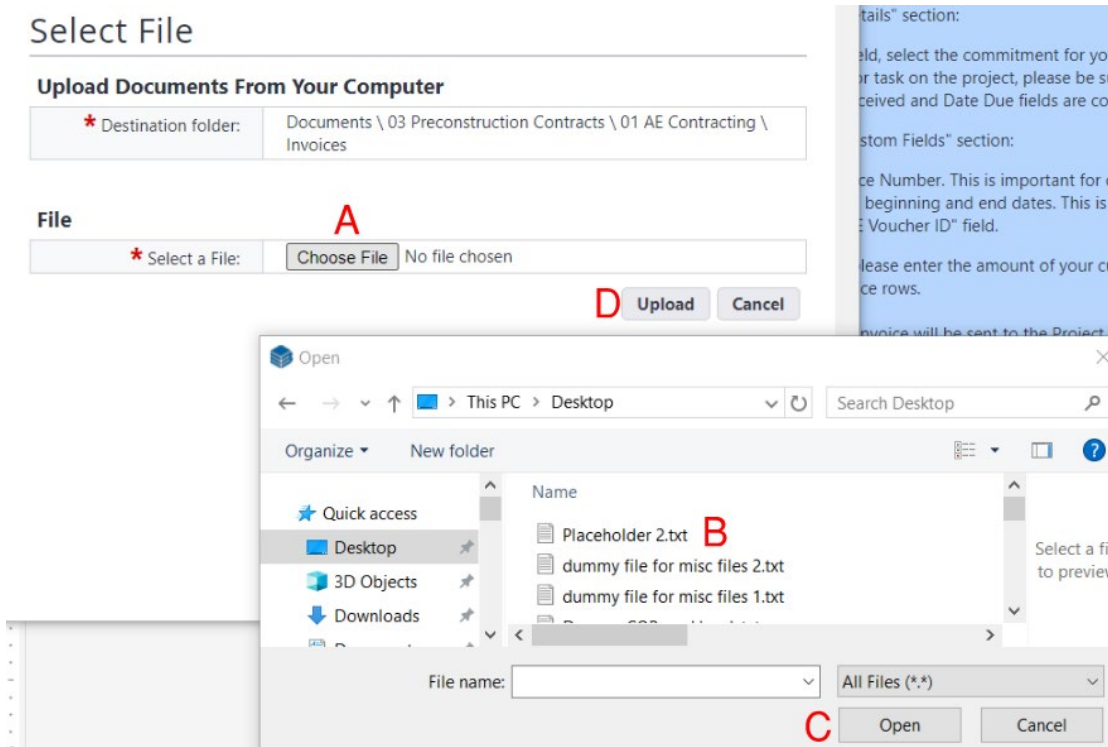


When the user **drags and drops** a file in the block that says, “Drag and drop file here”, an “Upload Files” dialogue box will appear. If successful, (A) there should be a green dot next to the filename. Also note that, (B) the location into which the file was uploaded in the project’s Documents folders appears. To complete the upload, click “Upload”.

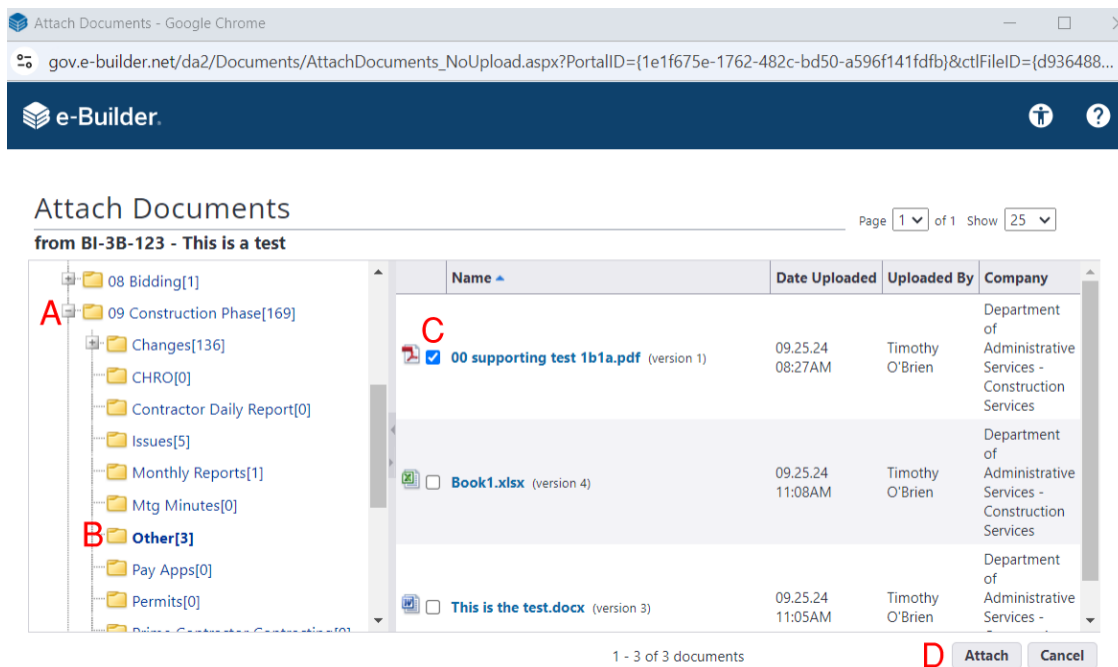




When the “Browse Computer” button is used, a pop-up window will appear. (A) Click the “Choose file” button. (B) Select the file to upload. (C) Click “Open”. (D) Click “Upload” to complete the upload.

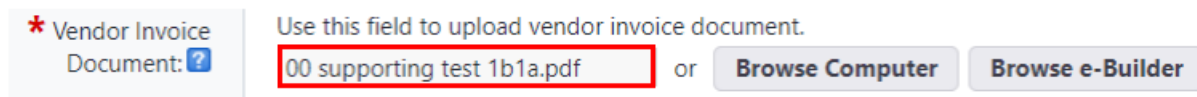


When the “Browse e-Builder” button is used, a pop-up window will appear. (A) Click the “+” buttons to open file folders to navigate to the folder in the project’s e-Builder files where the needed file is located. (B) Click on the name of the file folder where the needed file is located. (C) Click the check box next to the needed file. (D) Click “Attach” to complete the upload.

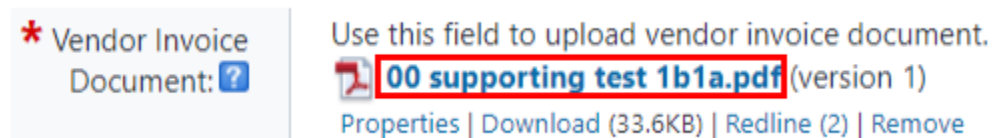




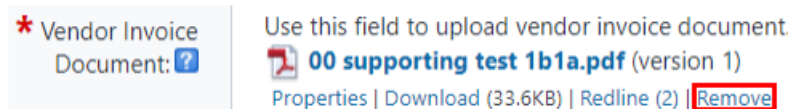
After a file is uploaded the filename will appear in text form in what was the drag-and-drop block.



After the Process instance has been submitted or advanced further in the Process workflow, or after the user has clicked “Save Draft” in the Process instance, the filename will change to a link. Clicking on this link opens a file viewer, allowing users to see the file.



Users who are able to upload into a file field in a Process step also have the option to remove the previously uploaded file by clicking “Remove” under the filename. This clears the file from the field and allows another file to be uploaded.



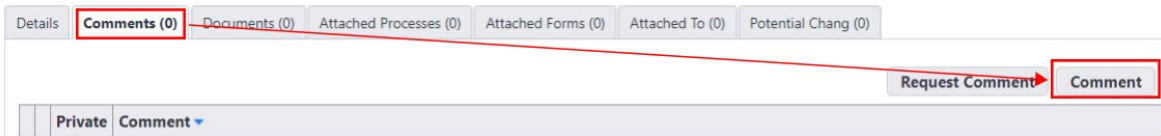


Section 7B: Comments in Processes Instances

7B.01 Manually placing comments in process instances.

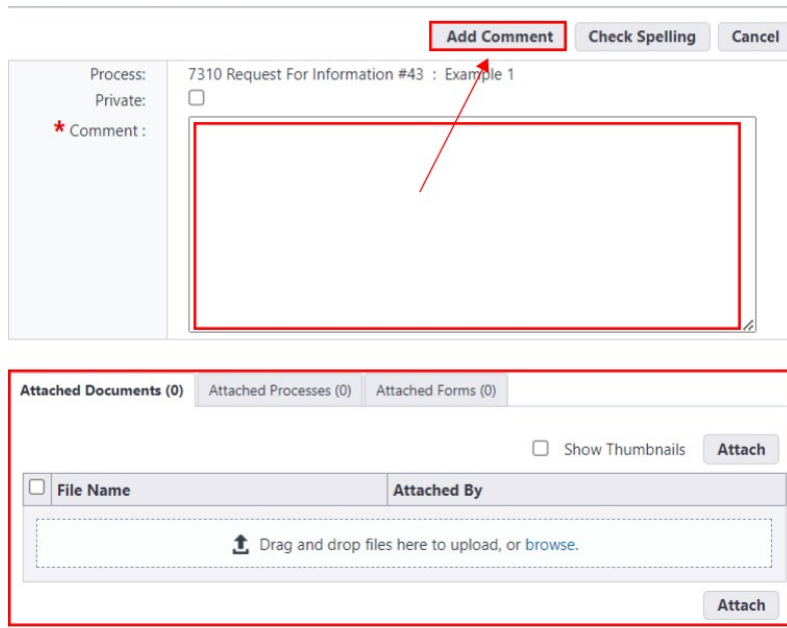
Comments appear in the Comments tab of a process instance for a number of reasons. Some Processes steps are set up to allow or require comments when users take certain actions. In other cases, the e-Builder, system, itself places a comment in the Comments tab.

In addition to this, users may manually add comments. To do this, go to the Comments tab of the Processes instance, then click “Comment”.

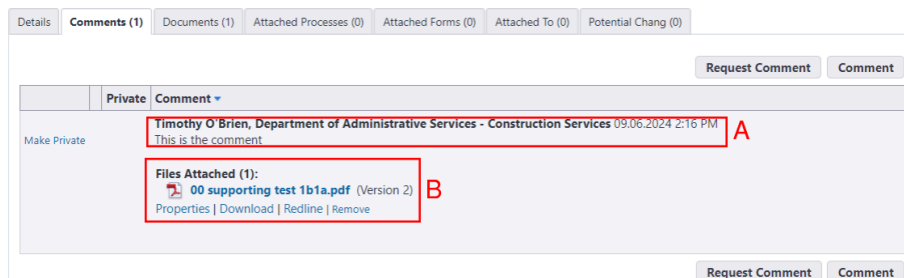


The user may then type in the “Comment” box and click “Add Comment” to complete the comment. Also note that there are options for uploading files with the comment. If using this, the user may be prompted to select the project Documents folder where the file will be placed.

Add Comment



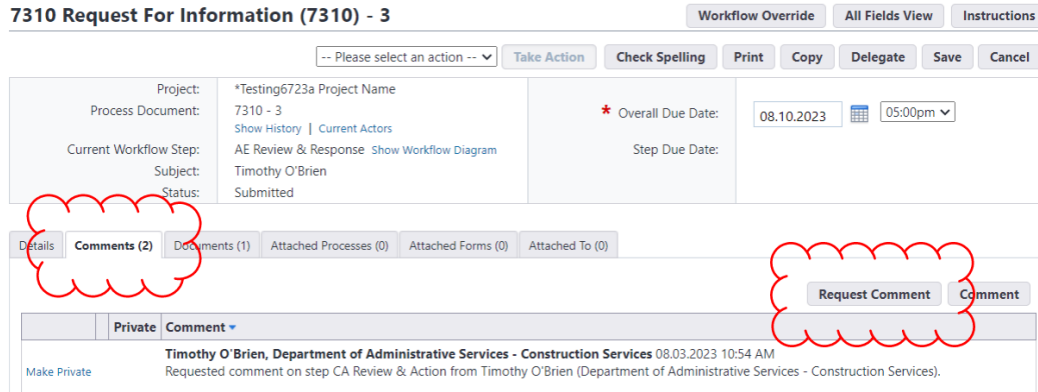
When the comment pop-up closes, (A) the user’s comment will appear in the Comments tab and (B), if the user uploaded a file with the comment, that will appear in the Comments tab, as well.





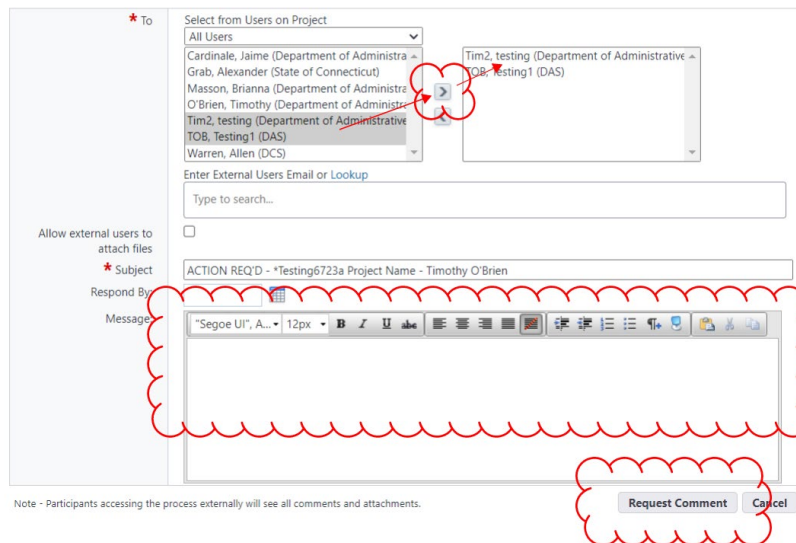
7B.02 Requesting comments.

Users may prompt other users to leave a comment in a Processes instance. To do this, click the “Request Comment” button.



After clicking the “Request Comment” button, a pop-up will appear that allows the requesting user to select the user(s) from whom they are requesting a comment in the “To” field by selecting their names and pressing the arrow button to move them to the right panel. The “Message” field allows the requesting user to ask a question of the user from whom they are requesting a comment. Also note that there is a “Allow external user to attach files” toggle available.

Then the “Request Comment” button sends the comment request in the form of an e-mail notification.



Both the question asked, and the response will appear in the Comments tab of the Process instance.



Section 7C: Processes Notification E-Mails

7C.01 Notification E-Mails from Processes Instances.

The workflows of Processes instances generate e-mail notifications to users when workflow actions are taken. Users may receive e-mail notifications when the step at which the workflow has reached provides that their user role on the project is to take action. Users also might receive notifications, for example, as carbon copy notifications, in which they are informed but need not take action.

When a Processes instance workflow has reached a step at which the user to take action, that user is a “Current Actor” at that workflow step. In this case, the notification not only informs the user about the Processes instance and its status, but also allows the user to access the Processes instance.

When the user is a “Current Actor”, the notification will look similar to the following:

- A. A brief description of the notification.
- B. “Click here” links at the top and bottom of the notification. Clicking on either of these links should bring the user to the Processes instance to which the notification refers. If the user is already logged into e-Builder, the instance should open automatically. If the user is not logged into e-Builder when clicking the “Click here” link, the user should be prompted to log into e-Builder, after which the Processes instance should open.
- C. Information about the project, the Processes type and instance number, due date, subject, the current workflow step and other workflow information.
- D. Depending on the Processes type, there may be field information from the Processes instance that may inform the user about the instance from the notification itself.
- E. If there are comments on the Processes instance, they should also appear in the e-mail notification.

The screenshot shows an email notification for a process instance. At the top, it says "BI-3B-123 - This is a test" with a red box labeled 'A' around the subject line. Below this is a yellow banner with the text "Process instance is in your court. To view details or take action, [click here](#)" with a red box labeled 'B' around the link. The main body of the email is divided into sections. The first section is "Process Details" with a red box labeled 'C' around it, containing a table of information: Project (BI-3B-123 - This is a test), Process (7310 - 43), Process Date Due (09/13/2024), Subject (Example 1), Step (CA Review & Action), In Step Since (09.06.2024), Last Action (Submit), Last Action Taken By (Timothy O'Brien), and Status (Submitted). Below this is a section for questions and solutions with a red box labeled 'D' around it, containing fields for Question, Proposed Solution, Specification Section, Drawing Number, and several yes/no questions. At the bottom, there is a "Comment(s)" section with a red box labeled 'E' around it, stating "There are no comments for this process." Finally, a yellow banner at the very bottom repeats the text "Process instance is in your court. To view details or take action, [click here](#)" with a red box labeled 'B' around the link. A red arrow points from the 'B' label at the top to the 'B' label at the bottom.



Section 8: 1105 Project Intake Request

8.01 Accessing the Process

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

8.02 Capital Project Initiation Submission (Process Initiator)

Click the “Start Process” button.

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

Unfinished Drafts | Import Processes

Processes For *Project Creation Project

Filter Processes Start Process

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

Type of Process All Processes Draft Open Finished

Status All Statuses

Containing Text

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

Start a process on *Project Creation Project

Processes Cancel

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

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

Capital Project Initiation Request

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

* Project Name:

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

Print Check Spelling Submit Save Draft Cancel

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

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



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

Forms **Processes** Documents Contacts Cost Schedule

Processes

1105 Project Intake Request

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

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

Details

General Instructions

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

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

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

Helpful Hints for completing Form 1105

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

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

State Funding Row Height: 1X

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

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

Federal Funding Row Height: 1X

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

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



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

Project Budget Detail

Upload 1105 Project Budget Detail spreadsheet for the subject project.

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

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

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

Interagency ▼ Take Action Check Spelling Print Copy Delegate Save Cancel

Add Comment

Private

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

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

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

Available Users		Selected Users
O'Brien, Timothy (Department of Administrative Services - Construction Services)	>	
Russell, Craig (Department of Administrative Services - Construction Services)		



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

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

8.03 Interagency Review (Interagency Reviewer)

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

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

*BI-CS-1010 - DAS Test Project

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

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

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

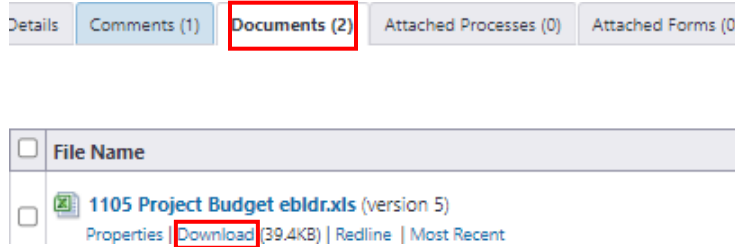
Details **Comments (1)** Documents (1) Attached Processes (0) Attached Forms (0) Attached To (0)

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

Return Take Action



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



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

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

8.04 ADPM Assignment (CSS)

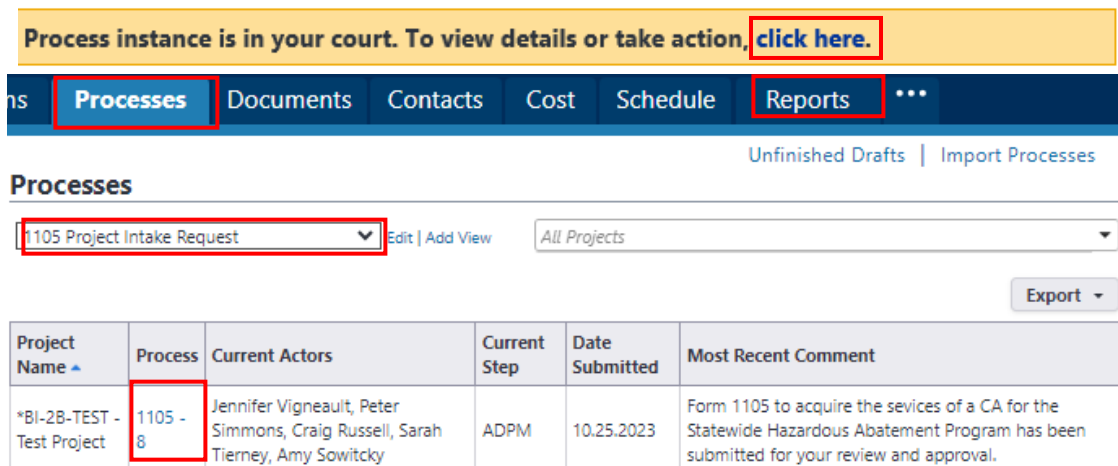
CSS will receive an email from eBuilder as notification that the Capital Project Initiation Request has been submitted for ADPM Assignment.

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

8.05 Capital Project Initiation Request Review (ADPM)

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

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

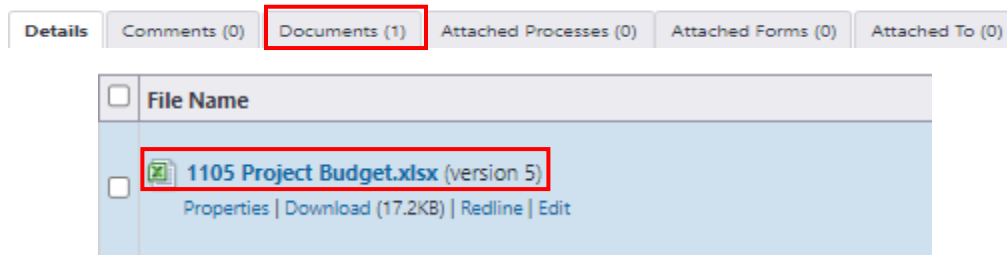




The ADPM can review the 1105 submission in its entirety under the “Details” tab.

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

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



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

CT DAS Management Review & Approval

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

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

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

Project Size (Construction Budget):

Consultant Selection Type(s):
On-Call Task Assignment
Formal A/E Selection

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

Project Delivery Method:

High Performance Building: Yes No

Construction Administration Contract Type:

* ADPM:

* Project Manager:

* Document Folder Template Project:

* e-Builder Project Administrator:

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

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



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

*** Add Comment**

Private

8.06 Capital Project Initiation Request Revision (Process Initiator)

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

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

*Project Creation Project

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

Processes
Documents
Contacts
Cost
Schedule
Reports
⋮

Unfinished Drafts | Import Processes

Processes

1105 Project Intake Request
Edit | Add View
All Projects

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

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

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

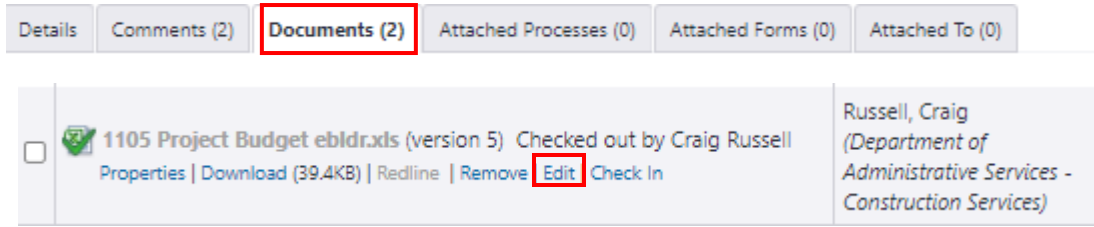
1105 Project Intake Request (1105) - 12

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

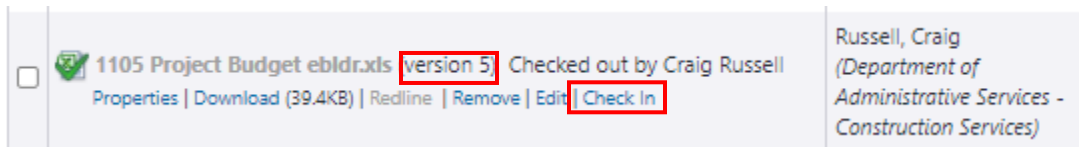
Details
Comments (0)
Documents (1)
Attached Processes (0)
Attached Forms (0)
Attached To (0)



If the 1105 Project Budget Detail requires revision, click the “Documents” tab, and then click the “Edit” link beneath the project budget to open the link, and then click “OK” when prompted.



Make the necessary edits to the project budget, save the changes when you have completed the edit and close the document. Return to the “Documents” tab in the 1105 process instance and click on the “Check In” link to upload your edits to the Documents tab. Each time the document is edited and checked in; the “Version” of the document will change. The latest version of the project budget edits will have the highest version number.



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

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

Add Comment

Private

Add actors to the next step

Available Users

- O'Brien, Timothy (Department of Administrative Services - Construction Services)
- Russell, Craig (Department of Administrative Services - Construction Services)**

Selected Users

> <

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



8.07 Capital Project Initiation Request Review (Chief Architect)

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

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

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

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

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

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



8.08 Authorized Signatory Selection (Process Initiator)

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

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

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

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

Add Comment

Private

Add actors to the next step

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

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

8.09 Capital Project Initiation Sign Off (Agency Authorized Signatory)

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

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

*Project Creation Project

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



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

Unfinished Drafts | Import Processes

Processes

1105 Project Intake Request

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

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

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

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

1105 Project Intake Request (1105) - 12

-- Please select an action --

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

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

File Name
<input type="checkbox"/> 1105 Project Budget.xlsx (version 5) Properties Download (17.2KB) Redline Edit



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

Capital Project - Agency Authorization

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

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

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

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

*** Add Comment**

Private

Check Spelling **Reject** Cancel

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

8.10 Capital Project Initiation Request Review (CSS)

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

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

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



8.11 Capital Project Initiation Request Review (DC)

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

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

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

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

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

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

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

1105 Project Intake Request (1105) - 12

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

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

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



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

Capital Construction Project - DAS Approval

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

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

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

*** Add Comment**

Private

8.12 Capital Project Initiation Request Project Number Assignment (CSS)

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

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

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

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

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



8.11 Capital Project Initiation Request CEPA Review (Environmental Services)

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

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

*Project Creation Project

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

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

Unfinished Drafts | Import Processes

Processes

1105 Project Intake Request Edit | Add View All Projects

Export

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

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

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

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

1105 Project Intake Request (1105) - 12

-- Please select an action --

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

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

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



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

DAS Environmental Review

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

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

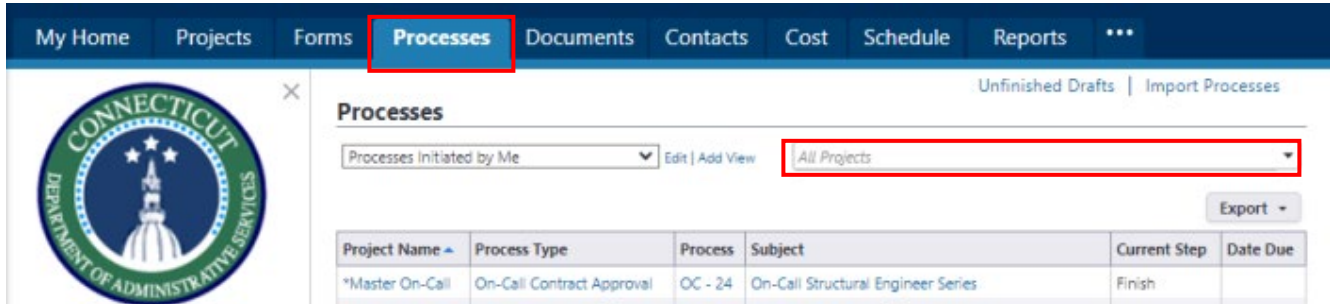


Section 9: 1105R Project Revision Request

9.01 Accessing the Process

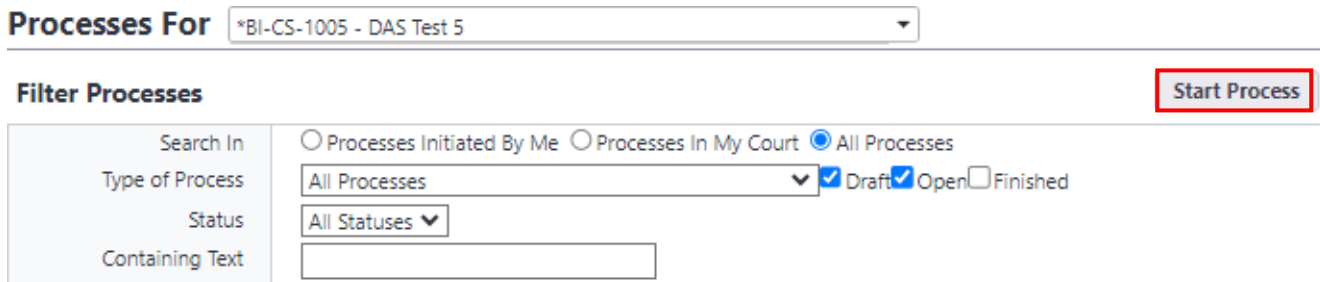
Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>

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



9.02 Project Revision Request Submission (Process Initiator)

Click the “Start Process” button.



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

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

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

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

Revised Capital Project Initiation Request

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

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

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



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

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

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

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

Agency Request for Project Administration

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

Agency Request for Project Administration:

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

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

9.03 Complete Revised Capital Project Initiation Request (Process Initiator)

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

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

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

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

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



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



Welcome, Craig!

All projects ▾

[Edit My Home](#)

My Processes ...

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

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

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

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

Administrative Information

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

* Agency:	Board of Regents for Higher Education
* Project Name:	*BI-CS-1010 - DAS Test Project
* Project Address:	123 Boltz Dr.
* City:	San Diego
Agency Request for Project Administration:	
DAS/CS Building Number:	223457
Land Number:	23867
CAPEX Number:	23CSCU002
* Project Description and Special Requirements:	Test Project

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

Project Budget Detail

Upload 1105 Project Budget Detail spreadsheet for the subject project.

* 1105 Project Budget:

Drag and drop file here

or

[Browse Computer](#)

[Browse e-Builder](#)



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

State Funding Show Filter | Select All Row Height: 15

Download Template Import Delete

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

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

Add New Item for State Funding

Description

Authorize

Allocate

Clear Add

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

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

Interagency Take Action Check Spelling Print Copy Delegate Save Cancel

Add Comment

Private

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

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

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



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

Add actors to the next step

Available Users

- O'Brien, Timothy (Department of Administrative Services - Construction Services)
- Russell, Craig (Department of Administrative Services - Construction Services)

Selected Users

Check Spelling **Submit** Cancel

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

9.04 Other Reviewers (Interagency/Outside Reviewer)

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

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

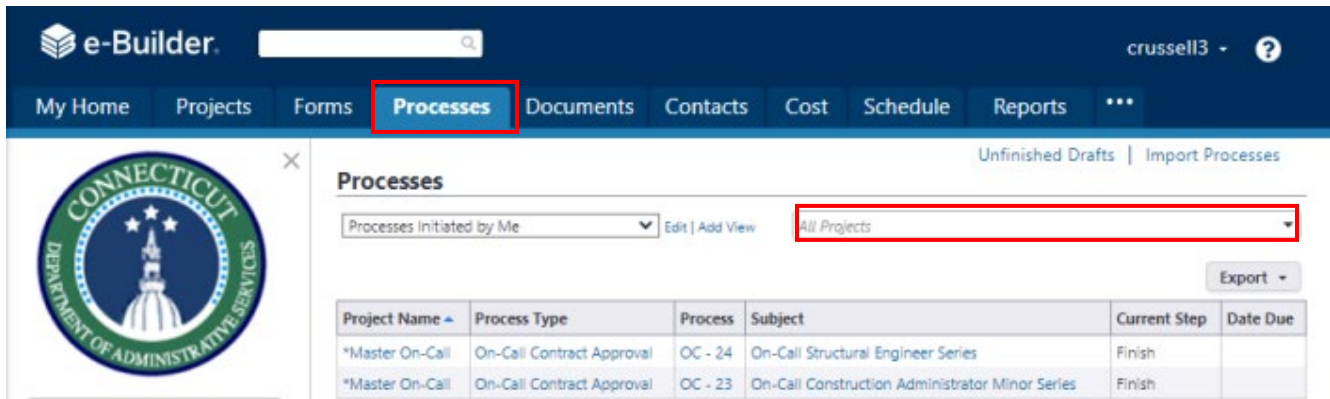


Section 10: 1135 Task Letter

10.01 Accessing the Process

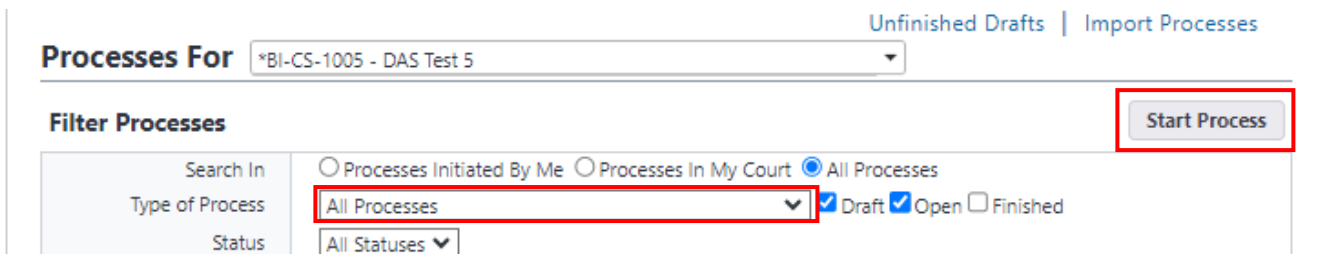
Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>

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



10.02 On-Call Request (PM or CSS)

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



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

1135 - Task Letter (TL)



Below the subject are directions to initiate the On-Call Selection/Task Letter Process, which are summarized below.

DAS Administered Projects Task Assignments:

If the subject project is Administered by DAS, the DAS PM shall prepare an On-Call Selection Request, Form 1135, to initiate the selection of an On-Call Consultant and upload the draft Form 1135 (in Word format), along with a copy of the completed Form 1105 (signed by DC) to the “Documents” tab.



Agency Administered Projects Task Assignments:

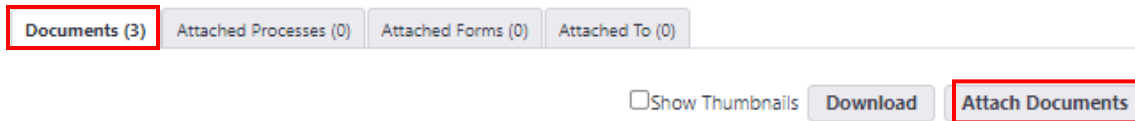
If the subject project is Agency Administered, Construction Support Services shall prepare Form 1135, to initiate the selection of an On-Call Consultant and upload the draft Form 1135 (in Word format), along with a copy of the completed Form 1105 (signed by DC) to the “Documents” tab.

Supplemental Task Assignments:

The DAS PM shall prepare a new On-Call Selection Request, Form 1135, for each supplement task request and follow the same protocol as above based on the cumulative fee value (total of all task letters with a consultant for the same project).

If the request for a supplemental task assignment is for an On-Call Consultant with an expired contract, a Supplemental Task Justification Memo will also need to be uploaded to the “Documents” tab, as well as copies of all previously executed task letters made to the Consultant on the subject project.

To upload documents to the “Documents” tab, click the “Attach Documents” button.



Next, click “Upload from your Computer” and either drag and drop your files into the space provided or browse your computer to search for the files you want to upload.



Drag your files or [Browse](#)

After uploading the required documents, return to the “Details” tab and complete the “On-Call Selection Request” section. Upon completion, click the "Take Action" button.

Note: Only answer “Yes” to the “Request for Multiple Solicitations” question if a Consultant was already assigned the task and after the scope review meeting, it was determined that the Consultant Fee is greater than or equal to \$300,000, requiring the solicitation of multiple On-Call Consultants.

On-Call Selection Request

Select the type of On-Call Consultant you wish to have assigned to the project task and the estimated fee for the On-Call Consultant to complete the task.

* Type of OC Consultant:	-- Please select an option --
* Consultant Fee:	
* Request for Multiple Solicitations?:	If a Consultant has already been assigned this task and after the scope review meeting it was determined that the total Consultant Fee will be greater than or equal to \$300,000, answer "Yes" to solicit multiple vendors, otherwise answer "No". No



10.03 ADPM 1135 Review (ADPM)

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

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

The screenshot shows the eBuilder dashboard with the 'My Home' tab selected. Below the navigation bar, there is a 'Welcome, ADPM!' message and a 'My Processes' section. A table lists process instances with columns for Project, Instance, Subject, and Step. The 'Instance' column for the first row contains the value 'TLV2 - 1', which is highlighted with a red box.

Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	TLV2 - 1	BI-CS-1010 - On-Call STR Request	ADPM 1135 Review

After opening the process instance, review the "General Instructions" and then click on the "Documents" tab to review the 1135 submission.

The screenshot shows a set of tabs for document management: 'Details', 'Comments (8)', 'Documents (3)', 'Attached Processes (0)', 'Attached Forms (0)', and 'Attached To (0)'. The 'Documents (3)' tab is highlighted with a red box.

Click on the link to any of the subject files to view those files.

File Name	Attached By
<input type="checkbox"/> BI-CTC-686_NWCC_BrdgRef_1105_230918.pdf (version 2) <small>Properties Download (570.7KB) Redline Stamp Remove</small>	Russell, Craig <i>(Department of Administrative Services Construction Services)</i>
<input type="checkbox"/> 1135_OnCallSel.docx (version 2) <small>Properties Download (56.2KB) Redline Most Recent Remove</small>	Russell, Craig <i>(Department of Administrative Services Construction Services)</i>
<input type="checkbox"/> 1105 Project Budget Detail.xlsx (version 1) <small>Properties Download (38.9KB) Redline Remove Edit</small>	Russell, Craig <i>(Department of Administrative Services Construction Services)</i>

After completing your review, either select "Submit" from the dropdown list next to the "Take Action" button to forward the 1135 submission to the DPM and Chief Architect for review, or "Revise" to return the 1135 submission to the PM for revision and click the "Take Action" button. You will then be prompted to provide a comment.

If "Submit" was selected, utilize the comment section to provide applicable detail regarding any intricacies to the project that the DPM and Chief Architect should be made aware of, or if there is a specific consultant that is being requested for this project, please provide that information along with the reason why that specific consultant should be selected.

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



After adding your comment, click the “Revise” or “Submit” button respectively.

Add Comment

Private

10.04 PM Revision – 1105/1135 (PM)

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

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

My Home
Projects
Forms
Processes
Documents
Contacts
Cost
Schedule

Welcome, Craig! All pr

My Processes

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

After opening the process instance, review the “General Instructions” under the “Details” tab, and any comments provided by the ADPM under the “Comments” tab.

If the ADPM requested revisions to the 1135 submission, click on the “Documents” tab to access the 1135. To open the 1135 for editing, click on the “edit” link below the subject 1135 and click “Ok” when prompted. After opening the 1135, make the necessary edits and save your file upon completion. Close the document and return to the “Documents” tab. Then, click the “Check In” link below the subject 1135 to upload your changes.

[BI-MH-115_ARC 1135_2024.7.22.docx](#) (version 3) Checked out by Craig Russell
[Download \(57.4KB\)](#) | [Redline](#) | [Compare With](#) | [Send](#) | [Properties](#) |



Upon completion, scroll down to the bottom of the page and click the "Take Action" button. You will then be prompted to provide a comment, where you can provide detail regarding the revised submission. After adding your comment, click the "Submit" button.

Add Comment

Private

10.05 DPM/Chief Architect 1135 Review (DPM/Chief Architect)

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

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

My Home | Dashboard | Projects | Planning | Forms | Processes | Documents | Calendar | Contacts | Cost | Schedule | Reports | Time Tracking | Setup

Announcements
Welcome, State of Connecticut!

Welcome, ADPM!

My Processes

Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	TLV2 - 1	BI-CS-1010 - On-Call STR Request	ADPM 1135 Review

After opening the process instance, review the "General Instructions" and then click on the "Documents" tab to review the 1135 submission.

Click on the link to any of the subject files to view those files.

File Name	Attached By
<input type="checkbox"/> BI-CTC-686_NWCC_BrdgRef_1105_230918.pdf (version 2) <small>Properties Download (570.7KB) Redline Stamp Remove</small>	Russell, Craig <i>(Department of Administrative Services Construction Services)</i>
<input type="checkbox"/> 1135_OnCallSel.docx (version 2) <small>Properties Download (56.2KB) Redline Most Recent Remove</small>	Russell, Craig <i>(Department of Administrative Services Construction Services)</i>
<input type="checkbox"/> 1105 Project Budget Detail.xlsx (version 1) <small>Properties Download (38.9KB) Redline Remove Edit</small>	Russell, Craig <i>(Department of Administrative Services Construction Services)</i>

After completing your review of the documents, return to the "Details" tab and review the section entitled "On-Call Selection Request". If you agree with the "Type of On-Call Consultant" selected and the



estimated "Consultant Fee", proceed to the "On-Call Task Assignment Solicitation" section. If you disagree with the "Type of On-Call Consultant" selected and/or the estimated "Consultant Fee", revise the subject field(s) accordingly and then proceed to the "On-Call Task Assignment Solicitation" section.

On-Call Selection Request

Select the type of On-Call Consultant you wish to have assigned to the project task and the estimated fee for the On-Call Consultant to complete the task.

* Type of OC Consultant:	-- Please select an option --
* Consultant Fee:	<input type="text"/>

If the estimated "Consultant Fee" is greater than \$300,000, determine whether all, or a certain delegation of, Consultants from the selected On-Call Contract Series should be solicited to provide a proposal for the subject task assignment. If not "All On-Call Series Consultants", then provide the firm name of those Consultants that should be solicited in the fields entitled "On-Call 1" through "On-Call 5". Refer to the [Active On-Call Contracts](#) report for a listing of all the active On-Call Contracts.

On-Call Task Assignment Solicitation

If the estimated "Consultant Fee" is greater than \$300,000, determine whether all, or a certain delegation of, Consultants from the selected On-Call Contract Series should be solicited to provide a proposal for the subject task assignment. If not "All On-Call Series Consultants", then provide the firm name of those Consultants that should be solicited in the fields below. Refer to the [Active On-Call Contracts](#) report for a listing of all the active On-Call Contracts.

On-Call Consultant Solicitation:	-- Please select an option --
On-Call 1:	<input type="text"/>
On-Call 2:	<input type="text"/>

After all documents have been reviewed and all sections have been completed, scroll down to the bottom of the page and click the "Take Action", button. A prompt will appear after you click "Take Action" to allow you to provide a comment, if applicable, regarding changes made to the selection type and/or consultant fee.

Add Comment

Private

10.06 Solicit Multiple Vendors (PM)

If the estimated Consultant fee for the subject task assignment is estimated to be greater than or equal to \$300,000, the PM will receive an email from eBuilder as notification to solicit proposals from multiple vendors in the selected On-Call Series for the subject task assignment. To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject process instance link from the "My Processes" section.

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



- My Home**
- Dashboard
- Projects
- Planning
- Forms
- Processes
- Documents
- Calendar
- Contacts
- Cost
- Schedule
- Reports
- Time Tracking
- Setup

Welcome, ADPM!

My Processes

Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	TLV2 - 1	BI-CS-1010 - On-Call STR Request	ADPM 1135 Review

Announcements
Welcome, State of Connecticut!

After opening the process instance, scroll down to the “On-Call Task Assignment Solicitation” section for the list of Consultants selected by the DPM and/or Chief Architect to be solicited for the subject On-Call task assignment.

On-Call Task Assignment Solicitation

If the estimated "Consultant Fee" is greater than \$300,000, determine whether all, or a certain delegation of, Consultants from the selected On-Call Contract Series should be solicited to provide a proposal for the subject task assignment. If not "All On-Call Series Consultants", then provide the firm name of those Consultants that should be solicited in the fields below. Refer to the Active On-Call Contracts report for a listing of all the active On-Call Contracts.

On-Call Consultant Solicitation:

On-Call 1:

On-Call 2:

On-Call 3:

Proceed with scheduling a scope review meeting with the Client Agency and all Consultants listed in the “On-Call Task Assignment Solicitation” section. Please note that the listed Consultants have the right to decline participation in the scope review meeting if they are unable to provide a proposal for the subject task assignment at this time. After the scope review meeting has been held, collect proposals from each of the Consultants that participated in the scope review meeting, on a date to be determined, and select the lowest responsible bidder from the list of Consultants to be assigned to the task.

After the lowest responsible bid has been determined, return to the process instance, scroll down to the “On-Call Selection Request” section, and provide the name of the “Selected On-Call Consultant” and update the “Consultant Fee” to match the proposal. Upon completion, click the “Take Action” button.

On-Call Selection Request

Type of OC Consultant:

- * Selected On-Call Consultant:
- * Consultant Fee:

10.07 On-Call Assignment (CSS)

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

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

A Warning prompt will appear at the top of the page after the process instance is opened. DO NOT TAKE ACTION on this page. First, click on the “Comments” tab to review any relevant comments regarding the submission, then click the “Click here” link in the warning banner to edit the process instance.

Warning
A draft x35 TL - Cost Integrated V2 - DO NOT USE has been automatically created. [Click here](#) to provide required Commitment information and submit the instance.



Prior to editing the process instance, return to the eBuilder homepage, click on the “Documents” tab. Scroll down the "12 Task Letters" file folder to access the draft Form 1135 submission documents. Review Form 1135 and assign an appropriate On-Call Consultant (refer to the “Reports” tab and open the “On-Call Contracts – Active” report to determine which On-Call Consultant to select), then download the 1135 to your desktop, complete the task assignment portion of the 1135 and save a signed copy of the 1135 as a pdf.

Once the assignment has been determined and Form 1135 has been completed with the assigned Consultant identified in Form 1135, return to the “12 Task Letters” file folder and rename the first unnamed file folder, with the provided naming protocol based on the task letter assignment, and move the 1105 and the executed 1135 into the "Drafts" subfolder. Then click on the "Properties" hyperlink for the "Drafts" file folder and copy the "Private Folder URL" link to be pasted in the "Task Letter - Draft" field in the Task Letter - Cost Integrated process instance. Repeat this step for the "Final" file folder to be pasted in the "Task Letter - Final" field in the process instance.


Return to the process instance and paste the links into the respective fields. Then complete the “on-Call Information”, "Commitment Details" and "Commitment Custom Fields" sections. In the "Commitment Custom Fields" section, data should be provided for the following fields: On-Call Request Received, On-Call Request Approved, Type of On-Call Consultant, Project Status Summary, Document Type, and Consultant/Contractor Name. Upon completion, click the "Take Action" button.

10.08 DAS Fee Transfer (DAS Admin)

If the On-Call Selection Request is for an Agency Administered Project, DAS Admin will receive an email from eBuilder as notification to request a funding transfer, via email, of \$5,000 from the Client Agency to cover DAS fees related to the preparation of the task letter package. To take action on the subject process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project under the “My Processes” section. The process “Step” will be entitled “DAS Fee Transfer”.

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

My Home Projects Forms Processes Documents Contacts Cost Schedule



Welcome, Craig!

My Processes

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



After opening the process instance, review the “General Instructions” under the “Details” tab and proceed in making the request for a funding transfer. Upon completion, click the “Take Action” button.

1135 TL - Cost Integrated V2 (TCIV2) - 9 Delete Instance Workflow Override All Fields View

Submit Take Action Check Spelling Print Copy Delegate Save Cancel

Project:	*BI-CS-1010 - DAS Test Project	Overall Due Date:	
Process Document:	TCIV2 - 9 <a>Show History <a>Current Actors	Step Due Date:	
Current Workflow Step:	DAS Fee Transfer <a>Show Workflow Diagram		
* Subject:	*BI-CS-1010 - DAS Test Project (TLV2 - 8)		
Status:	Pending		

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

Expand All | Collapse All

General Instructions

An On-Call Consultant has been assigned to the subject Agency Administered project. Please request a funding transfer, via email, of \$5,000 from the Client Agency to cover DAS fees related to the preparation of the task letter package by the PM assigned to the project. Upon completion click the "Take Action" button.

10.09 Prepare Task Letter Package (PM)

The PM will receive an email from eBuilder as notification that an On-Call Consultant has been assigned to the Project and the PM can begin preparing the Task Letter Package for submission.

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

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

My Home Dashboard Projects Planning Forms Processes Documents Calendar

Welcome, PM!

My Processes

Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package	PM Reconciliation Review
*BI-CS-1010 - DAS Test Project	x35a - 3	BI-CS-1010 - On-Call STR Request (TLV2 - 1)	PM Prepare Task Letter Package

After opening the process instance, read the “General Instructions” and then click on the link in the “Task Letter – Draft” field, provided under the “On-Call Consultant Request” section, to open the file folder where you will be uploading your task letter submission package and where you can access the signed 1135 to view the On-Call Assignment.

Task Letter File Folders

Task Letter - Draft: [?](#) [Paste link to the subject task letter assignment "Draft" file folder.](https://gov.e-builder.net/da2/daLanding.aspx?QS=a30a318000324673ab4550a24275cb34)



Proceed with scheduling the scope review meeting with the Consultant and Client Agency and begin preparing the task letter package for submission.

Note: If after the scope review meeting, the estimated Consultant fee to complete the task assignment is determined to be greater than \$300,000, the PM will be required to solicit multiple proposals from a list of On-Call Consultants, selected by the DPM and/or Chief Architect, in the On-Call Contract series. To initiate the selection of multiple proposals, scroll to the "Multiple Solicitations Required" section and answer the related question. Next, select "Void" from the dropdown list next to the "Take Action" button and click "Take Action."

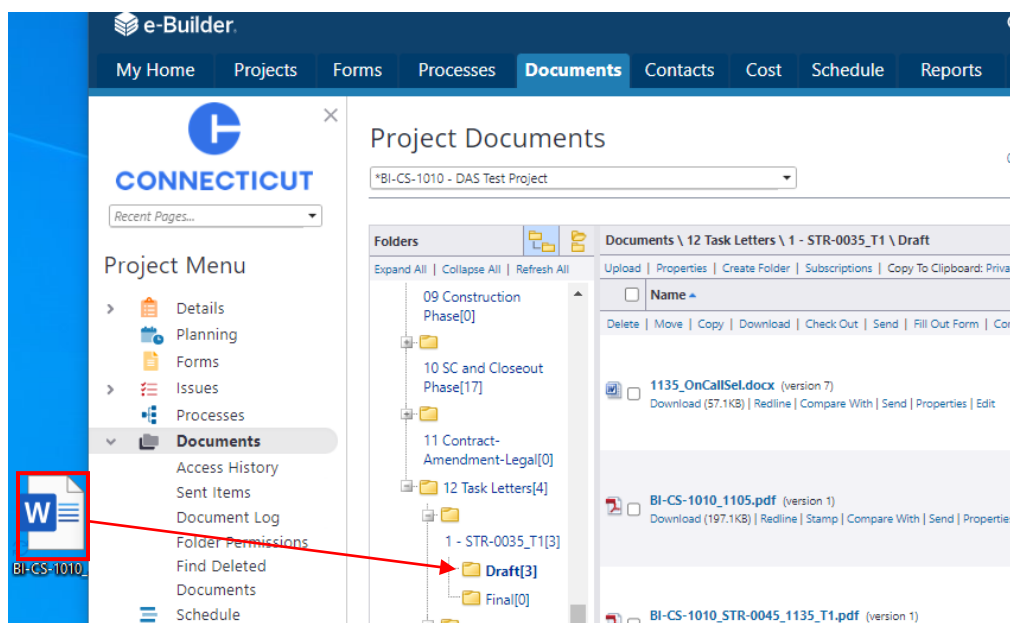
Multiple Solicitations Required?

<p>* Multiple Solicitations Required?:</p>	<p>If a Consultant has already been assigned this task and after the scope review meeting it was determined that the total Consultant Fee will be greater than or equal to \$300,000, answer "Yes" to solicit multiple vendors, otherwise answer "No".</p> <p>-- Please select an option --</p>
--	---

This will cancel the current task assignment and notify CSS to initiate a new On-Call Assignment/Task Letter process instance, so that the DPM and Chief Architect can provide a list of On-Call Consultants, in addition to the original selection, to solicit for the subject task assignment from which the On-Call Consultant with the lowest responsible bid will be selected to execute the task assignment.

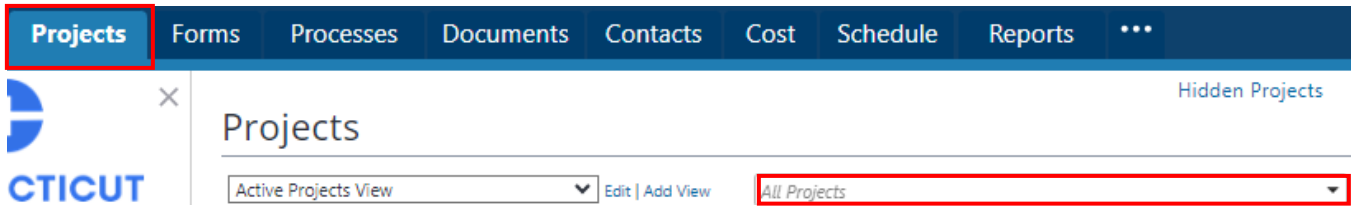
If the task assignment does not require multiple proposals, no further action is required until the task letter package is complete. Once the task letter package is ready for upload into eBuilder, return to the process instance and click on the link in the "Task Letter – Draft" field to open the Consultant's On-Call Task Letter file folder. Upload the task letter submission package by dragging and dropping the required documents into the subject Consultant's On-Call Task Letter file folder.

Note: Include all of the required documents and only the required documents, in the specified file format, for upload and submission to CSS and/or legal for review.

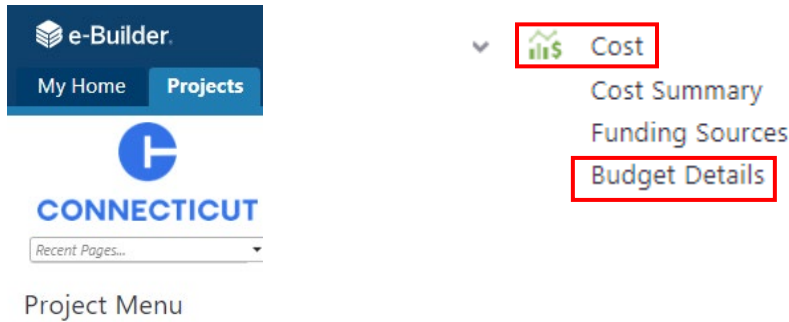




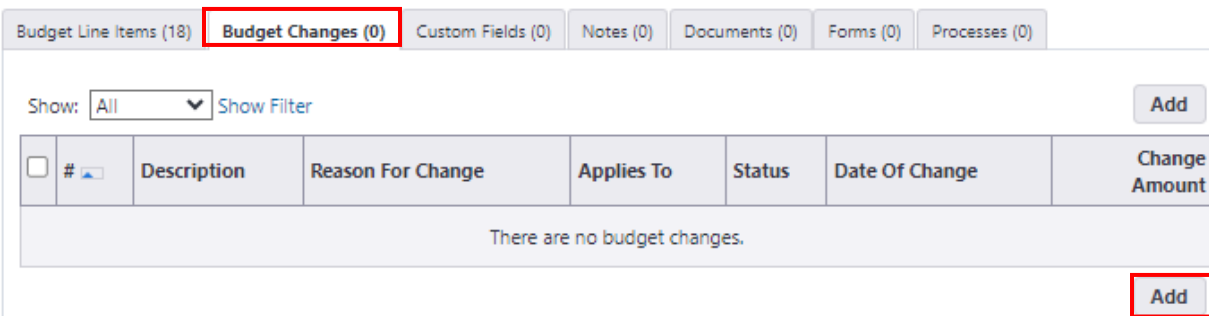
After the required documents have been uploaded, return to eBuilder and click on the “Projects” tab, then select your project from the “Active Projects” dropdown list.



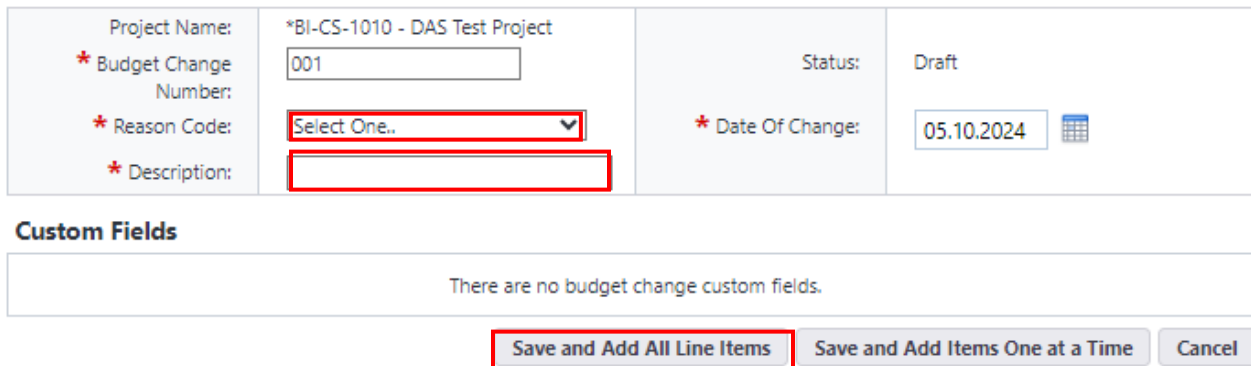
Click “Cost” under the Project Menu, and then click on “Budget Details”.



Click on the “Budget Changes” tab and then click “Add”.



Provide data input in the required fields and click the “Save and Add All Line Items” button. A prompt will appear asking: “Are you sure you want to add all budget line items to the change?”. Click “Continue”.





Input the amount of On-Call Consultant Fee in the “Change Amount” column for the appropriate On-Call line item (2.130, 8.130, 10.130, or 13.130) and click the “Save” button.

Budget Change Items Recalc

Description	Budget Line Item	Current Budget Amount	Projected Commitments	Formula	Change Amount
On-Call (ENV, HAZ)	02.130	0.00	0.00	Add	0.00
Total CMR Construction ...	03.100	0.00	0.00	Add	0.00
Total DBB Construction P...	03.200	0.00	0.00	Add	0.00
Total DAS/CS Contingen...	04.000	0.00	0.00	Add	0.00
Total Equipment	05.000	0.00	0.00	Add	0.00
Total Telecommunications	06.000	0.00	0.00	Add	0.00
Total Studies (Pre-Design...	07.000	0.00	0.00	Add	0.00
Total A/E (Design Phase, ...	08.000	0.00	0.00	Add	0.00
On-Call (ARC, CIV-SUR-L...	08.130	0.00	500.00	Add	0.00

Then, click the “Make Pending” button.

Budget Change Details

Then, return to the process instance and input the date of the scope review. Upon completion, click the "Take Action" button.

Scope Review

* Date of Scope Review:

Submit

10.10 Support Services Review (CSS)

CSS will receive an email from eBuilder as notification that the Task Letter Package has been submitted for review.

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

After opening the process instance, click on the link in the “Task Letter – Draft” field to view the Task Letter Package submission.

If the value of the task letter, or if a supplemental task the cumulative value of all task letters, is less than \$100,000, or in the case of CSCU or the Judicial Branch the value of the task letter or cumulative value of all task letters is less than \$300,000, CSS shall conduct the initial review of said task letter for completeness, compliance with the project scope and compliance with the subject On-Call Contract.

If there are any proposed revisions to the subject task letter, those changes shall be incorporated using track changes in the task letter from the subject file folder. After completing its review of the draft task



letter, CSS will return to the process instance, complete the "Task Letter Value" Section and update the "Project Status Summary".

If the value of the task letter, or if a supplemental task the cumulative value of all task letters, is greater than \$100,000, or in the case of CSCU or the Judicial Branch the value of the task letter or the cumulative value of all task letters is greater than or equal to \$300,000, CSS shall forward the task letter package to the ADPM to conduct the initial review of said task letter. Prior to forwarding the task letter package to the ADPM, CSS shall complete the "Task Letter Value" Section and update the "Project Status Summary".

After the task letter value has been determined and, if applicable, the review completed, CSS will either select "Revise" from the drop-down list, next to the "Take Action" button, to return the task letter package to the PM for revision or select "Submit" to forward the task letter package to the ADPM for review. After taking action, CSS will be prompted to provide a comment regarding the proposed revisions for the PM or a comment regarding the type of review the ADPM is to conduct prior to submitting the package to Legal.

10.11 Task Letter Revision (PM)

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

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

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

My Home Dashboard Projects Planning Forms Processes Documents Cal

Welcome, PM!

My Processes

Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package	PM Reconciliation Review
*BI-CS-1010 - DAS Test Project	x35a - 3	BI-CS-1010 - On-Call STR Request (TLV2 - 1)	PM Revision

After opening the process instance, review the "Comments" tab for additional information regarding proposed revisions.

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

After reviewing the comments, return to the "Details" tab.

If the task letter package was submitted for SPRB review and the attorney assigned to the project reviewed the task letter package outside of eBuilder, direction will have been provided under the

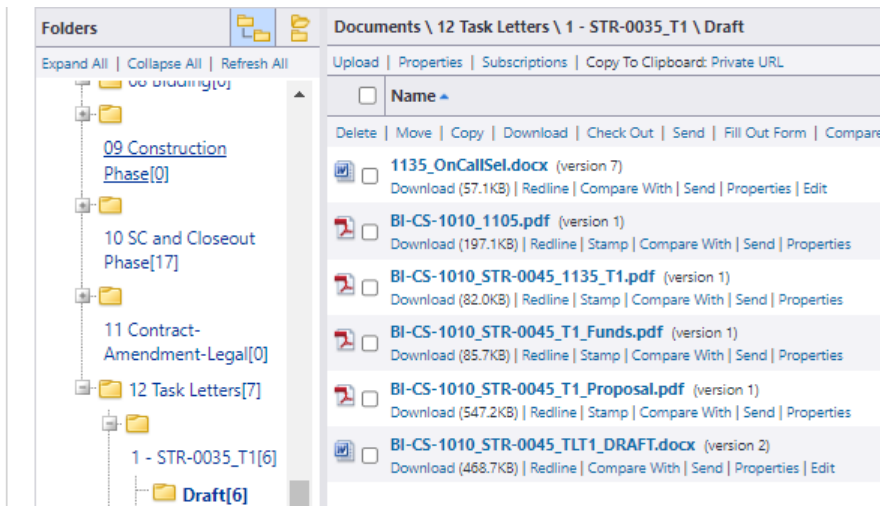


“Comments” tab for the location of the task letter submission package and direction to complete the proposed changes for resubmission.

If the task letter package was reviewed in eBuilder, scroll down to the “Task Letter File Folders” section, right click on the link provided in the “Task Letter - Draft” field, and select “Open Link in New Tab” to open the subject Project On-Call Task Letter file folder.

Task Letter File Folders

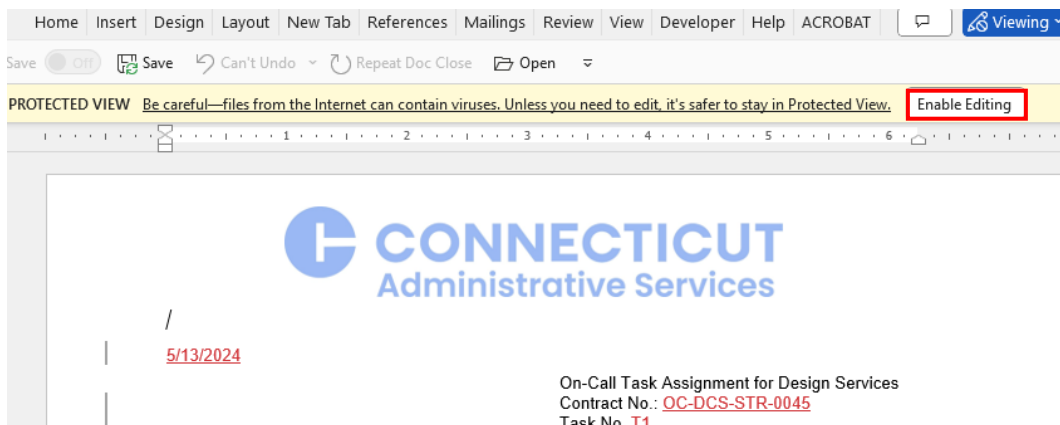
Task Letter - Draft: ? Paste link to the subject task letter assignment “Draft” file folder.
<https://gov.e-builder.net/da2/daLanding.aspx?QS=a30a318000324673ab4550a24275cb34>



Find the revised draft task letter and click the “Edit” link to check out the draft task letter and open it in Word to review the proposed edits.



After opening the task letter, click the “Enable Editing” button and click “No” when the prompt appears.





The author would like you to open this as read-only, unless you need to make changes. Open as read-only?

Yes No Cancel

Review the proposed revisions, determine if they are acceptable and, if applicable, provide additional revisions (with Track Changes enabled) and/or a response to any comments in the subject task letter. After completing the review and incorporating any revisions, save and close the document.

Next, return to the “Documents” tab and find the revised draft task letter, click the “Check In” link below the draft task letter to save your revisions and click “OK” when prompted. If any additional documentation is required to complete the task letter package submission, upload it now by following the steps provided in [Section 10.06](#) above.

12 Task Letters[7]
1 - STR-0035_T1[6]
Draft[6]

BI-CS-1010_STR-0045_T1_Proposal.pdf (version 1)
Download (547.2KB) | Redline | Stamp | Compare With | Send | Properties

BI-CS-1010_STR-0045_TLT1_DRAFT.docx (version 2) Checked out by PM Russell
Download (468.7KB) | Redline | Compare With | Send | Properties | Edit | **Check In**

After all revisions have been incorporated, either within or outside of eBuilder, return to the “Details” tab for the process instance and click “Take Action” to resubmit the task letter package. A prompt will appear after clicking “Take Action” to allow you to comment on the revised submission. Click “Submit” after adding the comment.

Task Letter File Folder

Task Letter - Draft:

Submit **Take Action**

10.12 ADPM Review (ADPM)

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

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

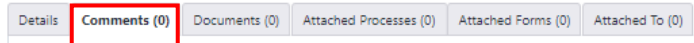
My Home Dashboard Projects Planning Forms Processes Documents Ca

Welcome, ADPM! All pr

My Processes

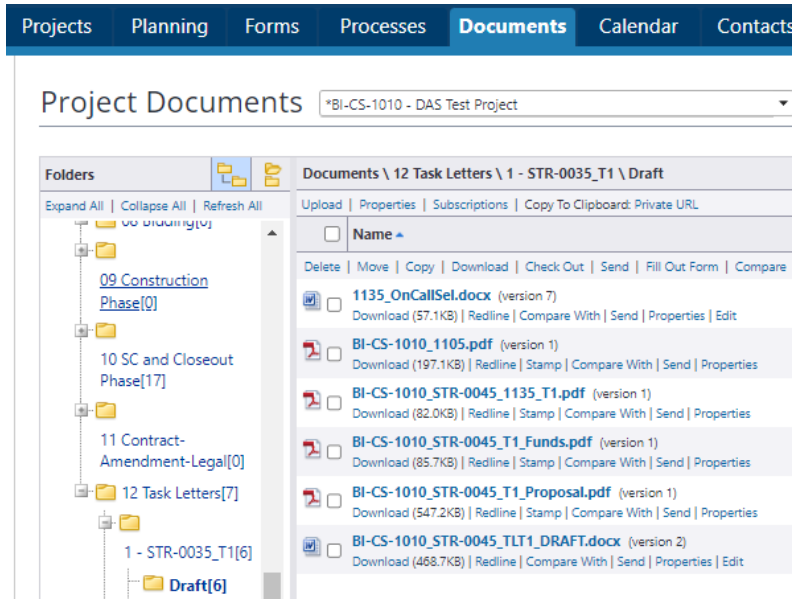
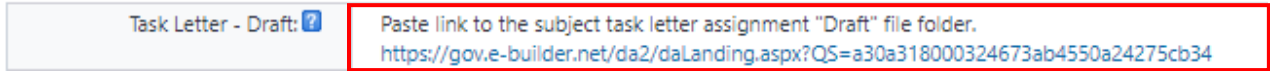
Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	x35a - 3	BI-CS-1010 - On-Call STR Request (TLV2 - 1)	ADPM Review

After opening the process instance, select the “Comments” tab to review comments from previous Actors regarding the task letter submission and to get direction on the type of task letter review that is to be conducted.



Then, return to the “Details” tab and right click on the link provided in the “Task Letter - Draft” field, and select “Open Link in New Tab” to open the subject Project On-Call Task Letter file folder.

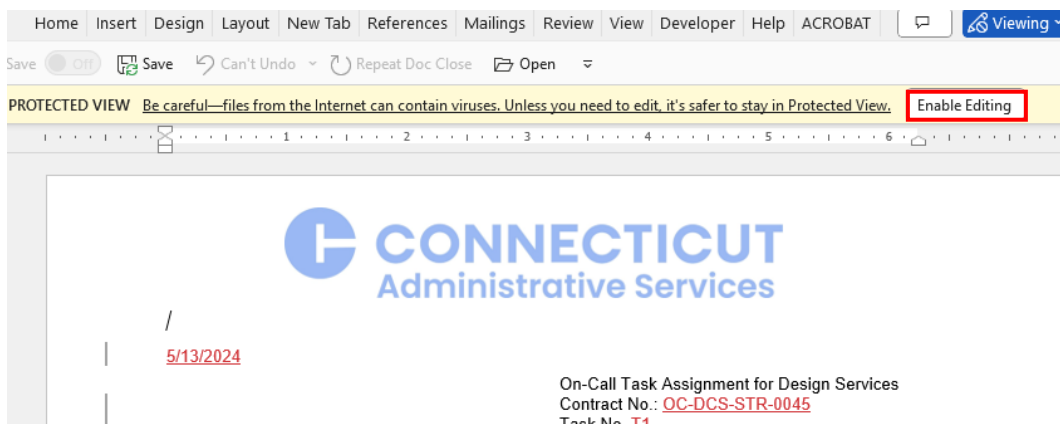
Task Letter File Folders

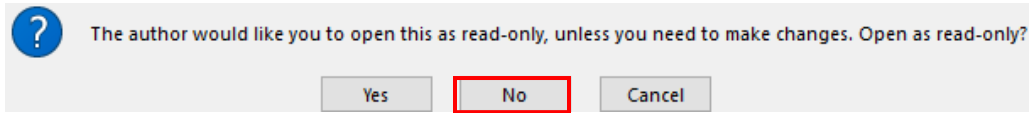


Click on the link to any of the documents within the task letter folder to view those documents. To open the draft task letter for review and editing, click the “Edit” link under the draft task letter.



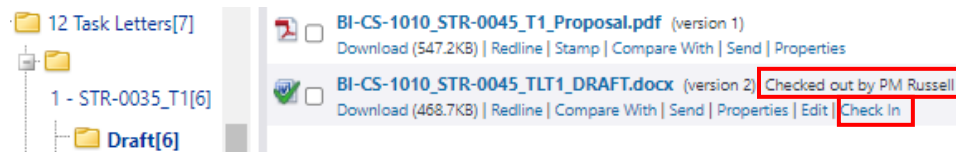
The task letter will open in Word. After opening the document, click the “Enable Editing” button and click “No” when the prompt appears.



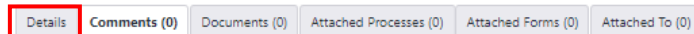


Review the task letter for completeness, compliance with the project scope and compliance with the subject On-Call Contract. If the task letter requires any revision, input those revisions using "Track Changes". Upon completion of your review, click "Save" to save the document.

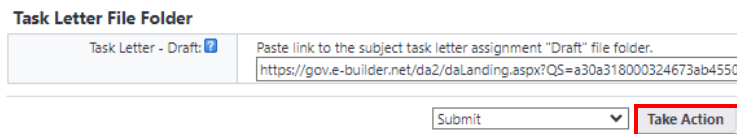
Return to the "Documents" tab and find the draft task letter again. Note that the draft task letter has been "Checked out by... (you)". To complete the process of saving and/or accepting any proposed changes to the revised draft task letter, click the "Check In" link, then click "OK" when the following prompt appears: "A new version of the following file was created during this check in."



Upon completion of the check in, return to the "Details" tab.



Scroll down the bottom of the page and either select "Revise" from the dropdown list next to the "Take Action" button, if there are proposed revisions to the task letter, or if there are no revisions and/or the proposed revisions have been accepted, select "Submit" from the dropdown list and click the "Take Action" button. After clicking "Take Action", a prompt will appear to provide a comment, which should be used to provide a brief summary of the proposed changes and/or to provide direction to the next Actor in the process.



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

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

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

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

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



My Home Projects Forms Processes Documents Contacts Cost S

Welcome, Craig!

My Processes

Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	x35a - 3	BI-CS-1010 - On-Call STR Request (TLV2 - 1)	Agency Legal Director

After opening the process instance, select the “Comments” tab to review comments from previous Actors regarding the task letter submission.

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

Then, return to the “Details” tab and right click on the link provided in the “Task Letter - Final” field, and select “Open Link in New Tab” to open the subject Project On-Call Task Letter file folder.

Task Letter File Folder

Task Letter - Final: ? Paste link to the subject task letter assignment “Final” file folder.

<https://gov.e-builder.net/da2/daLanding.aspx?QS=a30a318000324673ab4550a24275cb34>

Projects Planning Forms Processes **Documents** Calendar Contacts

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

Documents \ 12 Task Letters \ 1 - STR-0035_T1 \ Draft

Name	Version	Size
1135_OnCallSel.docx	(version 7)	Download (57.1KB)
BI-CS-1010_1105.pdf	(version 1)	Download (197.1KB)
BI-CS-1010_STR-0045_1135_T1.pdf	(version 1)	Download (82.0KB)
BI-CS-1010_STR-0045_T1_Funds.pdf	(version 1)	Download (85.7KB)
BI-CS-1010_STR-0045_T1_Proposal.pdf	(version 1)	Download (547.2KB)
BI-CS-1010_STR-0045_TLT1_DRAFT.docx	(version 2)	Download (468.7KB)

Click on the link to any of the documents within the task letter folder to view those documents. To check out the final version of the draft task letter and open it in Word for review and editing, click the “Edit” link under the draft task letter.

12 Task Letters[7]

1 - STR-0035_T1[6]

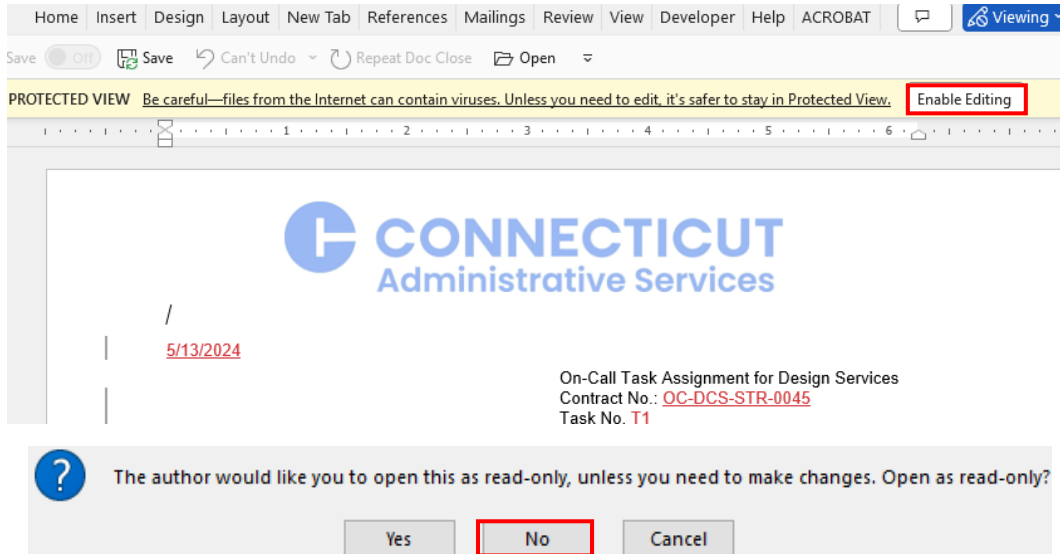
Draft[6]

BI-CS-1010_STR-0045_T1_Proposal.pdf (version 1)
Download (547.2KB) | Redline | Stamp | Compare With | Send | Properties

BI-CS-1010_STR-0045_TLT1_DRAFT.docx (version 2)
Download (468.7KB) | Redline | Compare With | Send | Properties **Edit**



After opening the document, click the "Enable Editing" button and click "No" when the prompt appears.

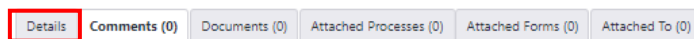


Review the task letter for completeness, compliance with the project scope and compliance with the subject On-Call Contract. If the task letter requires any revision, input those revisions using "Track Changes". Upon completion of your review, click "Save" to save the document.

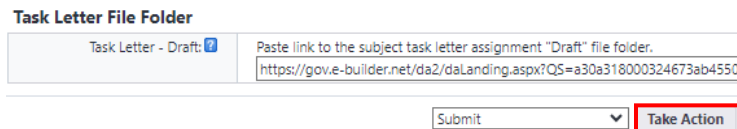
Return to the "Documents" tab and find the draft task letter again. Note that the draft task letter has been "Checked out by... (you)". To complete the process of saving and/or accepting any proposed changes to the revised draft task letter, click the "Check In" link, then click "OK" when the following prompt appears: "A new version of the following file was created during this check in."



Upon completion of the check in, return to the "Details" tab in the process instance.



Scroll down the bottom of the page and either select "Revise" from the dropdown list next to the "Take Action" button, if there are additional revisions that need to be incorporated into the subject task letter, or if there are no revisions and/or the proposed revisions have been accepted, select "Submit" from the dropdown list and click the "Take Action" button. After clicking "Take Action", a prompt will appear to provide a comment, which should be used to provide a brief summary of the proposed changes and/or to provide direction to the next Actor in the process.





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

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

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

After opening the process instance, scroll down to the "Legal Assignment" section and answer the "Make Legal Assignment?" question by selecting "Yes" from the dropdown list. Next, Select the Attorney and Paralegal that you want to assign to the project from the subject field dropdown list (this step does not complete the assignment, but rather makes it so the assigned Attorney and Paralegal are visible contacts throughout the remainder of the process). After answering the questions, scroll down to the bottom of the page and click the "Take Action" button.

Legal Assignment

* Make Legal Assignment?: -- Please select an option --

* OLAPP Attorneys: Please select...

* OLAPP Paralegals: Please select...

Submit Take Action Check Spelling Print

After the "Take Action" button has been clicked, a prompt will be displayed where you can add a comment and formally select an Attorney and Paralegal to assign to the task letter review. To assign a Paralegal and Attorney, select said Attorney and Paralegal from the "Add actors to the next step" column and then click on the ">" to move the Attorney and Paralegal from the "Available Users" to the "Selected Users" column. After adding a comment and selecting the Attorney and Paralegal, click "Submit".

Add Comment

Private

Add actors to the next step

Available Users: LaChance, Amy (Department of Administrative Services), Peterson, Anne (Department of Administrative Services - Construction Services), Tamborra, Rebecca (Department of Administrative Services)

Selected Users: Russel, Craig (Department of Administrative Services - Construction Services)

10.14 OLAPP Review (OLAPP – Attorneys & Paralegals)

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

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

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



My Home Projects Forms Processes Documents Contact

Welcome, Craig!

My Processes

Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	x35a - 3	BI-CS-1010 - On-Call STR Request (TLV2 - 1)

After opening the process instance, select the “Comments” tab to review comments from previous Actors regarding the task letter submission.

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

Then, return to the “Details” tab and right click on the link provided in the “Task Letter - Draft” field, and select “Open Link in New Tab” to open the subject Project On-Call Task Letter file folder.

Task Letter File Folders

Task Letter - Draft: ? Paste link to the subject task letter assignment “Draft” file folder.
<https://gov.e-builder.net/da2/daLanding.aspx?QS=a30a318000324673ab4550a24275cb34>

Projects Planning Forms Processes **Documents** Calendar Contacts

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

Folders: 09 Construction Phase(0), 10 SC and Closeout Phase(17), 11 Contract-Amendment-Legal(0), 12 Task Letters(7), 1 - STR-0035_T1(6), Draft(6)

Documents \ 12 Task Letters \ 1 - STR-0035_T1 \ Draft

Name	Version	Download	Redline	Stamp	Compare With	Send	Properties	Edit
1135_OnCallSel.docx	(version 7)	Download (57.1KB)	Redline	Stamp	Compare With	Send	Properties	Edit
BI-CS-1010_1105.pdf	(version 1)	Download (197.1KB)	Redline	Stamp	Compare With	Send	Properties	
BI-CS-1010_STR-0045_1135_T1.pdf	(version 1)	Download (82.0KB)	Redline	Stamp	Compare With	Send	Properties	
BI-CS-1010_STR-0045_T1_Funds.pdf	(version 1)	Download (85.7KB)	Redline	Stamp	Compare With	Send	Properties	
BI-CS-1010_STR-0045_T1_Proposal.pdf	(version 1)	Download (547.2KB)	Redline	Stamp	Compare With	Send	Properties	
BI-CS-1010_STR-0045_TLT1_DRAFT.docx	(version 2)	Download (468.7KB)	Redline	Stamp	Compare With	Send	Properties	Edit

Click on the link to any of the documents within the task letter folder to view those documents. Click on the “Check Box” next to the link and click the “Download” link to download any of the subject documents for review and editing, or to review and edit a Word document in eBuilder (i.e. task letter), you can check out the subject document by clicking the “Edit” link under said document.

12 Task Letters(7)

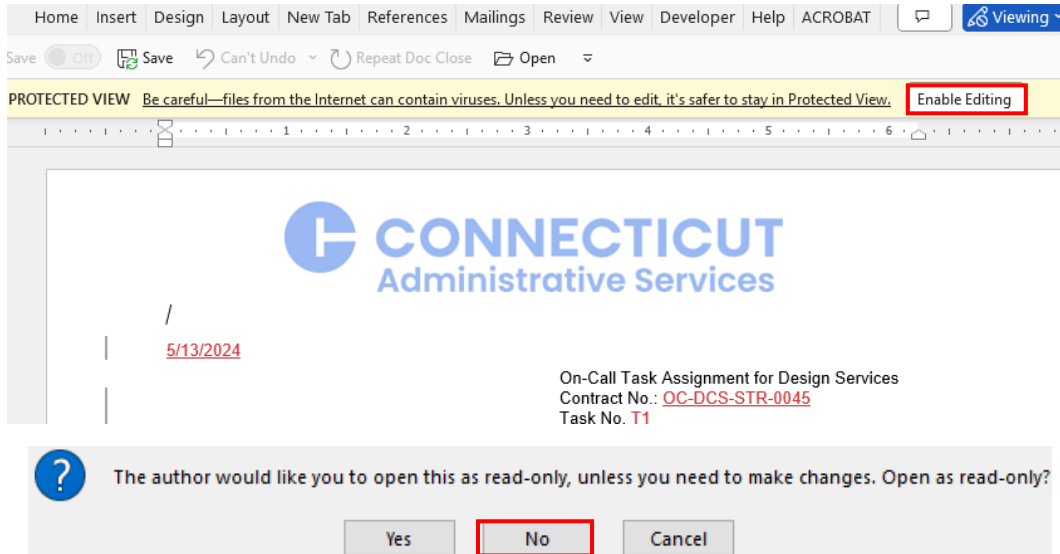
1 - STR-0035_T1(6)

Draft(6)

BI-CS-1010_STR-0045_T1_Proposal.pdf	(version 1)	Download (547.2KB)	Redline	Stamp	Compare With	Send	Properties	
BI-CS-1010_STR-0045_TLT1_DRAFT.docx	(version 2)	Download (468.7KB)	Redline	Stamp	Compare With	Send	Properties	Edit

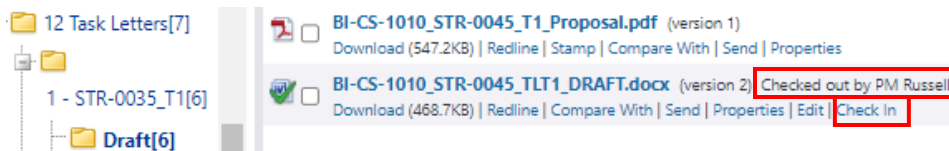


Then, after opening the document, click “Enable Editing” and then click “No” when the prompt appears.

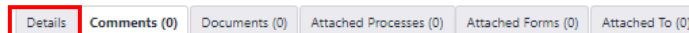


Review the task letter for completeness, compliance with the project scope and compliance with the subject On-Call Contract. If the task letter requires any revision, input those revisions using “Track Changes”. Upon completion of your review, save and close the document.

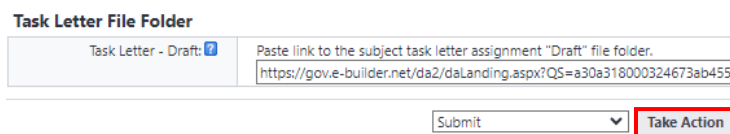
If the task letter was reviewed and revised in eBuilder, return to the “Documents” tab and find the draft task letter that has been “Checked out by... (you)”. Next, click the “Check In” link, then click “OK” when the following prompt appears: “A new version of the following file was created during this check in” to complete the process of saving and/or accepting any proposed changes to the revised draft task letter.



After the task letter review has been completed (either within or outside of eBuilder), return to the “Details” tab in the process instance.



Then, scroll down the bottom of the page and either select “Revise” from the dropdown list next to the “Take Action” button, if there are revisions that need to be incorporated into the subject task letter that require input by the PM, or if there are no revisions and/or the proposed revisions have been accepted, select “Submit” from the dropdown list and click the “Take Action” button to forward the task letter package to the assigned Paralegal for submission to SPRB.



If “Revise” was selected, a prompt will appear to provide a comment with direction to complete the task letter submission package. If the task letter package was reviewed and edited outside of eBuilder, also



include the location of the task letter file folder that the PM will need to access to make the proposed changes for resubmission. After adding your comment, click "Revise".

*** Add Comment**

Private

10.15 SPRB Review (OLAPP - Paralegals)

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

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

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

My Home
Projects
Forms
Processes
Documents
Conta

Welcome, Craig!

My Processes

Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	x35a - 3	BI-CS-1010 - On-Call STR Request (TLV2 - 1)

Scroll down to the "Task Letter File Folders" and right click on the link provided in the "Task Letter - Draft" field. Select "Open Link in New Tab" to open the subject Project On-Call Task Letter file folder. Click on the link to any of the task letter files to open said files for viewing. Click the checkbox, next to "Name"(see below), to select all documents in the submission package for download to your computer for submission to SPRB. After all of the documents have been selected, click the "Download" link.

Task Letter File Folders

Task Letter - Draft: ?	Paste link to the subject task letter assignment "Draft" file folder. https://gov.e-builder.net/da2/daLanding.aspx?QS=a30a318000324673ab4550a24275cb34
--	---



Save the compressed file folder to your computer and prepare the task letter package for SPRB review. After the task letter package has been prepared and submitted, return to the process instance and scroll down to the “SPRB Review” section to provide the “SPRB File Number” and the date “Sent to SPRB”.

SPRB Review

* SPRB File Number:

* Sent to SPRB:

-- Please select an action --

You are now ready to take action. Proceed to the bottom of the page and select “Revise”, from the dropdown list next to the "Take Action" button, if there are any documents missing from the task letter submission package that are required for SPRB review. Select “Submit” from the dropdown list if the task letter package is complete and is ready for SPRB review. After making the selection, click the “Take Action” button. Note that the subject task letter package will not be submitted to SPRB through eBuilder. The TL Package should be submitted to SPRB through traditional means for their review.

Task Letter File Folder

Task Letter - Draft: Paste link to the subject task letter assignment "Draft" file folder.
<https://gov.e-builder.net/da2/daLanding.aspx?QS=a30a318000324673ab4550>

Submit

If “Revise” was selected, a prompt will appear to provide a comment, which should be used to provide direction on what will be required to complete the submission package for SPRB review. After adding your comment, click “Revise” to return the task letter package to the PM for additional information.

*** Add Comment**

Private

Check Spelling Cancel



10.16 Process Task Letter through DocuSign (CSS)

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

If the task letter submission package was submitted to SPRB for review and approval, CSS will scroll down to the bottom of the page and click the “Take Action” button. If the task letter submission package did not require SPRB approval, CSS will access the project file folder, download the final version of the task letter and process the task letter through DocuSign.

After initiating the processing of the task letter through DocuSign, click the “Take Action” button.

10.17 Task Letter Executed (CSS)

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

CSS will access the process instance, complete the “Task Letter Executed” section of eBuilder, upload a copy the executed task letter to the “Task Letter Executed” field for placement in the project file (Pre-Construction/On-Call Task Letters), and provide data input in the “Commitment Custom Fields” section, including Date of Final Approval, Date TL Signed by Consultant, Date Contract Executed, SPRB File No. (if applicable), Date Sent to SPRB (if applicable), and Date Approved by SPRB (if applicable). Select “Submit” to complete the task letter process.



Section 11: Contract and Amendment Process

THIS PROCESS IS CURRENTLY UNDER DEVELOPMENT

11.01 Accessing the Process (OLAPP Procurement or PM)

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

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

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

11.02 Selecting the Contract Type (OLAPP Procurement or PM)

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

11.03 Selecting the Document Type (OLAPP Procurement or PM)

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

If the Contract Type selected was On-Call Contract, proceed to [Section 11A – On-Call Contract Approval](#).

If the Contract Type selected was DBB, proceed to [Section 11B – Design Bid Build Contract Approval](#).

If the Contract Type selected was CMR, proceed to [Section 11C – Construction Manager at Risk Contract Approval](#).

If the Contract Type selected was Formal, proceed to [Section 11D – Formal Contract Approval](#).



Section 11A: On-Call Contract Approval

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

Review the “General Instructions” and complete the “On-Call Contract Series” section.

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

Expand All | Collapse All

General Instructions

In the “Subject” line above, input “On-Call (Contract Type) Series,” i.e. On-Call Architect Series. Then, complete the “On-Call Contract Series” section below and upload a copy of each of the required documents to the “Documents” tab. Upon completion, click the “Submit” button.

On-Call Contract Series

Provide data input for the “On-Call Contract Series” section below. Upon completion of data input and after uploading the required documents to the “Supporting Documents” subfolder in the subject On-Call Series file folder, scroll down to the bottom of the page and click the “Take Action” button.

* Series Number:

* Description:

Award Date:

Award Amount:

On-Call Contract Checklist:

Please check all that apply, and upload signed (if applicable) copies of each of the respective documents to the respective “Supporting Documents” subfolder within the subject On-Call Contract Series file folder.

- Web Advertisement
- On-Call Long List & Contact Information
- On-Call Selection Calculations (signed)
- On-Call Selection Approval Memo (signed)
- Conditional Selection Letter
- QBS Reports

Upon completion, click on the “Documents” tab and upload a copy of each of the checklist items to the “Documents” tab. This can be done by dragging and dropping the subject documents into the space provided and clicking the “Select” button when prompted to upload the documents to the default file folder, or...

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

Show Thumbnails

<input type="checkbox"/> File Name	Attached By
<input type="button" value="Upload"/> Drag and drop files here to upload, or browse.	

Select Destination Folder


Documents / **99 On-Call Contract [Default]**

- Documents
- ▶ 01 On-Call Contract Creation
- ▶ 99 On-Call Contract



...by clicking the “browse” link, selecting “Upload from your Computer”, clicking the “Select” button, then clicking the “Browse” link, and then doing a search for the applicable files on your computer to select for upload to the default file folder.

↑ Drag and drop files here to upload, or [browse](#).



Upload from your Computer

Select Destination Folder

[Documents](#) / [99 On-Call Contract \[Default\]](#)

- Documents
 - ▶ 01 On-Call Contract Creation
 - ▶ 99 On-Call Contract

[Select](#)

↑

Drag your files or [Browse](#)

After all of the documents have been uploaded, click the “Submit” button.

[Print](#)
[Check Spelling](#)
[Submit](#)
[Save Draft](#)
[Cancel](#)

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

If legal needs additional information or documentation, and you receive and email notification from eBuilder, you can access the process instance by either clicking on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the subject process instance link from the “My Processes” section.

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

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



Welcome, Craig!

All pr

My Processes

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



Click on the “Comments” tab to see what additional information or documentation is required. If additional documentation is required, return to the “Details” tab, right click on the link in the "On-Call Series File Folder" field and select “Open link in new tab” to access the On-Call Contract Series file folder.

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

On-Call Contract Series

Series Number:

Description:

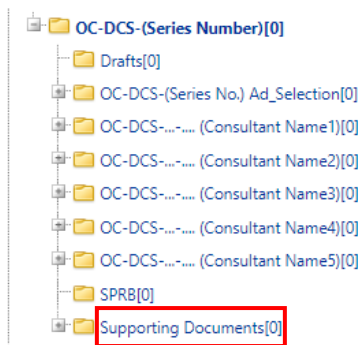
Award Date:

Award Amount:

On-Call Contract Checklist: Please check all that apply, and upload signed (if applicable) copies of each of the respective documents to the respective "Supporting Documents" subfolder within the subject On-Call Contract Series file folder.
Web Advertisement

* On-Call Series File Folder:

Then, open the subject On-Call Series file folder and upload the respective supporting documents to the “Supporting Documents” subfolder.



Upon completion, return to the “Details” tab in the subject On-Call Series process instance, scroll down to the bottom of the page and press the "Take Action" button.

Submit

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

Add Comment

Private



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

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

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

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

My Home Projects Forms Processes Documents Contacts Cost Schedule

Welcome, Craig! All pr

My Processes

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

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

Open a duplicate eBuilder tab, click on the "Documents" tab once opened, and select "*Master On-Call" from the "Active Projects" dropdown list.

e-Builder

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

Documents

All Projects Edit | Add View All Projects

Click on the "+" next to the "01 On-Call Contract Creation" file folder to open the file folder and click on the file folder link entitled "OC-DCS-(Series Number)". After clicking on the file folder link, click the "Properties" link and rename the file folder for the new On-Call Contract Series, and click the "Save" button.

Folders

Documents \ 01 On-Call Contract Creation \ OC-DCS-(Series Number)

Upload **Properties** Create Folder Subscriptions Copy To Clipboard: Private URL

Name	Date Uploaded
OC-DCS-(Series Number)[0]	

Delete | Move | Copy | Download | Check Out | Send | Fill Out Form | Compare

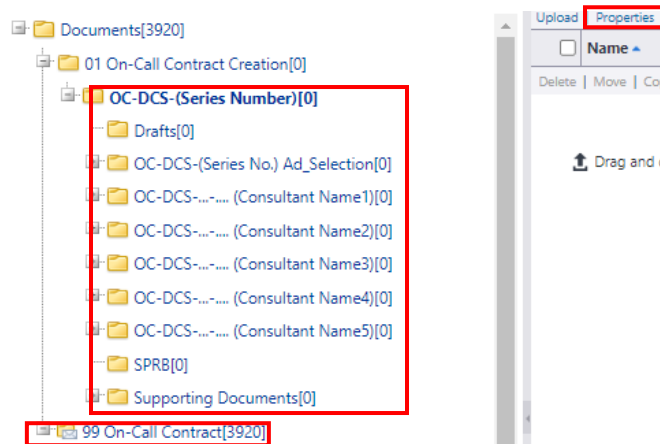
General History Permissions Subscribers Recycle Bin

General Properties Save

* Name: OC-DCS-(Series Number)



Then, open the On-Call Series subfolders and rename each of those file folders accordingly. Next, move all of the documents that were uploaded to the "01 On-Call Contract Creation" folder to the newly named On-Call Series subfolders. Upon completion, click on the newly named On-Call Series file folder, click on the "Properties" link again, and move the file folder into the "99 On-Call Contract" file folder.



After completing the move, click on the newly named On-Call Series file folder, then click on the "Properties" link, and copy the "Private URL File" link that is displayed.

Private Folder URL: <https://gov.e-builder.net/da2/daLanding.aspx?QS=1766aa3652dd4e798cd15553b74b430e>

Return to the "Details" tab in the subject On-Call Series process instance and paste the link in the "On-Call Contract Series File Folder" field.

* On-Call Series File Folder:

Then, complete the "On-Call Contract Data" section for each of the selected Vendors by filling out the respective fields highlighted in the section instructions and clicking the "Add" button. Repeat this process for each Vendor. Upon completion, click the "Take Action" button.

Add New Item for On-Call Contract Data

Vendor	<input type="text" value="Lookup"/>
On-Call Contract No. ?	<input type="text"/>
Actual Fee ?	<input type="text"/>
SPRB File No. ?	<input type="text"/>
Date Sent to SPRB ?	<input type="text"/> <input type="calendar"/>

Send to Legal

11A.03 Legal Assignment (Legal Director)


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

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

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



My Home Projects Forms Processes Documents Contacts Cost Schedule

 Welcome, Craig! All pr

My Processes

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

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

On-Call Contract Series

Provide data input for the "On-Call Contract Series" section below. Upon completion of data input and after uploading the required documents to the "Supporting Documents" subfolder in the subject On-Call Series file folder, scroll down to the bottom of the page and click the "Take Action" button.

* Series Number:

* Description:

Award Date:

Award Amount:

On-Call Contract Checklist: Please check all that apply, and upload signed (if applicable) copies of each of the respective documents to the respective "Supporting Documents" subfolder within the subject On-Call Contract Series file folder.

- Web Advertisement
- On-Call Long List & Contact Information
- On-Call Selection Calculations (signed)
- On-Call Selection Approval Memo (signed)
- Conditional Selection Letter
- QBS Reports

Right click on the link in the "On-Call Series File Folder" field and select "Open link in new tab" to access the On-Call Contract Series file folder.

* On-Call Series File Folder: <https://qov.e-builder.net/da2/daLanding.aspx?QS=1766aa3652dd4e798cd15553b74b430e>

Open the subject On-Call Series file folder and click on the "Supporting Documents" subfolder, and the applicable sub-subfolders to view the "On-Call Contract Checklist" documents.

- OC-DCS-(Series Number)[0]
 - Drafts[0]
 - OC-DCS-...-... (Consultant Name1)[0]
 - OC-DCS-...-... (Consultant Name2)[0]
 - OC-DCS-...-... (Consultant Name3)[0]
 - OC-DCS-...-... (Consultant Name4)[0]
 - OC-DCS-...-... (Consultant Name5)[0]
 - SPRB[0]
 - Supporting Documents[0]
 - Ad-Selection-Approval-Recommendation[0]
 - Cost-Technical Proposal[0]
 - QBS[0]
 - RFP & Addendums[0]



Upon completion of your review, return to the "Details" tab for the process instance, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and then click the "Take Action" to assign an Attorney and a Paralegal to draft the contract.

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

Add Comment

Private

Add actors to the next step

Available Users	Selected Users
LaChance, Amy (Department of Administrative Services) Peterson, Anne (Department of Administrative Services - Construction Services) Tamborra, Rebecca (Department of Administrative Services)	Russell, Craig (Department of Administrative Services - Construction Services)

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

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

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

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

My Home | Projects | Forms | Processes | Documents | Contacts | Cost | Schedule

Welcome, Craig! All pr

My Processes

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

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

On-Call Contract Series

Provide data input for the "On-Call Contract Series" section below. Upon completion of data input and after uploading the required documents to the "Supporting Documents" subfolder in the subject On-Call Series file folder, scroll down to the bottom of the page and click the "Take Action" button.

* Series Number:

* Description:

Award Date:

Award Amount:

On-Call Contract Checklist: Please check all that apply, and upload signed (if applicable) copies of each of the respective documents to the respective "Supporting Documents" subfolder within the subject On-Call Contract Series file folder.

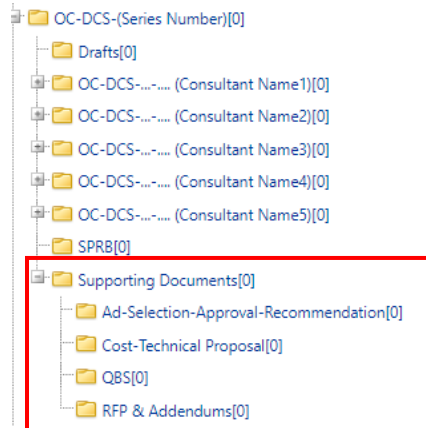
- Web Advertisement
- On-Call Long List & Contact Information
- On-Call Selection Calculations (signed)
- On-Call Selection Approval Memo (signed)
- Conditional Selection Letter
- QBS Reports



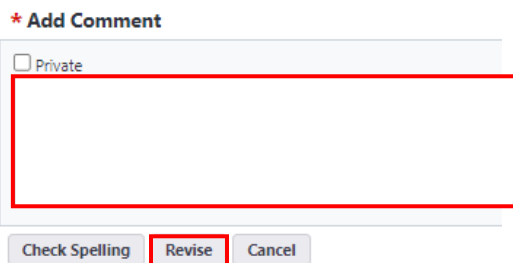
Right click on the link in the "On-Call Series File Folder" field and select "Open link in new tab" to access the On-Call Contract Series file folder.

* On-Call Series File Folder: <https://qov.e-builder.net/da2/daLanding.aspx?QS=1766aa3652dd4e798cd15553b74b430e>

After opening the subject On-Call Series file folder, click on the "Supporting Documents" subfolder, and then click on the applicable sub-subfolders to view the "On-Call Contract Checklist" documents.



If additional documentation or information is required by OLAPP Procurement to initiate the drafting of said contract series, return to the "Details" tab of the process instance, scroll down to the bottom of the page and select "Revise" from the dropdown list next to the "Take Action" button and click the "Take Action" button. A prompt will appear to add a comment on the request of additional documentation. After adding the comment, click the "Revise" button.



If all the documentation is in order to begin drafting the On-Call Contracts in the Contract Series, the Paralegal assigned to the project should return to the "Details" tab and begin providing data input for the "On-Call Checklist for Credential Review" field in the "On-Call Information" section. Upload copies of each of the respective documents checked off to the respective file folder listed in the field instructions.

On-Call Information

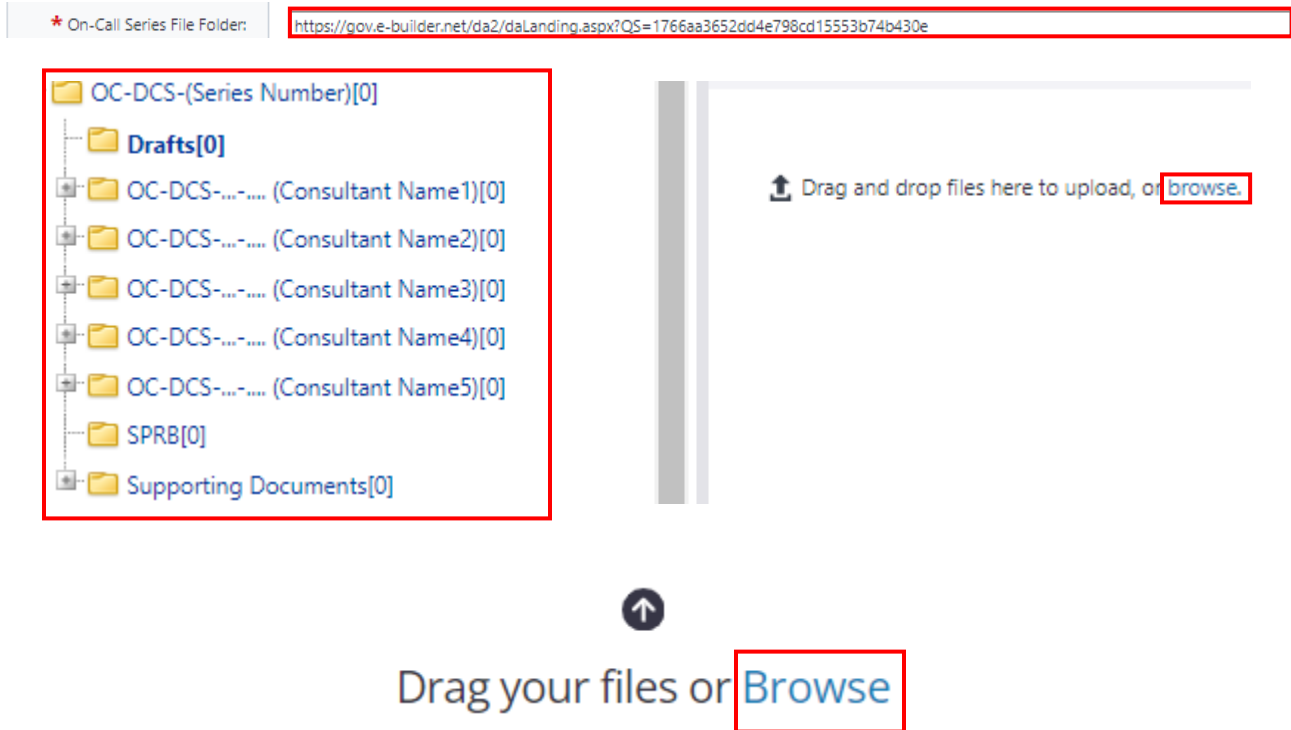
Complete data input for the "On-Call Checklist for Credential Review" field in the "On-Call Information" section. Upload copies of each of the respective documents checked off to the respective file folder listed in the field instructions.

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

On-Call Checklist for Credential Review:	<p>Please check all that apply and upload signed and sealed (if applicable) copies of each of the respective documents to the "Credential and Insurance" subfolder within each respective "On-Call Contract" file folder.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Certificate of Insurance <input type="checkbox"/> Professional Liability Claims History <input type="checkbox"/> Consultant Hourly Rates <input type="checkbox"/> Current Licences <input type="checkbox"/> Certificate of Legal Existence (From CT SOTS - CONCORD Online) <input type="checkbox"/> Good Standing Certificate from home state (if not from CT) <input type="checkbox"/> Statement Regarding Labor Law Violations and OSHA Violations <input type="checkbox"/> Trade Name Certificate (if DBA) <input type="checkbox"/> Certificate of Authority (Form 1215) <input type="checkbox"/> Disclosure Affidavit (Form 1216) <input type="checkbox"/> Consulting Affidavit (OPM Form 5, Rev: 3-28-14) <input type="checkbox"/> Gift and Campaign Contribution Certification (if SEEC required reporting, a copy of SEEC decision) <input type="checkbox"/> Nondiscrimination Certification (Form C, Rev: 7-8-09) <input type="checkbox"/> Affirmation of Receipt of State Ethics Law Summary (OPM Form 6, Rev: 10-1-11)
--	--



To access said file folders, right click on the link in the "On-Call Series File Folder" field and select "Open link in new tab". Then, click on the file folder that you want to upload the document to and click the "browse" link. After clicking the link, either drag and drop the document in the space provided or click "Browse" to search for the document on your computer and select the document for upload.



At the same time, the Attorney assigned to the project should begin preparing a draft contract for each of the selected Consultants in the subject On-Call Contract Series. Upon completion, upload a copy of each draft contract to the "Drafts" subfolder within the subject On-Call Series File Folder. To access the file folder, right click on the link in the "On-Call Series File Folder" field and select "Open link in new tab". After opening the subject On-Call Series file folder, open the "Drafts" subfolder, click the "browse" link and either drag and drop the document in the space provided or click "Browse" to search for the document on your computer and select the document for upload (refer to previous page diagram).

After the Attorney has completed the draft contracts, and the Paralegal has **completed the data input, and after** all of the required documents have been uploaded to the respective file folders, return to the "Details" tab for the process instance, scroll down to the bottom of the screen and click the "Take Action" button to submit the draft to the Legal Director for review and approval.

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

Note: If the Legal Director has recommended revisions to the On-Call Contract, the Legal Director will return the subject On-Call Series Contracts to this step.

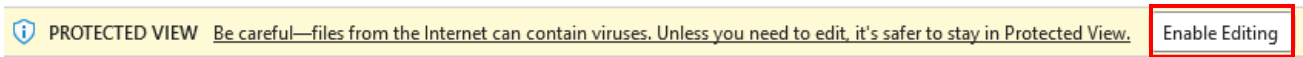
If the Legal Director returns the Contract Series for revision, and you receive an email notification from eBuilder, you can access the process instance in the same manner as described at the beginning of the



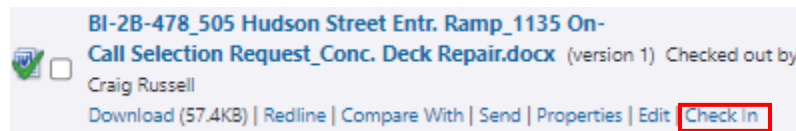
section. After opening the process instance, refer to the “Comments” tab for instructions regarding the revision. Then, return to the On-Call Series File Folder (right click on the link in the "On-Call Series File Folder" field and select “Open link in new tab”) and locate the document that needs to be revised. To view the edits provided and/or make additional edits to the document, click the “Edit” link for the subject document in the file folder to “Check Out” the document.



This will open the document in Word. Click the “Enable Editing” button in the Word document to review the document and begin editing.



After making your edits, save and close the document in Word and return to the view of document in the file folder in eBuilder. Then, click the “Check in” link to return the revised document to eBuilder.



Upon completion, return to the “Details” tab of the process instance, scroll down to the bottom of the page and click the "Take Action" button. After clicking “Take Action”, a prompt will appear to allow you to provide a comment regarding the edits made.

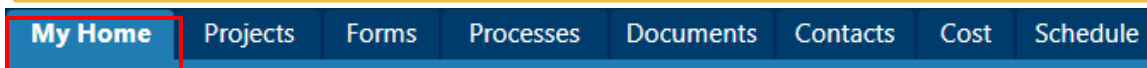
11A.05 Legal Director Contract Review

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

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

*Master On-Call

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



Welcome, Craig!

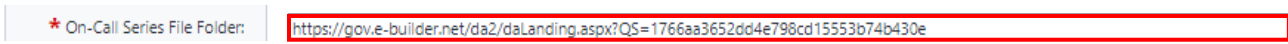
All pr

My Processes

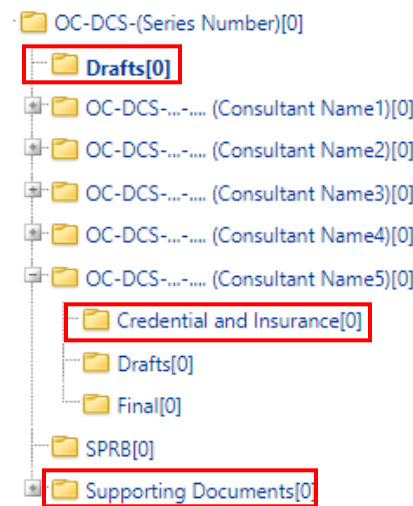
Project	Instance	Subject	Step
*Master On-Call	OC - 27	On-Call Architect Series	Prepare Contract Package for SPRB



After opening the process instance, right click on the link in the "On-Call Series File Folder" field and select "Open link in new tab".



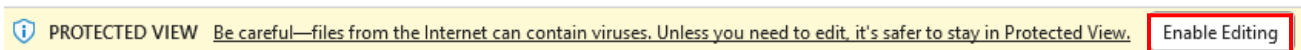
After opening the subject On-Call Contract Series file folder, click on the "Drafts" subfolder to open and view the draft Contracts. Open each of the respective On-Call Contract file folders and select the "Credentials and Insurance", and "Supporting Documents" subfolders to review such documents related to each of the Contracts in the subject On-Call Series.



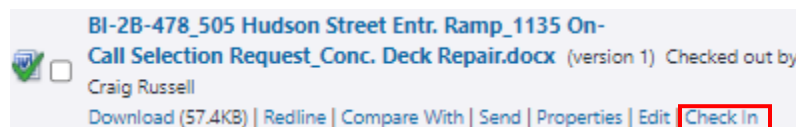
To view and edit a Word document that has been uploaded to eBuilder, click the "Edit" link for the subject document to "Check Out" the document.



This will open the document in Word. Click the "Enable Editing" button in the Word document to begin editing.



After making your edits, save and close the document and return to the view of the document in the file folder in eBuilder. Then, click the "Check in" link to return the revised document to eBuilder.



Upon completion, return to the "Details" tab of the process instance, scroll down to the bottom of the page and select one of the following from the dropdown list next to the "Take Action" button:

- Select "Revise" and then click the "Take Action" button to return the draft to the Attorney and/or Paralegal assigned to the project for additional review and revision; or



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

After clicking the "Take Action" button, a prompt will appear to allow for comments related to the draft agreement. After providing your comments and making your selection, either click the "Revise" or "Submit" button.

*** Add Comment**

Private

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

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

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

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

My Home
Projects
Forms
Processes
Documents
Contacts
Cost
Schedule

Welcome, Craig! All pr

My Processes

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

After opening the process instance, follow the instructions provided and complete the data input for the "On-Call Checklist for Credential Review", if applicable, and complete the data input for the "On-Call SPRB Checklist" in the "On-Call Information" section.

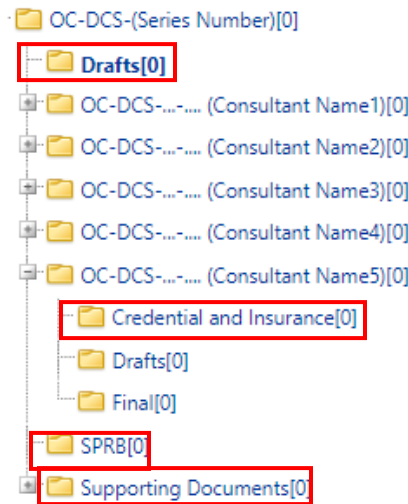
Then, upload copies of each of the respective documents checked off in the "On-Call Checklist for Credential Review" and "On-Call SPRB Checklist" fields to the respective file folders listed in the field instructions; and upload copies of the final draft Contract for each of the selected firms to the "SPRB" file folder and into the "Drafts" subfolder within each respective "On-Call Contract" file folder.



To upload the aforementioned documents, right click on the link in the "On-Call Series File Folder" field and select "Open link in new tab".

* On-Call Series File Folder:

After opening the subject On-Call Contract Series file folder, upload any required documents to the respective subfolders in eBuilder in the same way as described in [Section 11A.04](#).



Upon completion, return to the "Details" tab for the process instance and complete the section entitled "On-Call Contract Data" and provide data input for the "SPRB File No." and "Date Sent to SPRB" fields for each of the respective On-Call Contracts.

To input data for the above referenced fields, go to the row of the respective vendor, then scroll over to the column for the subject field and click on the "Pencil" toggle () to input the required data. After completing all of the data input, and after all of the required documents have been uploaded to the respective file folders, scroll down to the bottom of the page and click the "Take Action" button.

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

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

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

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

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

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

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

Submit Take Action Check Spelling Print Copy Delegate Save Cancel

This will complete the On-Call Contract Approval Process for the Legal Department in eBuilder. **The Legal Department should process the SPRB submission package to SPRB in the same format as it always has.**



After SPRB has reviewed and approved any of the subject On-Call Contracts in the series, and after said Contract has been signed and executed, a copy of the Contract shall be sent to the Director of CSS to complete the data input related to each individual On-Call Contract and to upload a copy of said Contract to eBuilder to complete the process.

11A.07 SPRB Review/CSS Final Review (Possible Hold Step for SPRB to Review) – SPRB & CSS


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

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

***Master On-Call**

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

My Home Projects Forms Processes Documents Contacts Cost Schedule



Welcome, Craig! All pr

My Processes

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

SPRB Review

To access the documentation submitted for SPRB Review, click on the link in the "On-Call Series File Folder" field.

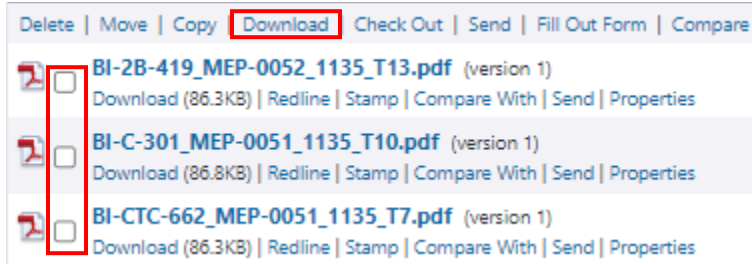
* On-Call Series File Folder: <https://gov.e-builder.net/da2/daLanding.aspx?QS=1766aa3652dd4e798cd15553b74b430e>

This will open the subject On-Call Series file folder. Within the subject file folder, click on the "SPRB" subfolder to view the SPRB submission package.

- OC-DCS-(Series Number)[0]
 - Drafts[0]
 - OC-DCS-...-... (Consultant Name1)[0]
 - OC-DCS-...-... (Consultant Name2)[0]
 - OC-DCS-...-... (Consultant Name3)[0]
 - OC-DCS-...-... (Consultant Name4)[0]
 - OC-DCS-...-... (Consultant Name5)[0]
 - Credential and Insurance[0]
 - Drafts[0]
 - Final[0]
 - SPRB[0]**
 - Supporting Documents[0]



Select all of the documents in the “SPRB” file folder and then click on the “Download” link to download the files to a .zip file folder on your computer for review.



After completing the download, you can close out of eBuilder.

CSS Final Review

Upon receipt of one or more of the executed Contracts, CSS should open the process instance for the subject On-Call Series and select the “Comments” tab to note comments provided by previous actors in the process.

Then, return to the “Details” tab and provide data input for each field listed in the “On-Call Contract Data” section instructions for each of the On-Call Contracts that have been executed. A copy of the executed On-Call Contract should be uploaded to the “Documents” tab. When uploading the document, the file folder that is to be selected to upload the Contract to is the “Contracts” subfolder within the subject On-Call Contract file folder.

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

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

11A.08 On-Call Contract Creation – Cost Integrated (CSS)

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

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

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



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

On-Call Contract Approval (OC) - 27

Delete Instance

Workflow Override

All Fields View

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

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

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

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

1. Account Code: Click the “🔍” toggle.

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

- a. 2.0 – Total Environmental & HazMat.
- b. 8.0 – Total A/E.
- c. 10.0 – Total CA.
- d. 13.0 – Total Claims.

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

- a. 2.130 – Environmental On-Call Contract services
- b. 8.130 – A/E and all other On-Call Contract services.
- c. 10.130 – CA or Cx On-Call Contract services.
- d. 13.130 – ANLY-AUD On-Call Contract services.

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

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

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

1. Take a snip of the On-Call Contract Series data input prior to clicking the “Take Action” button. This will allow you to preserve the information for the data input for each individual Contract in the Cost Integrated process.

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

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



Answer the “All Contracts Complete?” question under the “On-Call Contract Series” section. Respond “No” to the “All Contracts Complete?” question if there are any Contracts in the series have not yet been executed. Respond “Yes” only if all of the Contracts have been executed and the data input has been completed for each contract. Upon completion, click the “Take Action” button to return the process instance to Cost Integrated step to input the next executed On-Call Contract, or to complete the process if the data for all of the executed Contracts has been input.

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



Section 11B: Design Bid Build Contract Approval

11B.01 DBB Contract Initiation (PM)

Follow the “General Instructions” and complete the “GC Information” section.

GC Information	
* GC - Firm:	[Lookup]
* GC - Contact:	Please select...
* GC - Contact Email:	
* Document Type:	Please select the type of document being submitted for approval from the dropdown list. -- Please select an option --

Then, scroll down and complete the “GC Selection Documents” section. Complete the "Bid Release Checklist" by checking off each of the documents that are to be submitted from the checklist. Then, upload copies of each of the required checklist forms to the respective form fields, if applicable.

If “Form 6010 – Bid Release Form” was completed using the “6010 Bid Release Form” process, click the “Lookup” link in the “Form 6010 – Bid Release Form” field to attach the process instance. If Form 6010 was completed outside of eBuilder, upload a copy of the completed form to the “Form 6010 – Bid Release Form (Word)” field, and then upload copies of each of the other required supporting documents to their respectively titled fields.

To upload the bid release documents, either drag and drop the subject document into the subject field or click the “Browse Computer” button next to the subject field to search your computer for the subject file to upload.

GC Selection Documents	
Complete the "Bid Release Checklist" and upload copies of each of the required checklist forms to the respective form fields, if applicable.	
If Form 6010 was completed using the "6010 Bid Release Form" process in eBuilder, click the "Lookup" link in the "Form 6010 - Bid Release Form" field to attach the process instance.	
If Form 6010 was completed outside of eBuilder, upload a copy of Form 6010 to the subject field, as well as a copy of each of the other respective bid selection forms to the respective subject fields.	
Bid Release Checklist:	<p>Check off each of the Documents submitted for the subject Project from the Bid Release Checklist.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Form 6010 - Bid Release Form <input type="checkbox"/> Form 6050 - Construction Contract Award Recommendation <input type="checkbox"/> Form 3080 - Liquidated Damages <input type="checkbox"/> Form 3150 - Certificate of Compliance <input type="checkbox"/> Building Permit <input type="checkbox"/> 0 01 01 Title Page <input type="checkbox"/> 0 01 07 Seals Page <input type="checkbox"/> 0 01 10 Table of Contents <input type="checkbox"/> 0 01 15 List of Drawing Sheets <input type="checkbox"/> 0 25 13 Pre-Bid Meeting Agenda <input type="checkbox"/> 0 30 General Statement for Available Information <input type="checkbox"/> Specifications Vol. 1 <input type="checkbox"/> Drawings Vol. 1
Form 6010 - Bid Release Form:	Click on the "Lookup" link provided for a copy of the subject project bid release form. [Lookup]
Form 6010 - Bid Release Form (Word):	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>

If the “Browse Computer” button was clicked, a prompt will appear. Click “Browse” to do a search of files on your computer for upload.

Drag your files or



After the "GC Information" and "GC Selection Documents" sections are complete and all documents have been uploaded, return to the process instance and click the "Take Action" button to forward the process instance to the OLAPP Bidding Unit for review and drafting of the Contract.

Note: If the Bidding Unit requires additional documentation and/or information regarding the subject DBB Bid Selection submission, the submission will be returned to the Project PM and the PM will receive notification of the return, via email from eBuilder, that additional documentation and/or information is required.

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

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

My Home Projects Processes Documents Contacts Cost Reports

CONNECTICUT

Welcome, Craig!

My Processes

Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test	Legal Assignment (Pre-Con)

Announcements
Welcome, State of Connecticut!
e-Builder welcomes the

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

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

If additional documentation is required, return to the "Details" tab, scroll down to the "Contract / Amendment / WAO File Folder" field and right click on the link provided. Select "Open link in new tab".

Contract/Amendment/WAO File Folder: <https://gov.e-builder.net/da2/dalanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6>

After opening the "DBB Contract Approval" file folder, select the "Contract/DBB Selection" subfolder, to begin uploading the missing documentation. You can upload documents by either dragging and dropping the documents in the space provided, or by clicking the "browse" link...

Folders: Expand All | Collapse All | Refresh All

- DBB Contract Approval[0]
 - Amendment[0]
 - Contract[0]**
 - Credentials and Insurance[0]
 - DBB Selection[0]**

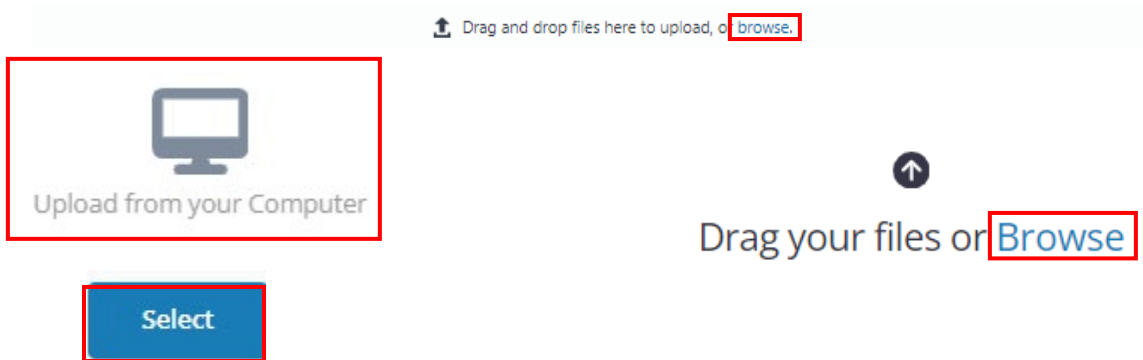
Documents: Upload | Properties | Create Folder | Subscription

Name	Date Uploaded
Delete Move Copy Download Check Out	

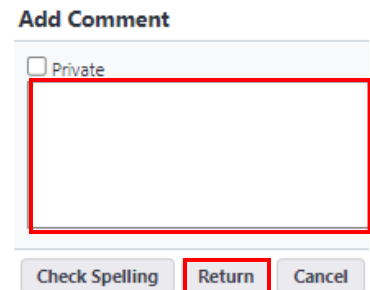
Drag and drop files here to upload, or browse.



Then, select "Upload from your Computer", click the "Select" button, and then click the "Browse" link to do a search on your computer for the applicable files to select for upload.



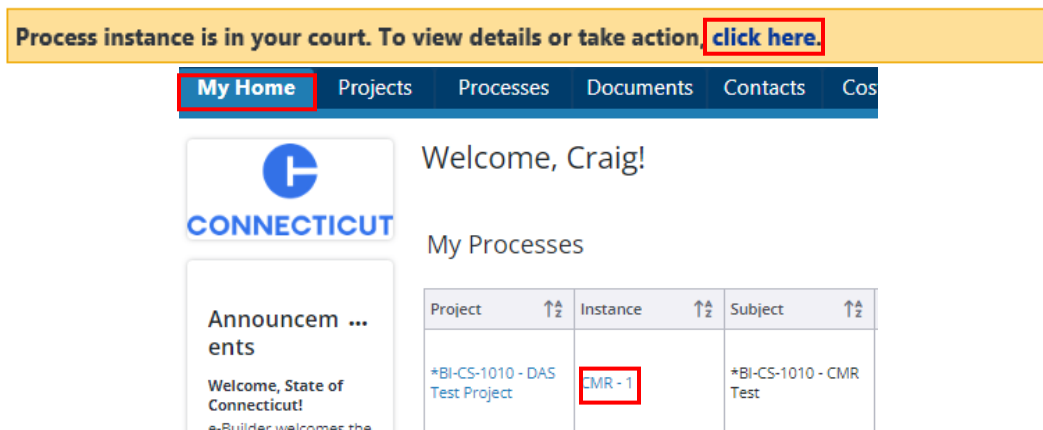
After all documents have been uploaded, return to the process instance and click the "Take Action" button to return the submission to the Bidding Unit. After clicking "Take Action", a prompt will appear to allow you to provide comments regarding the revised submission. Click "Return" after adding your comments **(Add Picture)**.



11B.02 Role Assignment (CSS)

CSS will receive an email from eBuilder as notification to establish the role assignment for the subject DBB Contract.

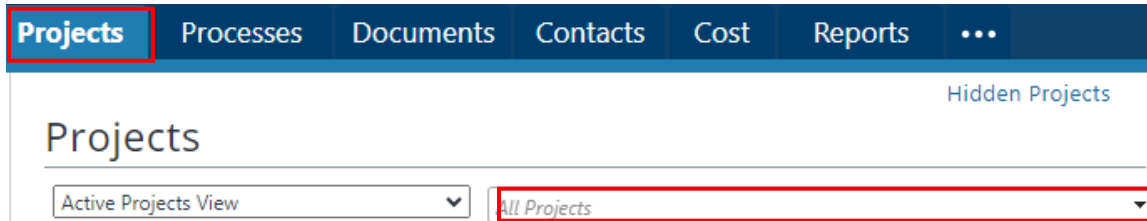
To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject process instance link from the "My Processes" section **(Replace Picture)**.



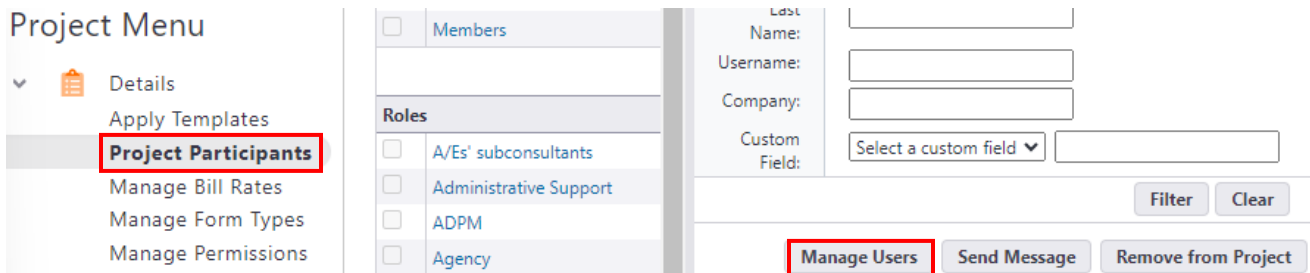


After opening the process instance, scroll down to the "GC Information" section and assign the "GC – Contact" listed to the GC Role on the subject project.

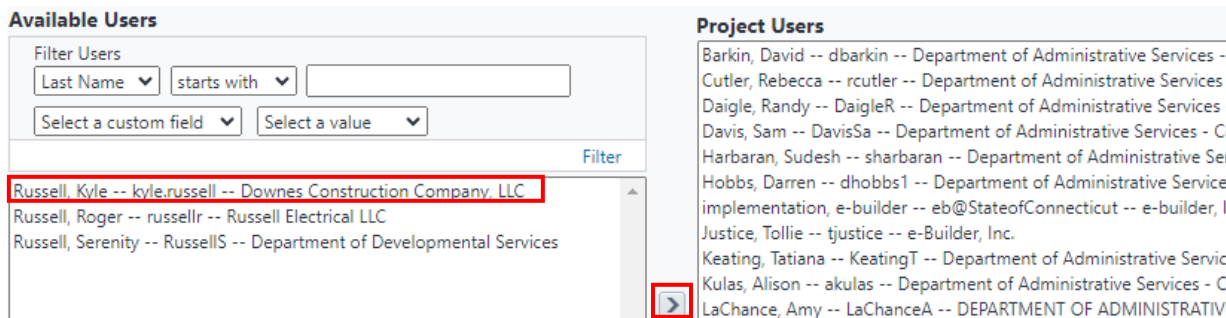
To assign the GC Contact to the GC Role, go to the "Projects" tab and select the subject project number/name from the "All Projects" dropdown list.



After opening the subject project, select "Project Participants" from the "Project Menu" and click the "Manage Users" button.



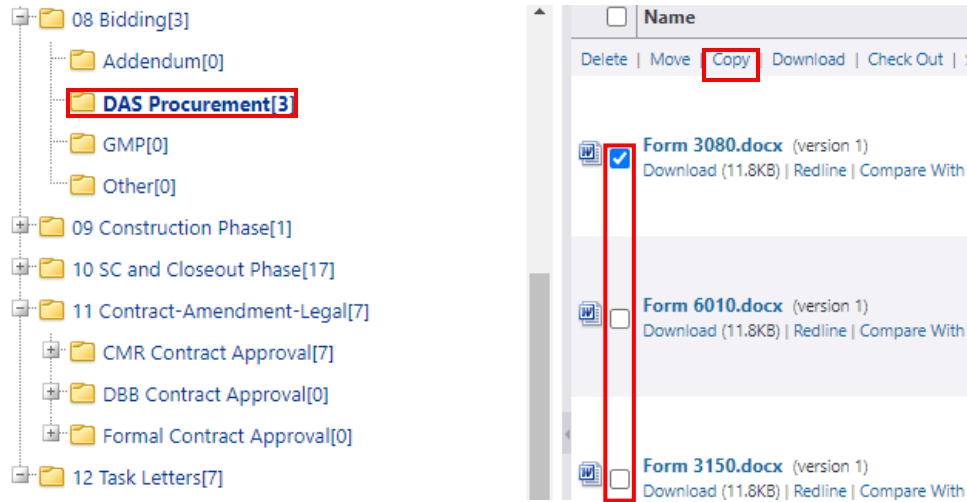
Search for the name of the "GC – Contact" from the list of "Available Users", move that person into the list of "Project Users", and click the "Save" button to add the user to the project role.



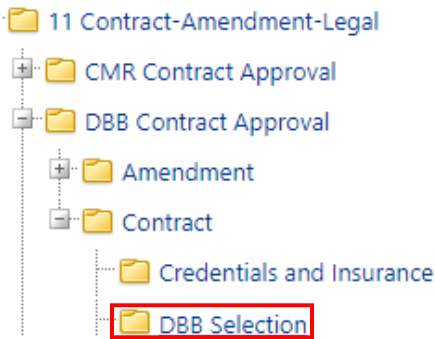
Return to the process instance and scroll down to the "GC Selection Documents" section. If "Form 6010 - Bid Release Form" was completed in eBuilder as part of the Form 6010 process, the documents that were uploaded as part of that process, will need to be copied from the subject project "08 Bidding/DAS Procurement" file folder to the "11 Contract-Amendment-Legal/DBB Contract Approval/Contract/DBB Selection" file folder.



To copy the bid selection forms, open a new eBuilder tab, then click on the “Documents” tab within eBuilder and select the subject project number/name from the “All Projects” dropdown list. After opening the file folder structure, open the "08 Bidding/DAS Procurement" file folder to view the files that are to be copied. Check off each of the documents that need to be copied and then click the “Copy” link.



After clicking “copy”, a new screen will open showing the entire folder structure for the subject project. First, click on the “+” sign next to the "11 Contract-Amendment-Legal" file folder, and then do the same for the “DBB Contract Approval” and “Contract” file folders, and then click on the “DBB Selection” file folder to prepare the documents to be copied and click “OK” after the prompt appears.

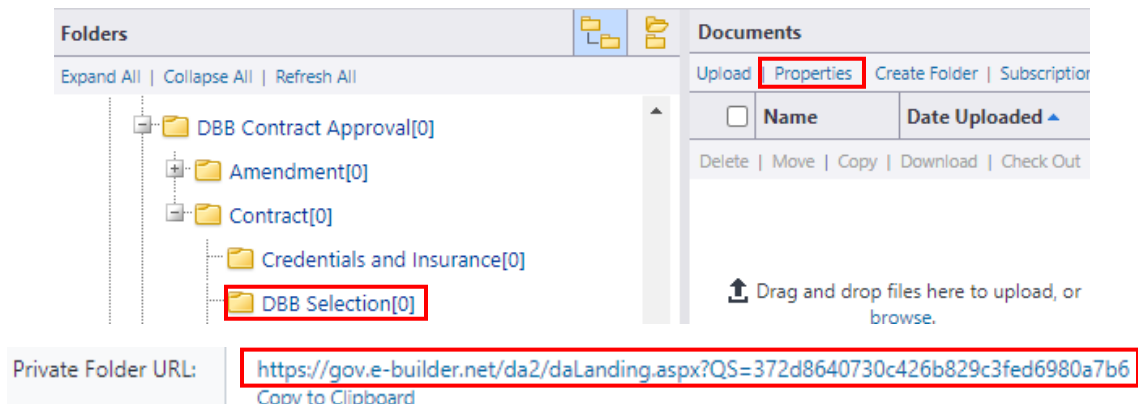


gov.e-builder.net says

Are you sure you want to copy the selected file(s) to this folder?



After the documents have been copied to the “DBB Selection” file folder, click on the “Properties” link for said file folder. Copy the “Private Folder URL” link, so that it can be pasted in the “Contract/Amendment/WAO File Folder” field in the process instance.





Return to the process instance and paste the copied link into the "Contract/Amendment/WAO File Folder" field. Upon completion, click the "Take Action" button.

DBB Contract

Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder
	<input type="text"/>

11B.03 Bid Selection Review (Bidding Unit)

The Bidding Unit will receive an email from eBuilder as notification that the required documents have been submitted by the subject Project PM to initiate the drafting of a DBB Agreement for the subject project.

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

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

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Project	Instance	Subject
+BI-CS-1010 - DAS Test Project	CMR - 1	+BI-CS-1010 - CMR Test

After opening the process instance, scroll down to the "DBB Contract" section and review the "Bid Release Checklist" of documents submitted by the Project PM. To view the actual documents submitted, right click on the link in the "Contract/Amendment/WAO File Folder" and select "Open link in new tab" to open the subject project "DBB Contract Approval" file folder **(Add Picture)**.

Then select the "Contract/DBB Selection" subfolder to view the selection documents submitted.

11 Contract-Amendment-Legal[10]

- CMR Contract Approval[7]
- DBB Contract Approval[3]
 - Amendment[0]
 - Contract[3]**
 - Credentials and Insurance[0]
 - DBB Selection[3]**
 - Drafts[0]
 - emails[0]
 - Final[0]
 - Legal[0]

Name

Delete | Move | Copy | Download | Check Out |

Form 3080.docx (version 1)
Download (11.8KB) | Redline | Compare Witt

Form 3150.docx (version 1)
Download (11.8KB) | Redline | Compare Witt



After completing your review, if it is determined that the "Bid Selection Checklist" and or the documents submitted are incomplete or insufficient, return to the process instance, scroll down to the bottom of the page and select "Revise" from the dropdown list next to the "Take Action" button and click "Take Action". This will return the process instance to the Project PM for the submission of additional information. After clicking "Take Action" a prompt will appear to add a comment for the PM regarding the requirements to complete the submission. Click "Revise" after your comments have been added.

Add Comment

Private

Check Spelling Revise Cancel

If it is determined that the "Bid Selection Checklist" and the documents submitted are sufficient, return to the process instance, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click "Take Action" to proceed to the next step in the process.

11B.04 Draft Contract (Bidding Unit)

The Bidding Unit will receive an email from eBuilder as notification that the required documents have been submitted to initiate the drafting of a DBB Agreement for the subject project.

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

Process instance is in your court. To view details or take action, click here.

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My Processes

Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

Proceed to Section [11E – Contract & Amendment Commitment Creation](#), which is automatically launched at the completion of this process, to create the commitment for the subject agreement.



Section 11C: Construction Manager at Risk Contract Approval

11C.01 CMR Contract/WAO/GMPA Initiation (OLAPP Procurement – Pre-Con; PM – WAO/GMPA)

Select the legal document type from the dropdown list. Upon completion, click the “Take Action” button.

Legal Document Type

Legal Document Type:

If Pre-Con was selected, proceed to 11C.02. If WAO or GMP was selected, proceed to [CMR – WAO/GMP](#).

11C.02 CMR Selection – Pre-Con (OLAPP Procurement)

After clicking the “Take Action” button, select “My Home” tab and click on the process instance for the project for which you are seeking contract approval from the “My Processes” section.

After opening the process instance, follow the instructions provided and complete the “CMR Information” section. To enter the “CMR Firm”, click the “Lookup” link to do a search for the selected firm. Then, enter the company name and click the “Filter” button to search for the firm. After clicking the “Filter” button, a list of companies will appear in the “Companies” section. Click on the link of the selected firm name from the list to add that company to the “CMR Information” section.

CMR Information

* CMR - Firm:

Filter Companies

Filter Companies Clear

Company:	<input type="text" value="Sample"/>	Company Custom Fields:	Select a custom field <input type="text"/>
City:	<input type="text"/>	State:	<input type="text"/> <input type="button" value="Lookup"/>
Area Code:	<input type="text"/>	County:	<input type="text"/> <input type="button" value="Lookup"/>
Zip Proximity:	Within <input type="text" value="50"/> miles of <input type="text"/>		
Construction Codes:	<input type="text"/> <input type="button" value="Lookup"/> <input type="button" value="Filter"/>		

Companies (Click on company name to view the details)

Company Name	City	State	Phone
*Sample Company	Someplace		(000) 000-0000



Complete the remainder of the “CMR Information” section. Check off each of the documents collected for the subject contract in the “CMR Contract Checklist Field”.

CMR Information

* CMR - Firm: *Sample Company [Change] [Remove]

* CMR - Contact: [?]

* CMR - Contact Email: [?]

* CMR Contract Checklist: [?]

Please check all that apply and upload signed (if applicable) copies of each of the respective documents to the “Documents” tab.

- Web Advertisement
- AFP & Addendums
- CMR Selection Calculations (Signed)
- CMR Long List & Contact Information
- CMR Selection Approval Memo (Signed)
- Recommendation for CMR Agreement (Signed)
- CMR Price Proposal
- CMR Technical Proposal
- QBS Report
- Conditional Selection Letter

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

Upload a copy of each of the documents collected to the "Documents" tab. You can upload documents by either dragging and dropping the documents in the space provided, or

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

Show Thumbnails **Attach**

<input type="checkbox"/> File Name	Attached By
Drag and drop files here to upload, or browse .	

Attach

Print Check Spelling Submit Save Draft Cancel

...by clicking the “browse” link, selecting “Upload from your Computer” and clicking the “Select” button, then clicking the “Browse” link to search for the applicable files on your computer to select for upload.

Drag and drop files here to upload, or [browse](#).

Upload from your Computer

Drag your files or [Browse](#)

Select

After the “CMR Information” section is complete and after all documents have been uploaded to the “Documents” tab, click the “Take Action” button to forward the submission to the Legal Department for review and assignment.

Note: If legal requires additional documentation and/or information regarding the subject CMR Contract submission, the submission will be returned and OLAPP Procurement will receive notification of the return, via email from eBuilder, that additional documentation and/or information is required.



If legal needs additional information or documentation, and you receive an email notification from eBuilder, you can access the process instance by either clicking on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject process instance link from the "My Processes" section.

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

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Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test	Legal Assignment (Pre-Con)

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

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

If additional documentation is required, return to the "Details" tab, scroll down to the "Contract / Amendment / WAO File Folder" field and right click on the link provided. Select "Open link in new tab".

Contract/Amendment/WAO File Folder: <https://gov.e-builder.net/da2/dalanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6>

After opening the subject file folder, select the "Supporting Documents" subfolder, then select the appropriate "Supporting Documents" sub-subfolder to begin uploading the missing documentation.

Upload | Properties | Create Folder | Subscriptions | Copy To Clipboard

Name	Date Uploaded
Delete Move Copy Download Check Out Send Fill Out	
Drag and drop files here to upload, or browse.	

- CMR[1]
 - Credentials and Insurance[0]
 - Drafts[0]
 - emails[0]
 - Exhibits[0]
 - Final[0]
 - Legal[0]
 - Supporting Documents[1]**
 - Ad-Selection-Approval-Recommendation[1]
 - Cost-Technical Proposal[0]
 - QBS[0]
 - RFP & Addendums[0]
 - Wage Certs and Rates[0]

You can upload documents by either dragging and dropping the documents in the space provided, or by clicking the "browse" link, selecting "Upload from your Computer", clicking the "Select" button, then clicking the "Browse" link, and then doing a search for the applicable files on your computer to select for



upload to the default file folder (see diagrams from earlier in this section for assistance with uploading documents).

After all documents have been uploaded to the appropriate "Supporting Documents" subfolder, return to the process instance and click the "Take Action" button to return the submission to Legal. After clicking "Take Action", a prompt will appear to allow you to provide comments regarding the revised submission. Click "Return" after adding your comments.

CMR Information

CMR - Firm:	*Sample Company
CMR - Contact:	Russell, Craig
CMR - Contact Email:	craig.russell@ct.gov
* CMR Contract Checklist:	<ul style="list-style-type: none"> Please check all that apply and upload signed (if applicable) copies of each of the respecti <input checked="" type="checkbox"/> Web Advertisement <input checked="" type="checkbox"/> RFP & Addendums <input checked="" type="checkbox"/> CMR Selection Calculations (Signed) <input checked="" type="checkbox"/> CMR Long List & Contact Information <input checked="" type="checkbox"/> CMR Selection Approval Memo (Signed) <input checked="" type="checkbox"/> Recommendation for CMR Agreement (Signed) <input checked="" type="checkbox"/> CMR Price Proposal <input checked="" type="checkbox"/> CMR Technical Propposal <input checked="" type="checkbox"/> QBS Report <input checked="" type="checkbox"/> Conditional Selection Letter
Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6

Add Comment

Private

CMR Submittal WAO/GMPA (PM)

After clicking the "Take Action" button, select "My Home" tab and click on the process instance for the project for which you are seeking contract approval from the "My Processes" section.

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Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

If the CMR firm and contact information has not been infilled automatically after opening the process instance, follow the instructions provided and complete the "CMR Information" section. To enter the "CMR Firm", click the "Lookup" link to do a search for the selected firm.

CMR Information

* CMR - Firm:

Then, enter the company name and click the "Filter" button to search for the firm. After clicking the "Filter" button, a list of companies will appear in the "Companies" section. Click on the link of the selected firm name from the list to add that company to the "CMR Information" section.



Filter Companies

Company: City: Area Code: Zip Proximity: Within miles of Construction Codes:

Company Custom Fields: Select a custom field State: County:

Companies

(Click on company name to view the details)

Company Name	City	State	Phone
*Sample Company	Someplace		(000) 000-0000

Complete the remainder of the "CMR Information" section.

CMR Information

* CMR - Firm:

* CMR - Contact:

* CMR - Contact Email:

Then, upload a copy of the draft WAO or GMPA to the "Documents" tab. You can upload the document by either dragging and dropping the documents in the space provided, or

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

Show Thumbnails

File Name	Attached By
<input type="button" value="↑"/> Drag and drop files here to upload, or browse.	

...by clicking the "browse" link, selecting "Upload from your Computer", clicking the "Select" button, then clicking the "Browse" link to search for the applicable files on your computer for upload.

Drag and drop files here to upload, or



Drag your files or

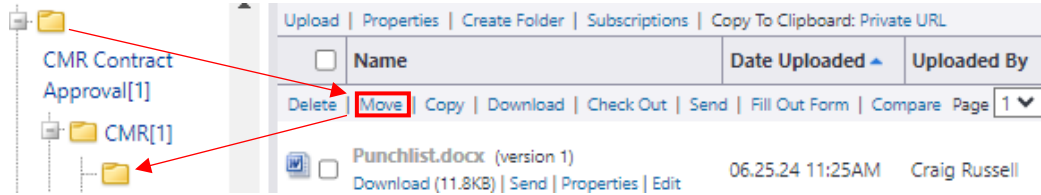
After the "CMR Information" section is complete and after the draft WAO or GMPA has been uploaded to the "Documents" tab, click the "Take Action" button to forward the submission to the Legal Department for review and assignment. Please refer to Section [11C.12](#) for the next step in the WAO/GMPA Approval Process.



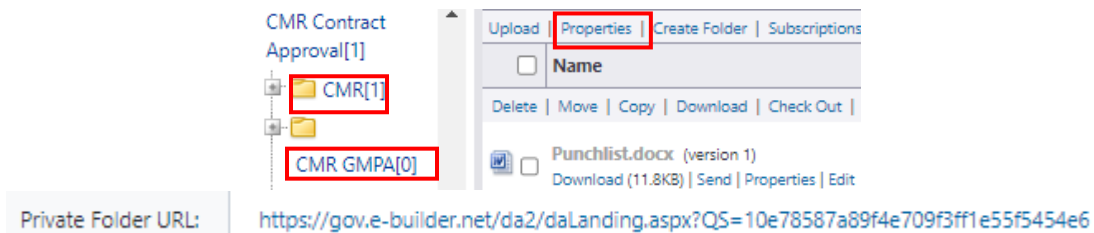
CMR Pre-Construction Contract

11C.03 Folder Creation – Pre-Con (CSS)

Follow the instructions provided and move the documents that were uploaded to “CMR Contract Approval” file folder into the respective CMR, GMPA, or WAO subfolder.



After moving the document(s) to the respective subfolder, click on the primary CMR, GMPA, or WAO file folder, click on the “Properties” link for that folder, and copy the “Private Folder URL” link.

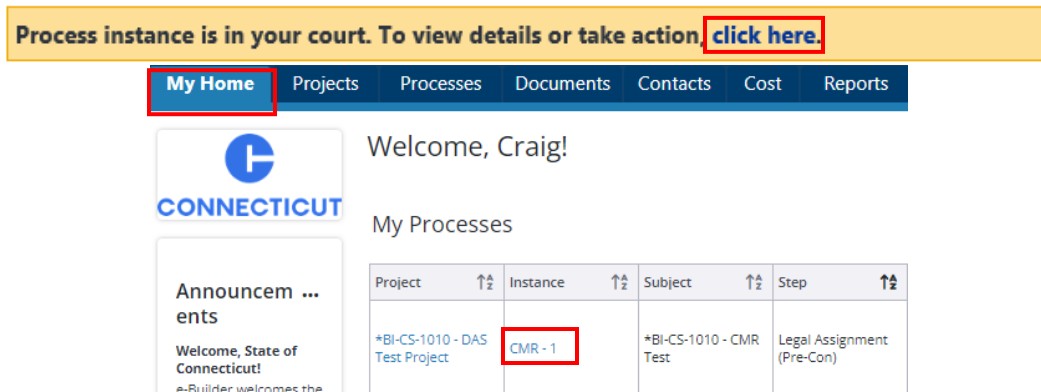


Return to the process instance and paste the link in the “Contract/Amendment/WAO File Folder” field. Then select the legal document type (Pre-Con, WAO/GMP) from the dropdown list next to the “Take Action” button and click the “Take Action” button.

11C.04 Legal Assignment – Pre-Con (Legal Director)

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

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



Follow the instructions provided in the “General Instructions” section. To view the documents that were checked off in the “CMR Contract Checklist” field, scroll down to the "Contract / Amendment / WAO File Folder" field and right click on the link provided. Select "Open link in new tab".



CMR Contract Checklist: ?

Please check all that apply and upload signed (if applicable) copies of each of the respective documents to the "Documents" tab.

- Web Advertisement
- RFP & Addendums
- CMR Selection Calculations (Signed)
- CMR Long List & Contact Information
- CMR Selection Approval Memo (Signed)
- Recommendation for CMR Agreement (Signed)
- CMR Price Proposal
- CMR Technical Proposal
- QBS Report
- Conditional Selection Letter

Contract/Amendment/WAO File Folder: <https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6>

After opening the subject file folder, select the "Supporting Documents/Ad-Selection-Approval-Recommendation" subfolder to view the supporting documents submitted.

After you have completed your review of the document submission package, return to the process instance and scroll down to the section entitled "Legal Assignment". Select an "OLAPP Attorney" and/or an "OLAPP Paralegal" to assign to draft the contract. Upon completion, click the "Take Action" button.

Legal Assignment

Please select an Attorney and/or Paralegal to assign to draft the subject contract. If you intend to draft the subject contract yourself, please select your name as the OLAPP Attorney.

OLAPP Paralegal - CMR:

OLAPP Attorney - CMR:

Date Legal Received:

After clicking "Take Action", a prompt will appear that will allow you to add a comment regarding the contract submission package, if applicable. Upon completion, click the "Submit" button.

Add Comment

Private



11C.05 Consultant Information – Pre-Con (PM)

The PM assigned to the project will receive an email from eBuilder as notification that the required documents have been submitted by DAS Procurement to initiate the drafting of a CMR Pre-Construction Contract for the subject project.

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

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

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Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

After opening the process instance, complete the section entitled "Consultant Information". Upon completion, click the "Take Action" to forward the draft to CSS to ensure that the roles for those Consultants have been assigned to the project.

Consultant Information

- * CA - Firm: [?]
- * CA - Contact: [?]
- * CA - Contact Email: [?]
- * Architect/Engineer - Firm: [?]
- * Architect/Engineer - Contact: [?]
- * Architect/Engineer - Contact Email: [?]

[Lookup]

[Lookup]

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

11C.06 CMR Contract Checklist Review – Pre-Con (Paralegal)

After opening the process instance, the Paralegal should scroll down to CMR Information section, review the "CMR Contract Checklist" field of documents submitted by OLAPP Procurement. To view the documents submitted, right click on the link in the "Contract/Amendment/WAO File Folder" and select "Open link in new tab" to open the subject project "CMR Contract Approval" file folder.

CMR Information

CMR - Firm: *Sample Company
 CMR - Contact Email: d.g.@foo.com

CMR Contract Checklist: [?]

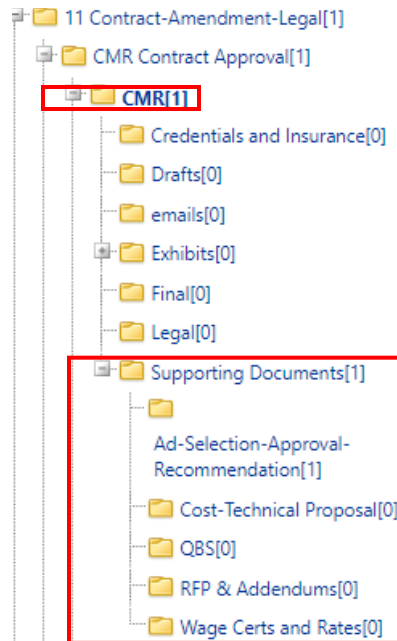
Please check all that apply and upload signed (if applicable) copies of each of the respective documents to the "Documents" tab.

- Web Advertisement
- RFP & Addendums
- CMR Selection Calculations (Signed)
- CMR Long List & Contact Information
- CMR Selection Approval Memo (Signed)
- Recommendation for CMR Agreement (Signed)
- CMR Price Proposal
- CMR Technical Proprietary
- QBS Report
- Conditional Selection Letter

Contract/Amendment/WAO File Folder: <https://qov.e-builder.net/da2/daLanding.aspx?Qs=10e78587a89f4e709f3ff1e55f5454e6>



Then, select the "CMR" file folder/"Supporting Documents" subfolder to view the supporting documents submitted.



After completing your review, if it is determined that the "CMR Contract Checklist" and or the documents submitted are insufficient, return to the process instance, scroll down to the bottom of the page and select "Revise" from the dropdown list next to the "Take Action" button and click "Take Action". This will return the process instance to OLAPP Procurement for the submission of additional information. After clicking "Take Action" a prompt will appear to provide instruction regarding the requirements to complete the submission. Click "Revise" after your comments have been added.

Add Comment

Private

After completing your review, if it is determined that the "CMR Contract Checklist" and or the documents submitted are sufficient, return to the process instance, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click "Take Action" to proceed to drafting the Pre-Con Contract.



11C.06 Draft Contract/Credential Review – Pre-Con (Attorney, Paralegal)

The Attorney and Paralegal assigned to the project will receive an email from eBuilder as notification that the required documents have been submitted by DAS Procurement to initiate the drafting of a CMR Pre-Construction Contract for the subject project.

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

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

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My Processes

Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

Credential Review – Pre-Con (Paralegal)

The Paralegal assigned to the project should begin collecting the required documents listed in the "CMR Checklist for Credential Review" field. Upon receipt of said documents, the Paralegal should return to this process instance and check off each of the documents collected in the “CMR Checklist for Credential Review” field and upload copies of said documents to the respective sub-subfolders in the subject project “CMR Contract Approval/CMR” file folder. To access the respective sub-subfolders, right click on the link in the "Contract/Amendment/WAO File Folder" and select "Open link in new tab" to open the subject project "CMR Contract Approval" file folder.

CMR Checklist for Credential Review:

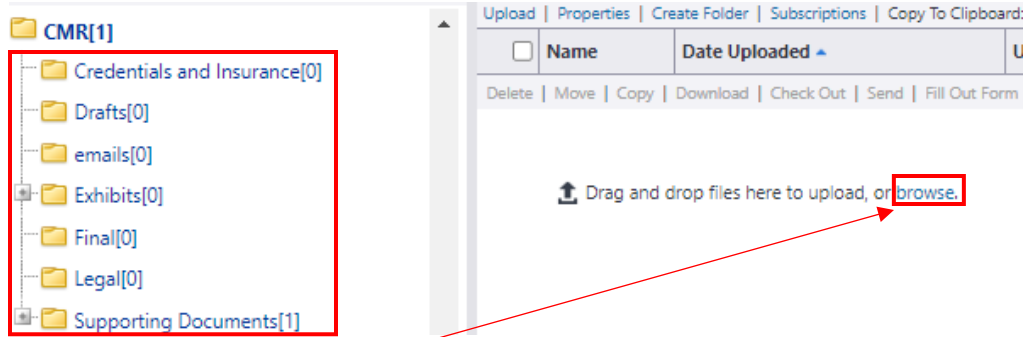
Please check all that apply and upload signed and sealed (if applicable) copies of each of the respective documents to the "Credentials and Insurance" subfolder within the subject project "CMR Contract Approval/CMR" file folder.

- Certificate of Insurance
- Professional Liability Claims History
- Current Licences
- Certificate of Legal Existence (From CT SOTS - CONCORD Online)
- Good Standing Certificate from home state (If not from CT)
- Trade Name Certificate (if DBA)
- Certificate of Authority (Form 1215)
- Disclosure Affidavit (Form 1216)
- Consulting Affidavit (OPM Form 5, Rev: 3-28-14)
- Gift and Campaign Contribution Certification (if SEEC required reporting, a copy of SEEC decision)
- Nondiscrimination Certification (Form C, Rev: 7-8-09)
- Affirmation of Receipt of State Ethics Law Summary (OPM Form 6, Rev: 10-1-11)
- IRAN Certification (OPM Form 7, Rev: 3-28-14)
- Agency Vendor Form (SP-26NB - Only if the vendor has not done business with the State)
- IRS Form W-9
- FORM CT 330 - Parts I and II (including Part II for all subcontractors) for New Contracts Only

Contract/Amendment/WAO File Folder: <https://gov.e-builder.net/da2/daLanding.aspx?OS=10e78587a89f4e709f3ff1e55f5454e6>



Then select the "CMR" file folder to view the respective subfolders to upload the required documents.



To upload the required documents, first select the file folder with which you wish to upload the document(s) and then click the "browse" link. After clicking "browse", you can either drag and drop the documents into the space provided or click on the "Browse" link to search for the applicable files on your computer for upload.

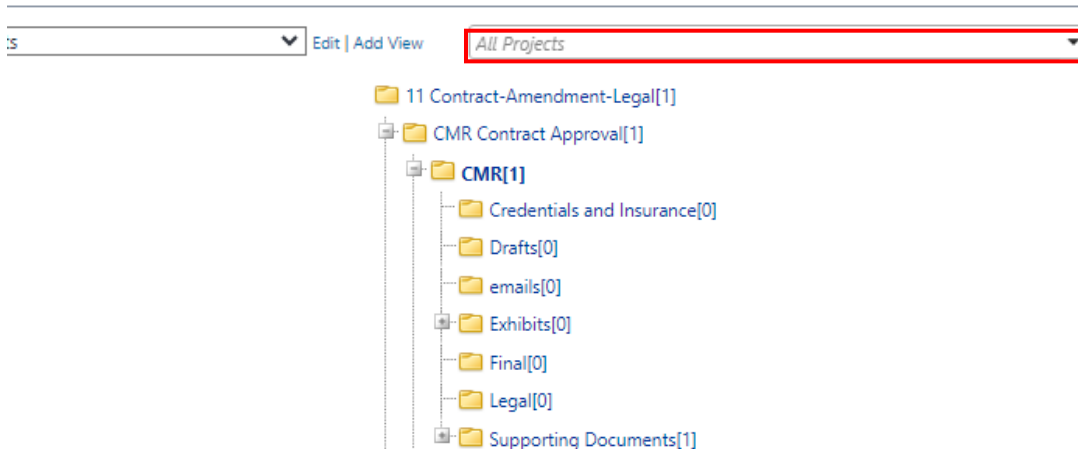


Drag your files or **Browse**

Note: Upon completion of the draft Contract, the Contract will be sent to the PM, ADPM, and if applicable, the CA and A/E for review. If all of the Credential Review documents have not yet been collected at the time the draft Contract is distributed, you can either wait until the draft Contract is returned to upload the remaining documents or you can log into eBuilder, select the "Documents" tab, and then select the subject project for which the Contract is being drafted from the "All Projects" dropdown list to open the subject project's file folder structure. Scroll down to and select the "11 Contract-Amendment-Legal" file folder, then select the "CMR Contract Approval" file folder, then select "CMR" to view the respective subfolders, and then select the respective subfolder with which you wish to upload a document and upload the document using the instructions provided above.



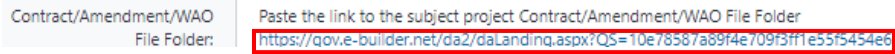
ments



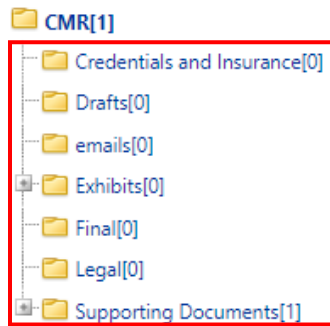


Draft Contract – Pre-Con (Paralegal/Attorney)

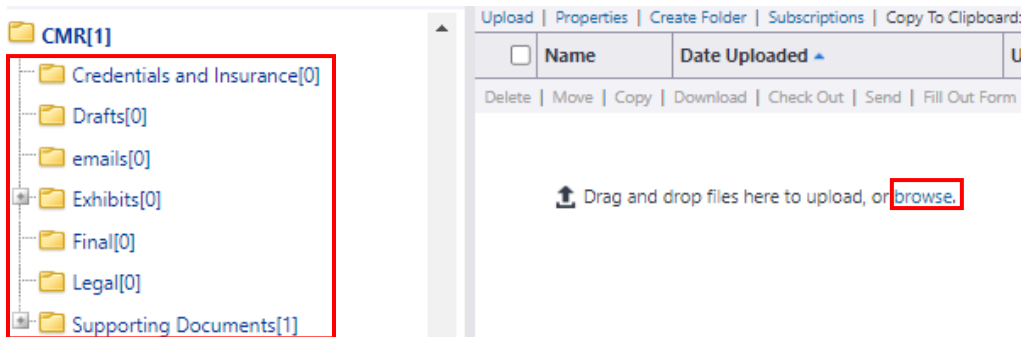
The Paralegal or Attorney assigned to the project should begin drafting the Pre-Construction CMR Contract Agreement. To view the documents submitted by OLAPP Procurement to initiate the drafting of Pre-Con Contract or to view any of the documents collected to date by the Paralegal in the "CMR Checklist for Credential Review" field, scroll down to the "Contract/Amendment/WAO File Folder" field, right click on the link and select "Open link in new tab" to open the subject project "CMR Contract Approval" file folder.



Then select the "CMR" file folder to view the respective subfolders. Click on the applicable subfolder or sub-subfolder to view the respective documents uploaded by OLAPP Procurement (Supporting Documents subfolder) or by the Paralegal (Credentials and Insurance) subfolder.



Upon completion of the draft CMR Pre-Construction Contract Agreement, return to the process instance and again, right click on the link in the "Contract/Amendment/WAO File Folder" and select "Open link in new tab". Then select the "CMR" file folder to view the respective subfolders to upload the Contract documents. To upload a copy of the draft Contract Agreement, and Exhibit documents to the respective subfolders in the subject project "CMR Contract Approval/CMR" file folder, first click on the subfolder with which you wish to upload the document to (Drafts" or "Exhibits"). After clicking "browse", you can either drag and drop the documents into the space provided or click on the "Browse" link to search for the applicable files on your computer for upload.



Drag your files or **Browse**



After uploading the draft Contract agreement, return to the process instance, scroll down to the bottom of the page and select "DAS/RECS Review" from the dropdown list next to the "Take Action" button and click the "Take Action" button to submit the draft contract to the project PM and ADPM for review, and then to the CMR and, if applicable, to the A/E and CA for review. A prompt will appear after the "Take Action" button is clicked to allow for comments related to the draft agreement.

When providing a comment, please note how you would like the subsequent users to propose changes to the subject contract, i.e. track changes, add comments in the Word document, add comments in the eBuilder process instance, etc. Upon completion, click the "DAS/RECS Review" button.

Repeat this step until such time that the draft Contract is in its final format and ready to be submitted to the Legal Direct for review.

Add Comment

Private

After all of the Credential Review documents have been collected, the draft contract is in its final format, and all such documents have been uploaded to the respective subfolders in the subject project "CMR Contract Approval/CMR" file folder, scroll down to the bottom of the page and select "Legal Director" from the dropdown list next to the "Take Action" button and click the "Take Action" button to submit the final draft contract to the Legal Director for review. A prompt will appear after the "Take Action" button is clicked to allow for comments related to the draft agreement. Upon completion, click the "Legal Director" button.

11C.07 DAS/RECS Contract Review – Pre-Con (PM/ADPM)


PM Review

The PM assigned to the project will receive an email from eBuilder as notification that a draft CMR Pre-Construction Contract for the subject project has been completed and is ready for DAS/RECS review.

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

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

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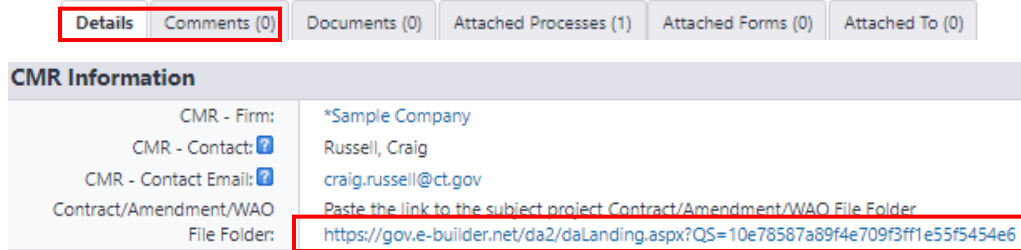
Welcome, Craig!

My Processes

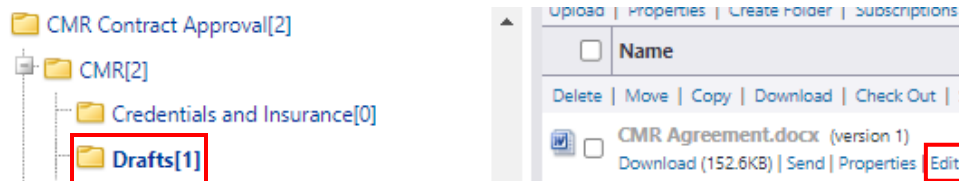
Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test



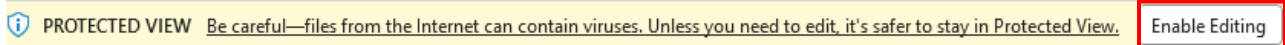
After opening the process instance, click on the “Comments” tab to view any comments provided by past actors. To review the draft contract, return to the “Details” tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field and select “Open link in new tab.”



After opening the subject project contract approval file folder, open the “CMR” subfolder and then the "Drafts" sub-subfolder to view the draft contract. To check out the document for editing, click on the “Edit” link to open the draft Contract in Word.



After opening the draft Contract in Word, click the “Enable Editing” button at the top of the page.



Review and revise the draft, accordingly, using the means and methods recommended by legal for making proposed revisions as described under the "Comments" tab. After completing your review and making any proposed edits to the draft Contract, return to the “Documents” tab, open the “CMR” subfolder and then the "Drafts" sub-subfolder. Then, click on the “Check In” link to check the draft Contract back into the “Drafts” subfolder with your saved edits.



After checking in the draft Contract, return to the process instance and scroll down to the bottom of the page to take action.

- Select “ADPM” from the dropdown list next to the “Take Action” button to send the draft to the ADPM for additional review and revision, or
- Select "CMR" to send the draft to the CMR for review and revision, or
- Select “A/E – CA” to send the draft to the A/E and/or the CA for review and revision, then click the “Take Action” button.



- Select "Return" from the dropdown list next to the "Take Action" button to return the draft to Legal for additional review and revision.
 - A prompt will appear after the "Take Action" button is clicked to allow for comments related to the draft agreement. If the "A/E – CA" was selected, you will also be required to select either one or both of the Consultants to send the draft agreement to. After adding a comment and, if applicable selecting the A/E and/or CA, click the "ADPM", "CMR", "AE/CA" or "Return" button respectively.

Add Comment

Private

Add actors to the next step

Available Users

Russell, ARC (DAS)
 Russell, CA (DAS)

Selected Users

Check Spelling AE/CA Cancel

ADPM Contract Review – Pre-Con

The ADPM assigned to the project will receive an email from eBuilder as notification that a draft CMR Pre-Construction Contract for the subject project has been completed and is ready for DAS/RECS review. To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the subject process instance link from the "My Processes" section.

Process instance is in your court. To view details or take action, click here.

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Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test



After opening the process instance, click on the “Comments” tab to view any comments provided by past actors regarding the draft Contract. To review the draft contract, return to the “Details” tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field, in the "CMR Information" section, and select “Open link in new tab.

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

CMR Information

CMR - Firm:	*Sample Company
CMR - Contact:	Russell, Craig
CMR - Contact Email:	craig.russell@ct.gov
Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6

After opening the subject project contract approval file folder, open the “CMR” subfolder and then the "Drafts" sub-subfolder to view the draft contract. To check out the document for editing, click on the “Edit” link to open the draft Contract in Word.

After opening the draft Contract in Word, click the “Enable Editing” button at the top of the page.

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

Review and revise the draft, accordingly, using the means and methods recommended by legal for making proposed revisions as described under the "Comments" tab. After completing your review and making any proposed edits to the draft Contract, return to the “Documents” tab, open the “CMR” subfolder and then the "Drafts" sub-subfolder. Then, click on the “Check In” link to check the draft Contract back into the “Drafts” subfolder with your saved edits.

Documents \ 11 Contract-Amendment-Legal \ CMR Contract Approval \ CMR \ Drafts

Upload | Properties | Create Folder | Subscriptions | Copy To Clipboard

<input type="checkbox"/>	Name	Date
<input type="checkbox"/>	CMR Agreement.docx (version 1) Checked out by Craig Russell	07.1

Delete | Move | Copy | Download | Check Out | Send | Fill Out Form

Download (152.6KB) | Send | Properties | Edit | Check In



After checking in the draft Contract, return to the process instance, scroll down to the bottom of the page and click the "Take Action" button to return the draft contract to the PM for further processing. A prompt will appear after the "Take Action" button is clicked to allow for comments related to the draft agreement. After adding a comment, click the "Return" button.

Add Comment

Private

11C.08 CMR Contract Review – Pre-Con (CMR)

The CMR assigned to the project will receive an email from eBuilder as notification that a draft CMR Pre-Construction Contract for the subject project has been completed and is ready for the CMR to review.

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

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

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My Processes

Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

After opening the process instance, click on the "Comments" tab to view any comments provided by past actors. To review the draft contract, return to the "Details" tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field and select "Open link in new tab."

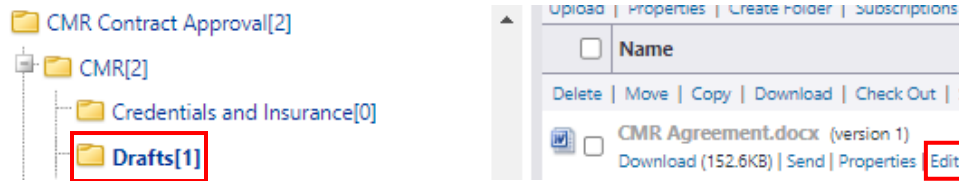
Details
Comments (0)
Documents (0)
Attached Processes (1)
Attached Forms (0)
Attached To (0)

CMR Information

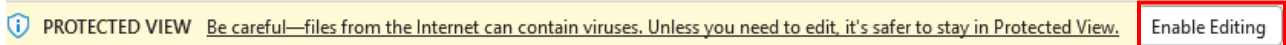
CMR - Firm:	*Sample Company
CMR - Contact:	Russell, Craig
CMR - Contact Email:	craig.russell@ct.gov
Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder
	https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6



After opening the subject project contract approval file folder, open the "CMR" subfolder and then the "Drafts" sub-subfolder to view the draft contract. To check out the document for editing, click on the "Edit" link to open the draft Contract in Word.



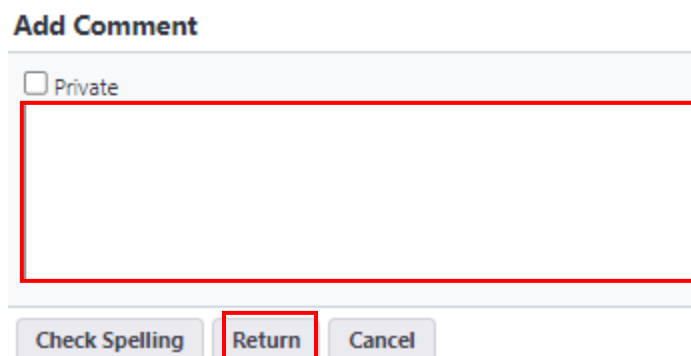
After opening the draft Contract in Word, click the "Enable Editing" button at the top of the page.



Review and revise the draft, accordingly, using the means and methods recommended by legal for making proposed revisions as described under the "Comments" tab. After completing your review and making any proposed edits to the draft Contract, return to the "Documents" tab, open the "CMR" subfolder and then the "Drafts" sub-subfolder. Then, click on the "Check In" link to check the draft Contract back into the "Drafts" subfolder with your saved edits.



After checking in the draft Contract, return to the process instance, scroll down to the bottom of the page and click the "Take Action" button to return the draft contract to the PM for further processing. A prompt will appear after the "Take Action" button is clicked to allow for comments related to the draft agreement. After adding a comment, click the "Return" button.



11C.09 A/E and CA Contract Review – Pre-Con (A/E, CA)

The A/E and CA assigned to the project will receive an email from eBuilder as notification that a draft CMR Pre-Construction Contract for the subject project has been completed and is ready for the A/E and CA to review.



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

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

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Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

After opening the process instance, click on the "Comments" tab to view any comments provided by past actors. To review the draft contract, return to the "Details" tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field and select "Open link in new tab."

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

CMR Information

CMR - Firm: *Sample Company
 CMR - Contact: ? Russell, Craig
 CMR - Contact Email: ? craig.russell@ct.gov
 Contract/Amendment/WAO File Folder: <https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6>

After opening the subject project contract approval file folder, open the "CMR" subfolder and then the "Drafts" sub-subfolder to view the draft contract. To check out the document for editing, click on the "Edit" link to open the draft Contract in Word.

CMR Contract Approval[2]

- CMR[2]
 - Credentials and Insurance[0]
 - Drafts[1]**

Upload | Properties | Create Folder | Subscriptions

<input type="checkbox"/>	Name
<input type="checkbox"/>	CMR Agreement.docx (version 1)

Delete | Move | Copy | Download | Check Out | **Edit**

After opening the draft Contract in Word, click the "Enable Editing" button at the top of the page.

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. **Enable Editing**



Review and revise the draft, accordingly, using the means and methods recommended by legal for making proposed revisions as described under the "Comments" tab. After completing your review and making any proposed edits to the draft Contract, return to the "Documents" tab, open the "CMR" subfolder and then the "Drafts" sub-subfolder. Then, click on the "Check In" link to check the draft Contract back into the "Drafts" subfolder with your saved edits.



After checking in the draft Contract, return to the process instance, scroll down to the bottom of the page and click the "Take Action" button to return the draft contract to the PM for further processing. A prompt will appear after the "Take Action" button is clicked to allow for comments related to the draft agreement. After adding a comment, click the "Return" button. The first actor to take action on the process instance (either the A/E or CA) will also receive a second prompt after clicking "Return", at which time the "Vote for Return" button should be clicked.

Add Comment

Form with a 'Private' checkbox and a large text input field outlined in red. Below the input field are buttons for 'Check Spelling', 'Return' (highlighted in red), and 'Cancel'.

Action will proceed when voted on by all actors.

Buttons for 'Vote for Return' (highlighted in red) and 'No, Cancel'.

11C.10 Legal Director Contract Review – Pre-Con (Legal Director)

The Legal Director will receive an email from eBuilder as notification that a draft CMR Pre-Construction Contract for the subject project has been completed and is ready for the Legal Director to review.

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

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

Navigation menu with 'My Home' highlighted in red. Below is a 'Welcome, Craig!' message and a 'My Processes' table. The table has columns for Project, Instance, and Subject. The 'Instance' column contains 'CMR - 1' which is highlighted in red.



After opening the process instance, click on the “Comments” tab to view any comments provided by past actors. To review the draft contract, return to the “Details” tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field and select “Open link in new tab.”

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

CMR Information

CMR - Firm:	*Sample Company
CMR - Contact: ?	Russell, Craig
CMR - Contact Email: ?	craig.russell@ct.gov
Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6

After opening the subject project contract approval file folder, open the “CMR” subfolder and then open the “Credentials and Insurance”, “Exhibits”, and “Supporting Documents” sub-subfolders to review such documents related to the Pre-Construction Contract. Then, open the "Drafts" sub-subfolder to view the draft contract.

To check out the document for editing, click on the “Edit” link to open the draft Contract in Word.

After opening the draft Contract in Word, click the “Enable Editing” button at the top of the page.

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

Review and revise the draft, accordingly, using the means and methods recommended by legal for making proposed revisions as described under the "Comments" tab. After completing your review and making any proposed edits to the draft Contract, return to the “Documents” tab, open the “CMR” subfolder and then the "Drafts" sub-subfolder. Then, click on the “Check In” link to check the draft Contract back into the “Drafts” subfolder with your saved edits.

Documents \ 11 Contract-Amendment-Legal \ CMR Contract Approval \ CMR \ Drafts

Upload | Properties | Create Folder | Subscriptions | Copy To Clipboard

<input type="checkbox"/>	Name	Date
<input type="checkbox"/>	CMR Agreement.docx (version 1) Checked out by Craig Russell	07.1

Delete | Move | Copy | Download | Check Out | Send | Fill Out Form

Download (152.6KB) | Send | Properties | Edit | Check In



After checking in the draft Contract, return to the process instance, scroll down to the bottom of the page and either select "Return" from the dropdown list next to the "Take Action" button to return the Contract to the Attorney and Paralegal for additional edits, or select "Submit" to forward the Contract to the Paralegal to schedule a meeting for the signing of the Contract. A prompt will appear after the "Take Action" button is clicked to allow for comments related to the draft agreement. After adding a comment, click either the "Return" or "Submit" button respectively.

Add Comment

Private


11C.11 Contract Signing – Pre-Con (Paralegal)

The Paralegal assigned to the project will receive an email from eBuilder as notification that the Legal Director has reviewed and approved the subject project draft Pre-Construction Contract Agreement.

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

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

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My Processes

Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

After opening the process instance, click on the "Comments" tab to view any comments provided by past actors. To review the final Pre-Construction Contract package, return to the "Details" tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field and select "Open link in new tab."

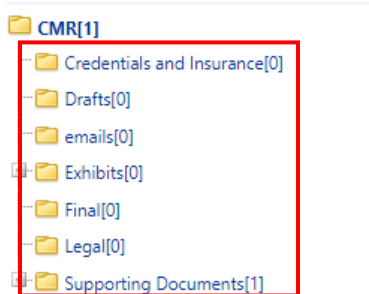
Details
Comments (0)
Documents (0)
Attached Processes (1)
Attached Forms (0)
Attached To (0)

CMR Information

CMR - Firm:	*Sample Company
CMR - Contact:	Russell, Craig
CMR - Contact Email:	craig.russell@ct.gov
Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder
	https://gov.e-builder.net/da2/daLanding.aspx?QS=10e785b7ab9f4e709f3f1e55f5454e6

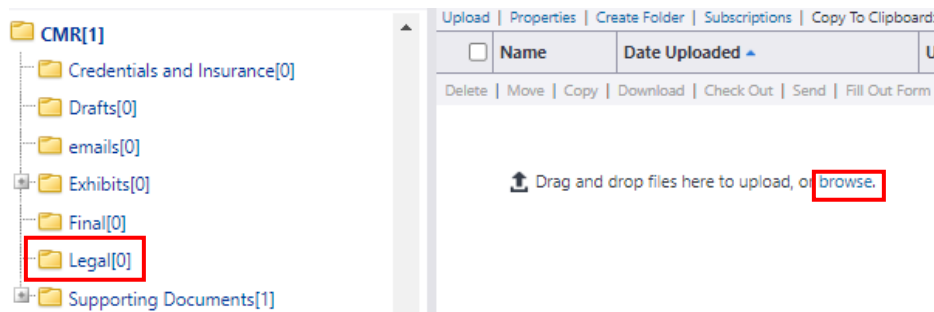


After opening the subject project contract approval file folder, open the “CMR” subfolder and then open the “Credentials and Insurance”, “Exhibits”, and “Supporting Documents” sub-subfolders to review such documents related to the Pre-Construction Contract. Then, open the "Drafts" sub-subfolder to view the draft contract.



Proceed with scheduling a meeting with the respective parties to sign the contract, draft the AG checklist and submit to the OAG for review and signature.

After the Contract has been fully executed, return to the process instance, scroll down to the “CMR Information” section, right click on the link provided in the "Contract/Amendment/WAO File Folder" field, in the "CMR Information" section, then select “Open link in new tab”. After opening the subject project contract approval file folder, open the “CMR” subfolder and then the "Final" sub-subfolder. Upload copies of the AG memo, Agreement Cover Letter, CERT-134, CORE CT Entry, and Executed Contract Agreement to the “Final” subfolder by clicking the “browse” link and either dragging and dropping the documents into the space provided, or by clicking on the “Browse” link to search for the applicable files on your computer for upload.



Drag your files or **Browse**



After all documents have been uploaded to the "Final" sub-subfolder, return to this process instance, scroll down to the "CMR Contract" section, upload a copy of the executed agreement to the "Executed Contract / Amendment" field and provide a response to the remaining questions in the "CMR Contract" section. Upon completion, click the "Take Action" button to complete the process for the Pre-Construction Contract.

CMR Contract

- * DAS Contract Number:
- * CORE Contract No:
- Contract/Amendment Amount: [input]
- * Date of Final Approval: [calendar icon]
- * Date Contract Signed by Consultant/Contractor: [calendar icon]
- * Date Contract Executed: [calendar icon]
- * Executed Contract/Amendment: [input] Drag and drop file here or Browse Computer Browse e-Builder
- * Contract Start Date: [calendar icon]
- Contract End Date: [calendar icon]

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

CMR WAO/GMP

11C.12 Legal Assignment – WAO/GMP (Legal Director)

The Legal Director will receive an email from eBuilder as notification that the PM assigned to the subject project has submitted a draft WAO or GMP from the CMR for review and approval.

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

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

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Welcome, Craig!

My Processes

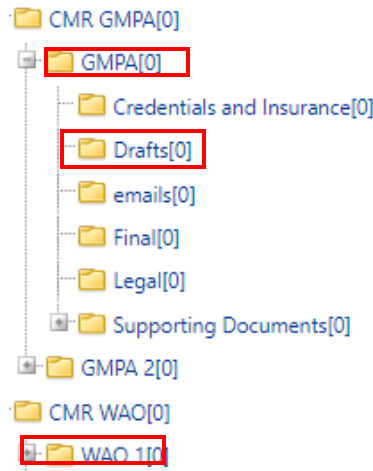
Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

To view the draft submission, right click on the link in the "Contract/Amendment/WAO File Folder" and select "Open link in new tab" to open the subject project "CMR Contract Approval" file folder.

Contract/Amendment/WAO File Folder: <https://gov.e-builder.net/da2/dalanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6>



Then, depending upon the document type, select either the "CMR GMPA/GMPA 1" or "CMR WAO/WAO 1" subfolder, and then select the "Drafts" sub-subfolder to view the draft submission.



After you have completed your review of the document submission package, return to the process instance and scroll down to the section entitled "Legal Assignment". If the "OLAPP Paralegal - CMR" and the "OLAPP Attorney - CMR" fields have not been filled automatically, select an "OLAPP Attorney - CMR" and/or an "OLAPP Paralegal - CMR" to assign to draft the WAO or GMP. Upon completion, click the "Take Action" button to forward the process instance to CSS to set up the role assignment.

Legal Assignment

Please select an Attorney and/or Paralegal to assign to draft the subject contract. If you intend to draft the subject contract yourself, please select your name as the OLAPP Attorney.

OLAPP Paralegal - CMR:	Please select...
OLAPP Attorney - CMR:	Please select...
Date Legal Received:	

Submit Take Action Check Spelling Print Copy Delegate Save Cancel

After clicking "Take Action", a prompt will appear that will allow you to add a comment regarding the contract submission package, if applicable. You will also be required to select the Paralegal assigned to the project to forward the submission package. Upon completion, click "Submit".

Add Comment

Private

Add actors to the next step

Available Users		Selected Users
Russell, Craig (Department of Administrative Services - Construction Services)	>	
	<	

Check Spelling Submit Cancel



11C.13 Draft WAO/GMPA - Credential Review (Attorney, Paralegal)

The Attorney and Paralegal assigned to the project will receive an email from eBuilder as notification that the PM assigned to the subject project has submitted a draft WAO or GMPA from the CMR for review and approval for the subject project.

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

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

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Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

Credential Review – WAO/GMPA (Paralegal)

The Paralegal assigned to the project should begin collecting the required documents listed in the "CMR Checklist for WAO/GMP Review" field. Upon receipt of said documents, the Paralegal should return to this process instance and check off each of the documents collected in the ""CMR Checklist for WAO/GMP Review" field and upload copies of said documents to the respective sub-subfolders in the respective subject project "CMR Contract Approval/CMR GMPA/GMPA 1" or the "CMR Contract Approval/CMR WAO/WAO 1" subfolder. To access the respective submittal or to access the file folder structure to upload the checklist documents, scroll down to the "CMR Information" section and right click on the link in the "Contract / Amendment / WAO File Folder" field and select "Open link in new tab".

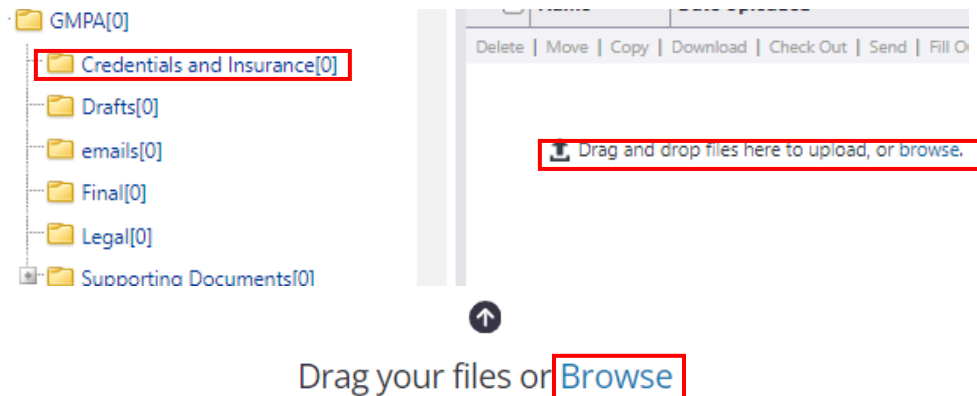
Contract/Amendment/WAO File Folder: [Paste the link to the subject project Contract/Amendment/WAO File Folder https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6](https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6)

- CMR GMPA[0]
 - GMPA[0]
 - Credentials and Insurance[0]
 - Drafts[0]
 - emails[0]
 - Final[0]
 - Legal[0]
 - Supporting Documents[0]
 - GMPA 2[0]
- CMR WAO[0]
 - WAO 1[0]

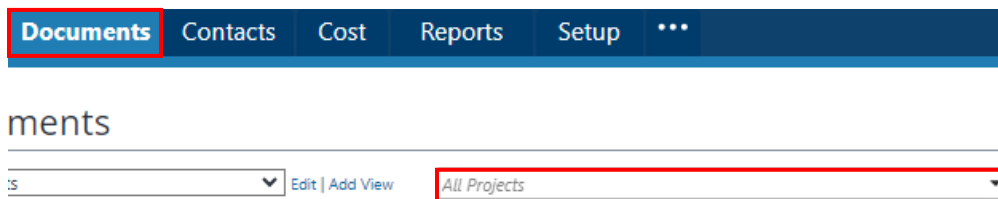


Then, select the respective “GMPA/GMPA 1” or “WAO/WAO 1” subfolder, and then select the respective “Credentials and Insurance” sub-subfolder to upload credentials and insurance information; or select “emails” to upload any correspondence related to the submittal, select “Legal” to upload any documents that are to be saved, viewed, and or edited by Legal Staff only; or select “Supporting Documents”, “Approvals & Confirmations”, “Bonds”, “Subconsultant SOTS”, or “Wage Certs and Rates” for an upload of any of those respective documents to their respective file folders.

To upload the required documents, first select the file folder with which you wish to upload the document(s) and then click the “browse” link. After clicking “browse”, you can either drag and drop the documents into the space provided or click on the “Browse” link to search for the applicable files on your computer for upload.



Note: Upon completion of the draft WAO or GMPA, the subject document will be sent to the PM, ADPM, CA, A/E, and CMR for review. If all of the CMR Checklist for WAO/GMP Review documents have not yet been collected at the time the WAO or GMPA is distributed, you can either wait until the WAO or GMPA is returned to upload the remaining documents or you can log into eBuilder, select the “Documents” tab, and then select the subject project for which the WAO or GMPA is being drafted from the “All Projects” dropdown list to open the subject project’s file folder structure.



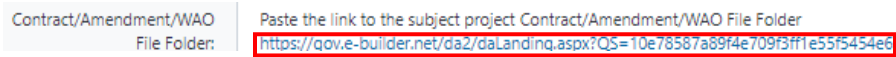
Scroll down to and select the “11 Contract-Amendment-Legal” file folder, then select the “CMR Contract Approval” file folder, then select the respective “WAO” or “GMP” file folder to view the respective subfolders. Then select the respective subfolder with which you wish to upload a document and follow the instructions above to upload the document.



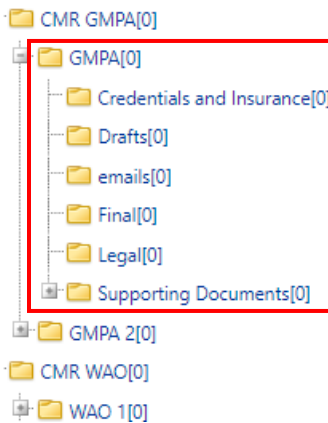


Draft WAO/GMP (Paralegal/Attorney)

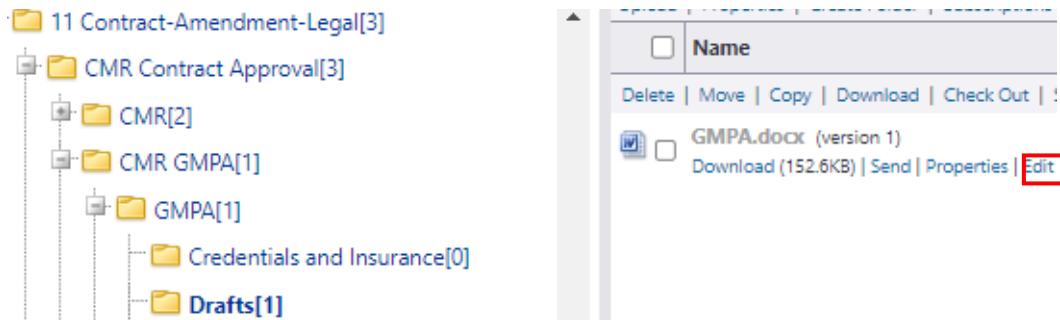
The Attorney assigned to the project should begin to review and revise the draft submittal. To view the draft submittal or any of the documents collected to date by the Paralegal in the “CMR Checklist for Credential Review” field, scroll down to the "Contract/Amendment/WAO File Folder" field, right click on the link and select "Open link in new tab" to open the subject project "CMR Contract Approval" file folder.



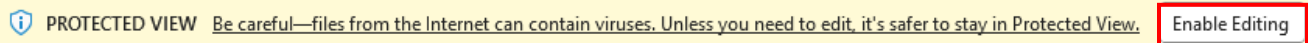
Then, select the respective "CMR GMPA" or "CMR WAO" file folder; and then select “Drafts” to view the draft submittal or select any of the other respective subfolders to view the supporting documents related to the draft submittal.



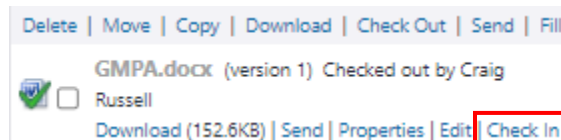
To edit the draft submittal, click the “Edit” link to “Check Out” the document.



After clicking “Edit”, the document will open in Word with a “Protected View” prompt. Click on the “Enable Editing” button within the prompt to begin editing the document.



Review and revise the document as needed. After completing any edits, save the document, return to the “Drafts” sub-subfolder and “Check-In” the document.





Upon completing edits to the draft WAO/GMP, return to this process instance, scroll down to the bottom of the page and either select "Return" to send the draft WAO/GMP to the project PM and ADPM for additional review and to further allow for DAS/CS to submit the draft WAO/GMP to the CMR for review; or select "Approvals" to send the file to the Paralegal assigned to the project to obtain approvals from the A/E, CA, CHRO and, if applicable, CSCU; or select "Submit", if the draft agreement has been finalized and all of the required supporting documents have been collected and determined to be acceptable, to send the final draft WAO/GMP to the Legal Director for review and approval.

Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6
-------------------------------------	---

[- Please select an action --]
Take Action
Check Spelling

A prompt will appear after clicking "Take Action" to allow for comments related to the draft agreement. After adding a comment click the "PM", "Approvers", or "Submit" button respectively.

Add Comment

Private

Check Spelling
Submit
Cancel

11C.14 DAS/RECS - WAO/GMP Review (PM/ADPM)

PM Review

The PM assigned to the project will receive an email from eBuilder as notification that the draft GMP or WAO for the subject project has been reviewed and revised by Legal and is now ready for DAS/RECS review.

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

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

My Home Projects Processes Documents Contacts Cos

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My Processes

Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

After opening the process instance, click on the "Comments" tab to view any comments provided by past actors.

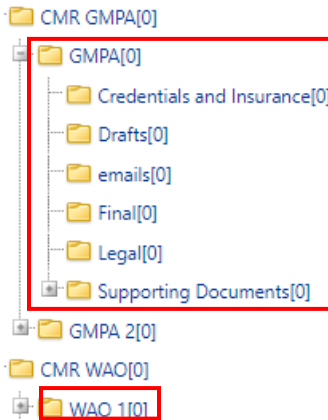
Details
Comments (0)
Documents (0)
Attached Processes (1)
Attached Forms (0)
Attached To (0)

To review the draft contract, return to the "Details" tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field and select "Open link in new tab."

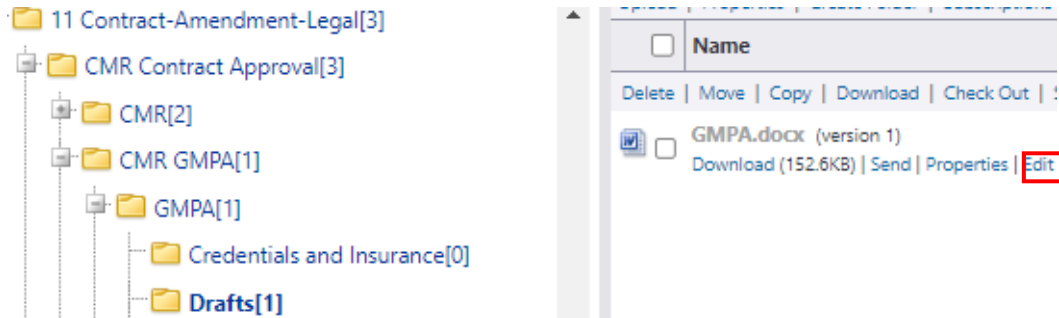


CMR Information	
CMR - Firm:	*Sample Company
CMR - Contact:	Russell, Craig
CMR - Contact Email:	craig.russell@ct.gov
Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder
	https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6

Then, select the respective "GMPA/Drafts" or "WAO/Drafts" subfolder to view the draft submittal or select any of the other respective subfolders to view the supporting documents related to the submittal.



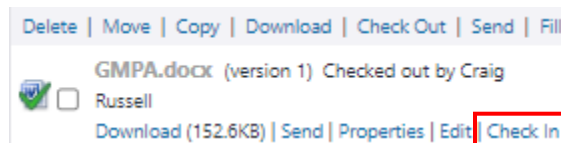
To review and edit the revised draft submittal, click the "Edit" link to "Check Out" the document.



After clicking "Edit", the document will open in Word with a "Protected View" prompt. Click on the "Enable Editing" button within the prompt to begin editing the document.



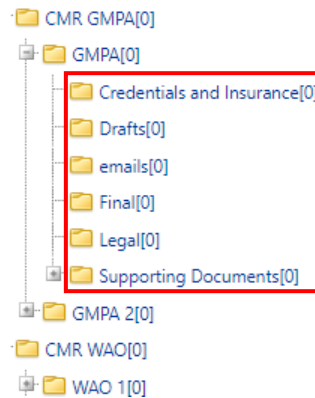
Review and revise the draft using the means and methods recommended by legal for making proposed revisions as described under the "Comments" tab. After completing your review and making any proposed edits to the revised draft submittal, return to the "Documents" tab, open the respective "CMR GMPA" or "CMR WAO" subfolder and then open the "Drafts" sub-subfolder. Click the "Check In" link to check the revised draft submittal back into the "Drafts" subfolder with your saved edits.



To view any of the supporting documents submitted from the "CMR Checklist for WAO/GMP Review", select either the respective "Credentials and Insurance" sub-subfolder to view the credentials and insurance submission; or select "emails" to view any correspondence related to the submittal; or select



“Supporting Documents” and then select “Approvals & Confirmations”, “Bonds”, “Subconsultant SOTS”, or “Wage Certs and Rates” to view any of those respective documents.



After completing your review and checking in the revised draft submittal, return to the process instance and scroll down to the bottom of the page to take action. Prior to returning the revised draft agreement to Legal, be sure to upload a copy of the funding verification for the agreement to the "Funding Verification" field before taking action.

- Select “ADPM” from the dropdown list next to the “Take Action” button to send the draft to the ADPM for additional review and revision, or
- Select "CMR" to send the draft to the CMR for review and revision, or
- Select "Return" from the dropdown list next to the “Take Action” button to return the draft to Legal for additional review and revision.
 - A prompt will appear after the "Take Action" button is clicked to allow for comments After adding a comment, click the “ADPM”, “CMR”, or “Return” button respectively.

Add Comment

Private

Check Spelling **CMR** Cancel

ADPM Review

The ADPM assigned to the project will receive an email from eBuilder as notification that the draft GMP or WAO for the subject project has been reviewed and revised by DAS Legal and is now ready for DAS/RECS review.



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

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

My Home Projects Processes Documents Contacts Cos

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My Processes

Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

After opening the process instance, click on the "Comments" tab to view any comments provided by past actors. To review the draft contract, return to the "Details" tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field and select "Open link in new tab."

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

CMR Information

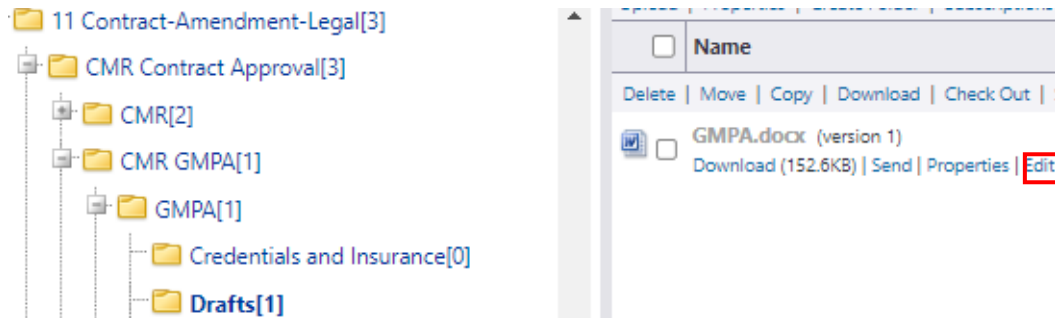
CMR - Firm: *Sample Company
 CMR - Contact: Russell, Craig
 CMR - Contact Email: craig.russell@ct.gov
 Contract/Amendment/WAO File Folder: <https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6>

Then, select the respective "CMR GMPA" or "CMR WAO" file folder; and then select "Drafts" to view the draft submittal or select any of the other respective subfolders to view the supporting documents related to the draft submittal.

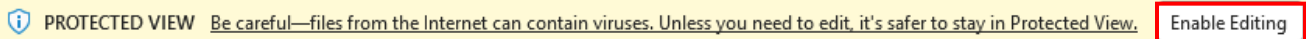
- CMR GMPA[0]
 - GMPA[0]
 - Credentials and Insurance[0]
 - Drafts[0]**
 - emails[0]
 - Final[0]
 - Legal[0]
 - Supporting Documents[0]
 - GMPA 2[0]
- CMR WAO[0]
 - WAO 1[0]**



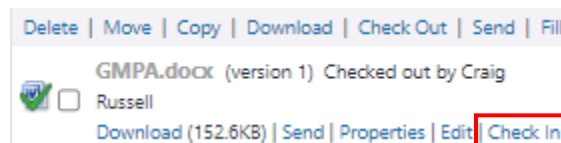
To review and edit the revised draft submittal, click the “Edit” link to “Check Out” the document.



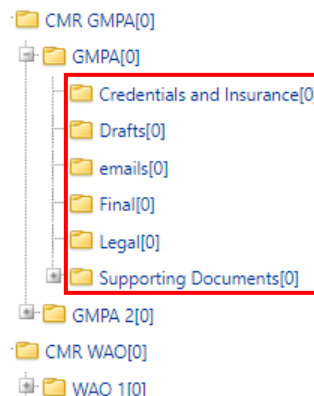
After clicking “Edit”, the document will open in Word with a “Protected View” prompt. Click on the “Enable Editing” button within the prompt to begin editing the document.



Review and revise the draft, accordingly, using the means and methods recommended by legal for making proposed revisions as described under the "Comments" tab. After completing your review and making any proposed edits to the revised draft submittal, return to the “Documents” tab, open the respective “CMR GMPA” or “CMR WAO” subfolder and then open the "Drafts" sub-subfolder. Click the “Check In” link to check the revised draft submittal back into the “Drafts” subfolder with your saved edits.



To view any of the supporting documents submitted from the “CMR Checklist for WAO/GMP Review”, select either the respective “Credentials and Insurance” sub-subfolder to view the credentials and insurance submission; or select “emails” to view any correspondence related to the submittal; or select “Supporting Documents” and then select “Approvals & Confirmations”, “Bonds”, “Subconsultant SOTS”, or “Wage Certs and Rates” to view any of those respective documents.





After completing your review and checking in the revised draft submittal, return to the process instance, scroll down to the bottom of the page and click the "Take Action" button to return the draft contract to the PM for further processing. A prompt will appear after the "Take Action" button is clicked to allow for comments related to the draft agreement. After adding a comment, click the "Return" button.

Add Comment

Private


11C.15 CMR WAO/GMP Review (CMR)

The CMR assigned to the project will receive an email from eBuilder as notification that the subject project GMP or WAO has been reviewed and revised by DAS Legal, the DAS PM and ADPM assigned to the project, and is now ready for the CMR’s review.

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

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

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My Processes

Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

After opening the process instance, click on the “Comments” tab to view any comments provided by past actors. To review the draft contract, return to the “Details” tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field and select “Open link in new tab.”

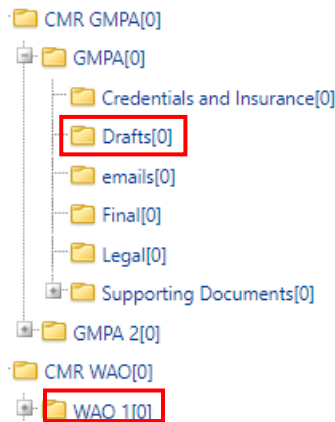
[Details](#)
[Comments \(0\)](#)
[Documents \(0\)](#)
[Attached Processes \(1\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)

CMR Information

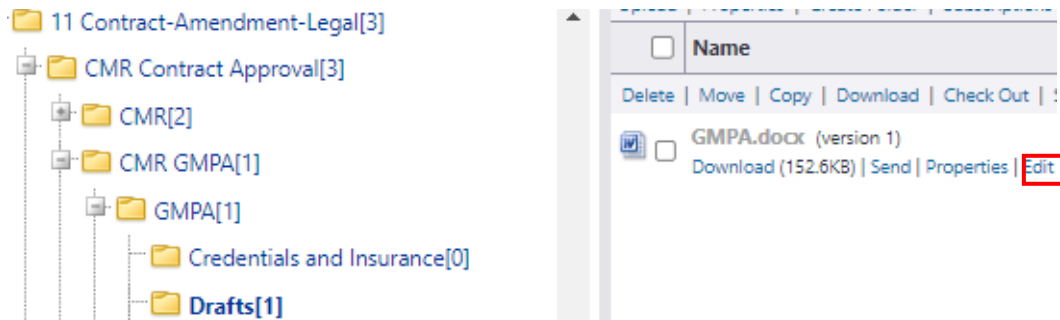
CMR - Firm:	*Sample Company
CMR - Contact:	Russell, Craig
CMR - Contact Email:	craig.russell@ct.gov
Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78567a89f4e709f3ff1e55f5454e6



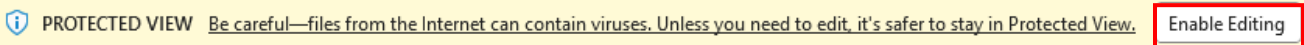
Then, select the respective "CMR GMPA" or "CMR WAO" file folder; and then select "Drafts" to view the draft submittal.



To review and edit the revised draft submittal, click the "Edit" link to "Check Out" the document.



After clicking "Edit", the document will open in Word with a "Protected View" prompt. Click on the "Enable Editing" button within the prompt to begin editing the document.



Review and revise the draft, accordingly, using the means and methods recommended by legal for making proposed revisions as described under the "Comments" tab.

After completing your review and making any proposed edits to the revised draft submittal, return to the "Documents" tab, open the respective "CMR GMPA" or "CMR WAO" subfolder and then open the "Drafts" sub-subfolder. Click the "Check In" link to check the revised draft submittal back into the "Drafts" subfolder with your saved edits.





After checking in the revised draft submittal, return to the process instance, scroll down to the bottom of the page and click the "Take Action" button to return the submission to the DAS RECS. A prompt will appear after the "Take Action" button is clicked to allow for comments related to the draft agreement.

A prompt will appear after the "Take Action" button is clicked to allow for comments related to the draft agreement. After adding a comment, click the "Return" button.

Add Comment

Private


11C.16 A/E, CA, CHRO, CCSU Review Placeholder (Paralegal - GMP/WAO)

The Paralegal assigned to the project will receive an email from eBuilder as notification that the subject project GMPA or WAO has been reviewed and revised by DAS Legal, the DAS PM and ADPM assigned to the project. At this time, the:

- CHRO Director should be contacted for approval to proceed;
- A/E should be contacted, via email, to obtain approval on the final version of the WAO/GMP and its attachments, the schedule, the Assumptions and Clarifications, the list of plans and specifications, and any addenda thereto, Supplements, Alternates and prices, Unit prices;
- CA should be contacted, via email, to obtain approval on the final version of the WAO/GMP and its attachments, the schedule, the GMP amount and support for the amount, the permitted allowances, and the Assumptions and Clarifications, Supplements, Alternates and prices, Unit prices; and, if the project is for CSUS,
- CSCU Director of Facilities should be contacted, if applicable, to review and approve the final version of the WAO/GMP and its attachments.

Upon receipt of each approval, the Paralegal should log into eBuilder, select the "My Home" tab and click on the subject process instance link from the "My Processes" section.

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Processes
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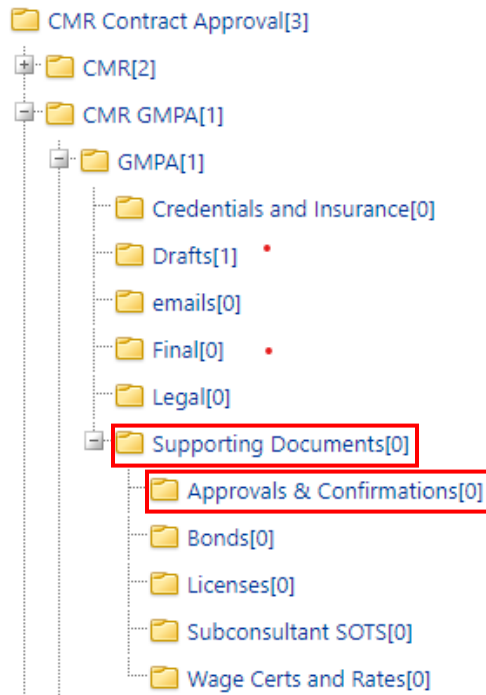
Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test



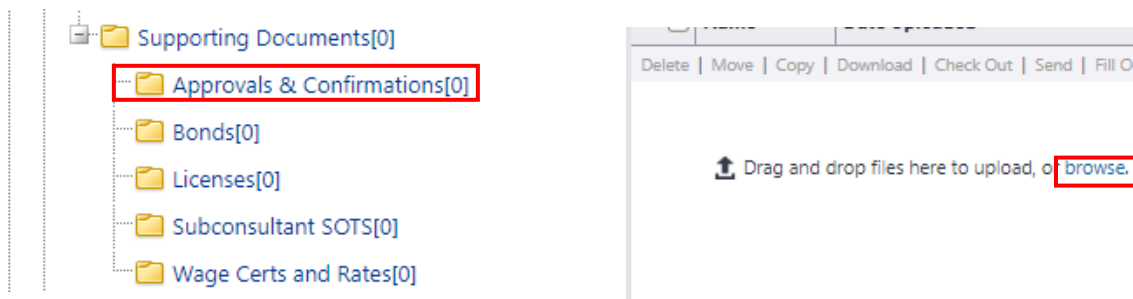
After opening the process instance, scroll down to the “CMR Information” and check off the respective approval in the “CMR Checklist for WAO/GMP Review” field, then right click on the link provided in the “Contract/Amendment/WAO File Folder” field and select “Open link in new tab.”

CMR Information	
CMR - Firm:	*Sample Company
CMR - Contact:	Russell, Craig
CMR - Contact Email:	craig.russell@ct.gov
Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6

After opening the subject project contract approval file folder, open the respective “WAO/WAO 1/Supporting Documents” or “GMPA/GMPA 1/Supporting Documents” subfolder, and then open the “Approvals and Confirmations” sub-subfolder to upload the corresponding documents.



After opening the “Approvals and Confirmations” subfolder, you can upload the approvals by clicking the “browse” link. After clicking “browse”, you can either drag and drop the documents into the space provided or click on the “Browse” link to search for the applicable files on your computer to upload.



Drag your files or [Browse](#)



After each approval has checked off and uploaded, or if any of the respective reviewers require additional information prior to approval, return to this process instance, scroll down to the bottom of the page and click the "Take Action" button to return the process instance to the WAO/GMP - Draft/Credential Review step to be revised by the Legal Department or so the Legal Department can forward the information to the appropriate party.

After clicking "Take Action", a prompt will appear to allow you to add comments, if applicable. Click the "Return" button after your comment has been added.

Add Comment

Private


11C.17 Legal Director Review (Legal Director)

The Legal Director will receive an email from eBuilder as notification that the subject project GMP or WAO has been finalized and is now ready for your review.

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

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

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Contacts
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My Processes

Project	Instance	Subject
*BI-CS-1010 - DAS Test Project	CMR - 1	*BI-CS-1010 - CMR Test

After opening the process instance, click on the "Comments" tab to view any comments provided by past actors. To review the draft contract, return to the "Details" tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field and select "Open link in new tab."

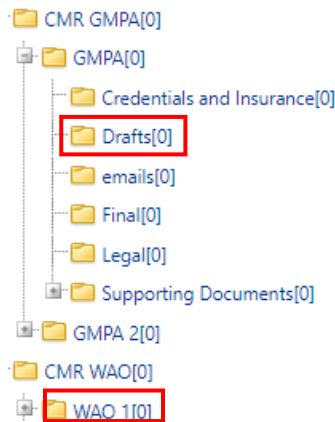
Details
Comments (0)
Documents (0)
Attached Processes (1)
Attached Forms (0)
Attached To (0)

CMR Information

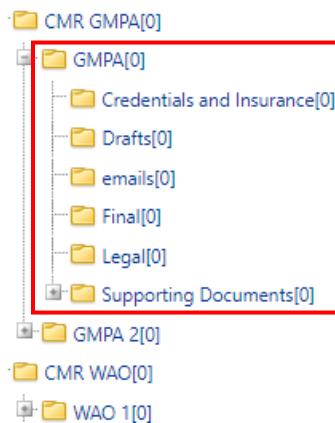
CMR - Firm:	*Sample Company
CMR - Contact:	Russell, Craig
CMR - Contact Email:	craig.russell@ct.gov
Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder
	https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6



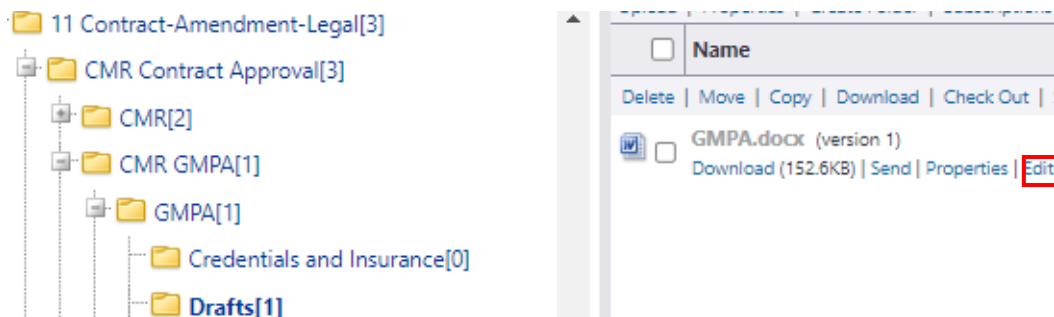
Then, select the respective "CMR GMPA" or "CMR WAO" file folder; and then select "Drafts" to view the draft submittal.



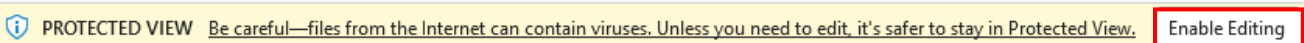
Then, select the respective "CMR GMPA" or "CMR WAO" file folder; and then select "Drafts" to view the final draft submittal or select any of the other respective subfolders to view the supporting documents related to the draft submittal.



To edit the draft submittal, click the "Edit" link to "Check Out" the document.

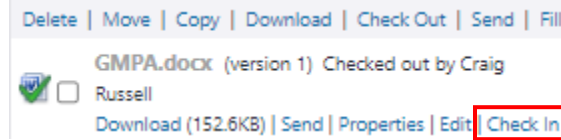


After clicking "Edit", the document will open in Word with a "Protected View" prompt. Click on the "Enable Editing" button within the prompt to begin editing the document.

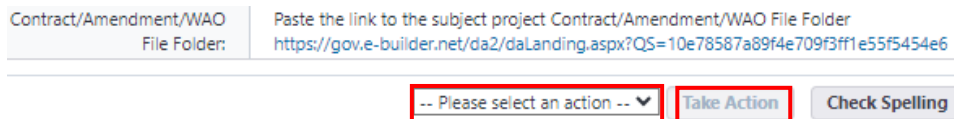




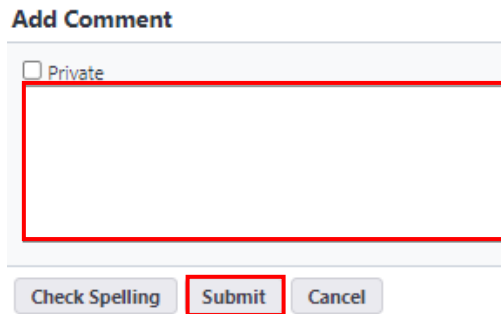
Review and revise the draft, accordingly, using the means and methods recommended by legal for making proposed revisions as described under the "Comments" tab. After completing any edits, save the document, return to the "Drafts" sub-subfolder and "Check-In" the document.



Upon completing edits to the draft WAO/GMP, return to the subject process instance, scroll down to the bottom of the page and select "Return" to return the draft to the Attorney/Paralegal assigned to the project for additional review and revision, or select "Submit" to submit the draft to a placeholder to allow the assigned Paralegal to process the agreement through DocuSign.



A prompt will appear after clicking "Take Action" to allow for comments related to the final draft agreement. After adding a comment click the "Submit" or "Return" button respectively.

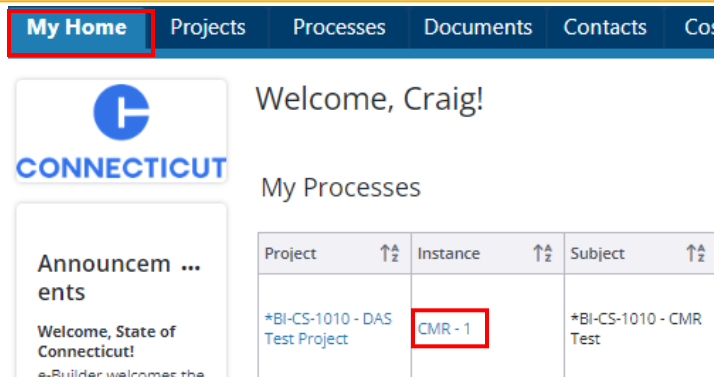


11C.18 GMPA/WAO Signing (Paralegal – GMPA/WAO)

The Paralegal assigned to the project will receive an email from eBuilder as notification that the Legal Director has reviewed and approved the subject project draft GMPA or WAO for signature.

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

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





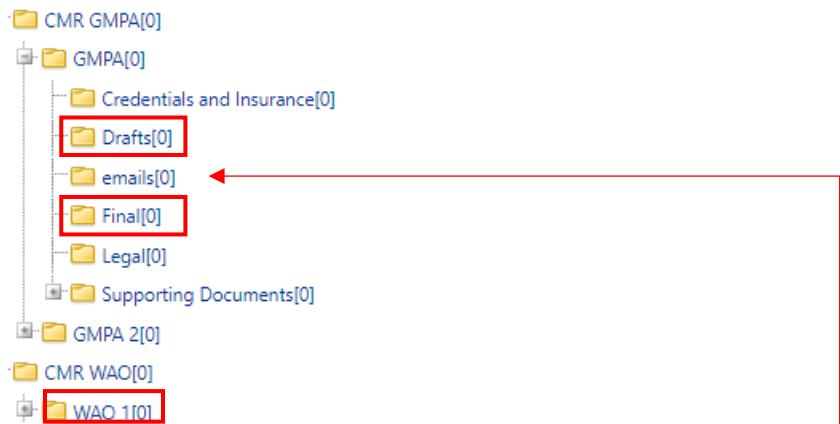
After opening the process instance, click on the “Comments” tab to view any comments provided by past actors. To view the final version of the draft contract for processing, return to the “Details” tab and right click on the link provided in the "Contract/Amendment/WAO File Folder" field and select “Open link in new tab.

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

CMR Information

CMR - Firm:	*Sample Company
CMR - Contact:	Russell, Craig
CMR - Contact Email:	craig.russell@ct.gov
Contract/Amendment/WAO File Folder:	Paste the link to the subject project Contract/Amendment/WAO File Folder https://gov.e-builder.net/da2/daLanding.aspx?QS=10e78587a89f4e709f3ff1e55f5454e6

Then, select the respective "CMR GMPA" or “CMR WAO” file folder; and then select the “Drafts” subfolder to view the final version of the draft submittal, or select the “Credentials and Insurance”, “Exhibits”, or “Supporting Documents” sub-subfolders to view such documents related to the GMPA or WAO agreement.



Proceed in processing the subject agreement through DocuSign. Upon completion, draft the AG checklist and submit the agreement to the OAG for review and signature.

After the Contract has been fully executed, return to the process instance, scroll down to the “CMR Information” section, right click on the link provided in the "Contract/Amendment/WAO File Folder" field, in the "CMR Information" section (see diagram above), then select “Open link in new tab”. After opening the subject project contract approval file folder, open either the “GMPA/GMPA 1” or “WAO/WAO 1” subfolder and then open the "Final" sub-subfolder (see diagram above). Upload copies of the AG memo, Agreement Cover Letter, CERT-134, CORE CT Entry, and Executed Contract Agreement to the “Final” subfolder, using the means and methods described in Section [11C.13](#).



After all documents have been uploaded to the “Final” sub-subfolder, return to the process instance, scroll down to the “CMR Contract” section, and upload a copy of the executed agreement to the “Executed Contract / Amendment” field by dragging and dropping the document into the space provided.

Note: After dragging and dropping the agreement into the “Executed Contract/Amendment” field, a prompt will appear that will allow you to select the specific subfolder within the “03 Preconstruction Contracts” file folder to upload the document. To select the file folder, first click the “Select folder” link in the prompt.

Then, click on the “+” next to the “03 Preconstruction Contracts” to expand the file folder. Then click on the “+” to expand the “04 CMR Construction Contracting” subfolder, and then click on the respective “CMR GMP Amendment” or “CMR WAOs” sub-subfolder to upload the document to and click the “Select” button, and then click the “Upload” button to upload the document.



After uploading the executed agreement, provide a response to the remaining questions in the “CMR Contract” section. Upon completion, click the "Take Action" button to complete the process.

CMR Contract

* DAS Contract Number:	<input type="text"/>
* CORE Contract No.:	<input type="text"/>
* Contract/Amendment Amount:	<input type="text"/>
* Date of Final Approval:	<input type="text"/>
* Date Contract Signed by Consultant/Contractor:	<input type="text"/>
* Date Contract Executed:	<input type="text"/>
* Executed Contract/Amendment:	<input type="text"/> <i>Drag and drop file here</i> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
* Contract Start Date:	<input type="text"/>
Contract End Date:	<input type="text"/>

Proceed to Section [11E – Contract & Amendment Commitment Creation](#), which is automatically launched at the completion of this process, to create the commitment for the subject agreement.



Section 11D: Formal Contract Approval

11D.01 (Coming Soon)

Proceed to Section [11E – Contract & Amendment Commitment Creation](#), which is automatically launched at the completion of this process, to create the commitment for the subject agreement.



Section 11E: Contract & Amendment Commitment Creation

11E.01 Commitment Creation (CSS)

CSS will receive an email from eBuilder as notification that a contract or amendment has been executed. The commitment process has been spawned to create a commitment for the subject agreement.

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

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

My Home Dashboard Projects Processes Documents Contacts Co

Welcome, Craig!

My Processes

Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	CMR - 28	*BI-CS-1010 - CMR Test (C&A - 25)	Contract Amendment CI

After the process instance is opened, a “Warning” prompt will appear at the top of the page. Click on the “Click here” link within the warning notification to access the cost integrated process to enter the commitment details for the subject agreement. DO NOT TAKE ANY ACTION on this page.

Warning
A draft DO NOT USE - Contract/Amendment - Cost Integrated has been automatically created. [Click here](#) to provide required Commitment information and submit the instance.

After opening the spawned process instance, scroll down to the “Contract Information” section and fill in the “Document Type”; the “Award Date”, and “Award Amount”, if applicable; and the “SPRB File Number”, “Sent to SPRB”, and “Approved by SPRB”, if applicable.

Then, complete the “Commitment Details” section, selecting the “Commitment Type” and “Company”.

Under the “Commitment Others” section, input the “Commitment Date” and “Notice to Proceed” date, if applicable.

Then, scroll down to the “Add New Commitment Item Section”. Select the appropriate “Budget Line Item” and “Funding Rule”, and then input the total fee in the “Amount” field. Click the “Add” button upon completion, and then click the “Submit” button.

Note: The “Commitment Custom Fields” section will automatically fill out when you proceed to the next step in the process.



Return to the “Home” tab and open the new process instance for the subject project.

Project	Instance	Subject	Step
*BI-CS-1010 - DAS Test Project	C&ACI - 4	*BI-CS-1010 - CMR Test (C&A - 25) (CMR - 28)	PSS Review

Review the “Commitment Custom Fields” and ensure all applicable fields have been filled out. Take a screen shot of the “Commitment Custom Fields”. Then, scroll down to the “Commitment Items” section and click on the “Custom Fields” icon.

Commitment Items

[Update Retainage %](#) [Manage Fu](#)

<input type="checkbox"/>	Item Number	inal mitment	Current Commitment	Projected Commitment	Current Retainage Held	Actuals Approved	Allowance	Custom Field(s)
<input type="checkbox"/>	001	50.00	50.00	50.00	0.00	0.00		

Replicate the data field input from the “Commitment Custom Fields” section to the “Commitment Items Custom Fields” section. Upon completion, click “Save”, then click the “Take Action” button.



Section 12: 1165 HazMat Project Intake Request

12.01 Accessing the Process

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

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

Unfinished Drafts | Import Processes

Processes

1165 Process Status

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

- *Becky Test Project
- *Becky Test Project - 2
- *BI-CS-1005 - DAS Test 5
- *BI-CS-1010 - DAS Test Project
- *e-Builder Testing Project
- *HazMat Project Creation Project**

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

Processes For *HazMat Project Creation Project

Filter Processes

Search In	<input type="radio"/> Processes Initiated By Me <input type="radio"/> Processes In My Court <input checked="" type="radio"/> All Processes
Type of Process	1165 HazMat Project Intake Request (HAZ) <input checked="" type="checkbox"/> Draft <input checked="" type="checkbox"/> Open <input type="checkbox"/> Finished
Status	All Statuses ▼
Step Name	▼
Containing Text	▼

12.02 Hazardous Materials Assistance Request (Agency PM)

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

1165 HazMat Project Intake Request (HAZ)

Start Process

Project:	*HazMat Project Creation Project
Process:	1165 HazMat Project Intake Request
* Subject:	<input type="text"/>



Hazardous Materials Assistance Request - Form 1165

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

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

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

Agency Information

* Agency: Board of Regents for Higher Education

* Agency PM: Please select...

* Agency PM - Email:

* Agency PM - Phone:

Print Check Spelling **Submit** Save Draft Cancel

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

12.03 HazMat Project Information (Agency PM)

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

Processes Documents Contacts Cost Schedule Reports

Unfinished Drafts | Import Processes

Processes For *HazMat Project Creation Project

Filter Processes Start Selected Process Type Start Process

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

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

Status: All Statuses

Step Name:

Containing Text:

Filter

Processes Reports (0)

Print Log

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



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

Project Information

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

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

Emergency Use of HazMat Funds

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

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

* Emergency Use of Funds:

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

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



12.04 HazMat Emergency Project (Agency PM)

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

Processes For: *HazMat Project Creation Project

Filter Processes: Start Selected Process Type Start Process

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

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

Status: All Statuses

Step Name: [Empty]

Containing Text: [Empty]

Filter

Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
<input type="checkbox"/>	HAZ - 8	HazMat Test Project 8	Agency Emergency Project	07.20.2023	Submitted	

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

1165 HazMat Project Intake Request (HAZ) - 8

Delete Instance Workflow Override All Fields View **Instructions**

Submit Take Action Check Spelling Print Copy Delegate Save Cancel

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



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

Emergency Consultant/Contractor

Show Filter | Select All Row Height: 1X

Download Template Import Delete

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

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

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

Add New Item for Emergency Consultant/Contractor

* Preferred Consultant/Contractor

* Preferred Consultant/Contractor Quote

Clear Add

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

Other Consultant/Contractor

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

Other Consultant/Contractor:

Other Consultant/Contractor Fee:

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

Estimated Fee Known?:

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



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

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

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

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

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

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



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



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

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

*HazMat Project Creation Project

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

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

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



Welcome, Craig!

All pr

My Processes

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

Announcements



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

Emergency Consultant/Contractor

Show Filter | Select All Row Height: 1X

Download Template Import Delete

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

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

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

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

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

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

FYI - *HazMat Project Creation Project - Paff Test 05

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

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

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

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

*HazMat Project Creation Project

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

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

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



12.05 HazMat Services Requested (Agency PM)

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

Processes For: *HazMat Project Creation Project

Filter Processes: Start Selected Process Type | Start Process

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

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

Status: All Statuses

Step Name: []

Containing Text: []

Filter

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

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

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

Environmental Consultant Services

Show Filter | Select All | Row Height: 13x

Download Template | Import | Delete

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

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

Grand Totals (3 items) Min: 50,000

Add New Item for Environmental Consultant Services

Environmental Consultant: Please select...

Environmental Services Quote: []

Clear Add



Abatement Contractor Services

Show Filter | Select All Row Height: 1X

Download Template Import Delete

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

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

Add New Item for Abatement Contractor Services

Abatement Contractor

Abatement Contractor Quote

Clear Add

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

Other Consultant/Contractor

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

Other Consultant/Contractor:

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

Preferred Consultant/Contractor

Show Filter | Select All Row Height: 1X

Download Template Import Delete

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

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

Add New Item for Preferred Consultant/Contractor

* Preferred Consultant/Contractor

* Preferred Consultant/Contractor Quote

Clear Add

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

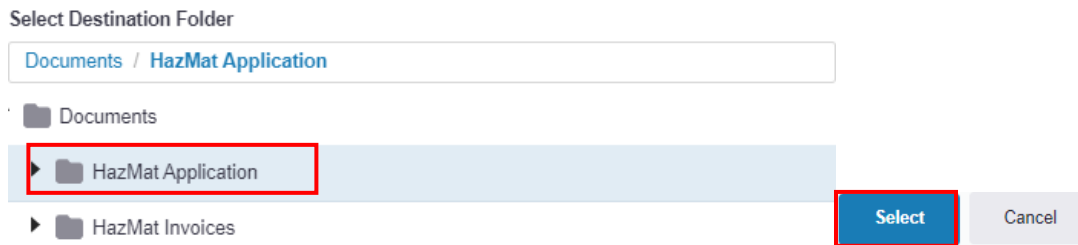
Review the instructions and complete the "Work Plans & Cost Estimates" section. After reviewing the instructions, click on the "Documents" tab, and then click the "Attach Documents" button.

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

Attach Documents



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



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

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

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

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

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

*HazMat Project Creation Project

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



Welcome, Craig!

All pr

My Processes

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

Announcem ...
ents



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

Consultant/Contractor Approval & Assignment

FOR DAS USE ONLY

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

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

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

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

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

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

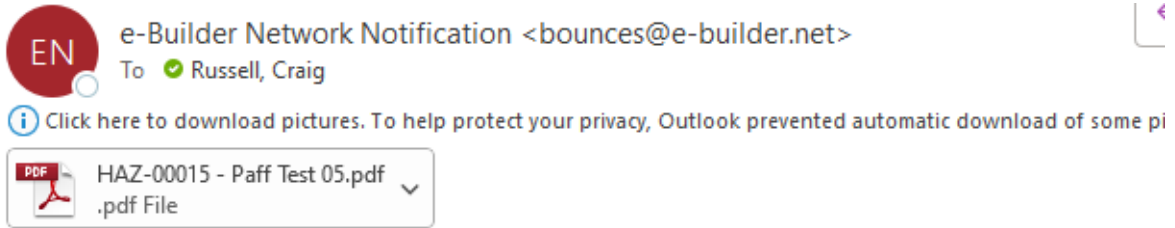
After the Supervising Environmental Analyst provides a recommendation for the Notice to Proceed, the client agency will receive an email notification through eBuilder that either the application has been submitted to the DAS Authorized Authority for signature or that the application will need to be revised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

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



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

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



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

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



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

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


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

*HazMat Project Creation Project

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

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

My Home Projects Forms Processes Documents Contacts Cost Schedule



Welcome, Craig! All pr

My Processes

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

Announcements

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

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

Details Comments (2) Documents (2) Attached Processes (0) Attached Forms (0) Attac



After reviewing the application submission, scroll down to the sections entitled “Consultant/Contractor Approval & Assignment” and “Project Status Summary”, review the general instructions for and complete those sections.

Consultant/Contractor Approval & Assignment

Complete the Consultant/Contractor Approval & Assignment section below.

Environmental Consultant Request:	-- Please select an option --
Approved Environmental Consultant:	-- Please select an option --
Environmental CORE No.:	-- Please select an option --
Approved Environmental Consultant Fee:	
Abatement Contractor Request:	-- Please select an option --
Approved Abatement Contractor:	-- Please select an option --
Abatement CORE No.:	-- Please select an option --
Approved Abatement Contractor Fee:	
Reason for Consultant/Contractor Approval/Rejection:	
* Request Reviewed by:	-- Please select an option --
Date of Review:	07.20.2023

Project Status Summary

Complete the Project Status Summary section below, if applicable. Once complete, scroll down to the bottom of the page and either select “Approve”, “Reject”, or “Void” from the dropdown list next to the “Take Action” button and click on the “Take Action” button. After clicking the “Take Action” button, you will be prompted to provide a comment, where you can provide additional detail regarding the reason for approval or rejection, if applicable, and you can select additional users (i.e. approved Consultant/Contractor) to allow access to the submitted Form 1165 for review and comment.

Project Status Summary: Provide notes on the status of the project application and/or status of the project as applicable.

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

Upon completing all sections, scroll down to the bottom of the page and select either “Approve”, “Reject”, or “Void” from the dropdown list next to the “Take Action” button and click “Take Action”.

If “Approve” was selected, you will be prompted to “Add users for review and comment”, which will allow access to the submitted Form 1165 to those selected users for review and comment. Select the approved consultant/contractor from the list of “Available Users” to grant them access to review the application and receive notification that a scope review meeting is to be scheduled.

Add users to review and comment

<p>Available Users</p> <ul style="list-style-type: none"> Asselin, Mathieu (Department of Emergency Services and Public Protection) Bantz, Marilyn (Department of Administrative Services) Beermann, Ahmed (Connecticut State Colleges and Universities) Burke, Stephen (Connecticut State Colleges and Universities) Calvi, Frank (Connecticut State Library) Camirero, Ervin (CT Military Department) 	<p>Selected Users</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div>
<p>Check Spelling Approve Cancel</p>	

If “Reject” was selected, Form 1165 will be returned to the client agency for revision, if applicable.



12.07 Emergency Assignment/NTP (Environmental Analyst – DAS Only)

The Environmental Analyst will receive an email from eBuilder as notification that an Emergency HazMat Assistance Request has been submitted for DAS Review and Processing.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “Emergency Assignment/NTP”. Please refer to the diagrams in Section 12.0.6 DAS Approval & Assignment for a visual representation on accessing the process.

Review the general instructions and complete the “Emergency Assignment”, “Notice to Proceed Recommendation”, and “Project Status Summary” sections.

When completing the “Emergency Assignment” section (*see diagram on the next page*):

- a) Select “Emergency” from the dropdown list for the fields entitled “Environmental Consultant Request” and “Abatement Contractor Request”;
- b) Input the names and quotes provided by the client agency from the “Preferred Consultant/Contractor” section into the respective “Approved” consultant, contractor and fee fields.
- c) The “Project Name” field should consist of the following: “HazMat Project Number – HazMat Project Name” as listed under “Subject” at the top of the page, i.e. 24-CSCU-HAZ-01 - HazMat Test Project 8.
- d) Select Craig Russell as the “eBuilder Project Administrator”.

Select Matthew Pafford as the “Project Manager” of the HazMat Program.

Emergency Assignment

Complete the Emergency Assignment section below. If the Consultant and/or Contractor fee is unknown at the time of submission, input a dollar value of 0 and make a note in the Notice to Proceed Recommendation - Recommendation Comments that the fees are to be determined.

Environmental Consultant Request:	-- Please select an option --
Environmental CORE No:	-- Please select an option --
Approved Environmental Consultant:	-- Please select an option --
Approved Environmental Consultant Fee:	<input type="text"/>
Abatement Contractor Request:	-- Please select an option --
Approved Abatement Contractor:	-- Please select an option --
Abatement CORE No:	-- Please select an option --
Approved Abatement Contractor Fee:	<input type="text"/>
* HazMat Project Number:	<input type="text"/>
* Project Name:	<input type="text"/>
* e-Builder Project Administrator:	Please select...



When completing the “Project Status Summary” section, select “Active” from the dropdown list for “Project Status”.

Project Status Summary

Complete the Project Status Summary section below, if applicable. Upon completion, scroll down to the bottom of the page and either select “Approve”, “Reject”, or “Void” from the dropdown list next to the “Take Action” button and click on the “Take Action” button. Once you have clicked the “Take Action” button, you will be prompted to provide a comment, where you can provide additional detail regarding your recommendation, if applicable. You will also be prompted to add an “Actor” to the next step for project authorization. Select either the DC or Chief Architect and click the “Recommend” button.

* Project Status: Active

Project Status Summary: Provide notes on the status of the project application and/or status of the project as applicable.

N/A

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

After clicking the “Take Action” button, you will be prompted to “Add actors to the next step”, which will direct the application to the Authorized Authority to sign off on the approval of the application; and to “Add users to review and comment”, which will allow selected users access to the submitted Form 1165 for review and comment.

To add an actor to act as the Authorized Signatory, select the individual’s name from the list of “Available Users” for which you wish to sign off on the application, then click on the “>” to move that individual into “Selected Users”.

Add actors to the next step

Available Users

- Barkin, David (Department of Administrative Services - Construction Services)
- Hobbs, Darren (Department of Administrative Services - Office of Regulatory Compli
- Pafford, Matthew (Department of Administrative Services - Construction Services)

Selected Users

- Russell, Craig (Department of Administrative Services - Construction Services)

Check Spelling Recommend Cancel

Repeat this process to “Add users for review and comment”. Select the “Approved” Consultant and/or Contractor from the list of “Available Users” so that they can receive notification that the application is being processed and to allow them access to the application for review and comment. After adding the actors and users, click the “Recommend” button. Proceed to Section 12.10 Form 1165 Executed.

12.08 Scope Review/NTP Recommendation/Project Assignment (EA – DAS Only)

The “Scope Review/NTP/Project Assignment” step should not be completed until after the scope review meeting has been scheduled and completed.

After the scope review meeting, the Environmental Analyst can access the process instance by either clicking on the link provided in the aforementioned email or by logging into eBuilder, selecting the “My Home” tab and clicking on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section. The “Step” column should read “Scope Review/NTP/Project Assignment”. Please refer to the diagrams in Section 12.06 DAS Approval & Assignment for a visual representation on accessing the process.



Review the general instructions and complete the “Scope Review”, “Consultant/Contractor Approval & Assignment”, “Notice to Proceed Recommendation”, “Project Assignment”, and “Project Status Summary” sections.

- * When completing the “Project Assignment” section, the “Project Name” should consist of the following: “HazMat Project Number – HazMat Project Name” as listed under “Subject” at the top of the page, i.e. 24-CSCU-HAZ-01 - HazMat Test Project 8. Select Craig Russell as the “eBuilder Project Administrator”. Select Matthew Pafford as the “Project Manager” of the HazMat Program.

Project Assignment

Assign a HazMat Project Number in the space provided.

HazMat Project Number:	24-CSCU-HAZ-01
* Project Name:	24-CSCU-HAZ-01 - HazMat Test Project 8
* e-Builder Project Administrator:	Please select...

- * When completing the “Project Status Summary” section, select “Active” from the dropdown list for “Project Status”.

* Project Status: Active

If “Recommend” was selected, you will be prompted to “Add actors to the next step”, which will direct the application to the Authorized Authority to sign off on the approval of the application.

To add a user, select the individuals name from the list of “Available Users” for which you wish to sign off on the application, then click on the “>” to move that individual into “Selected Users” and click the “Recommend” button.

Add actors to the next step

Available Users		Selected Users
Barkin, David (Department of Administrative Services - Construction Services)	>	Russell, Craig (Department of Administrative Services - Construction Services)
Hobbs, Darren (Department of Administrative Services - Office of Regulatory Compliance)	<	
Pafford, Matthew (Department of Administrative Services - Construction Services)	<	

Check Spelling **Recommend** Cancel

If “Reject” was selected, Form 1165 will be returned to the client agency for revision, if applicable.

12.09 Project Authorization (Chief Architect/Deputy Commissioner – DAS Only)

Either the Chief Architect or the Deputy Commissioner will receive an email from eBuilder as notification that the HazMat Assistance Request has been submitted for Project Authorization.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the “*HazMat Project Creation Project” from the “My Processes” section.

*HazMat Project Creation Project

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



My Home Projects Forms Processes Documents Contacts Cost Schedule

Welcome, Craig! All pr

My Processes

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

Announcem ... ents

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

Project: *HazMat Project Creation Project
 Process Document: HAZ - 8
[Show History](#) | [Current Actors](#)
 Current Workflow Step: DAS Project Authorization [Show Workflow Diagram](#)
 * Subject:
 Status: Submitted

Details Comments (2) Documents (2) Attached Processes (0) Attached Forms (0) Attac

To review comments specific to the “Recommendation for Notice Proceed”, scroll down to the section entitled “Notice to Proceed Recommendation” and refer to the field entitled “Notice to Proceed Comments”.

Notice to Proceed Recommendation

Complete the Notice to Proceed Recommendation and Project Assignment sections.

* Recommend Notice to Proceed:

Expected Deliverables:
 Survey Report
 Compliance Report
 Other

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

Other Deliverables:

Notice to Proceed Comments:



After completing your review of the application submission, scroll down to the section entitled “Project Authorization”, review the general instructions for and complete that section.

Project Authorization

Sign in the space provided for project authorization. Upon completion, scroll down to the bottom of the page and either select “Approve” or “Reject” from the dropdown list next to the “Take Action” button and then click the “Take Action”. If “Rejected”, you will be prompted to provide a comment to explain the reason for rejection.

Project Authorization:

Authorization Date:

Upon completion of all sections, scroll down to the bottom of the page and select either “Approve” or “Reject” from the dropdown list next to the “Take Action” button and click the “Take Action” button.

If "Reject" was selected, you will be prompted to provide a comment to explain the reason for rejection and to provide guidance for corrective action. After providing the comment, click the “Reject” button.

Add Comment

Private

If "Approve" was selected, the application will be finalized, and an email will be distributed through eBuilder to the client agency that includes a copy of the executed Form 1165. The executed Form 1165 will also be uploaded to the eBuilder the subject project “HazMat Application” project file folder.

12.10 Project Files (Environmental Analyst – DAS Only)

To access the newly created HazMat Project/HazMat Application file folder, go to the “Projects” tab and select the name of the newly created project from the dropdown list, i.e. 24-CSCU-Hazmat-900 – HazMat Test Project.

Hidden Projects



Next, select “Documents” from the “Project Menu” on the lefthand side of your screen. After selecting “Documents”, click on the “HazMat Application” file folder to access the newly executed Form 1165 and any other documents that were uploaded as part of the HazMat Project Intake Process.

Project Menu

- Details
 - Apply Templates
 - Project Participants
 - Manage Bill Rates
 - Manage Form Types
 - Manage Permissions
 - Permissions By User
 - Process Notification
 - Settings
 - Sent Items
 - Project Level
 - Options
- Planning
- Forms
- Issues
- Processes
- Documents**

Documents For: *HazMat Project Creation Project

Folders	Documents \ HazMat Application
Expand All Collapse All Refresh All	Upload Properties Create Folder Subscriptions Copy To Clipboard
Documents[1]	<input type="checkbox"/> Name ▲
HazMat Application[1]	Delete Move Copy Download Check Out Send Fill Out
	<input type="checkbox"/> HAZ-00031 - HazMat Test Project.pdf (version 1)
	Download (124.1KB) Redline Stamp Compare With Send

If Work Plans and/or Cost Estimates were not uploaded as part of the 1165 Project Intake Process, you should upload them to the “HazMat Application” file folder upon receipt. To upload files, click the “browse” link to open the “Upload” prompt and then either drag and drop the files in the space provided, or click “Browse” to open the file structure on your computer so that you can search for the respective file that you want to upload.

Folders	Documents \ HazMat Application
Expand All Collapse All Refresh All	Upload Properties Create Folder Subscriptions Copy To Clipboard: Private URL - Email Address
Documents[0]	<input type="checkbox"/> Name ▲ Date Uploaded Uploaded By
HazMat Application[0]	Delete Move Copy Download Check Out Send Fill Out Form Compare Page 1 of 1
HazMat Invoices[0]	

Drag and drop files here to upload, or **browse**.



Drag your files or Browse

Note that the upload of files may be delayed. The prompt will note when the upload is complete. Upon completion, click “Done”. This concludes the HazMat Project Intake process.



Section 13: HazMat Commitment

13.01 Accessing the Process

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

On your homepage, go to the “Processes” tab and select the hazmat project number for the project for which you want to make against from the “All Projects” dropdown list.

The screenshot shows the 'Processes' tab selected in a navigation bar. Below the navigation bar, there is a search area with a dropdown menu for 'Process Status' and buttons for 'Edit' and 'Add View'. A table with columns 'Process', 'Subject', and 'Current Step' is visible, but it contains 'No items match'. A dropdown menu is open, listing various project names, with '24-CSCU-HAZ-900 - HazMat Test Project' highlighted in red.

Click the “Start Process” button and select the “HazMat Commitment” link.

The screenshot shows the 'Processes For' dropdown menu with '24-CSCU-HAZ-900 - HazMat Test Project' selected. To the right, a 'Start Process' button is highlighted in red.

13.02 HazMat Commitment

Read the “General Instructions”, fill in the “Subject” field in accordance with the instructions and click the “Submit” button.

After clicking “Submit”, you will be returned to the “Processes” tab. Click on the link to the project listed in the “Subject” column.

<input type="checkbox"/>	Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
<input type="checkbox"/>	HC - 4	24-CSCU-HAZ-900 - Environmental & Abatement	Finish	10.02.2023		Submitted	
<input type="checkbox"/>	HC - 5	24-CSCU-HAZ-900 - Environmental & Abatement	HazMat Consultant / Contractor	10.04.2023		Submitted	



Read the “General Instructions”, revise the Consultant/Contractor Information, if applicable, and click the “Take Action” button.

After clicking “Take Action”, you will be returned to the “Processes” tab. Click on the link to the project listed in the “Subject” column again to spawn the cost integration for the commitment process.

13.03 HazMat Cost Integration

When spawning the commitment process, you will receive a “Warning” notification. Click on the link within the warning notification to access the cost integrated process where you can enter the commitment details for the subject HazMat project.

HazMat Commitment (HC) - 5

Delete Instance Workflow Override All Fields View

Warning
 A draft HazMat Cost Integrated has been automatically created. [Click here](#) to provide required Commitment information and submit the instance.

Begin the HazMat Cost Integrated process by completing the “Commitment Details” section. Under “Commitment Details”, go to the “Master Commitment” field and select the Master Commitment Contract, from the dropdown list, for either the “Approved Environmental Consultant” or “Approved Abatement Contractor” listed under the Consultant/Contractor Information section.

- * This process will be repeated at a later stage if there are multiple Consultant / Contractor(s) listed within the Consultant/Contractor Information section.

Consultant/Contractor Information

Approved Environmental Consultant:	Langan Engineerng and Environmental	Approved Environmental Consultant Fee:	50,000
Approved Abatement Contractor:	New England Yankee	Approved Abatement Contractor Fee:	101,000

Commitment Details

Status:	Draft		
Master Commitment:	Please select a master commitm		
* Commitment Type:	Master Commitment Number	Company	Description
* Commitment Control:			Current Contract Value
* Company:			Jump Sum Amount
Contact:			

Master Commitment Number	Company	Description	Current Contract Value	Jump Sum Amount
DASX2B501	ARCADIS US INC	HazMat CA	75,000.00	
DASX2B829	LANGAN ENGINEERING	Environmental Consultant	718.12	

After selecting the Master Commitment Contract, all of the remaining fields in the “Commitment Details” section will infill automatically, but for the “Contact” field for the company. You may leave this field blank, or you may select a contact from the dropdown list. Please note that the contact is specific to the contract, not to the project.

After completing the “Commitment Details” section, scroll down to the “Commitment Custom Fields” section and input the “CORE Contract No.” for the subject Consultant/Contractor and the “PO Number” assigned to the CORE Contract.

Commitment Custom Fields

Primary Construction Contract On Project?:	No
Type of OC Consultant:	Please select...
CORE Contract No.:	
PO Number:	0000000000



Then, scroll down to the “Add New Commitment Item” section. Click on the link in the “Master Commitment Item” field and then click on the “Item Number” link under “Master Commitment Items”.

Next, input the dollar amount of the approved fee for the subject Consultant/Contractor in the “Amount” field and click the “Add” button. Upon completion, scroll down to the bottom of the page and click the “Submit” button.

Add New Commitment Item

Item Number	<input type="text" value="001"/>
Master Commitment Item	Please Select a Master Commitment Item
Budget Line Item	Please Select a Line Item
Current Budget	
Description	<input type="text"/>
Retainage Percent	<input type="text" value="0.00"/>
Amount	<input type="text" value="0.00"/>
Allowance Item?	<input type="checkbox"/>
Custom Fields	

After clicking “Submit”, you will be returned to the “Processes” tab. First, click on the “Reset filters” link.

Processes For 24-CSCU-HAZ-900 - HazMat Test Project

Filter by...

Then, click on the project link in the “Subject” column to return to the HazMat Commitment Process (The “Step” column should read “Commitments Complete?”).

Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
HC - 7	24-CSCU-HAZ-900 - Environmental & Abatement	Commitments Complete?	10.05.2023		Approved	

Read the HazMat Commitment(s) instructions, answer the “All Commitments Entered” question and click the “Take Action” button.

HazMat Commitment(s)

Answer the question below. **Only answer “Yes” to this question if all commitments for this project have been entered. This process cannot be undone.**

* All Commitments Entered?:

If you answered “No” to the question, you will be returned to the “Processes” tab. Click on the project link under the “Subject” column to spawn the commitment process again (The “Step” column should read “Spawn Commitment”) . Repeat Step 13.02 until all commitments have been entered.

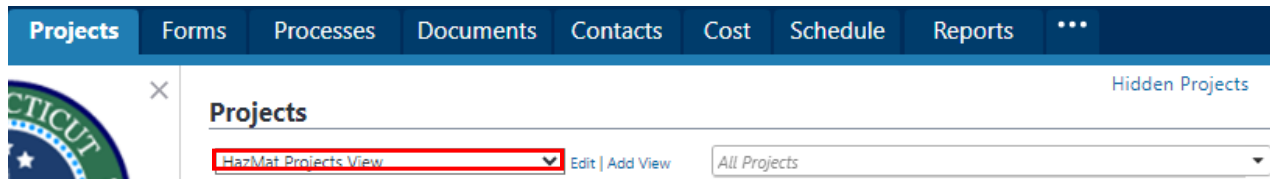
Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
<input type="checkbox"/> HC - 7	24-CSCU-HAZ-900 - Environmental & Abatement	Spawn Commitment	10.05.2023		Approved	



If you answered “Yes” to the question, the commitment process will be completed. The commitment status will be marked as “Pending”, so that the line item can be adjusted if necessary. The commitment status will need to be “Approved”, prior to payment.

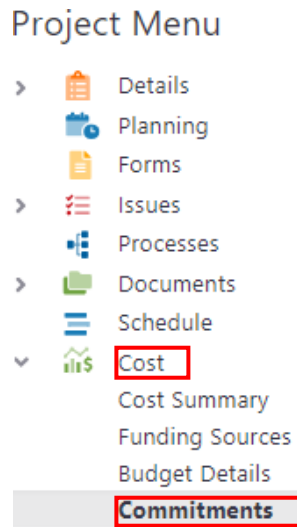
13.04 Edit or Approve a HazMat Commitment

Click on the “Projects” tab and select “HazMat Projects View” from the View dropdown list.



Click on the link in the “Project Name” column to access the HazMat Project Details page.

After opening the HazMat Project Details page, select “Cost” from the “Project Menu” and then select “Commitments” under the Cost dropdown list. This will open the Commitments display page, which will show all commitments related to that project.



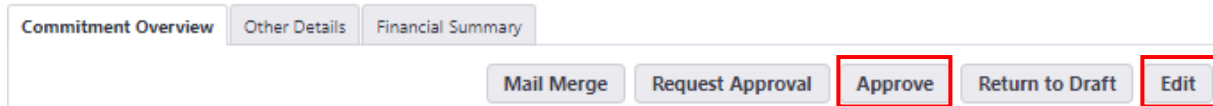
Click on the link in the “Description” column to access the “Commitment Details” page for the line-item commitment you wish to edit or approve.

Show: All		All Commitments		Go	Show All	Show Filter	Export	Mail Merge	Add
<input type="checkbox"/>	#	Description	Company	Date	Status	Commitment Type	Commitment Amount	Current Commitment	Projected Commitment
<input type="checkbox"/>	HCI - 00009	24-CSCU-HAZ-900 - Environmental & Abatement (HC - 7)	LANGAN ENGINEERING AND ENVIRONMENTAL	10.05.2023	Pending	HazMat Program	50,000.00		50,000.00
<input type="checkbox"/>	HCI - 00010	24-CSCU-HAZ-900 - Environmental & Abatement (HC - 7)	NEW ENGLAND YANKEE CONSTRUCTION LLC	10.05.2023	Pending	HazMat Program	100,000.00		100,000.00



After opening the “Commitment Details” page, you can either click the “Approve” button, if you wish to approve the commitment as is, or click the “Edit” button if you wish to edit the commitment amount.

Commitment Details



If the “Edit” button was clicked, then scroll down to the section entitled “Commitment Items” and scroll over to the column entitled “Amount”. Click on the “Pencil” toggle to edit the commitment amount. Upon completion, scroll down to the bottom of the page and click the “Save” button.

Commitment Items

<input type="checkbox"/>	Item Number	Master Commitment Item	Line Item	Description	Current Budget	Retainage Percent	Amount
<input type="checkbox"/>	001	001 - Total Haz-Mat	02.000	Total Environmental Remediation & Haz-Mat Abatement By Owner	1,151,000.00	0.00	50,000.00

After saving your changes, you can either click the “Approve” button, if you wish to approve the commitment, or closeout of the “” page until such time that you wish to approve the commitment.



Section 13A: HazMat Commitment Change Orders

13A.01 Hazmat change orders in e-Builder

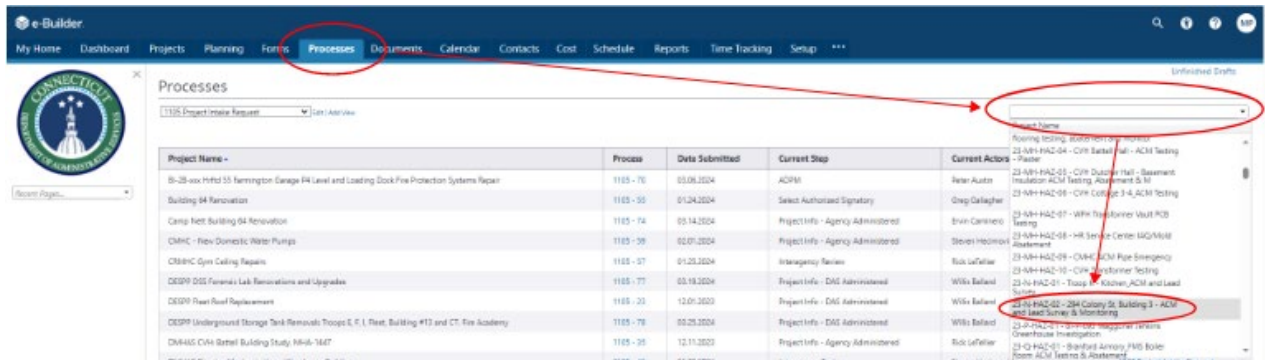
To process a HazMat Commitment Change Order in eBuilder, the Client Agency will need to acquire a proposal from the hazmat consultant or contractor that includes the following information:

- A brief description of the change;
- A brief description of the *reason* for the change;
- Estimated change in project cost;
- Estimated change to the project’s timeframe or schedule;
- Any additional supporting documentation, if applicable.

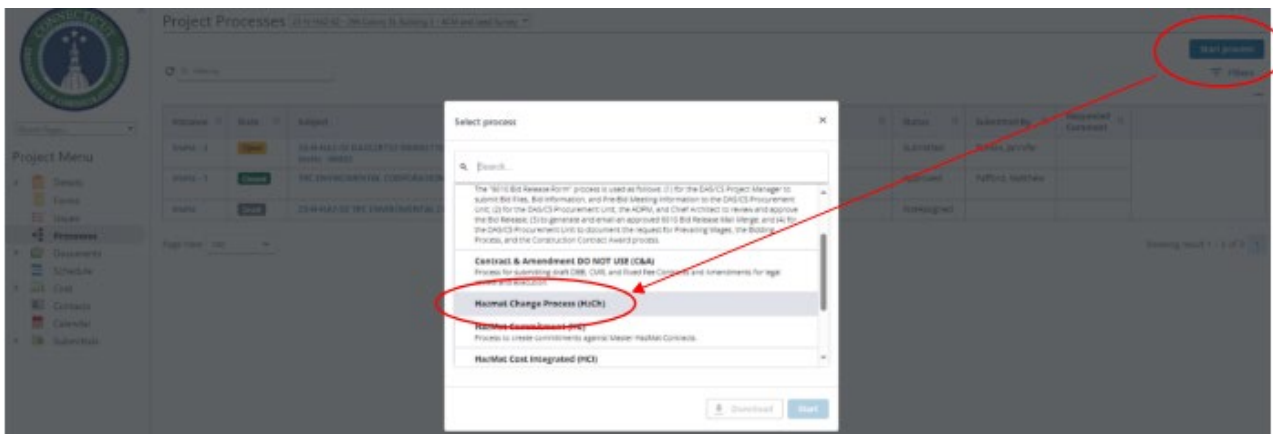
13A.02 Accessing the Process (Agency)

After acquiring the change order proposal from the hazmat consultant or contractor, the Agency PM should log in to [e-Builder](#) to initiate the HazMat Commitment Change Order Process.

After logging in, select the “Processes” tab and then use the drop-down menu on the right to navigate to the subject project:



After selecting the subject project, click “Start Process” and select “Hazmat Change Process (HzChz)” in the pop-up window to begin a new change order instance:





13A.03 Complete the form

Complete the following sections of the HazMat Commitment Change Order:

- A. Upload the change documentation from the consultant or contractor;
- B. Type a brief description of the requested change;
- C. Select either the Agency staff or CA person requesting the change;
- D. Enter or select the proposal date;
- E. Select the correct vendor commitment to be changed;
- F. Double check that the correct vendor was selected;
- G. Verify or edit the selected date;
- H. Enter the change order number (e.g. 01, 02, 03, etc.);
- I. Click the "Add All Existing Items" button;
- J. Click on the pencil or numbers in the "Change Amount" column of the SOV row to be changed and enter the requested change amount; and
- K. The "Add Additional Scope Commitment Item" section is not needed.

Expand All | Collapse All

Data

* Change documentation: or

* Requested Change:

Agency Proposal By: **C**

CA Proposal By:

* Proposal Date: **D**

Commitment Change Details

E Commitment: HCI - 00001 - 24-D-HAZ-09- Environmental & Abatement (HC - 1) **F** Company: BESTECH INC

Status: Draft

Created: 03.22.2024 (Matthew Palford)

* Date Of Change: **G** * Reason Code:

Commitment Change Custom Fields

Change Order Number:

Commitment Change Items

Download Schedule of Values Template | Import Schedule of Values | | Add Existing

#	Commitment Item	Description	Budget Line Item	Master Commitment Item	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount	Cust Field
Delete	001	001	Total Environmental Remediation & Haz...	02.000	001 - Total Haz-Mat	0.00	444,000.00	<input type="text" value="15,000.00"/> J	459,000.00
Total						444,000.00	15,000.00	459,000.00	

K

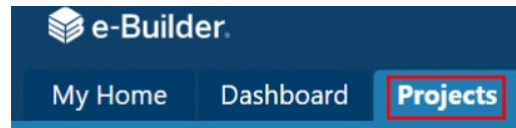
Upon completion, click the "Submit" button at the top or bottom of the window.



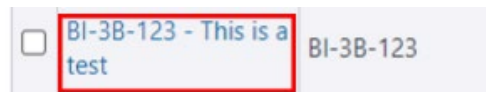
Section 13B: Filing Environmental Reports

13B.01 Navigating to the Project Processes Module

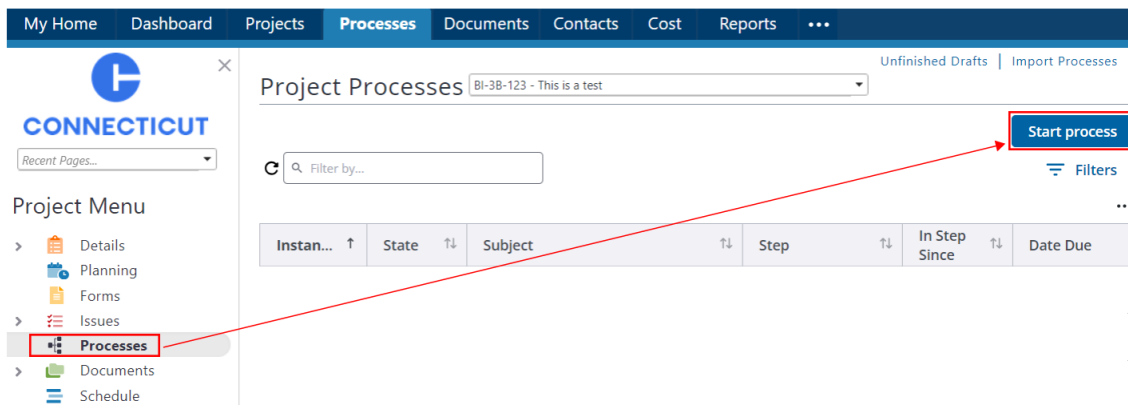
Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for “Projects”:



In the list that appears, click on the name of the project you would like to access:

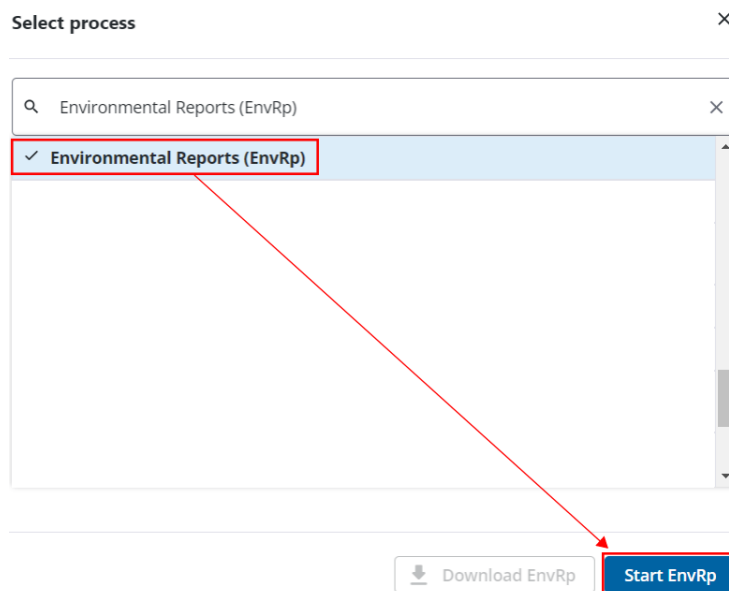


The Project Menu will appear in the left panel. Click “Processes.” Then, click “Start process.”



13B.02 Start Environmental Report Process Instance

In the “Select process” pop up window, search for and select “Environmental Report (EnvRp)”, and then click “Start EnvRp”.





13B.03 Completing Form, Uploading Report and Submitting

In the process instance pop-up that appears, upload the report by dragging and dropping it in to the “Drag and drop file here” block, or by using the tool to locate and upload the file using the “Browse Computer” button. Then select the correct Report Type. When complete, click, “Submit.” This will cause the report to be entered onto the DAS SharePoint site, so there is no need for the user to separately email it. The user submitting should receive an email notification that the report was submitted.

The screenshot shows the 'Environmental Reports (EnvRp)' form in the e-Builder system. At the top, there is a 'Start Process' section with a 'Project' field containing 'BI-3B-123 - This is a test' and a 'Process' field containing 'Environmental Reports'. To the right of these fields are buttons for 'Print', 'Check Spelling', 'Submit', 'Save Draft', and 'Cancel'. The 'Submit' button is highlighted with a red box, and a red arrow points to it from the right. Below this is a 'Details' section with tabs for 'Documents (0)', 'Attached Processes (0)', and 'Attached Forms (0)'. Underneath, there is a 'File Environmental Report' section. It contains a required field for 'Environmental Report' with a text input area containing 'Drag and drop file here' and buttons for 'Browse Computer' and 'Browse e-Builder'. This field is highlighted with a red box. Below it is a 'Report Type' dropdown menu, which is open and shows the following options: '-- Please select an option --', '-- Please select an option --', '--', 'SR', 'CR', and 'Other'. This dropdown is also highlighted with a red box. At the bottom right of the form, there are buttons for 'Spelling', 'Submit', 'Save Draft', and 'Cancel'.

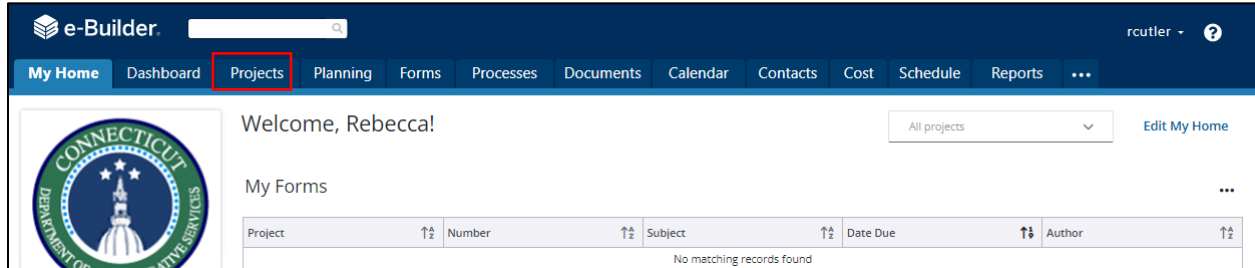


Section 14: 6010 Bid Release Form

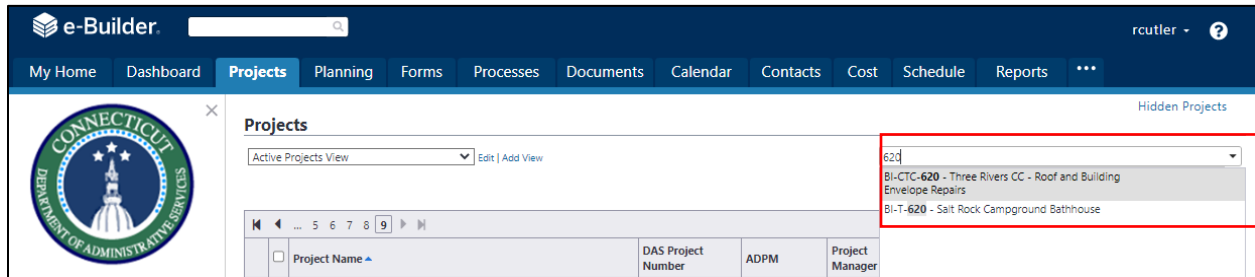
14.01 Accessing the Form

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

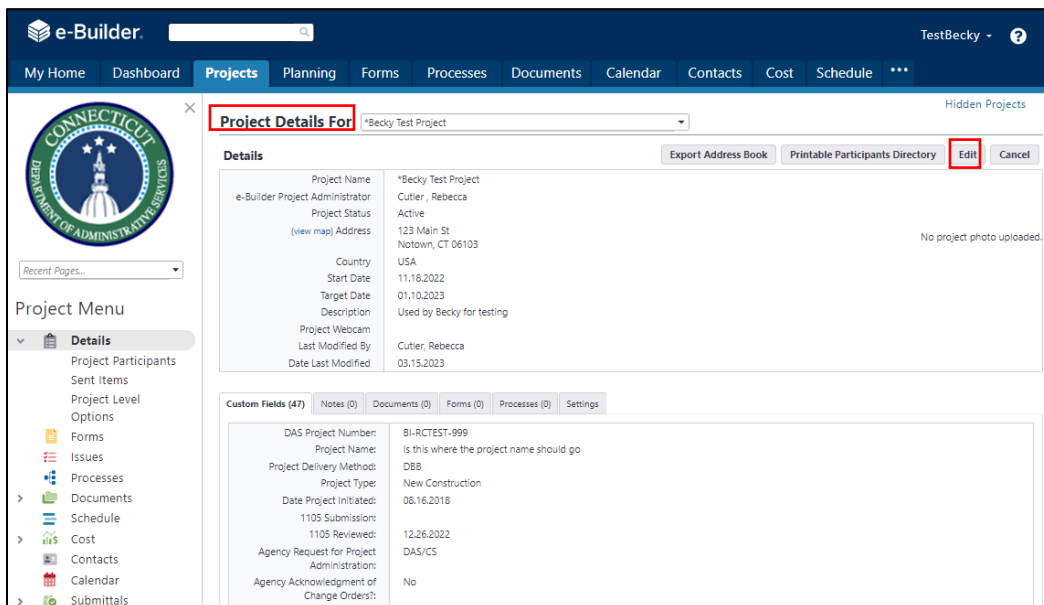
On your homepage, find your project by clicking on the top tab for “Projects”:



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



The “Project Details” page is your home page for your project. (Click “Edit” to edit info.). Under the “Project Menu” on the left, click on Processes to find project-specific processes.





Click on “Start Process” to find and start a process.

The screenshot shows the 'Processes' section of the e-Builder interface. At the top, there is a search bar and a user profile 'TestBecky'. Below the navigation menu, the 'Processes' tab is selected. A dropdown menu shows 'Processes For *Becky Test Project'. To the right, there is a 'Start Process' button highlighted with a red box. Below this, there are filter options for 'Filter Processes', including radio buttons for 'Processes Initiated By Me', 'Processes In My Court', and 'All Processes', and checkboxes for 'Draft', 'Open', and 'Finished'.

Click on “6010 Bid Release Form (6010)” to begin the process.

The screenshot shows the 'Start a process on *Becky Test Project' page. It features a table with two columns: 'Process Name' and 'Description'. The row for '6010 Bid Release Form (6010)' is highlighted with a red box. The description for this process states: 'The "Bid Release Form - 6010" process is used as follows: (1) by the DAS/CS Project Manager to submit Bid Information to the DAS/CS Procurement Unit, and (2) by the DAS/CS Procurement Unit to document the Construction Contract Award process.'

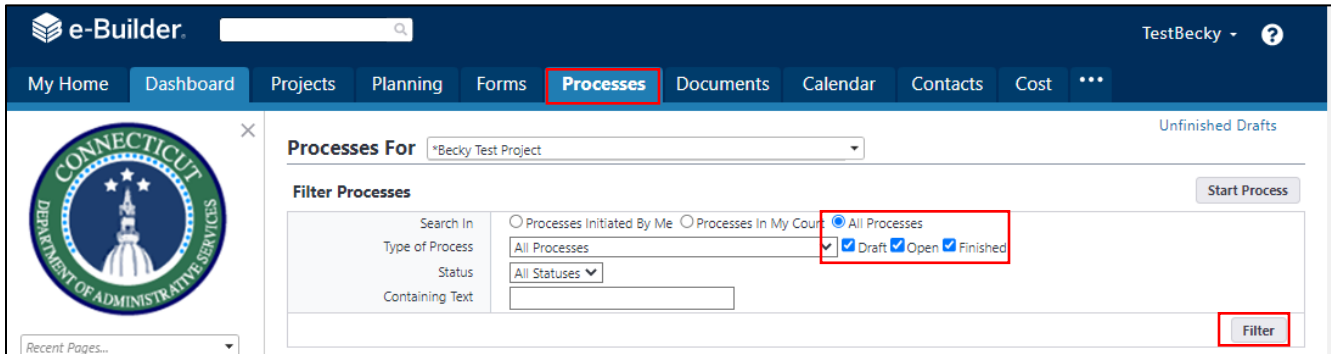
Read the first page and then click on “Submit”.

The screenshot shows the '6010 Bid Release Form (6010)' form page. At the top, there is a title bar with the 'e-Builder' logo and a user profile. Below the title, there are buttons for 'Print', 'Check Spelling', 'Submit', 'Save Draft', and 'Cancel'. The 'Submit' button is highlighted with a red box. The main content area contains instructions: 'Press the "Submit" button below to initiate the "6010 Bid Release Form" process. NOTE: After pressing "Submit", you will be taken to the list of processes in your court. Find the 6010 process and click on it to begin entering information. For a list of bid release items, download the original "6010 Bid Release Form" from the DAS/CS Library (do NOT email the form to OLAPP; the form is for your use only).'

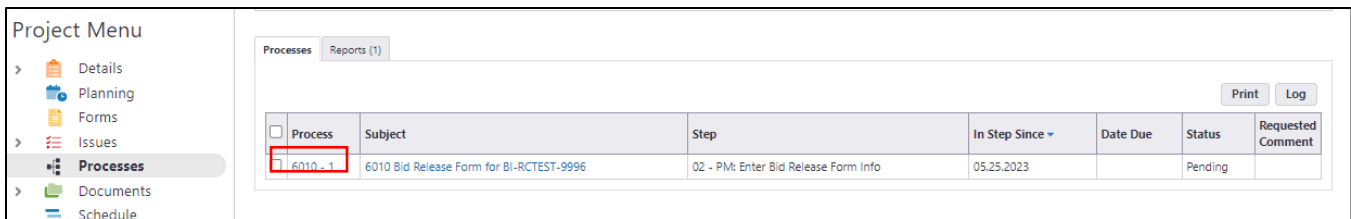


14.02 Project Manager Instructions for Entering Bid Release Form Information:

On the Processes page, if you cannot find the process, check the boxes for “Draft”, “Open”, and “Finished”, and click on “Filter”. This should show you the process for 6010.



On the Processes page for the Project, click on the process for 6010.



Read the “Bid Release Form Instructions”.

Upload all files indicated with a red asterisk (*).

FILES:

- * FILE 1: Liquidated Damages: ?
- * FILE 2: Certificate of Compliance - Part I (Form 3150): ?
- * FILE 3: Consultant Bid Data Statement (Form 6005): ?
- * FILE 4: Building Permit: ?
- * FILE 5: 00 01 01 Title Page: ?
- * FILE 6: 00 01 10 Table of Contents: ?
- * FILE 7: 00 01 07 Seals Page: ?
- * FILE 8: 00 01 15 List of Drawing Sheets: ?
- * FILE 9: 00 25 13 Pre-Bid Meeting Agenda: ?
- * FILE 10: 00 30 00 General Statements for Available Information: ?
- * FILE 11: Specifications (Vol. 1): ?
- * FILE 12: Drawings (Vol. 1): ?

Complete and upload form 3080 Liquidated Damages Calculator.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload form 3150 signed by Consultant and Chief Architect.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload form 6005 completed by the Consultant.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload the Building Permit from the Office of State Building Inspector (OSBI)
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one MS Word file.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file less than 2 GB (2000 MB) in size.
 Drag and drop file here or Browse e-Builder Browse Computer

Upload one PDF file less than 2 GB (2000 MB) in size.
 Drag and drop file here or Browse e-Builder Browse Computer

Enter all Bid Information as instructed. Any items indicated with a red asterisk (*) are required.



For Supplemental Bids and Named Subcontractors, follow the instructions in the process. Once the Bid Information has been entered, you have three options:

1. Save as a Draft: Select "Save".
2. Perform Final Review Prior to Submitting to the Procurement Unit: Click on "Please select an action", select "Review", then click on "Take Action".
3. Delete this Process: Click on "Please select an action", select "Void", then click on "Take Action".

NOTE: You will LOSE all of the information you have input and will NOT be able to return to this page.

"TAKE ACTION" INSTRUCTIONS:

NOTES TO PROJECT MANAGER:

- To save as a draft, select "**Save**" at the bottom of this page.
- To perform the final review prior to submitting to Bidding, click "**Please select an action**", select "**Review**", and then click "**Take Action**".
- To delete this process, click "**Please select an action**", select "**Void**" and "**Take Action**". **NOTE:** You will **LOSE** all of the information you have submitted and will **NOT** be able to return to this page.

-- Please select an action --
Take Action

Check Spelling
Print
Copy
Delegate
Save
Cancel

14.03 Project Manager Instructions for Reviewing the Bid Release Form Information:

From the Processes page for the Project, click on the process for 6010. Review the Bid Information. If the information is correct and complete, you have three options:

1. Save as a Draft: Select "Save".
2. Submit to the Procurement Unit: Click on "Please select an action", select "Submit", then click on "Take Action".
3. Delete this Process: Click on "Please select an action", select "Void", then click on "Take Action".

The process is then in Procurement Unit's ball court.

BID RELEASE FORM SUBMITTAL & "TAKE ACTION" INSTRUCTIONS:

NOTES TO PROJECT MANAGER:

- Review all of the information above.
- Ensure that any information with a "*" has been completed (it is required).
- To save as a draft, select "**Save**" at the bottom of this page.
- To submit to Bidding, click "**Please select an action**", select "**Submit**", and then click "**Take Action**".
- To delete this process, click "**Please select an action**", select "**Void**" and "**Take Action**". **NOTE:** You will **LOSE** all of the information you have submitted and will **NOT** be able to return to this page.

14.04 Procurement Unit Instructions for Bid Release Form:

Read the instructions. Download the files. Review the Bid Information.



At the bottom (or top) of the page, click on “Please select an action” and select “Approve” or “Revise”. Then click on “Take Action”. The process is then in the ADPM’s ball court.

OLAPP: BID RELEASE FORM INSTRUCTIONS:

- Review the information below.
- If **incorrect**, select “**Revise**” and “**Take Action**” at the bottom of the page. **Add comments** to describe information to be corrected.
- If **correct**, select “**Approve**” and “**Take Action**” at the bottom of the page.

6010 BID RELEASE FORM (“mail merge”):

Once approved by the ADPM and Chief Architect, the “**6010 Bid Release Form**” will be printed to PDF and emailed to:

- DAS/CS Agency Legal Director
- DAS/CS Chief Architect
- DAS/CS DPM
- DAS/CS ADPM for Project
- DAS/CS Project Manager
- DAS/CS OLAPP Bidding Unit
- Agency Representative
- Teams Project File

14.05 ADPM Instructions for Bid Release Form:

Read the instructions. Review the Bid Information.

Click on “Please select an action” and select “Approve” or “Revise”. Then click on “Take Action”. The process is then in the Chief Architect’s ball court.

ADPM: BID RELEASE FORM INSTRUCTIONS:

- Review the information below.
- If **incorrect**, select “**Revise**” and “**Take Action**” at the bottom of the page. **Add comments** to describe information to be corrected.
- If **correct**, select “**Approve**” and “**Take Action**” at the bottom of the page.

6010 BID RELEASE FORM (“mail merge”):

Once approved by the ADPM and Chief Architect, the “**6010 Bid Release Form**” will be printed to PDF and emailed to:

- DAS/CS Agency Legal Director
- DAS/CS Chief Architect
- DAS/CS DPM
- DAS/CS ADPM for Project
- DAS/CS Project Manager
- DAS/CS OLAPP Bidding Unit
- Agency Representative
- Teams Project File



14.06 Chief Architect Instructions for Bid Release Form:

Read the instructions. Select Yes or No for Priority Project. Review the bid information. Click on “Please select an action” and select “Approve” or “Revise”. Then click on “Take Action”.

CHIEF ARCHITECT: BID RELEASE FORM INSTRUCTIONS:

- Select "Yes" or "No" when asked if this is a Priority Project.
- Review the information below.
- If **incorrect**, select **Revise** and **Take Action** at the bottom of the page. **Add comments** to describe information to be corrected.
- If **correct**, select **Approve** and **Take Action** at the bottom of the page.

6010 BID RELEASE FORM ("mail merge"):

Once approved by the ADPM and Chief Architect, the **"6010 Bid Release Form"** will be printed to PDF and emailed to:

- DAS/CS Agency Legal Director
- DAS/CS Chief Architect
- DAS/CS DPM
- DAS/CS ADPM for Project
- DAS/CS Project Manager
- DAS/CS OLAPP Bidding Unit
- Agency Representative
- Teams Project File

DAS/CS Chief Architect: Is This A Priority Project?

* DAS/CS Chief Architect - Approved Priority Project:

Select "YES" if this is a Priority Project; select "NO" if this is not a Priority Project.

YES

NO

14.07 6010 Mail Merge:

When the 6010 Bid Release Form has been reviewed and approved by the Procurement Unit, the ADPM, and the Chief Architect, the 6010 Bid Release Form “mail merge” will be generated as a PDF document and emailed to everyone as indicated at the beginning of the process.

The 6010 Mail Merge will also be saved in the following e-Builder Documents folder:
Documents > 08 Bidding > DAS Procurement

Once the 6010 Mail Merge step is complete, the process is in the Procurement Unit’s ball court.

14.08 Procurement Unit Instructions for Pre-Bid Meeting Information:

Enter the Date of the Bid Advertisement and the Planned Date of the Bid Advertisement Ending. Select “Send” and “Take Action” to forward the process to the Project Manager.

The process is then in the Project Manager’s ball court, who will have three (3) days to enter the Pre-Bid Meeting Information and re-submit back to the Procurement Unit.

BID SCHEDULE:

- **Bidding:** Enter the following information for the bid:

Date of Bid Advertisement: <input type="text"/>	Date of Bid Advertisement on State Contracting Portal: 10.31.2023 <input type="text"/>
Planned Date of Bid Opening: <input type="text"/>	Planned Date of Bid Advertisement Ending on State Contracting Portal: 11.23.2023 <input type="text"/>



14.09 Project Manager Instructions for Pre-Bid Meeting Information:

Enter the Pre-Bid Meeting Information and send the process back to Bidding within three (3) days by selecting “Send” and “Take Action”. The process is then in the Procurement Unit’s ball court.

REQUEST FOR PRE-BID MEETING INFORMATION:	
NOTES TO PROJECT MANAGER:	
<ul style="list-style-type: none"> Using the bid information provided below by the OLAPP Bidding Unit, enter the Pre-Bid Meeting Information. Send to the Bidding Unit within three (3) business days of this request. 	
Date of Bid Advertisement: ?	Date of Bid Advertisement on State Contracting Portal: 10.31.2023
Planned Date of Bid Opening: ?	Planned Date of Bid Advertisement Ending on State Contracting Portal: 11.23.2023
* PRE-BID MEETING Attendance: ?	Select One for Pre-Bid Meeting Attendance: <input type="radio"/> No Pre-Bid Meeting Will Be Held <input type="radio"/> Attendance is Encouraged <input checked="" type="radio"/> Attendance is MANDATORY
PRE-BID MEETING Date: ?	Date of Pre-Bid Meeting: 11.01.2023
PRE-BID MEETING Time: ?	Time of Pre-Bid Meeting (with AM or PM): 10:00 am
PRE-BID MEETING Location: ?	Exact Location of Pre-Bid Meeting (building name, room number, street, town, etc.): Town Hall, 123 Main St, Notown, CT 06555
PRE-BID MEETING Site Contact: ?	Site Contact for Pre-Bid Meeting (name, cell phone number, email address, etc.): Ms. Jane Doe (860-555-1234); janedoe@fakegmail.com

14.10 Procurement Unit Instructions for Reviewing the Pre-Bid Meeting Information:

Review the Pre-Bid Meeting Information. You have three options:

1. Select “Save” to save as a draft.
2. If the information is correct, select “Go to Wages” and “Take Action” to enter the dates that the Prevailing Wages were requested from the Department of Labor.
3. If edits are required, select “Revise” and “Take Action” to send the process back to the Project Manager.

PRE-BID MEETING INFORMATION:	
Date of Bid Advertisement: ?	Date of Bid Advertisement on State Contracting Portal: 10.31.2023
Planned Date of Bid Opening: ?	Planned Date of Bid Advertisement Ending on State Contracting Portal: 11.23.2023
PRE-BID MEETING Attendance: ?	Select One for Pre-Bid Meeting Attendance: Attendance is MANDATORY
PRE-BID MEETING Date: ?	Date of Pre-Bid Meeting: 11.01.2023
PRE-BID MEETING Time: ?	Time of Pre-Bid Meeting (with AM or PM): 10:00 am
PRE-BID MEETING Location: ?	Exact Location of Pre-Bid Meeting (building name, room number, street, town, etc.): Town Hall, 123 Main St, Notown, CT 06555
PRE-BID MEETING Site Contact: ?	Site Contact for Pre-Bid Meeting (name, cell phone number, email address, etc.): Ms. Jane Doe (860-555-1234); janedoe@fakegmail.com



14.11 Procurement Unit Instructions for Prevailing Wage Rates:

NOTE: Instructions are provided in eBuilder for requesting Prevailing Wage Rates from the Department of Labor. The request itself is conducted separately from e-Builder. E-Builder is only used to track the dates that the wage rates were requested and the dates they were received.

Enter the Date Requested and (if available) Date Received. Select either "Refresh Screen" (to view the date that the wage rates are due) or "Go to Bid" to view Bid Information from the Project Manager and to begin entering additional Bid Information.

PREVAILING WAGE RATE REQUEST:	
NOTE TO BIDDING PERSONNEL:	
<ul style="list-style-type: none"> Enter the dates below as instructed. 	
Date of Bid Advertisement: ?	Date of Bid Advertisement on State Contracting Portal: 10.31.2023
Planned Date of Bid Opening: ?	Planned Date of Bid Advertisement Ending on State Contracting Portal: 11.23.2023
PREVAILING WAGE RATES Requested: ?	Enter Date REQUESTED from CT Department of Labor: 10.17.2023
PREVAILING WAGE RATES Due (10 Business Days): ?	(Automatic Field: To update, scroll to bottom of page and select "Refresh Screen" then "Take Action".) The DUE DATE of the Prevailing Wage Rates from the CT Department of Labor is as follows: 10.31.2023
PREVAILING WAGE RATES Received: ?	Enter Date RECEIVED from CT Department of Labor: 10.30.2023

14.12 Procurement Unit Instructions for Bidding Information:

NOTE: After Pre-Bid Meeting Information and Prevailing Wages Request Information has been entered, the Procurement Unit arrives at the final Bid Information page. The Procurement Unit will insert the Unique Solicitation Number and use the information to complete the Invitation to Bid and Bid Proposal Form outside of e-Builder. The Procurement Unit will also enter the Actual Date that the Bid Advertisement ends as well as the Number of Addendum for the Solicitation.

Follow the instructions on the e-Builder page in order to enter information and dates. Select "Refresh Screen" and "Take Action" at the bottom (or top) of the page in order to update Automatic Fields.

INVITATION TO BID & BID PROPOSAL FORM INFORMATION:	
NOTE TO BIDDING PERSONNEL:	
<ul style="list-style-type: none"> Use the following information to complete the Invitation to Bid and Bid Proposal Form. 	
Solicitation Number: ?	Unique Solicitation Number Assigned by OLAPP Bidding Personnel: <input type="text"/>



BID ADVERTISEMENT:

NOTES TO BIDDING PERSONNEL:

- Enter the following information as instructed.
- Select "**Refresh Screen**" and "**Take Action**" at the bottom of the page to update automatic fields.

Actual Date of Bid Opening: ?

Actual Date that the Bid Advertisement ends on the Portal (same date that the Bid Tab is uploaded to the Portal and emailed to the PM):

Date Pre-Bid RFIs Must Be Submitted By: ?

(Automatic Field: To update, scroll to bottom of page and select "Refresh Screen" then "Take Action".) The DUE DATE of all Project Questions, Bid Questions, and Pre-Bid Equals and Substitution Requests is as follows (14 Calendar Days prior to Actual Date of Bid Opening):

Number of Addendum: ?

Number of Addendum:

14.13 Procurement Unit Instructions for 6010 Bid Release Form Closeout:

Once the Project has gone into construction (or the Bid is cancelled/no award), close the e-Builder 6010 Bid Release Form process by selecting "Closeout" and "Take Action".

NOTE: "Closeout" will permanently close the process – do NOT select this option if the process is still open.



Section 15: Design Review Submittal

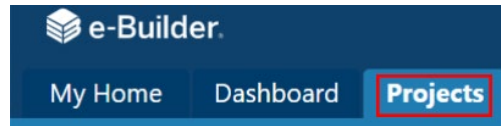
Coming soon.



Section 15A: 3050 Delegated Design

15A.01 Navigating to the Project Processes Module

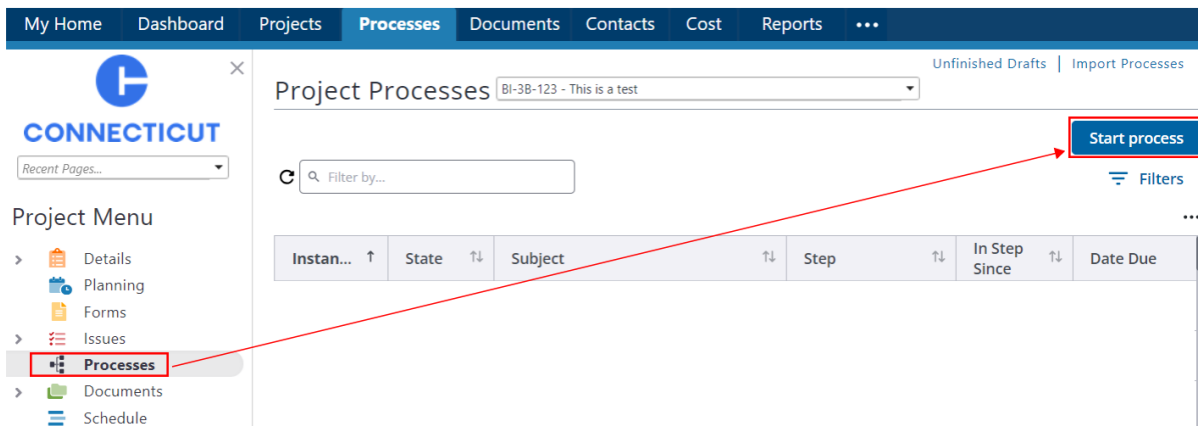
Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for “Projects”:



In the list that appears, click on the name of the project you would like to access:

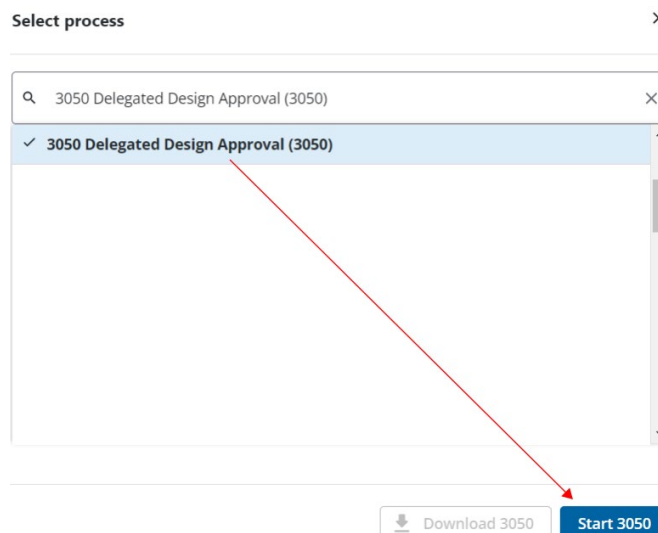


The Project Menu will appear in the left panel. Click “Processes.” Then, to the upper right, click “Start process.”



15A.02 Start 3050 Delegated Design Process Instance (A/E users)

In the “Select process” pop up window, the A/E user is to search for and select “3050 Delegated Design Approval (3055)”. Then click “Start 3050.”





15A.03 Complete 3050 Application (A/E users)

The 3050 Delegate Design Approval form should appear as a pop-up window. The A/E user then completes the form:

- A. Selecting the design phase
- B. Entering the prime consultant name
- C. Entering CSI section number
- D. Entering CSI section description
- E. Clicking "Add" (repeating steps C to E for as many sections as are needed)
- F. The sections, after clicking "Add" in step E should appear here. They can be edited by clicking a pencil icon or deleted.
- G. When complete, click "Submit" to send into workflow.

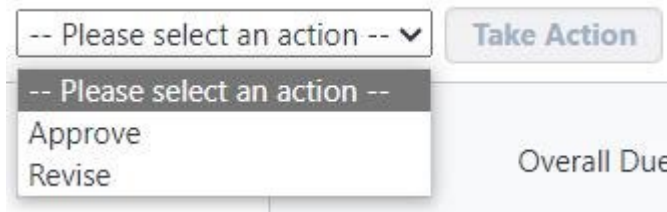
15A.04 Project Manager Review (DAS PMs)

Under "Delegated Design Items", the DAS Project Manager shall click in the "Decision" column of the item to suggest a decision on each. Then, the PM selects "Allowed" or "Not Allowed". The choice should appear as selected. Repeat for each proposed item.



The Project Manager then completes the step by taking one of the available workflow actions:

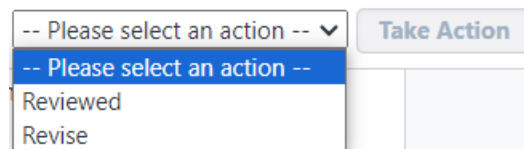
1. **Approve** will approve the decision selections and move the workflow to the next step.
2. **Revise** will send the item back to the A/E for any needed changes.



15A.05 Technical Services Review (Tech Services)

Technical Services has two workflow options after review of a draft 3050:

3. **Reviewed** proceeds the item to the ADPM for review.
4. **Revise** sends the item back to the Project Manager for any needed changes.



15A.06 ADPM and Chief Architect Review (ADPM and Chief Architect)

The ADPM and Chief Architect, at their steps in the workflow, have the same options available to the DAS Project Managers in step 15A.04, above, and are able to make changes in the draft/final decision.



Section 16: (Reserved for future instructions)



Section 17: Create Schedule of Values

17.01 SOV Approval for Upload

Construction Support Services (CSS) will upload SOVs into e-Builder commitments upon the request of the DAS project manager for that project. Please submit a request for the project manager to ask CSS to carry out the upload of the file described in Section 17.02, below.

17.02 SOV file format

When sending the SOV for upload, please follow the following format:

1. Use Excel, another similar spreadsheet format or CSV. Please do not send it in PDF, Word or similar file formats.
2. If the file is Excel or another spreadsheet, the data should be in a single sheet, not divided between two or more sheets.
3. Ensure that each SOV row has at least columns for (1) description or title and (2) SOV dollar amount. A row line number is permitted, as well.
4. For any consultant commitment that has a consultant contingency, please place the consultant contingency first, above all other SOV rows. Clearly label this row, such as “Consultant Contingency – Do Not Invoice This Line”. Include the amount of the contingency in this row. (See [Section 17A](#) for how contingency transfers are to be proposed and approved.) The contingency line will probably be line 002 in the commitment.
5. Do not have any blank rows.
6. If it is desired to have rows that are section titles, please place this title in the description column and place a \$0 in the amount column.

17.51 “Commitment Value Broken Down by SOV” Entry

When commitments are entered into e-Builder, they typically have one or more Commitment Lines for the whole amount of the new contract or contract amendment. SOV breakdown is accomplished by way of a Commitment Change that zeroes out this Commitment Line and then adds new Commitment Lines for each of the SOV lines.

Commitment Change Items (4) Custom Fields (11) Notes (0) Documents (0) Forms (0) Processes (0)

Show Filter Export ▾

# ▲	Commitment Item	Description	Budget Line Item	Current Commitment Amount	Change Amount
001	001	Total DBB Construction Phase	03.200	0.00	(100.00)
002	002	Trade 1	03.200	34.00	34.00
003	003	Trade 2	03.200	33.00	33.00
004	004	Trade 3	03.200	33.00	33.00
Totals				100.00	0.00

[Cost Summary](#) | [Commitment Details](#)

Because this line is zeroed out, there are reasons why it is important to keep a record of the contract or amendment value that the Commitment Line added to the commitment. To record this information, navigate to the “Commitment Details” page of the commitment. Then click on the Commitment Item



number of the Commitment Line that is to be or was zeroed out for the SOV breakdown. (This can be done either before or after the SOV breakdown is done.)

Commitment Details

Commitment Overview | Other Details | Financial Summary

Mail Merge | Close | Edit

Project:	BI-3B-126 - This is a test	Status:	Approved
Commitment Type:	Prime Contractor Contract	Company:	*Sample Company
Commitment Number:	test-0003	Company Number:	SAM001
Unit Cost Options:	Lump Sum Amount	Contact:	
Description:	GC test 3	Approved:	04.09.2024 (Timothy O'Brien)
Commitment Control:	Controlled By Line Item		
Created:	04.09.2024 (Timothy O'Brien)		

Commitment Items (4) | Commitment Changes (1) | Actual Costs (4) | Custom Fields (35) | Notes (0) | Documents (0) | Forms (0) | Processes (0)

Hide Filter | Export

Item #	Budget Line Item	Description	Current Budget	Original Commitment Amount	Current Commitment	Projected Commitment	Retainage Percent	Current Retainage Held	Actuals Approved	Custom Field(s)
001	03.200	Total DBB Construction Phase	300.00	0.00	0.00	0.00	9.50	0.00	0.00	
002	03.200	Trade 1	300.00	34.00	34.00	34.00	9.50	0.00	10.00	
003	03.200	Trade 2	300.00	33.00	33.00	33.00	9.50	0.43	15.00	
004	03.200	Trade 3	300.00	33.00	33.00	33.00	9.50	0.38	5.00	
Total			300.00	100.00	100.00	100.00		0.81	30.00	

That will bring up the “Edit Commitment Item” page. Enter the contract or amendment amount, as it was prior to SOV breakdown, in the “Commitment Value Broken Down by SOV” field. Then click Save.

Edit Commitment Item

Save | Cancel

Project Name:	BI-3B-126 - This is a test	Commitment Number:	test-0003
Allowance Item:	<input type="checkbox"/>	Current Budget:	300.00
* Commitment Item Number:	001	Remaining To Be Committed:	100.00
* Budget Line Item:	03.200 - Total DBB Construction Phase	* Amount:	0.00
* Description:	Total DBB Construction Phase	Retainage Released:	0.00
* Retainage Percentage:	9.50		
Amount Retained:	0.00		

Custom Fields

On-Call Request Received:

On-Call Request Approved:

Document Type: Please select...

Date of Scope Review:

Date Legal Received:

Date of Final Approval:

Date TL Signed by Consultant:

Date Contract Signed by Consultant/Contractor:

Date Contract Executed:

SPRB File Number:

Sent to SPRB:

Approved by SPRB:

Date PSS Received:

Contract Start Date:

Contract End Date:

CORE Fund:

CORE Voucher ID:

SID Number:

Line Item Breakdown:

Contractor Payment Application Paid Amount:

Commitment Value Broken Down by SOV:

Save | Cancel

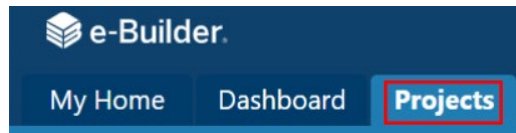


Section 17A: Consultant Contingency Transfer (CntTr)

Note: This section is for how to apply for and approve transfers from consultant contingency lines to new SOV lines that can be invoiced against. See step [17.02](#) for how contingency lines are created in the e-Builder commitments for approved task letters and contracts.

17A.01 Accessing the process

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

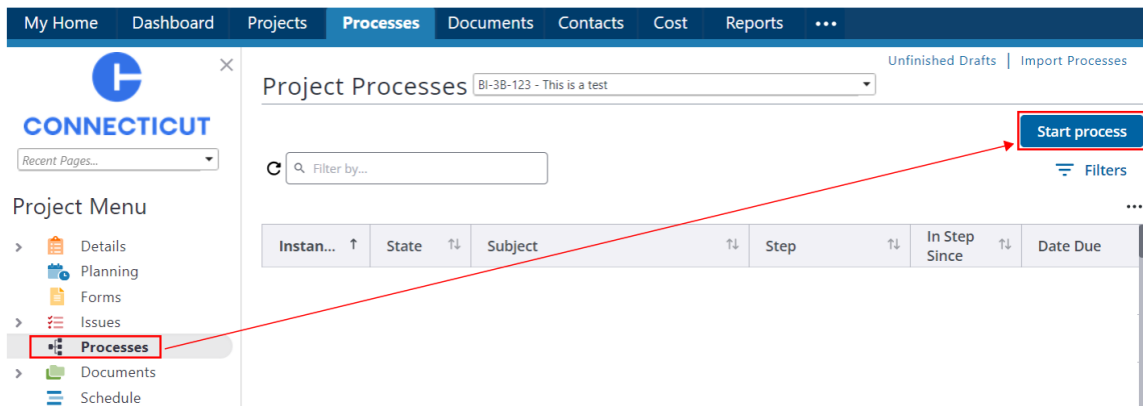


In the list that appears, click on the name of the project you would like to access:



The Project Menu will appear in the left panel. Click "Processes." Then, to the upper right, click "Start process."

In the "Select process" pop up window, the project manager is to search for and select "Consultant Contingency Transfer (CntTr)". Then click "Start CntTr."



17A.02 Submitting the Request (Consultant)

Drag and drop or upload the consultant's proposal document in the "Explanation for Contingency Transfer" field.

In the "Explanation for Contingency Transfer" block, below, enter a more detailed explanation.

A/E Contingency Change Proposal:
Explanation for Contingency Transfer:

Drag and drop file here or **Browse Computer** **Browse e-Builder**



Under "Commitment Change Details", select the commitment to be changed and enter the Commitment Change Number, if the auto-populated value is not correct.

Commitment Change Details

* Commitment: Please select a commitment...
 * Commitment Change Number:
 * Date Of Change: 06.11.2024
 Company:
 Status: Draft
 * Reason Code: Scope Change (Changes)

Under "Commitment Change Items", click the "Add All Existing Items" button.

Commitment Change Items

Download Schedule of Values Template **Import Schedule of Values** Manage Funding **Add All Existing Items** Add Existing Item

Click on the pencil or numbers in the "Change Amount" column in the contingency row (which would generally be named "Consultant Contingency - Do Not Invoice This Line"), typically line 002. In the "Change Amount" column of the contingency row, enter the amount to be taken from the commitment contingency, as a negative number.

Commitment Change Items

Download Schedule of Values Template **Import Schedule of Values** Manage Funding **Add All Existing Items** Add Existing Item

	#	Commitment Item	Description	Budget Line Item	Funding Rule	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount
Delete	001	001	Total A/E (Design Phase, Biddi...	08.000	State Bond Funds	0.00	0.00	0.00	0.00
Delete	002	002	Consultant Contingency - Do ...	08.000	State Bond Funds	0.00	2.00	(1.00)	1.00
Delete	003	003	SD	08.000	State Bond Funds	0.00	2.00	0.00	2.00
Delete	004	004	CD	08.000	State Bond Funds	0.00	6.00	0.00	6.00

In the "Add Additional Scope Commitment Item" part of the form:

- Click "Please Select a Line Item" next to "Account Code" and select the correct cost code.
- Change the INCORRECT value that auto-populates in the "Commitment Item" field and enter the next Commitment Item line number available. (For example, under the "Commitment Change Items" section, in the "Commitment Item" column, if there is already a line 001, 002, 003, 004, 005 and 006, enter 007" in the "Commitment Item" field of the "Add Additional Scope Commitment Item" part of the form.)
- In the "Description" field, enter what the contingency line should say on the consultant's invoices.
- Select a "Funding Rule".
- Ignore "Retainage Percent"
- In the "Change Amount" field, enter the amount of the new invoice line. This MUST be the positive opposite amount of the negative amount withdrawn from the commitment contingency above.
- Click "Add".



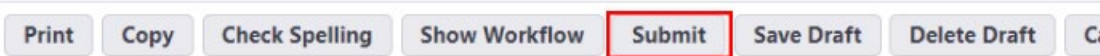
The proposed commitment line should appear as a new row above, under “Commitment Change Items”. Note that:

- A. The two values in the “Change Amount” column should net to \$0.
- B. The amount of the new commitment line will appear in the “Net Commitment Amount” column of the new commitment line.
- C. The amount left in the commitment contingency after the transfer (as proposed) will appear in the “Net Commitment Amount” column of the contingency line.

Commitment Change Items

#	Commitment Item	Description	Budget Line Item	Funding Rule	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount
Delete 001	001	Total A/E (Design Phase, Biddi...	08.000	State Bond Funds	0.00	0.00	0.00	0.00
Delete 002	002	Consultant Contingency - Do ...	08.000	State Bond Funds	0.00	2.00	(1.00)	1.00
Delete 003	003	SD	08.000	State Bond Funds	0.00	2.00	0.00	2.00
Delete 004	004	CD	08.000	State Bond Funds	0.00	6.00	0.00	6.00
Delete 006	005	New Design Work	08.000	State Bond Fun...	0.00	0.00	1.00	1.00
Total						10.00	0.00	10.00

Then, either at the top or bottom of the window, click the "Submit" button.



17A.03 PM Contingency Enter (Project Managers)

Open the “CntTr” process instance for the proposed contingency transfer for open it via the email notification that should have been sent

Filter by... CntTr

PROCESSES | REPORTS

<input type="checkbox"/>	Instance ↑	State ↑↓	Subject ↑↓	Step ↑↓	In Step Since ↑↓
<input type="checkbox"/>	CntTr - 1	Open	Consultant Contingency Use Notification	1.1 PM Contingency Enter	Jun 11, 2024



Under the “Contingency Check or Enter” section:

1. If this is the first time that the consultant contingency is being used on this project, enter the "Original Consultant Contingency Amount" (typically the SOV value of commitment line 001), below, and enter the SAME AMOUNT in the "Current Consultant Contingency Amount" field. The "Current Consultant Contingency Amount" is the current amount BEFORE the changes proposed here. Refer to the contract for the value of the contingency.
2. If this is a second or subsequent use of the consultant contingency for this commitment, The "Original Consultant Contingency Amount" and "Current Consultant Contingency Amount" should be pre-populated correctly, below. But check them to ensure that they are accurate. Again, the "Current Consultant Contingency Amount" is the current amount BEFORE the changes proposed here.

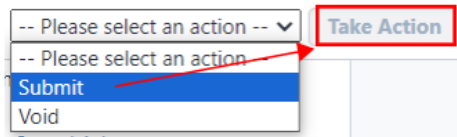
Contingency Check or Enter

1. If this is the first time that the consultant contingency is being used on this project, enter the "Original Consultant Contingency Amount" (typically the SOV value of commitment line 001), below, and enter the SAME AMOUNT in the "Current Consultant Contingency Amount" field. The "Current Consultant Contingency Amount" is the current amount BEFORE the changes proposed here. Refer to the contract for the value of the contingency.

2. If this is a second or subsequent use of the consultant contingency for this commitment, The "Original Consultant Contingency Amount" and "Current Consultant Contingency Amount" should be pre-populated correctly, below. But check them to ensure that they are accurate. Again, the "Current Consultant Contingency Amount" is the current amount BEFORE the changes proposed here.

Original Commitment Contingency Amount:	<input type="text" value="0.00"/>
Current Commitment Contingency Amount:	<input type="text" value="0.00"/>

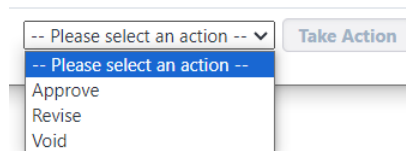
If the proposal is acceptable, select “Submit” from the action control at the top or bottom of the process instance and then click “Take Action”. An action option to “Void”, which ends consideration of the proposal without approving it, is available, as well. If the items are returned by the ADPM for further review, there will be a “Resubmit” action available.



17A.04 Review by ADPM and then by DPM or Chief Architect

At their review steps, the ADPM, DPM and Chief Architect have workflow actions available to;

- “Approve”, which sends the item forward in the approvals, in the case of the ADPM, or, in the case of the DPM or Chief Architect, finalizes the approval of the change, and generates a PDF form that is emailed to SPRB and the project files. After “Take Action” is clicked by the DPM or Chief Architect, another screen will prompt for an approval date and approval confirmation.
- “Revise” sends the item to the previous step in the workflow for the person or people in that step to take further action and resubmit.
- An action option to “Void”, which ends consideration of the proposal without approving it, is available, as well.





Section 17B: Retainage Reduction

17B.02 Navigate to the commitment

Under the Project Menu for the project, click on the Cost module, then the Commitments tool and then open the commitment requiring the retainage reduction.

Project Commitments BI-3B-125 - This is a test

Commitment Summary

Project:	BI-3B-125 - This is a test
Original Commitments:	
Approved Commitment Changes:	2
Non-commitment Costs:	
Current Commitments Value:	2

Quick Cost Summary

Current Budget	Current Commitments	Actuals Appro
200,201.00	200,133.00	1

Show: All | All Commitments | Go | Show All | Show Filter

#	Description	Company	Date	Status
001	test 1a	*Sample Company	02.20.2024	Approv
002	A/E	*Sample Company	02.28.2024	Approv
AE-test-1	test 1	*Sample Company	03.28.2024	Approv
AE-test-2	AE test 2	*Sample Company	03.28.2024	Approv
AE-test-3	A/E test 3	*Sample Company	04.04.2024	Approv
DAS001-3B125	DAS Fees	Department of Administrative Services	02.28.2024	Approv
GC-test-1	GC test test	*Sample Company	08.02.2024	Approv

17B.03 Edit the Retainage Percentages

On the Commitment Details page, click "Edit."

Commitment Details

Commitment Overview | Other Details | Financial Summary

Mail Merge | Close | **Edit**

Project:	BI-3B-125 - This is a test	Status:	Approved
Commitment Type:	Prime Contractor Contract	Company:	*Sample Company
Commitment Number:	GC-test-1	Company Number:	SAM001
Unit Cost Options:	Lump Sum Amount	Contact:	
Description:	GC test test	Approved:	08.02.2024 (Timothy O'Brien)
Commitment Control:	Controlled By Line Item		
Created:	08.02.2024 (Timothy O'Brien)		



Change the Default Retainage Percent, then click on each of the commitment line Retainage Percentages and change them. Then click "Save."

Commitment Overview

Project: BI-3B-125 - This is a test

* Commitment Type: Prime Contractor Contract

* Commitment Number: GC-test-1

Unit Cost Options: Lump Sum Amount

* Description: GC test test

* Commitment Control: Controlled By Line Item

Created: 08.02.2024 (Timothy O'Brien)

Status: Approved

* Company: *Sample Company

Company Number: SAM001

Contact: Select a contact...

Approved: 08.02.2024 (Timothy O'Brien)

Save

Other Details

Commitment Date: [Calendar icon]

Scope of work: [Text area]

Notice to Proceed Date: [Calendar icon]

* Default Retainage Percent: 7.50

Retainage amount: Support manual entry

Commitment Items

Item Number	Line Item	Description	Current Budget	Funding Rule	Retainage Percent	Amount	Allowance	Custom Field(s)
001	03.200	Total DBB Construction Phase	200,116.00	State Bond Funds	7.50	0.00		
002	03.200	SOV 1	200,116.00	State Bond Funds	7.50	5.00		
003	03.200	SOV 2	200,116.00	State Bond Funds	7.50	2.00		
004	03.200	SOV 3	200,116.00	State Bond Funds	7.50	3.00		
005	03.100	New change item	0.00	State Bond Funds	7.50	0.00		
1000	03.200	Total DBB Construction Phase	200,116.00	State Bond Funds	7.50	0.00		

Update Retainage % Manage



Section 17C: Retainage Release

17C.02 Downloading the Payment Application File (PMs and CAs)

After step 19A.02A, the Project Manager or CA will be able to calculate and upload the retainage release for a 7390A Application and Certification for Payment for which a retainage release is in order.

The first step for doing so is open the 7390A Payment Application process instance at the “Retainage Upload” step and click on “Download Schedule of Values Worksheet.xls”.

7390 Application And Certification For Payment (7390A) - 02 Delete Instance Work

- 4

Completed Take Action Check Spelling Print Copy

Project:	BI-3B-125 - This is a test	Overall Due Date:	
Process Document:	7390A - 02 - 4	Step Due Date:	
	Show History Current Actors		
Current Workflow Step:	Retainage Upload Show Workflow Diagram		
Subject:	BI-3B-125 - Application for Payment -		
Counter Prefix:	<input type="text" value="02"/>		
Status:	Submitted		

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

[Expand All](#) | [Collapse All](#)

Commitment Invoice Details

Status:	Draft	Date Due:	<input type="text"/>
Commitment:	GC-test-1 - GC test test		
Company/Contact:	*Sample Company		
* Date Received:	08.27.2024 <input type="text"/> [08.27.2024]		

Commitment Invoice Custom Fields

Vendor Invoice Number:	<input type="text"/>
Invoice period beginning:	<input type="text"/> <input type="text"/>
Invoice period end:	<input type="text"/> <input type="text"/>
CORE Voucher ID:	<input type="text"/>

Invoice Items

Download Schedule of Values Worksheet.xls Import Invoice

17C.03 Open and edit the Excel File (PMs and CAs)

After the Excel file downloads (see the images below):

1. Open the file.
2. Click “Enable Editing”.
3. Click on the File menu.
4. Click on the “Info” option, click “Unprotect”, then click on the back arrow.
5. In the spreadsheet, in cell T4, type the new retainage percentage as a decimal, so 7.5% is typed in as “0.075”.
6. In cell U4, type “=K4*T4”
7. In cell V4, type “=R4-U4”
8. Copy and paste cells T4, U4 and V4 to all of the rows of the SOV in columns T, U and V. Do not copy to the row with the totals.
9. Copy all of the cells of column V, from cell V4 to the bottom of the SOV.



10. Right-click on cell O4 and choose the option to paste values only
11. Delete columns T, U and V.
12. Save as the file to a location from which you can upload. Make sure that you do not change the file type from “Excel 97-2003 Workbook (*.xls)”.

File **3** Home Insert Draw Page Layout Formulas Data Review View Automate Developer Help BLUEBEAM Pow

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing **2**

Info

BI-3B-125-Thisisatest_7390A-00004Draft_sov

Downloads

Upload Share Copy path Copy local path Open file location

Compatibility Mode

Convert

Protect Workbook

Unprotect

	A	B	S	T	U	V
ProjectName:	BI-3B-125 - This is a test					
Commitment Item #	Description of Work		Commitment ue	5	6	7
001	Total DBB Construction Phase		0.00	0.075	0	0.00
002	SOV 1		0.00			
003	SOV 2		0.00			
004	SOV 3		0.00			
Total			0.00			



	A	B	S	T	U	V
1	ProjectName:	BI-3B-125 - This is a test				
2						
3	Commitment Item #	Description of Work	Commitment Value			
4	001	Total DBB Construction Phase	0.00	0.075	0	0.00
5	002	SOV 1	0.00	0.075	0.075	0.03
6	003	SOV 2	0.00	0.075	0	0.00
7	004	SOV 3	0.00	0.075	0	0.00
8	Total		0.00			

8

	A	B	S	T	U	V
1	ProjectName:	BI-3B-125 - This is a test				
2						
3	Commitment Item #	Description of Work	Commitment Value			
4	001	Total DBB Construction Phase	0.00	0.075	0	0.00
5	002	SOV 1	0.00	0.075	0.075	0.03
6	003	SOV 2	0.00	0.075	0	0.00
7	004	SOV 3	0.00	0.075	0	0.00
8	Total		0.00			

9

	A	B	O	R	S	T	U	V
1	ProjectName:	BI-3B-125 - This is a test						
2								
3	Commitment Item #	Description of Work	Retainage Release Amount	Cumulative Retainage	Current Payment Due			
4	001	Total DBB Construction Phase	0.00	0.00	0.00	0.075	0	0.00
5	002	SOV 1	4.00	0.10	0.00	0.075	0.075	0.03
6	003	SOV 2	2.00	0.00	0.00	0.075	0	0.00
7	004	SOV 3	3.00	0.00	0.00	0.075	0	0.00
8	Total		9.00	0.10	0.00			

10

17C.04 Open and Edit the Excel File (PMs and CAs)

Return to the 7390A process instance at the “Retainage Upload” step. In the “Invoice Items” section, click “Import Invoice Items.”

Invoice Items

[Download Schedule of Values Worksheet.xls](#)

Import Invoice Items

Manage Funding

A	B	C	D	E
		Funding Rule	Work in Place From	



In the “Import Invoice Items” pop-up window, click “Choose File”.

In the pop-up window that opens then, click the file created in step 17C-03 and click “Open”.

Then click the “Attach Selected” button.



When the pop-up closes, the 7390A process instance should still be open. Check the “Retainage Release” column to ensure that the values imported correctly. If it did, click “Take Action”. The GC/CMR should then be notified and can proceed with entering in the current invoice numbers.

Invoice Items

[Download Schedule of Values Worksheet.xls](#)

	A	B		H	I	J	
	Item #	Description of Work	and	% (G / C)	Balance to Finish (C - G)	Retainage Release Amount	Ret Per
	001	Total DBB Construction Phase	0.00	0.00 %	0.00	0.00	
	002	SOV 1	1.00	20.00 %	4.00	0.03	
	003	SOV 2	0.00	0.00 %	2.00	0.00	
	004	SOV 3	0.00	0.00 %	3.00	0.00	
Total			1.00	10.00 %	9.00	0.03	

[Cost Su](#)

Completed

Take Action



Section 17D: [Reserved]

17D.02



Section 18: Consultant and General Vendor Invoice

18.01 Access the project Process and Initiate the Invoice Process Instance

Follow the instructions provided in [Section 1](#) to access the project and start the invoice process instance.

For A/E the process type to select is "A/E Invoice (InvAE)" to begin the process. Users from other consultant types click the equivalent process, including "CA Invoice (InvCA)", "CMR Pre-Construction Invoice (CMpre)", "Other Consultant Invoice (InvOt)" or "Hazmat Invoice (InvHz)". These instructions also apply to purchase order commitments, which the vendors under which would typically use the "Other Consultant Invoice (InvOt)" process type.

18.02 Completing the Invoice Form.

Proceed as follows to complete the consultant Invoice form:

1. Either drag and drop the invoice into the "Drag and drop file here" or click "Browse Computer" to locate and upload the file. For other supporting documentation, a second upload block is available.
2. Select the applicable vendor commitment. Take care to select the correct commitment if the vendor has more than one task on the project. Once selected, note that the "Invoice Items" part populates.
3. Enter the vendor's invoice number and the beginning and end dates for the invoice.
4. Click on the "0.00" or pencil icon the "Invoice Amount" column and enter the amount of the invoice.
5. When the invoice form is correct, click "Submit" to submit the invoice to the project manager. The "Save Draft" button is available to save the form as a draft and return later.

In the case of any commitment that includes a consultant contingency, **do not** invoice any amount on the consultant contingency line. If a Consultant Contingency Transfer is to be made, see [Section 17A](#).

A/E Invoice (InvAE)

Start Process Print Check Spelling Submit Save Draft Cancel

Project: *Testing6723a Project Name
Process: A/E Invoice

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

Expand All | Collapse All

Please enter your current invoice information, below, and upload your own consultant invoice and any supporting documentation. Please use the comments tab to enter any comments or notes.

When you click "Submit" your invoice will be sent to the Project Manager for review.

Note: If you selected "No, Add a General Invoice," when initiating this invoice process, you did so incorrectly. Please click "Cancel" and restart your invoice process by selecting, "Yes, Add a Commitment Invoice."

* Vendor Invoice Document: or
 Additional Invoicing Documentation: or

Commitment Invoice Detail

Status: Draft
 * Commitment: 002 - AE
 Company/Contact: *Sample Company
 Date Received: 08.08.2023 | 1.08.08.2023
 Date Due:

This is a retainage release:

Commitment Invoice Custom Fields

Vendor Invoice Number:
 Invoice period beginning:
 Invoice period end:

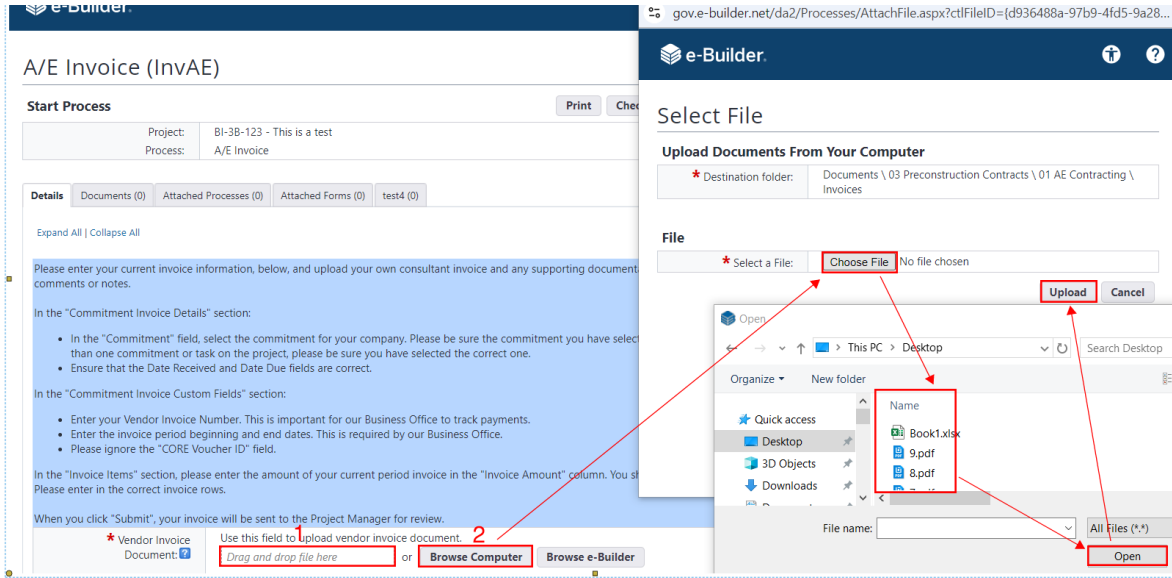
Invoice Items

Commitment Item #	Description	Budget Line Item	Funding Rule	Current Commitment	Invoiced To Date	Retained To Date	Remaining to Be Invoiced	Invoice Amount	Retainage %	Retained This Invoice
001	On-Call (ARC, CIV-SUR-LA, ENGV, EPA, EST, ...)	08.130	State Bond Fun...	0.00	0.00	0.00	0.00	0.00	100.00 %	



Below is more detail about how to perform a file upload, which can be done by:

1. A drag-and-drop, or
2. Searching for and uploading.



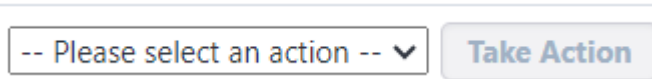
18.03 Invoices Returned for Revision

Once the form is submitted, the project manager may return it to the vendor if changes are needed.



Clicking on that will remove the current document, and a replacement can then be uploaded in its place.

After the changes needed are made, note, at the top and bottom of the pop-up, that there are workflow action controls.



By clicking "Please select an action" the user can select what action is intended on the invoice.

The option to "Resubmit" will appear and, if that is the intended action, select that. There is also an option to "Void", which has the effect of closing review of the invoice and voiding the invoice process instance.

When the action is selected, clicking on the "Take Action" button finalizes the user's action and sends the item to the next user in the workflow, if the "Resubmit" option is taken, or ends the workflow with no payment, if the "Reject" option is taken.



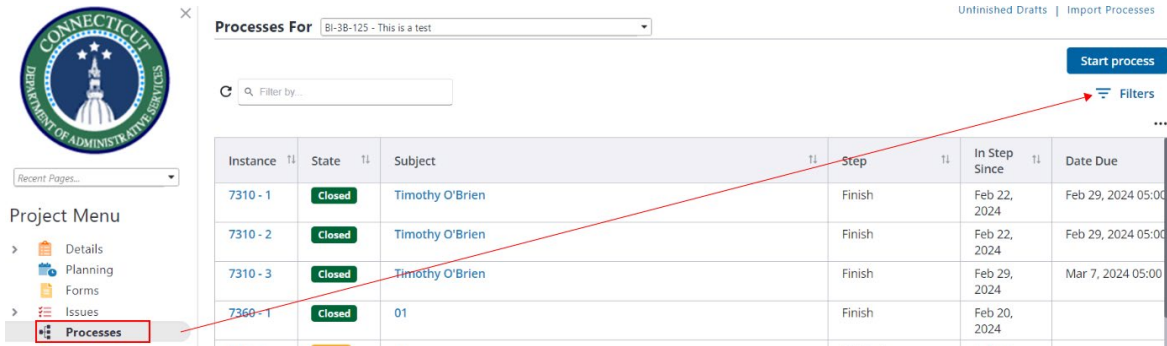
Section 18A: PM Review of Consultant & Vendor Invoice

18A.01 Access the Project Process

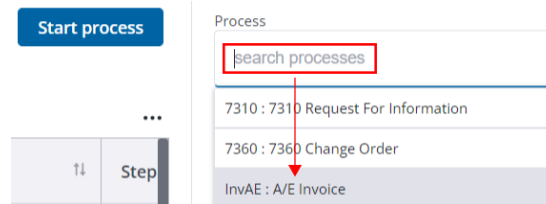
Follow the instructions provided in [Section 1](#) to access the project and start the invoice process instance.

18A.02 Locate the Process Instance

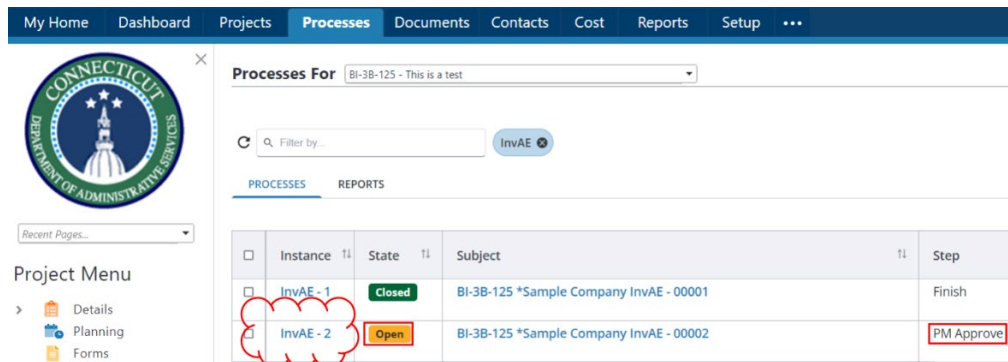
In the project record, click on the Processes module under the Project Menu and click on the Filters icon.



Under the Filters control, click “search processes”. Then, click on the consultant type invoice that is to be reviewed, i.e. “A/E Invoice (InvAE)”, “CA Invoice (InvCA)”, etc.



Click on the process instance number for the pending invoice, which should appear in the “PM Approve” step. It will also appear as “Open” in the State column.



18A.03 Key Items for PM Review

Key items for PM Review include:

- A. Click on the filename to cause a pop-up window to appear that has the vendor’s invoice.



- B. Under “Commitment Invoice Details”, it is important to make sure that the vendor is invoicing their own company and the correct commitment, if they have more than one commitment on the project.
- C. Vendor invoice number and beginning and end dates are requested from the Business Office.
- D. The Invoice Amount needs to be entered correctly for the e-Builder record to be accurate. Note that any mismatch between the amount entered here, and the PDF of the vendor’s invoice (see A, above) may cause the amount paid by the Business Office to be different than the amount in the e-Builder invoice records. Also note that, in the case of any commitment that includes a consultant contingency, the consultant **should not** invoice any amount on the consultant contingency line. If a Consultant Contingency Transfer is to be made, see [Section 17A](#).
- E. Select one of the following for payment of the invoice [Note 9/25/2024, this step is to be removed soon]:
 - a. Select “Business Office” to send the invoice automatically to the Business Office to be paid when the PM Approves the invoice, as described in items F and G, below.
 - b. Select “Agency” to send the invoice to the appropriate agency to pay expenses on a project. If the “Agency” is paying the invoice, the person processing these payments will need to be added to the Agency Payor role on the project.
- F. The Action pull down menu allows the PM to select Approve, Revise or Void.
 - a. “Approve” causes the invoice, with a cover sheet noting that the PM has determined that it is OK to Pay, to be sent to the Business office or agency for payment, depending on what was selected in item E, above.
 - b. “Revise” sends the invoice back to the vendor for any needed corrections. The PM will be prompted to enter comments for the vendor about what needs to be corrected.
 - c. “Void” ends consideration of the invoice.
- G. After the Action to be taken is selected, the Take Action button causes that Action.



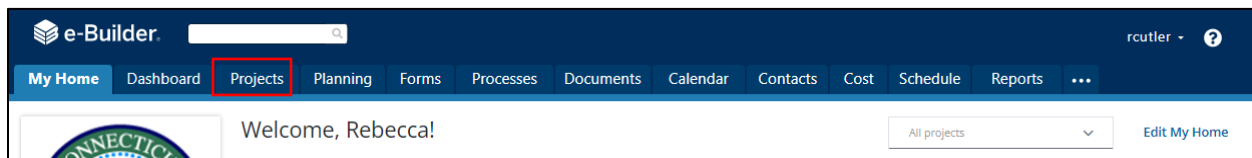
Section 18B: Hazmat Invoice Instructions for Agencies

18B.01 Access the Project Process

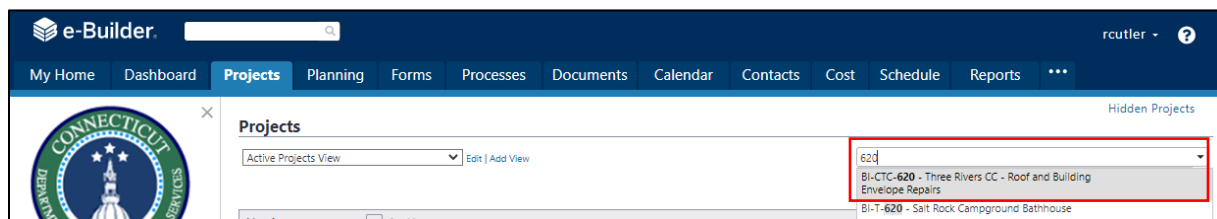
HazMat Invoices require review and approval from agencies. Agency staff will receive an email notification from eBuilder that an invoice is pending. To access the pending invoice, the agency can either click on the link in the email and the browser instance will appear as a pop-up.

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

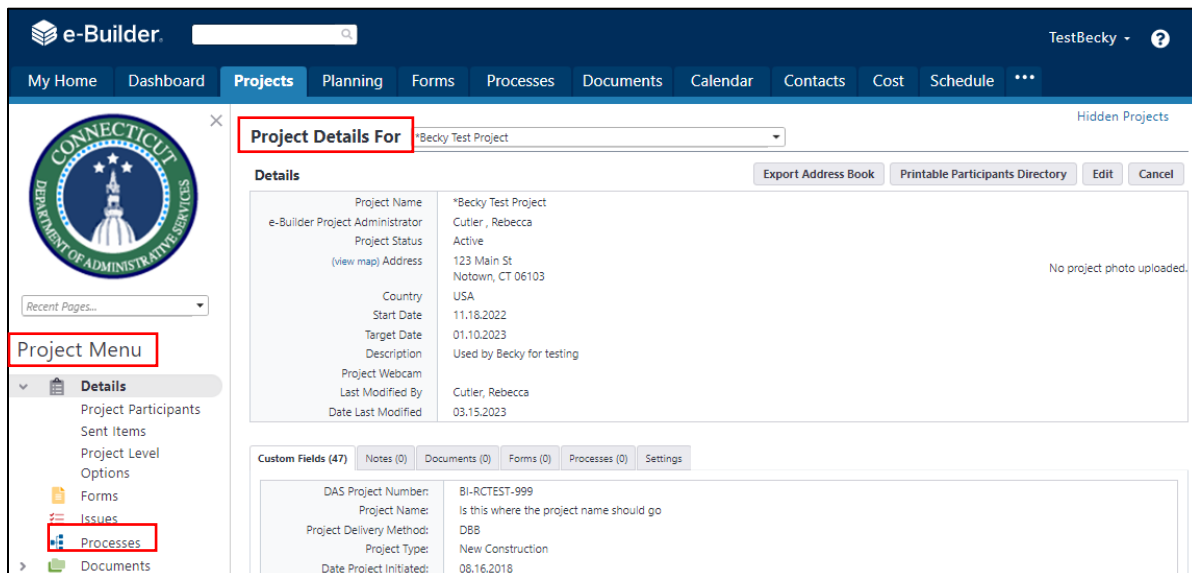
or the agency can log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f> and click on the “Projects” tab to find the applicable project.



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



The “Project Details” page is your home page for your project. (Click “Edit” to edit info.). Under the “Project Menu” on the left, click on Processes to find project-specific processes.





1. Change the Process filter settings to find the process instances you are looking for. In this case, switch Type of Process to “Hazmat Invoice (InvHz)”. Selecting All Processes will show all instances, regardless of whose ball-in-court the instances are in. Draft, Open or Finished status can be selected, as well.
2. The filtered list appears here. Click on the instance you wish to open. A pop-up will open. That is the process instance.

The screenshot shows the 'Processes For' section with a dropdown menu set to '*Testing6723a Project Name'. Below this are buttons for 'Start Selected Process Type' and 'Start Process'. A filter bar includes 'Filter by...', 'In My Court', 'In Progress', 'Process: 7390 Applic...', and 'Status'. A table of processes is displayed with columns for Process, Subject, Step, In Step Since, Date Due, Status, and Requested Comment. A list of process instances is shown on the right, including '0-X1 Test 1105 Project Intake ... (0-X', '1105R Project Revision Request (110', '7055 Construction Phase Agency ...', '7310 Request For Information (7310', '7360 Change Order (7360)', '7390 Application and Certifica ...', 'A/E Invoice (InvAE)', 'A/E Invoice - deprecated - do ... (In', and 'Potential Change Order (PCO)'. Red annotations include a scalloped border around the filter and list areas, and arrows pointing to the filter bar and the list.

18B.02 Invoice Review

Regardless of which route used to access it, when the pop-up for the invoice process instance appears, review the invoice information.

1. Click on the document name in the “Vendor Invoice Document” field. A viewer pop-up will appear, allowing review of the vendor’s invoice document. There may be supporting materials attached to this document or in “Additional Invoicing Documentation” field.

The screenshot shows a form field for 'Vendor Invoice Document'. It contains a document icon and the text 'supporting test 2.pdf (version 8)'. Below the document name are links for 'Properties', 'Download (36.1KB)', 'Redline', and 'Remove'. There is also a 'Drag and drop file here' area and buttons for 'Browse Computer' and 'Browse e-Builder'.

2. Documentation may also be uploaded into the Documents tab of the process instance. Review all documentation in each of these locations.

The screenshot shows a navigation bar with four tabs: 'Details', 'Comments (4)', 'Documents (2)', and 'Attachments'. The 'Documents (2)' tab is highlighted with a red box.

3. In the “Invoice Items” section, scroll to the right until the “Invoice Amount” column is seen. This is where the vendor should have entered the correct invoice amount. If there is more than one invoice



row, the correct amount should be in each row and the correct total for the invoice should appear in the gray summary row at the bottom.

Invoice Amount	R
0.00	
1.00	
1.00	

18B.03 Invoice Approval

If the information included in the invoice process instance is correct, and the agency wishes to approve, doing so involves two steps.

1. The first step is to select the “Agency Approver” and the approval date.

2. Then, at the top and bottom of the pop-up, there are workflow action controls.

3. By clicking “Please select an action” the user can select what action is intended on the invoice. The option to “Approve” will appear and, if that is the intended action, select that. There is also an option to “Reject”, which has the effect of closing review of the invoice and voiding the invoice process instance.
4. When the action is selected, clicking on the “Take Action” button finalizes the user’s action and sends the item to the next user in the workflow, if the “Approve” option is taken, or ends the workflow with no payment, if the “Reject” option is taken.



Section 19: 7390 Application and Certification for Payment

19A GC & CMR Users

19A.01 Instructions for the GC/CMR for creating and submitting Payment Applications:

Note: If retainage has just been reduced, do not proceed with this section until the DAS Project Manager has performed the steps in Section 17B to reduce the retainage for the commitment.

If proceeding with a 7390A Application and Certification for Payment, log in to e-Builder: <https://gov.e-builder.net>.

Follow the instructions provided in [Section 1](#) to access the project and start the invoice process instance.

Click on “7390 Application and Certification for Payment (7390A)” to begin the process.

Processes Cancel	
Process Name	Description
7390 Application and Certification for Payment (7390A)	

19A.02A Complete Preliminary Step (GC/CMR) (NEW as of 9/30/2024)

In the “Counter Prefix” field, enter the Payment Application number of this payment application.

7390 Application and Certification for Payment (7390A) Instructions

Start Process Print Check Spelling Submit Save Draft Cancel

Project:	*Testing6723a Project Name
Process:	7390 Application and Certification for Payment
Counter Prefix:	<input style="width: 100%;" type="text"/>

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

Then complete the preliminary steps below. NOTE: DO NOT enter any invoiced amounts or any stored material changes in this workflow step.

In this workflow step, the contractor:

- A. The “Will this Payment Application include a release of retainage?” will be set to “No” by default. If there is to be a retainage release done for all SOV/continuation sheet lines for which there is past retainage held, the contractor should switch this to “Yes.” Note that, in the case of a CMR who will be changing retainages and calculating retainage releases on a line-by-line basis, the CMR may leave this setting to “No.”
- B. Select the correct commitment for the vendor. Take care to select the correct commitment if the vendor has more than one on the project. Once selected, note that the “Invoice Items” part of the form populates.
- C. DO NOT enter anything under invoice items.
- D. Click “Submit” at the bottom or top of the form. The workflow instance will close.



7390 Application And Certification For Payment (7390A)

Start Process

Project: B-18-125 - This is a test
Process: 7390 Application and Certification for Payment
Counter Prefix: 01

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

Expand All Collapse All

CONSTRUCTOR:

- In the "Counter Prefix" field, enter the Payment Application number of this payment application.
- Select the correct commitment, below.
- If this Application and Certification for Payment is to contain a release of retainage, (A) keep the answer to the question, below, as "No", (B) click "Submit" at the top or bottom of this process instance and then (C) re-open the process instance to complete invoicing entry.
- If this Application and Certification for Payment is to contain a release of retainage, (A) confirm with the Construction Administrator and DAS Project Manager that the retainage release percentages have been changed in the commitment and relevant commitment SOV lines **BEFORE** clicking submit on this process instance, (B) answer "Yes" in the question, below, (C) click "Submit" at the top or bottom of this process instance and (D) re-open the process instance to complete invoicing entry.

* Will this Payment Application include a release of retainage? No Yes **A**

Commitment Invoice Details

Status: Draft
Commitment: GC-Test-1 - GC test test **B**
Company/Contact: Sample Company
Date Received: 06/27/2024 Date Due:

Commitment Invoice Custom Fields

Vendor Invoice Number:
Invoice period beginning:
Invoice period ends:
CORE Number ID:

Invoice Items

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O		
Item #	Description of Work	Budget Code with Description	Handling Rate	Scheduled Value	Work by Previous Application(s)	This Process	Total Materials Invoice Stored	Current Work Invoiced This Period	Current Payment Due	Retainage Completed and Stored to Date (D + E - F)	% (B / K)	Balance to Finish (K - G)	Retainage Release Amount	Retained This Period	Amount Less Retainage	Comulative Retainage
001	Total DBE Construction Phase	03.200 - Total DBE Constructio...	State Bond Fun...	0.00	0.00	0.00	0.00	0.00	0.00	100.00 %	0.00	0.00	0.00	0.00	0.00	0.00
002	SOV 1	03.200 - Total DBE Constructio...	State Bond Fun...	5.00	0.00	0.00	0.00	0.00	0.00	0.00 %	0.00	5.00	0.00	0.00	0.00	0.00
003	SOV 2	03.200 - Total DBE Constructio...	State Bond Fun...	2.00	0.00	0.00	0.00	0.00	0.00	0.00 %	0.00	2.00	0.00	0.00	0.00	0.00

19A.02B Complete the Payment Application Form (GC/CMR)

If there is no retainage release to be entered in the step 19A.02A, or after the retainage release upload has been completed, the contractor will receive a workflow notification. The contractors should then re-open the 7390A process instance for their Payment Application.

Carefully read and follow the instructions provided.

Upload supporting documentation for the Payment Application to the Documents tab. Click on the tab header to access the tab. Either drag-and-drop the documents to the tab or click the "Attach" button.

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

File Name Attached By

Drag and drop files here to upload, or browse.

Attach

Attach

If the "Attach" button is clicked, a pop-up will appear. Click "Upload from your Computer" to locate a locally stored document.

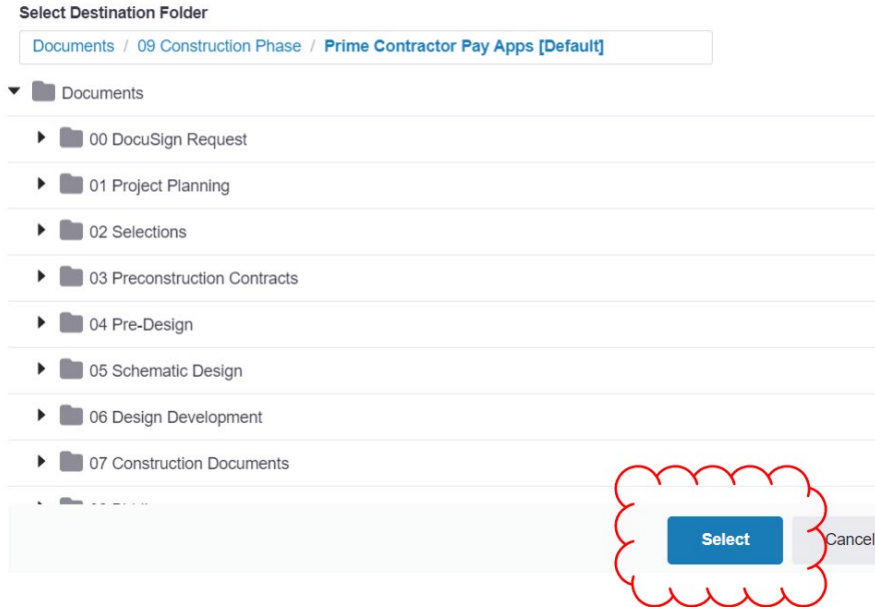
Upload from your Computer

Select from Documents Module

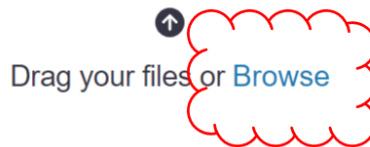
Cancel



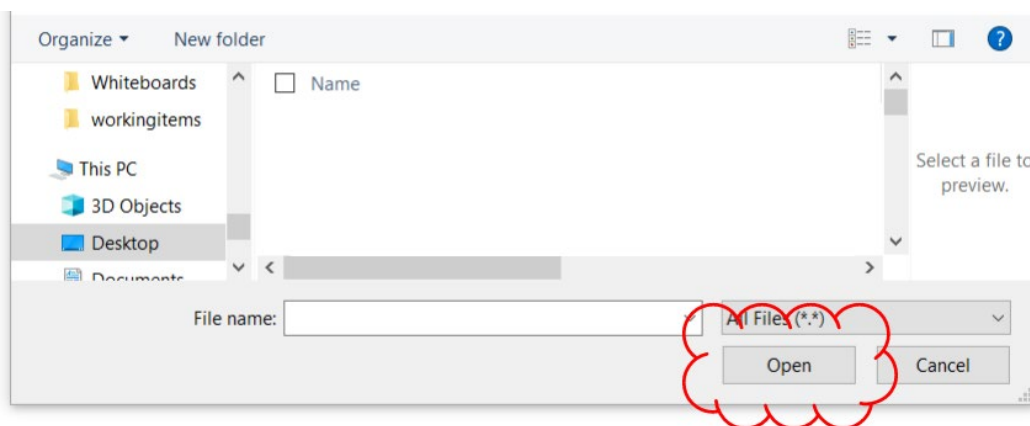
Then, click “Select” to use the pre-selected default folder (highlighted in blue font) as the destination folder in the eBuilder Documents module to upload the supporting documents. If applicable, an alternate folder can be selected.



Then click “Browse”.

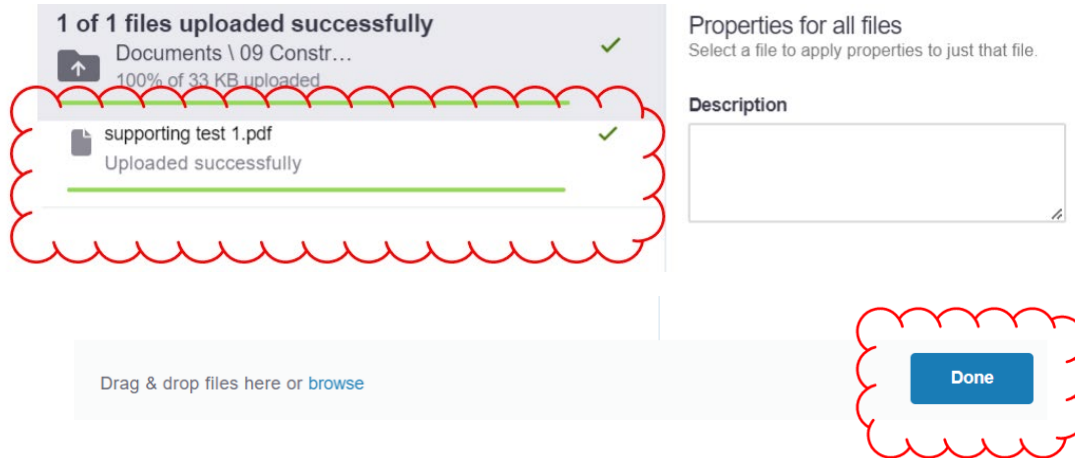


Select the file(s) you wish to upload and click “Open”.





If it worked properly, you should see the words “Uploaded successfully” under the filename . Click “Done” after the file has been uploaded.



The uploaded document should then appear in the Documents tab. Also note the number in parentheses next to the “Documents” tab title, indicating the number of uploaded files.



Complete the rest of the Payment Application Form as follows:

1. First group of questions after the blue instructions area.
 - a. Ensure that all required documentation is attached, as described above, and then acknowledge that it is in the field here.
 - b. Select who the contractor’s approver is in that field. This is the person whose name will appear in the signature block on the PDF copy of the Application and Certification for Payment, signing on behalf of the contractor.
 - c. Indicate whether securities in lieu of retainage is being used and, if so, the amount.
2. This question will, by default, be set to “Progress”. It can be set to “Substantial Completion” or “Final”. “Final” is only selected if the Payment Application was initiated by a 7990 Project Closeout process instance. The GC/CMR users are referred to [Section 19F](#) for this procedure.
3. Enter the vendor’s own invoice number and the beginning and end dates of the period being invoiced. This information is required.
4. Click on the “0.00” or pencil icon in the “This Period” column and enter the amount of the current invoice in each line.
5. If stored materials are being used, update each relevant row with the amount of current stored materials as of this Payment Application. In subsequent Payment Applications, when those amounts



are to be used, reduce this amount and add the amount reduced to the amount billed in that Payment Application under This Period for that row.

- 6. If the contractor any retainage release for this Payment Application on a line-by-line basis, enter the amount released for each row under Retainage Release Amount. (If there is a need to change retainage percentages, please communicate that to the DAS Project Manager.)

* Is All Required Documentation Attached?: Yes No

* Contractor Approver:

* Do you require Securities in lieu of Retainage (CGS 3-112a)?: Yes No

If yes, enter value of Securities in lieu of Retainage:

* Type of Payment Application:

Commitment Invoice Custom Fields

Vendor Invoice Number:

Invoice period beginning:

Invoice period end:

Invoice Items

A	B	C	D	E	F	G	H	I	J	K	L				
Item #	Description of Work	Budget Code with Description	Funding Rule	Scheduled Value	Work in Place From Previous Application(s)	This Period	Total Materials Presently Stored	Current Work Invoiced This Period	Current Payment Due	Total Completed and Stored to Date (D + E + F)	% (G / C)	Balance to Finish (C - G)	Retainage Release Amount	Released This Period	Am Re
0201	Line 1	03.200 - Total DBB Constructio...	State Bond Fun...	2.00	1.00	0.00	0.00	0.00	0.00	1.01	50.50 %	99	0.00	0.00	0.00
0202	Line 2	03.200 - Total DBB Constructio...	State Bond Fun...	5.00	0.00	0.00	2.10	0.00	0.00	2.10	42.00 %	2.90	0.00	0.00	0.00
0203	Line 2	03.200 - Total DBB Constructio...	State Bond Fun...	3.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00 %	3.14	0.00	0.00	0.00
03.200	Total DBB Construction Phase	03.200 - Total DBB Constructio...	State Bond Fun...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100.00 %	0.00	0.00	0.00	0.00
03.202	Total DBB Construction Phase	03.200 - Total DBB Constructio...	State Bond Fun...	10.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 %	10.00	0.00	0.00	0.00
03.205	Total CMR Construction Phase	03.100 - Total CMR Constructio...	State Bond Fun...	6.00	3.00	0.00	0.00	0.00	0.00	3.00	50.00 %	3.00	0.00	0.00	0.00
Total				26.14	4.01	0.00	2.10	0.00	0.00	6.11	23.37 %	20.03	0.00	0.00	0.00

When the invoice form is correct, the contractor sends it for review by selecting the workflow action "Submit" and clicking "Take Action". The "Save Draft" button is also available to save the form as a draft to return to later.

If "Substantial Completion" was selected as a "Type", refer to Section 19E for the next step. In the case of final payment applications, ensure that "Final" was selected as a "Type" and refer to Section 19F for the next step.

19A.03 Payment Application Form Returned for Revision

A payment application may be returned for revision. If the payment application is returned, the Actor having submitted the application will receive an email notification that the application has been returned for revision. The email will appear as follows and include the following information:



1. Process Details show the project, process type the notice concerns and the step the workflow is presently in, as of the notification.
2. The Comments section has comments from the workflow and other information.
3. There are links, top and bottom. Clicking on the link, if you are logged into e-Builder, will open the process instance pop-up.

The screenshot displays a process instance for '*Testing6723a Project Name'. At the top, a yellow notification bar states: 'A comment was added by Timothy O'Brien on step GC/CMR Revise on the following process. To view details or take action, [click here.](#)' This bar is annotated with a red '3' and a red arrow pointing to the 'click here' link. Below this is the 'Process Details' section, which is circled in red and annotated with a red '1'. It contains the following information:

Project	*Testing6723a Project Name
Process	7390A - new test 1 - 15
Subject	testing-TEST-6723a - Application for Payment - 08/31/2023
Step	GC/CMR Revise
In-Step Since	10/11/2023
Last Action	Revise
Last Action Taken By	Timothy O'Brien
Status	Received

Below the process details is the 'Comment(s)' section, also circled in red and annotated with a red '2'. It shows two comments from Timothy O'Brien, Department of Administrative Services - Construction Services, dated 10/11/2023. The first comment is at 10:26 AM and states 'A document was attached'. The second comment is at 10:14 AM and states 'This is a test'. At the bottom of the comments section, another yellow notification bar is present, identical to the one at the top, also annotated with a red '3' and a red arrow pointing to the 'click here' link.

Comments explaining the reasons for the return information on the actions needed may be included in the Documents tab:

The screenshot shows the 'Documents' tab selected in the e-Builder interface. The tab is circled in red. Below the tab, there is a table with one document entry:

<input type="checkbox"/>	File Name
<input type="checkbox"/>	supporting test 1.pdf (version 3) Properties Download (33.6KB) Redline Stamp Remove

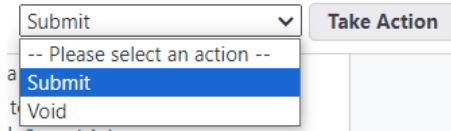
Or the Comments tab:

The screenshot shows the 'Comments' tab selected in the e-Builder interface. The tab is circled in red. Below the tab, there is a table with one comment entry:

<input type="checkbox"/>	Private	Comment
<input type="checkbox"/>	Private	Timothy O'Brien, Department of Administrative Services - Construction Services 10.11.2023 10:14 AM This is a test



Make the needed changes and resubmit the application by selecting “Submit” from the action menu on the top or bottom of the form and clicking “Take Action”. There is also an option to void the Payment Application.



19B CA Users

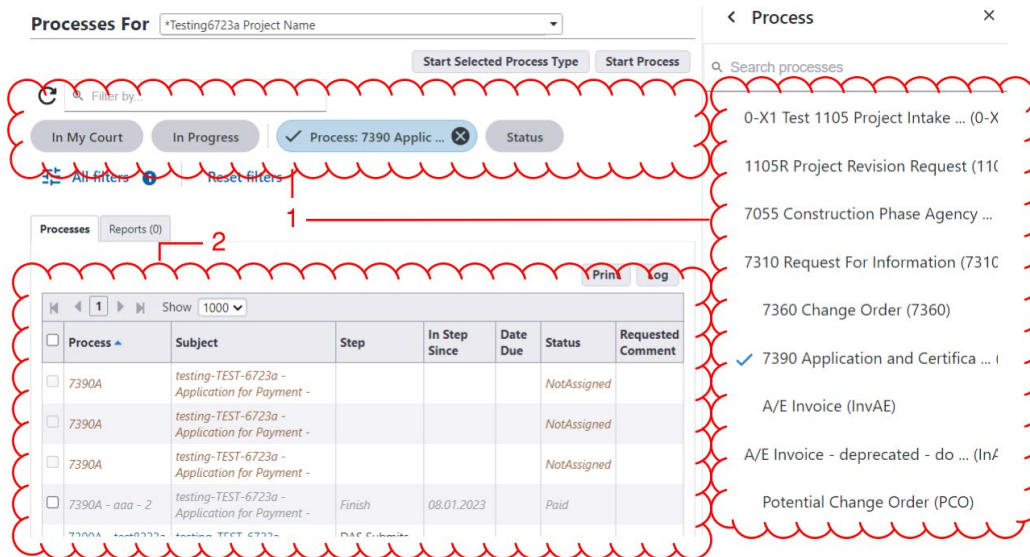
19B.01 Instructions for the CA for Review and Certification of Payment Applications:

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

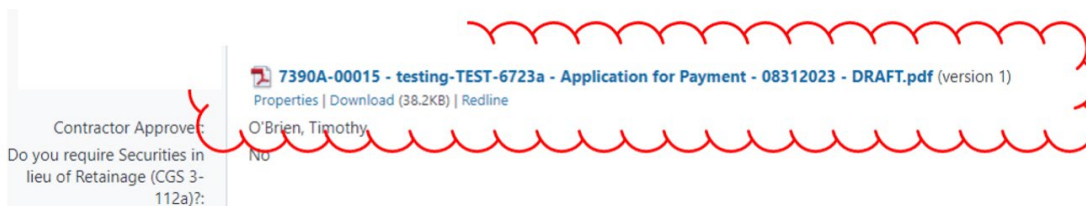
Follow the instructions provided in [Section 1](#) to access the project and access the invoice process instance.

Change the Process filter settings to find the process instances you are looking for.

1. Select “7390 Application and Certification for Payment” from the “Search Processes” dropdown menu.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.



Once the process instance opens, review all of the information entered, including the files uploaded to the Documents tab. To view the draft requisition, click the “Details tab” and then click on the link to the PDF, as shown below:





After reviewing the draft requisition, return to the "Details" tab and the CA should then select their name from the "CA Reviewer" dropdown list.

* CA Reviewer: Please select...

At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take on the item. "Submit" will send the item to the A/E for review. "Revise" will send the item back to the GC/CMR for any corrections that are needed. Once the action to be taken is selected, click the "Take Action" button.

Submit -- Please select an action -- Submit Revise Take Action

If "Revise" was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click "Revise" to complete and send the comments.

7390 Application and Certification for Payment (7390A) - new test 1 - 15
Add a comment.
* Add Comment
Private
Check Spelling Revise Cancel

19B.02 Other Items for Verification

Under Cost > Commitments, in the Custom Fields tab of each commitment, please check to ensure that the PO Number field is the correct purchase order number, especially for DAS Business Office invoicing. (The number "0000000000" is a placeholder and is not an actual PO Number.) This is important to ensure that the DAS Business Office is able to process payments without them being held up by uncertainty about the what purchase order to use for payment.

Commitment Details
Commitment Overview Other Details Financial Summary
Project: *Testing6723a Project Name
Commitment Type: Prime Contractor Contract
Commitment Number: 001
Unit Cost Options: Lump Sum Amount
Description: GC TEST TEST TEST
Commitment Control: Controlled By Line Item
Created: 06.07.2023 (Timothy O'Brien)
Status:
Company:
Company Number:
Contact:
Approved:
Commitment Items (12) Commitment Changes (8) Actual Costs (6) Custom Fields (7) Note (0)
Primary Construction Contract On Project?: No
Type of OC Consultant:
CORF Contract No.:
PO Number: 0000000000
DAS Contract Number:
Project Status Summary:



19C

A/E Users

19C.01 Instructions for the A/E for Review and Certification of Payment Applications:

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

Follow the instructions provided in [Section 1](#) to access the project and access the invoice process instance.

Change the Process filter settings to find the process instances you are looking for.

1. Select “7390 Application and Certification for Payment” from the “Search Processes” dropdown menu.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.

The screenshot shows the 'Processes For' interface. At the top, there is a search bar with the text '*Testing6723a Project Name'. Below it are buttons for 'Start Selected Process Type' and 'Start Process'. A 'Filter by' section contains buttons for 'In My Court', 'In Progress', 'Process: 7390 Applic...', and 'Status'. Below the filters is a table of process instances. A red dashed box labeled '1' encompasses the filter buttons, and another red dashed box labeled '2' encompasses the table. To the right of the table is a 'Process' pop-up window showing a search results list with '7390 Application and Certifica...' selected.

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

Once the process instance opens, review all of the information entered, including the files uploaded to the Documents tab. To view the draft requisition, click the “Details tab” and then click on the link to the PDF, as shown below:

The screenshot shows a document upload area. A PDF file is listed: '7390A-00015 - testing-TEST-6723a - Application for Payment - 08312023 - DRAFT.pdf (version 1)'. Below the file name are links for 'Properties', 'Download (38.2KB)', and 'Redline'. To the left, there is a 'Contractor Approver' section with a dropdown menu showing 'O'Brien, Timothy' and a 'No' option.

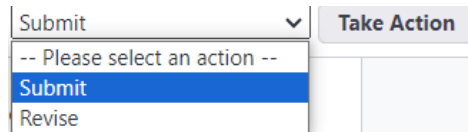
The A/E should then select their name from the “AE Approver” dropdown list.

* AE Approver:

At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take on the item. “Submit” will send the item to the project manager for review.



“Revise” will send the item back to the CA. Once the action to be taken is selected, click the “Take Action” button.



If “Revise” was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click “Revise” to complete and send the comments.

7390 Application and Certification for Payment (7390A) - new test 1 - 15

19D PM Users

19D.01 Instructions for the PM for Review and Certification of Payment Applications:

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

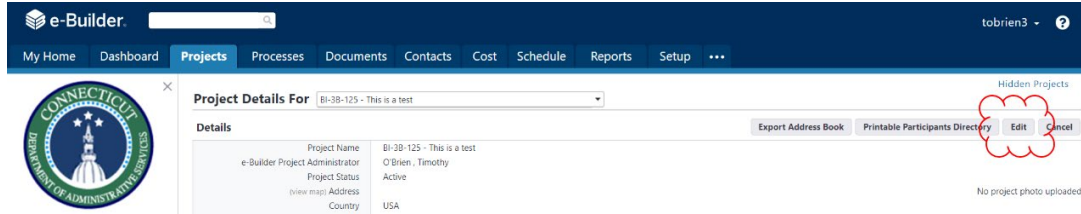
19D.02 Project set-up on Payment Applications whose costs are paid for by CHEFA

If CHEFA is directly responsible paying payment applications, the person who attends to the payment at CSCU must be in the Agency Payor role. If that person is not in that role, please request that Construction Support Services (Tim O’Brien) place that person in that role.

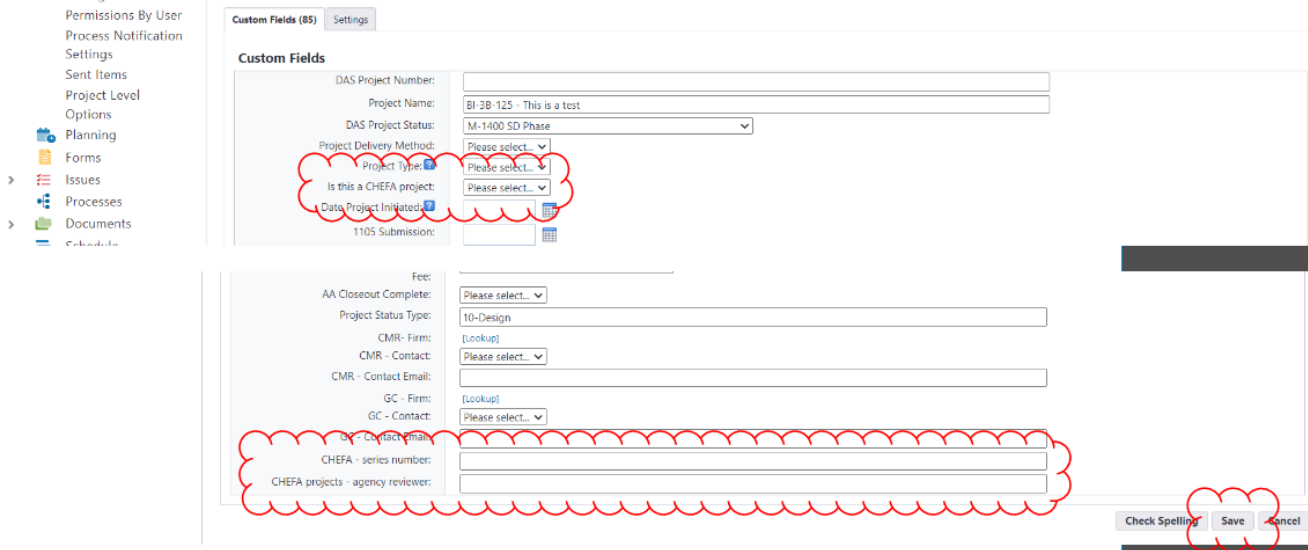


Also, if the payment will be made using CHEFA funds, proceed as follows:

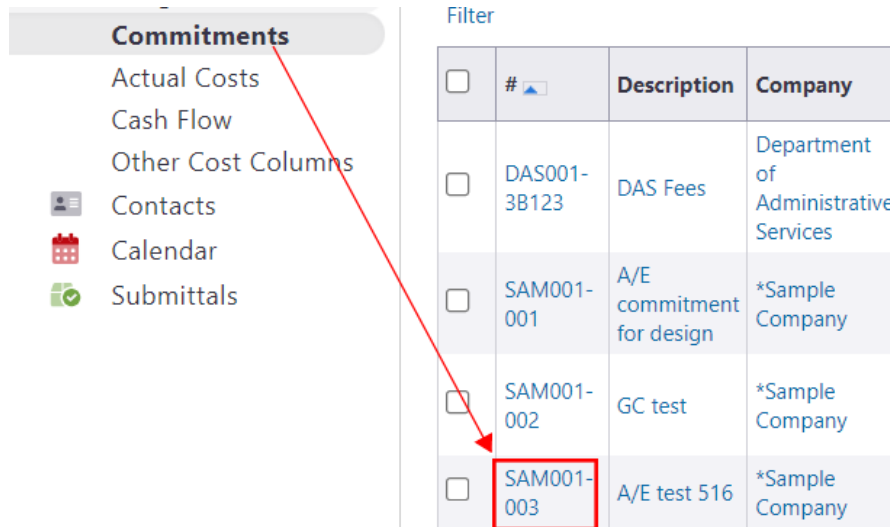
1. At the top of the Project Details page, click "Edit".



2. Select "Yes" on the line that asks, "Is this a CHEFA project."
3. Enter the CHEFA series number for the Payment Application cover letter.
4. Enter the agency reviewer for the signature page on the cover letter.
5. Click "Save."



7. For each commitment, go into the Commitment record in the Cost module





- 8. In the commitment record, click "Edit".

Commitment Details

Commitment Overview Other Details Financial Summary

Mail Merge Close **Edit**

- 9. Scroll down the page, under "Commitment Custom Fields" and enter the "CHEFA - commitment description"

CHEFA - commitment description:

- 10. At the top of the page, click "Save."

Edit Commitment

Commitment Overview **Save** Cancel

19D.03 Accessing the Process Instance

Follow the instructions provided in [Section 1](#) to access the project and access the invoice process instance.

Change the Process filter settings to find the process instance you are looking for.

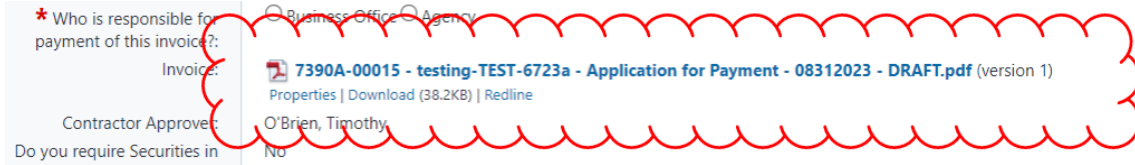
1. Select "7390 Application and Certification for Payment" from the "Search Processes" dropdown menu.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.

The screenshot shows the 'Processes For' dropdown set to '*Testing6723a Project Name'. Below it are filter buttons: 'In My Court', 'In Progress', 'Process: 7390 Applic...', and 'Status'. A red circle highlights the filter buttons, with an arrow pointing to the 'Process: 7390 Applic...' button. Below the filters is a table of process instances. A red circle highlights the table, with an arrow pointing to the first row. To the right is a 'Process' pop-up window with a search bar and a list of process instances. A red circle highlights the pop-up, with an arrow pointing to the '7390 Application and Certifica...' item, which is checked.

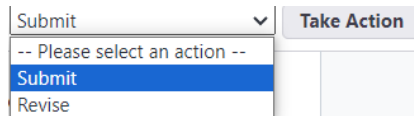
Process	Subject	Step	In Step Since	Date Due	Status	Requested Comment
<input type="checkbox"/>	7390A	testing-TEST-6723a - Application for Payment -			NotAssigned	
<input type="checkbox"/>	7390A	testing-TEST-6723a - Application for Payment -			NotAssigned	
<input type="checkbox"/>	7390A	testing-TEST-6723a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



Once the process instance opens, review all of the information entered, including the files uploaded to the Documents tab. To view the pencil requisition, click the “Details tab” and then click on the link to the PDF, as shown below:



At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take on the item. “Submit” will send the item to the final invoice approval screen, below. “Revise” will send the item back to the CA. Once the action to be taken is selected, click the “Take Action” button.



If the project manager took the “Submit” action, the project manager will then be prompted to approve the payment for the project Cost part of e-Builder and enter the Approved date.

If “Revise” was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click “Revise” to complete and send the comments.

19E Payment Application at Substantial Completion (Coming Soon)

19E.01 Instructions for the Substantial Completion step:

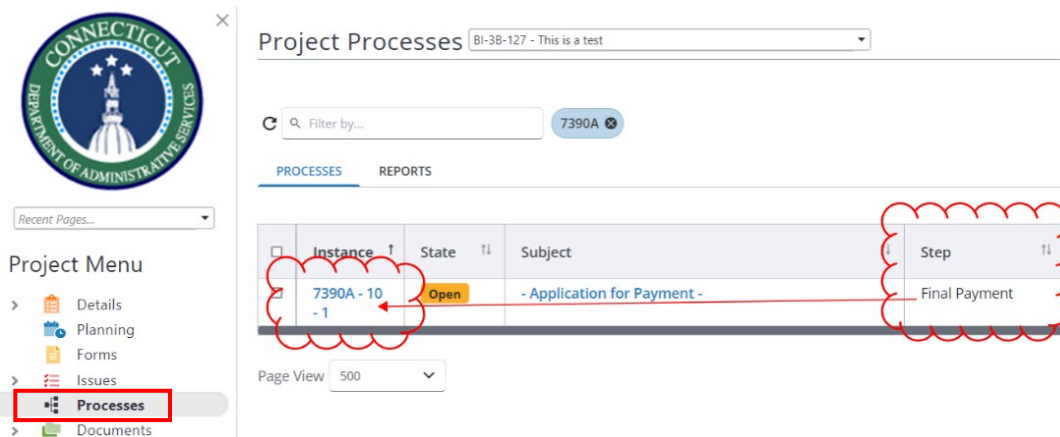


19F Final Payment Application

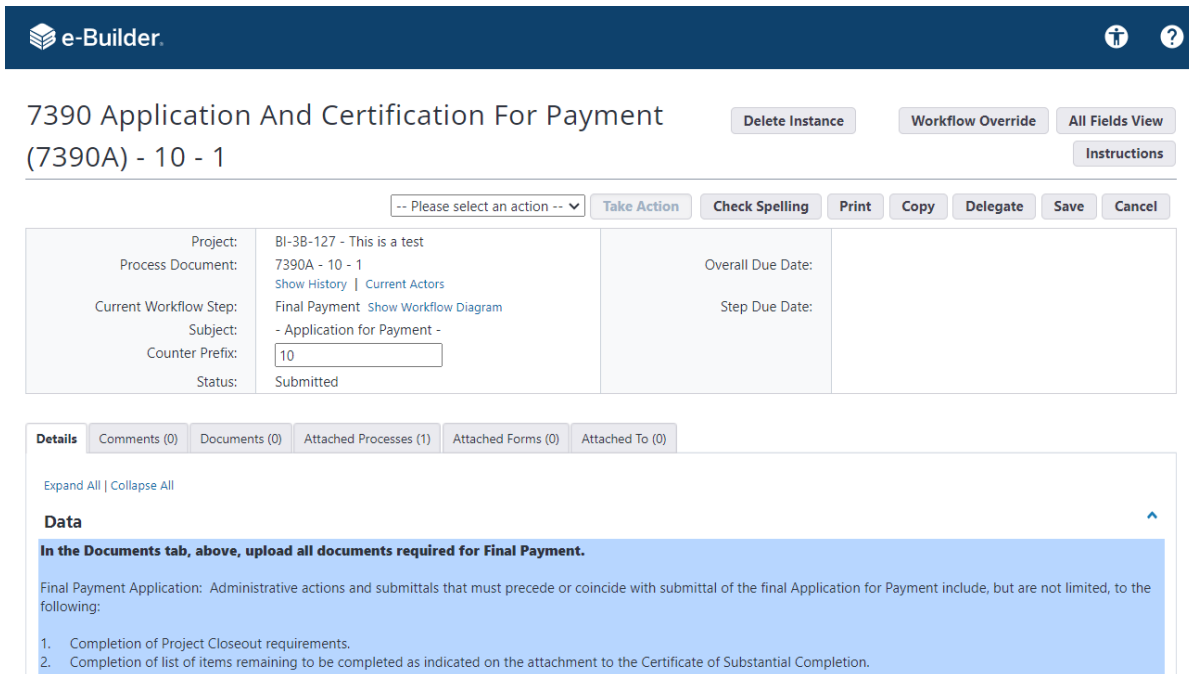
19F.03 Final Payment Application step

If the GC/CMR user indicated that the payment application is for a final payment by selecting “Final” in the “Type of Payment Application” field in step [19A.02B](#), with the GC/CMR user takes action, the process instance will close and the GC/CMR user can reopen it in the “Final Payment” Step.

To locate the process instance, click on the “Processes” module for the project, under the Project Menu, to locate the 7390 Payment Application process instance which should be in its “Final Payment” step. Click on this instance’s number or subject to open it.



In this step, upload all of the documentation required for Final Payment Application in the “Documents” tab of the process instance.





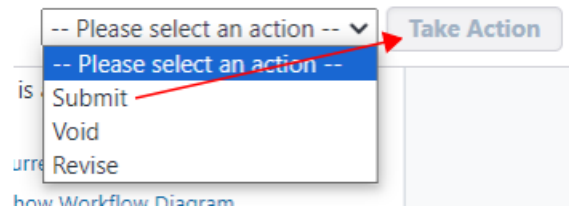
The GC/CMR then indicates the following:

By taking the "Submit" action on this step, the authorized representative of the General Contractor or Construction Manager at Risk agrees to the following:

The undersigned General Contractor or Construction Manager at Risk (the "Contractor") certifies that this Application for Payment has been executed by a person authorized to sign legal documents on behalf of the Contractor. Furthermore, the undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief, the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments were received from the Owner, and that the current payment shown herein is now due.

Does the person signing the Application for Payment for the GC or CMR agree to the above?:	<input type="radio"/> No <input type="radio"/> Yes
Is All of the information required for final payment uploaded:	<input type="radio"/> No <input type="radio"/> Yes

When complete, at the top or bottom of the form, the GC/CMR clicks, "Please select an action", to choose the workflow action desired.



The options include:

- "Submit" to submit the Payment Application for the creation of a PDF draft to the CA in the Payment Application workflow, as indicated in 0175 e-Builder Guidance Manual, Section 19A.
- "Void" to void the Payment Application instance. This action is permanent and cannot be undone.
- "Revise" to send the Payment Application instance back to the GC/CMR at the workflow step that allows the GC/CMR to further edit it and make corrections.

After making a selection, click the "Take Action" button to forward the application process to the next respective user.

As with other processes in e-Builder, a "Save" button is also available to allow the user to save the process instance without clicking "Take Action" yet, to return later for further edit.

19F.04 7390 Process

After the GC/CMR user has clicked "Submit" in 19F.03, the 7390 will be sent to the CA for further action. Please refer to [Section 19B – CA User](#) for CA instructions. If the CA sends the Payment Application back to the GC/CMR for revisions, the GC/CMR's workflow may include a return to the Final Payment Application step.



Section 20: Request for Information

20.01 GC/CMR RFI Submission - Accessing the Process

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

Follow the instructions provided in [Section 1](#) to access the project and initiate an RFI process instance.

When the pop-up window that is the RFI form appears. Complete the answers to the questions asked in the form.

7310 Request For Information (7310) Instructions

Start Process Print Check Spelling Submit Save Draft Cancel

Project: *Testing6723a Project Name
 Process: 7310 Request For Information
 * Date Due: 10.18.2023 05:00pm

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

Expand All | Collapse All

* Question:

Proposed Solution:

Spec. Section: -- Please select an option --

Drawing Number:

Is There a Potential Cost Impact?: Yes No

Is There a Potential Time Impact?: Yes No

Print Check Spelling Submit Save Draft Cancel

The RFI “Subject” field is available for editing. Please enter a subject describing the RFI.

7310 Request For Information (7310)

Start Process Print Check Spelling

Project: BI-3B-125 - This is a test
 Process: 7310 Request For Information
 * Subject:
 * Date Due: 05.14.2024 05:00pm

In the “Documentation” section, there is a file field for each user type in the RFI process to upload documentation. See step [7A.02](#) for instructions on uploading into file fields. Only documentation uploaded into these fields will be included in the RFI PDF for the record.

Documentation

GC/CMR Documentation for RFI:	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>
A/E Documentation for RFI:	<input type="text"/>
CA Documentation for RFI:	<input type="text"/>

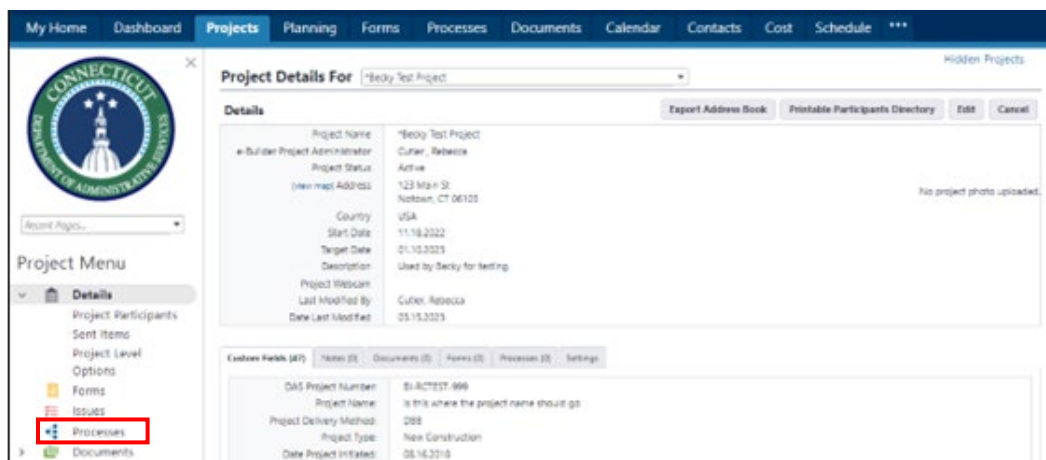


If the user would like to save the RFI, and keep it in draft form for future editing, the “Save Draft” button is available.



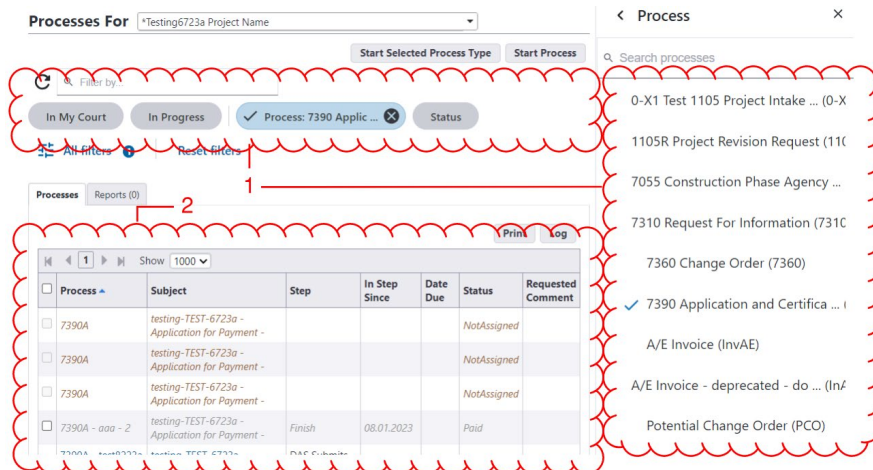
The RFI is saved as a type of e-Builder “Process instance”.

To locate the draft Process instance that is the draft RFI, go back into the project, and open the Processes module within the project.



Proceed as follows to change the Process filter settings to find the process instance you are looking for.

1. Select “7310 Request for Information (7310)” from the “Search Processes” dropdown menu.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.



When the user is ready to submit the RFI, click “Submit”. This will cause the RFI to be sent into workflow.





20.02 CA RFI Review - Accessing the Process

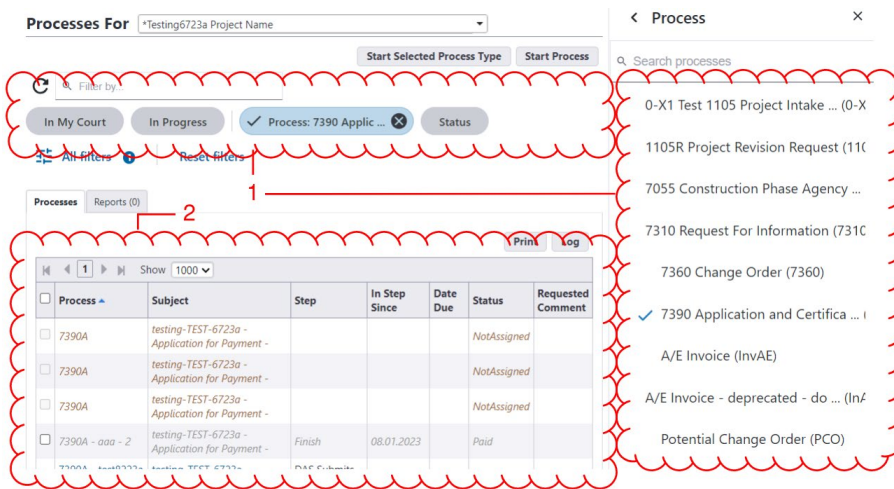
The CA will receive an email notification from eBuilder that an RFI is pending. To access the pending RFI, the CA can either click on the link in the email and the browser instance will appear as a pop-up; or

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

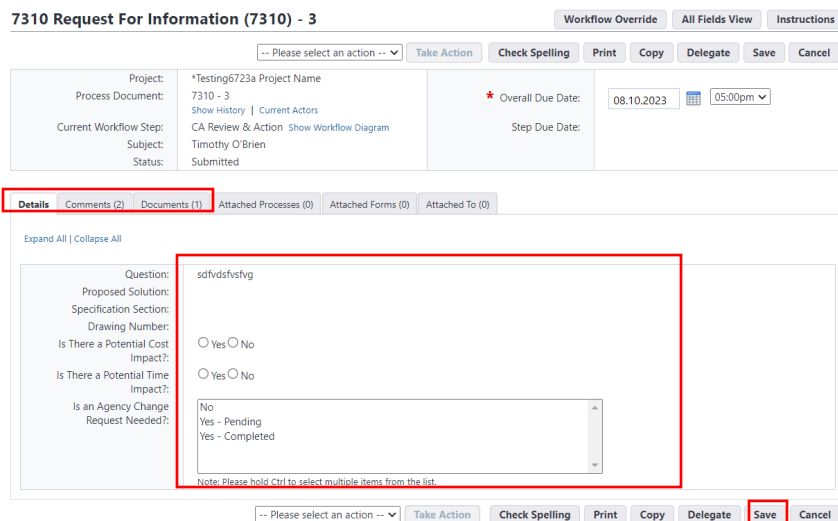
Alternatively, to navigate to the process instance through the e-Builder website, follow the instructions provided in [Section 1](#).

Proceed as follows to change the Process filter settings to find the process instance you are looking for:

1. Select “7310 Request for Information (7310)” from the “Search Processes” dropdown menu.
2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.



Once the process instance opens, the CA can review all of the information entered, including the files uploaded to the file fields in the “Documentation” section, and any comments made regarding the RFI under the “Comments” tab. The CA will then return to the “Details” tab and provide a response to the editable questions. The CA has the option to “Save” its edits and return for further edits, if it so chooses, by clicking the “Save” button.





In the “Documentation” section, there is a file field for each user type in the RFI process to upload documentation. See step [7A.02](#) for instructions on uploading into file fields. Only documentation uploaded into these fields will be included in the RFI PDF for the record.

Documentation

GC/CMR Documentation for RFI:	<input type="text"/>
A/E Documentation for RFI:	<input type="text"/>
CA Documentation for RFI:	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>

At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take. “Submit” will forward the RFI to the A/E for review. “Revise” will return the RFI to the GC/CMR for any corrections that are needed. Once the action to be taken is selected, click the “Take Action” button to complete the action.

Submit ▼

- Please select an action --
- Submit
- Revise

Take Action

If “Revise” was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click “Revise” to complete and send the comments.

Add a comment.

*** Add Comment**

Private

20.03 A/E RFI Review - Accessing the Process

The A/E will receive an email notification from eBuilder that an RFI is pending. To access the pending RFI, the A/E can either click on the link in the email and the browser instance will appear as a pop-up; or

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

Alternatively, to navigate to the process instance through the e-Builder website, follow the instructions provided in [Section 1](#).

Proceed as follows to change the Process filter settings to find the process instance you are looking for:

1. Select “7310 Request for Information (7310)” from the “Search Processes” dropdown menu.



- 2. The filtered list will appear as displayed below. Click on the instance you wish to open. A pop-up will open of the process instance selected.

The screenshot shows the 'Processes For' interface with a search filter set to '*Testing6723a Project Name'. A red dashed box highlights the filter area and a table of process instances. The table has columns for Process, Subject, Step, In Step Since, Date Due, Status, and Requested Comment. A red arrow points from the filter area to the table, and another red arrow points from the table to the 'Process' pop-up window on the right, which displays a list of process instances including '7390 Application and Certifica...'.

Once the process instance opens, the A/E can review all of the information entered, including the files uploaded to the “Documents” tab, and any comments made regarding the RFI under the “Comments” tab. The A/E will then return to the “Details” tab and provide a response to the editable questions. The A/E has the option to “Save” its edits and return for further edits, if it so chooses, by clicking the “Save” button.

The screenshot shows the '7310 Request For Information (7310) - 3' details page. The 'Details' tab is selected, and a red box highlights the 'Questions' section. The questions include 'Is There a Potential Cost Impact?', 'Is There a Potential Time Impact?', and 'Is an Agency Change Request Needed?'. A dropdown menu is visible for the 'Is an Agency Change Request Needed?' question, with options: 'No', 'Yes - Pending', and 'Yes - Completed'. The 'Save' button is highlighted with a red box.

In the “Documentation” section, there is a file field for each user type in the RFI process to upload documentation. See step [7A.02](#) for instructions on uploading into file fields. Only documentation uploaded into these fields will be included in the RFI PDF for the record.

Documentation

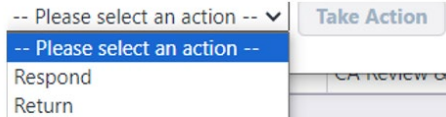
GC/CMR Documentation for RFI:

A/E Documentation for RFI: Drag and drop file here or

CA Documentation for RFI:



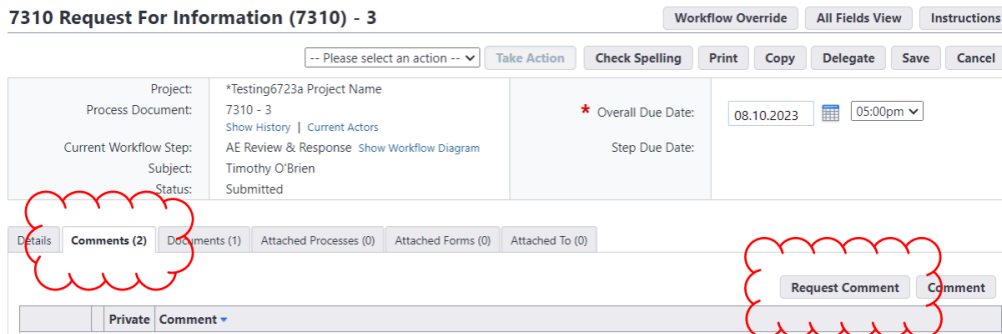
At the top and bottom of the form are pull-down menus that allow the user who is ball-in-court to select the action they need to take. "Respond" will forward the RFI to for final determination. "Return" will return the RFI to the CA for any corrections that are needed.



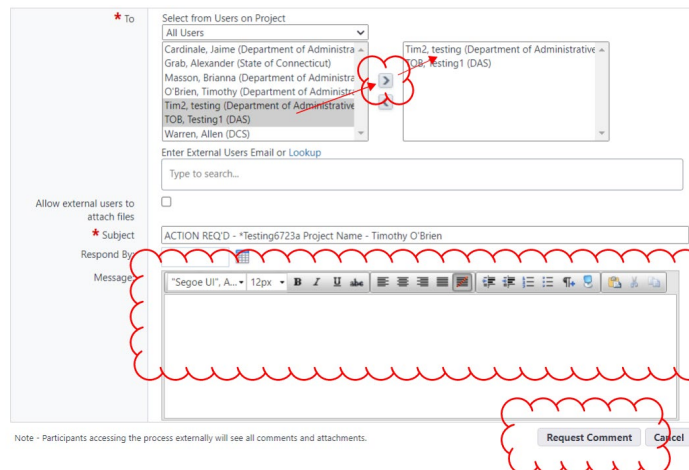
If "Return" was selected, a comment screen will appear which, in this case, is required. After comments are entered into the space provided, click "Return" to complete and send the comments.



To request comment from subconsultants using the e-Builder process, go to the "Comments" tab of the RFI instance and click the "Request Comment" button.



After clicking the "Request Comment" button, a pop-up will appear that allows the A/E to select their subconsultant user names in the "To" field and pressing the arrow button to move them to the right panel. The "Message" field allows the A/E user to provide instructions to the subconsultants. Then the "Request Comment" button sends a comment request notification to the subconsultant.





When the subconsultant responds, their comments will be posted in the “Comments” tab of the RFI instance.

20.04 CA Determination

After the A/E completes their review, the RFI will be forwarded to the CA for final determination. To access the RFI instance, the CA should follow the steps outlined in Section 20.02 to open the process instance.

Once the process instance opens, the CA can review all of the information entered, including the files uploaded to the “Documents” tab, and any comments made regarding the RFI under the “Comments” tab. The CA will then return to the “Details” tab and provide a response to the editable questions.

7310 Request For Information (7310) - 3

Workflow Override | All Fields View | Instructions

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

Project: *Testing6723a Project Name	* Overall Due Date: 08.10.2023 05:00pm
Process Document: 7310 - 3 Show History Current Actors	
Current Workflow Step: CA Determination Show Workflow Diagram	Step Due Date:
Subject: Timothy O'Brien	
Status: Submitted	

Details | Comments (2) | Documents (1) | Attached Processes (0) | Attached Forms (0) | Attached To (0)

Expand All | Collapse All

Question: sdfvdsfsvfg	
Proposed Solution:	
Specification Section:	
Drawing Number:	
Is There a Potential Cost Impact?: <input checked="" type="radio"/> Yes <input type="radio"/> No	
Is There a Potential Time Impact?: <input checked="" type="radio"/> Yes <input type="radio"/> No	
Is an Agency Change Request Needed?:	No Yes - Pending Yes - Completed
A/E Response:	Note: Please hold Ctrl to select multiple items from the list.
A/E Response Date: 11.22.2023	This is the A/E response.
CA Comments:	

In the “Documentation” section, there is a file field for each user type in the RFI process to upload documentation. See step [7A.02](#) for instructions on uploading into file fields. Only documentation uploaded into these fields will be included in the RFI PDF for the record.

Documentation

GC/CMR Documentation for RFI:	<input type="text"/>
A/E Documentation for RFI:	<input type="text"/>
CA Documentation for RFI:	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>

At the top and bottom of the form are pull-down menus that allow the CA to select the action they need to take. The CA can either select “Determination” or “Return”. “Send Code Unit” is also listed as an option but should not be used at this time. After making a selection, click the “Take Action” button.

-- Please select an action -- | Take Action

-- Please select an action --

Determination

Return

* Over



If the CA selects “Return”, the RFI will be returned to the A/E with instructions for correction

If the CA selects “Determination” and answered “Yes” to the “Is there a Potential Cost Impact” question, then the RFI workflow will generate a Proposal Request, as part of a “Potential Change Order (PCO)” process instance.

20.05 A/E Proposal Request Step

After the CA makes a final Determination on an RFI that was identified as having a potential cost impact, the A/E will receive an email notification to that effect. To access the RFI instance, the A/E should follow the steps outlined in Section 20.03 to open the process instance.

The purpose of the RFI process instance at this step is to launch a Proposal Request instance. After opening the process instance, note the yellow “Warning” banner at the top of the page. The “Warning” does not indicate an error. It is only to bring the user’s attention to it. The only action the A/E should take is to click the “Click here” link in the banner.

7310 Request For Information (7310) - 55

Instructions

Warning
 A draft Potential Change Order has been automatically created. [Click here](#) to provide required Commitment Change information and submit the instance.

Print Cancel

Click Here

After clicking “Click here,” an instance of the “Potential Change Order (PCO)” process type will be launched. This is an entirely new process type and an entirely new process instance. The “Potential Change Order (PCO)” is the umbrella name for a process that begins with Proposal Requests and may generate into CCDs and/or COPs. See the instructions for the “Potential Change Order (PCO)” process in [Section 21](#) for how to proceed with this process.

Note that the RFI’s workflow process will be automatically completed when the Submit button is pressed by the A/E user in the Proposal Request part of the “Potential Change Order (PCO)” process, meaning that no further action needs to be nor should be taken by users on the RFI.

Potential Change Order (PCO) Instructions

Start Process Print Copy Check Spelling Show Workflow Submit Save Draft Delete Draft Cancel

Project: *Testing6723a Project Name
 Process: Potential Change Order
 * Subject: Timothy O'Brien (7310 - 3)

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

Expand All | Collapse All

Proposal Request

Note:
 While this form is a part of the Proposed Change Order/Change Order Proposal process in e-Builder, at this point in the process, you are submitting a Proposal Request. A PCO/COP may be created as a result of your Proposal Request, later in the workflow of this process.

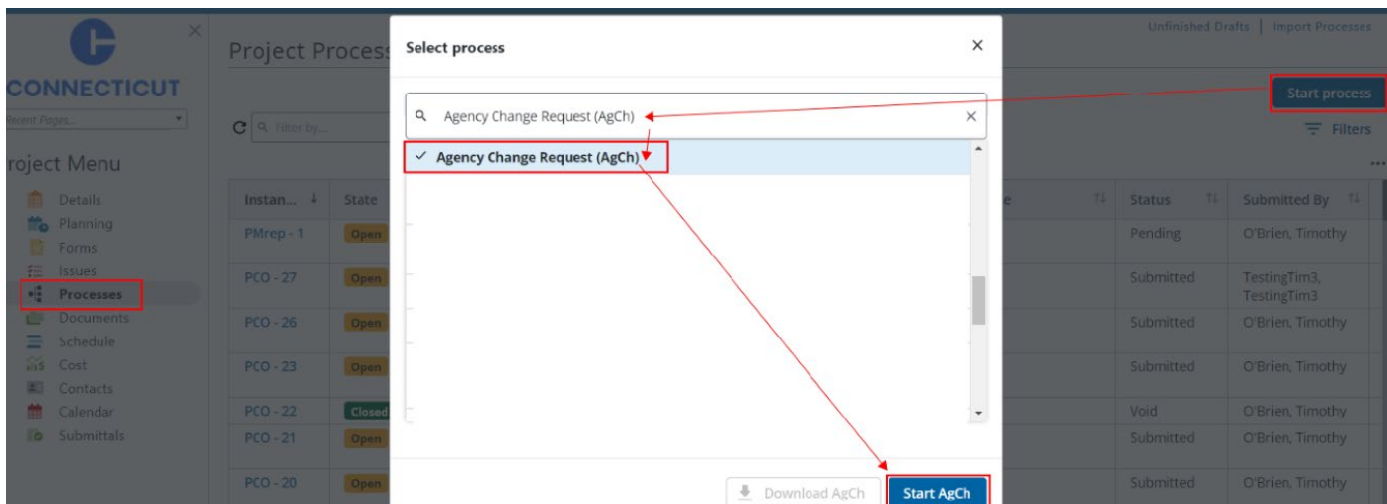
* Description of the Work: This is the A/E response.



Section 20A: Agency Change Request

20A.01 Beginning a process instance (user role: Agency)

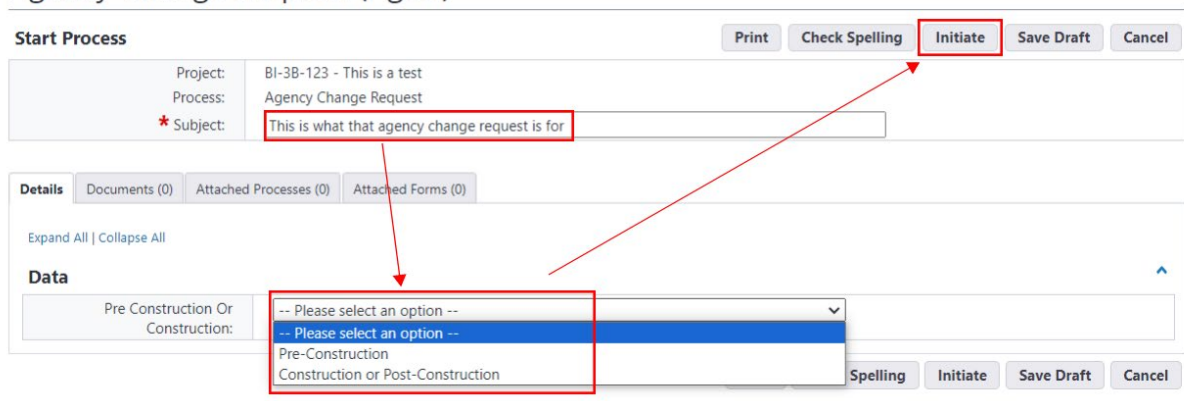
Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, find your project by clicking on the top tab for “Projects”. Follow the instructions provided in [Section 1](#) to access the project and start the invoice process instance. In the Process type selection pop-up window, click on the name of the “Agency Change Request (AgCh)” process and then click on the Start button in the lower right.



20A.02 Agency Change Request – Pre-Construction or Construction (user role: Agency)

The draft process instance is initiated, the Agency user enters a subject for the Agency Change Request instance, selects whether it is for “Pre-Construction” or “Construction or Post-Construction” and clicks “Initiate.” If “Pre-Construction” is selected, go to step 20A.03. If “Construction or Post-Construction” is selected, go to step 20A.06.

Agency Change Request (AgCh)



NOTE 1: In many steps of the Agency Change Request process, users who have taken a workflow action are prompted with a screen that allows them to leave a note for subsequent users in the workflow. On this screen the middle button below the comment block completes the workflow action. (“Initiate”, in this example, but the specific word may be different.)



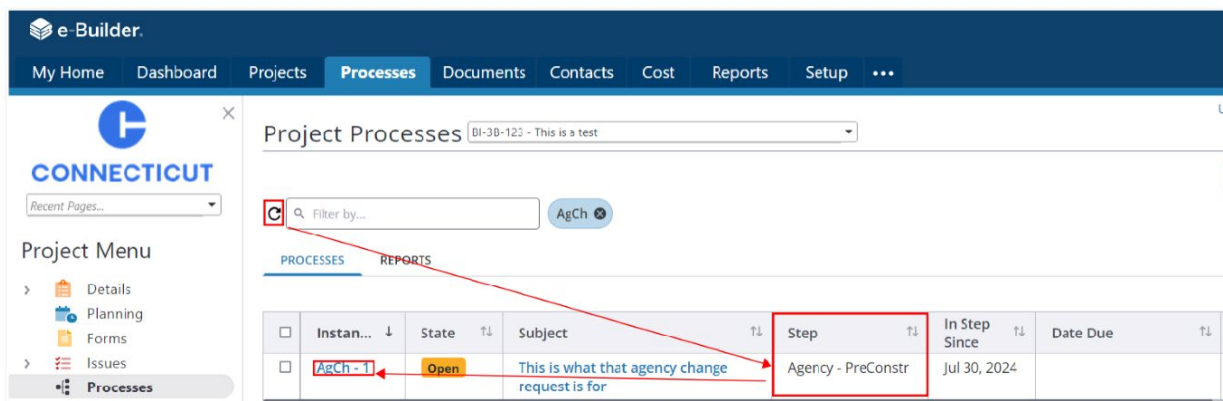
Agency Change Request (AgCh)

Add a comment.

Add Comment

Private

NOTE 2: As is the case of step 20A.02, in many steps, the user who took the workflow action may also be the user in the next step, as well. To access the workflow instance again, in the project’s Processes module, click the circle arrow button (sometimes repeatedly), until the Step column shows the next workflow step. Then click on the instance number to re-open the process instance.



20A.03 Filing a 3055 Agency Change Request during pre-construction (user role: Agency)

If “Pre-Construction” was selected in step 20A.02, re-open the process instance again, either by clicking “Click Here” on the notification email the user should have received or as instructed in Note 2 or step 20A.02.

That will bring the user to the 3055 Preconstruction Agency Change Request form. Complete the form and click “Take Action,” when done. A “Save” button is also available, allowing the user to save work and return to the process instance later (see Note 2 or step 20A.02) to complete this step.



The screenshot shows a web form with the following fields and controls:

- Pre-Construction Phase: -- Please select an option --
- Percent Complete: [text input]
- Specifications Section(s) / Number(s): [text input]
- Drawing (s) Number(s): [text input]
- Paragraph(s): [text input]
- Detail(s) Number(s): [text input]
- Requested Change: [Rich text editor with toolbar]
- Estimated Total Cost of Additional Fees: [text input]
- Funds Source: [text input]
- Potential Other Costs: yes
- Possible Amount of Other Costs: [text input]
- Authorized BOR Representative Name / Title: [text input]
- Authorized BOR Representative Date: [calendar icon]

At the bottom, there is a navigation bar with buttons: Submit, Take Action (highlighted with a red box), Check Spelling, Print, Copy, Delegate, Save, and Cancel.

20A.04 Project Manager 3055 Review (user role: DAS Project Manager)

The DAS Project Manager will receive a workflow email notification or can open the process instance from the project Processes in e-Builder. Then the Project Manager is able to review the Agency Change Request that was submitted. The process instance should show the DAS Project Status, the Construction Budget and the Total Project Cost, as this information appears on the project Details Page. In this Agency Change Request step, the Project Manager is able to make changes to this information, which will then update the project Details Page, if the Agency Change Request is approved.

To complete this workflow step, the Project Manager selects a workflow action and clicks “Take Action”. “Approve” sends the proposal to the ADPM in workflow and “Revise” sends it back to the Agency user for further action.

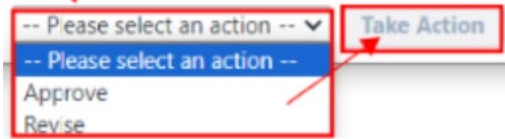
This screenshot shows the same form as above, but with the 'DAS Project Status' dropdown menu open. The menu options are: -- Please select an action --, Approve, and Revise. The 'Take Action' button is also highlighted with a red box. Red arrows indicate the flow from the dropdown menu to the 'Take Action' button.



20A.05 ADPM, DPM and Deputy Commissioner/Chief Architect review (user role: ADPM, DPM and Deputy Commissioner/Chief Architect)

Review steps for ADPMs, DPM and Deputy Commissioner/Chief Architect are similar. In the 3055 branch of the workflow, approvals are by ADPM and DPM. There is an additional Deputy Commissioner/Chief Architect approval for 7055s.

These reviewers select their name and approval date. To complete this workflow step, they select a workflow action and click “Take Action”. “Approve” sends the proposal to the next approver in workflow, or approves the item, in the case of the final approver. “Revise” sends the item back to the previous user in the workflow for further action.



20A.06 Agency Change Request – Construction Phase (user role: Agency)

If “Construction or Post-Construction” was selected in step 20A.02, re-open the process instance again, either by clicking “Click Here” on the notification email the user should have received or as instructed in Note 2 or step 20A.02.

That will bring the user to the 7055 Construction Phase Agency Change Request form. Complete the form and click “Take Action,” when done. A “Save” button is also available, allowing the user to save work and return to the process instance later (see Note 2 or step 20A.02) to complete this step.



20A.07 Project Manager 7055 Review (user role: DAS Project Manager)

The DAS Project Manager will receive a workflow email notification or can open the process instance from the project Processes in e-Builder. Then the Project Manager is able to review the Agency Change Request that was submitted. The process instance should show the DAS Project Status, the Construction Budget and the Total Project Cost, as this information appears on the project Details Page. In this Agency Change Request step, the Project Manager is able to make changes to this information, which will then update the project Details Page, if the Agency Change Request is approved.

The Project Manager should also indicate whether a Proposal Request is needed for this item. If the Project Manager indicates that a Proposal Request is needed, the workflow, upon approval, will prompt the project A/E users to go into the Agency Change Request process to initiate a “Proposed Change Order” process instance.

To complete this workflow step, the Project Manager selects a workflow action and clicks “Take Action”. “Approve” sends the proposal to the ADPM in workflow and “Revise” sends it back to the Agency user for further action.

Construction Phase Agency Change Request

Construction Phase:	
Percent Complete:	
DAS Project Status:	M-1300 Master Plan / Study
Specifications Section(s) / Number(s):	
Drawing (s) Number(s):	
Paragraph(s):	
Detail(s) Number(s):	
Requested Change_:	
Estimated Total Cost of Additional Fees:	
Funds Source:	
using contingency:	
Contingency Amount:	
Contingency Available Funds:	
Potential Other Costs:	
Possible Amount of Other Costs:	
Construction Budget:	40
Total Project Cost:	50
Authorized_Agency_Representative_Name:	O'Brien, Timothy
Authorized Agency Representative Date:	07.18.2024
Authorized BOR Representative Name / Title:	
Authorized BOR Representative Date:	
* Is a Proposal Request Needed?:	Yes
	No
Note: Please hold Ctrl to select multiple items from the list.	
* Project Manager Name:	Please select...
* Project Manager Date:	
-- Please select an action --	
Take Action	
Check Spelling	



Section 21: Proposal Requests

21.01 The “Proposed Change Order (PCO)” process

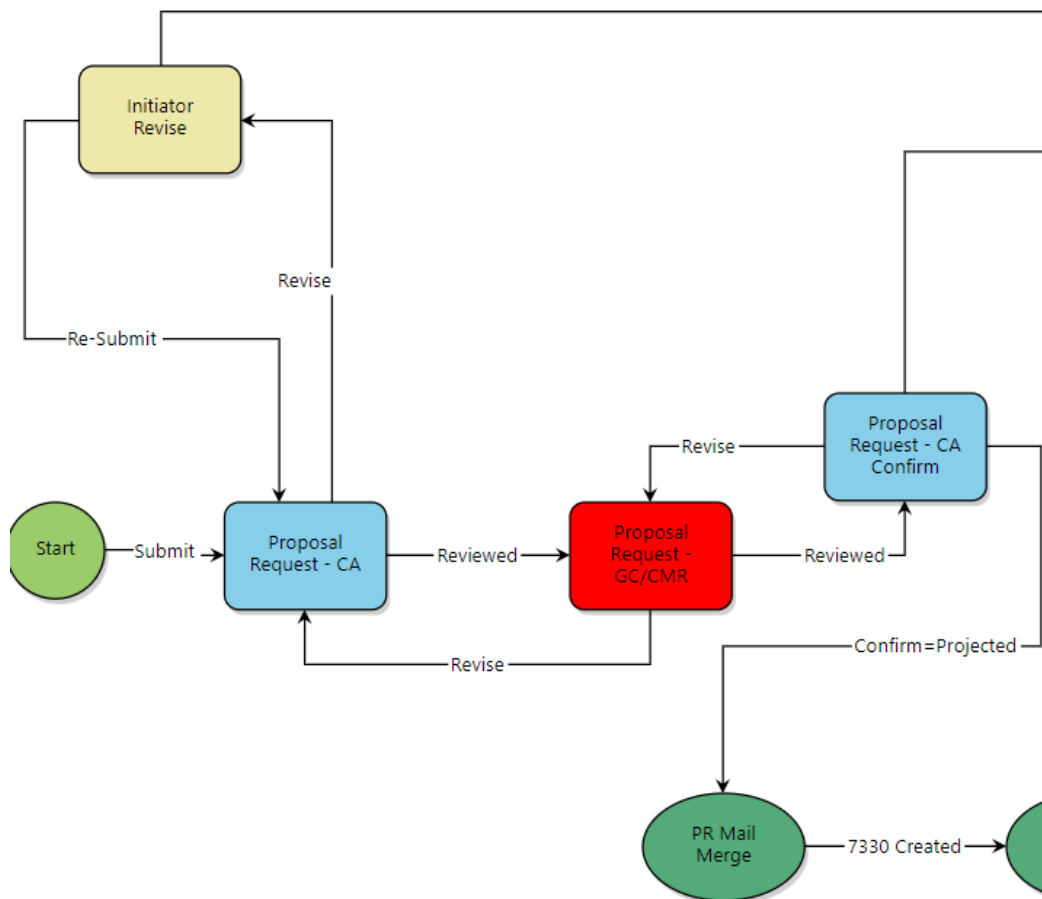
The “Proposed Change Order (PCO)” process is an e-Builder process type. This process contains three different forms:

- Proposal Request
- Change Order Proposal (COP)
- Construction Change Directive (CCD)

Different parts of the PCO process workflow contain these three different forms. PCO instances always start as Proposal Requests. Proposal Requests can then become Change Order Proposals, and CCDs may optionally be initiated from the COP part of the workflow by the CA.

The three parts of the workflow are:

Proposal Request





- C. The A/E user selects the commitment of the contractor for whom the proposed change would apply. Please be sure to select the correct commitment. If there is any question about this, the A/E should contact the CA or PM.
- D. The A/E should not enter anything under “Commitment Change Items”.
- E. The A/E user selects the correct “Reason Code” for the change. **Only select reason codes that have the parenthetical “(Changes)” after them. Do not select a change code that has “(Original)” after it.**

Start Process Print Check Spelling Submit Save Draft Cancel

Project: BI-3B-125 - This is a test
Process: Potential Change Order

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

Expand All | Collapse All

Proposal Request

Note:
While this form is a part of the Proposed Change Order/Change Order Proposal process in e-Builder, at this point in the process, you are submitting a Proposal Request. A PCO/COP may be created as a result of your Proposal Request, later in the workflow of this process.

* Description of the Work:

CA:

Commitment Change Details

* Commitment: Please select a commitment... D Company:

Status: Draft

* Date Of Change: 05.08.2024

* Reason Code: Select One... E

Commitment Change Items

Manage Funding Add All Existing Items Add Existing Item

D There are no Commitment Change Items

Print Check Spelling Submit Save Draft Cancel

The A/E then clicks “Submit” to submit the Proposal Request into the PCO process workflow. The item will receive a “PCO-___” change number designation in the Processes list for the project.

Proposal Requests sent back for revision.

If the CA sends the Proposal Request back to the A/E initiator for revision, the A/E user makes changes needed and selects “Re-Submit” to send it forward to the CA again. “Void” is also available as an action, which permanently voids and closes the PCO instance. In either case, clicking “Take Action” executes the selected action.

Take Action

-- Please select an action --

-- Please select an action --

Re-Submit

Void



21.02 Proposal Request First CA Step

There are two CA steps in the Proposal Request workflow. At this step, the CA reviews the Proposal Request to determine if it is acceptable to proceed to the contractor. The CA has two possible workflow actions:

- “Reviewed” sends the Proposal Request forward in the workflow to the GC/CMR users.
- “Revise” sends the Proposal Request back to the A/E user who initiated the Proposal Request for changes.

In either case, clicking “Take Action” executes the selected action.

The screenshot shows the e-Builder interface for a 'Potential Change Order (PCO) - 2'. At the top, there is a dark blue header with the 'e-Builder' logo. Below the header, the title 'Potential Change Order (PCO) - 2' is displayed in a light blue bar, with a 'Work' button to its right. A table-like structure contains project details: Project (BI-3B-123 - T...), Process Document (PCO - 2), Current Workflow Step (Proposal Request - CA), Subject (Change_*Sample Company), and Status (Submitted). A dropdown menu is open over the 'Take Action' button, showing options: '-- Please select an action --', 'Reviewed', and 'Revise'. To the right of the dropdown are buttons for 'Take Action' and 'Check Spelling'. Below the details table, there are tabs for 'Details', 'Comments (0)', 'Documents (0)', 'Attached Processes (1)', 'Attached Forms (0)', and 'Attached To (0)'. A section titled 'Proposal Request' is highlighted in blue, with a note below it: 'At this step, the CA is to create the new commitment lines that may be required for this potential change. In doing so, note'.

21.03 Proposal Request GC/CMR step

A GC/CMR user may then complete the contractor parts of the Proposal Request form.

If the Proposal Request is correct, the GC/CMR user can select “Reviewed” as an action step, which sends it forward in the workflow to the CA, or “Revise”, to send it backward in the workflow for further revisions. In either case, the GC/CMR can click “Take Action” to execute the action.

This screenshot is similar to the one above, showing the e-Builder interface for 'Potential Change Order (PCO) - 2'. It features the same header and title. The project details table is visible, and the 'Take Action' dropdown menu is open, showing 'Reviewed' and 'Revise' options. The 'Take Action' button is highlighted in blue. The 'Details' tab is selected, and the 'Proposal Request' section is highlighted in blue.



21.03 Proposal Request Second CA step

At the second of the two CA Proposal Request steps, the CA user checks all of the information. The CA user may then complete the Proposal Request, by selecting the workflow action, “Confirm”, which sends the PCO instance forward to the COP part of the workflow. The “Revise” option sends the item back to the GC/CMR users for revision, and a “Void” is also available as an action, which permanently voids and closes the PCO instance. Clicking “Take Action” executes the selected action.

Commitment Change Items

#	Commitment Item	Description	Budget Line Item	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount	Custom Field(s)
001	004	This is the example change item	03.200	9.50	0.00	5.00	5.00	
Total						0.00	5.00	5.00

Cost Summary | Commitment Details

-- Please select an action --
-- Please select an action --
Confirm
Revise
Void

Take Action Check Spelling Print Copy Delegate Save Cancel

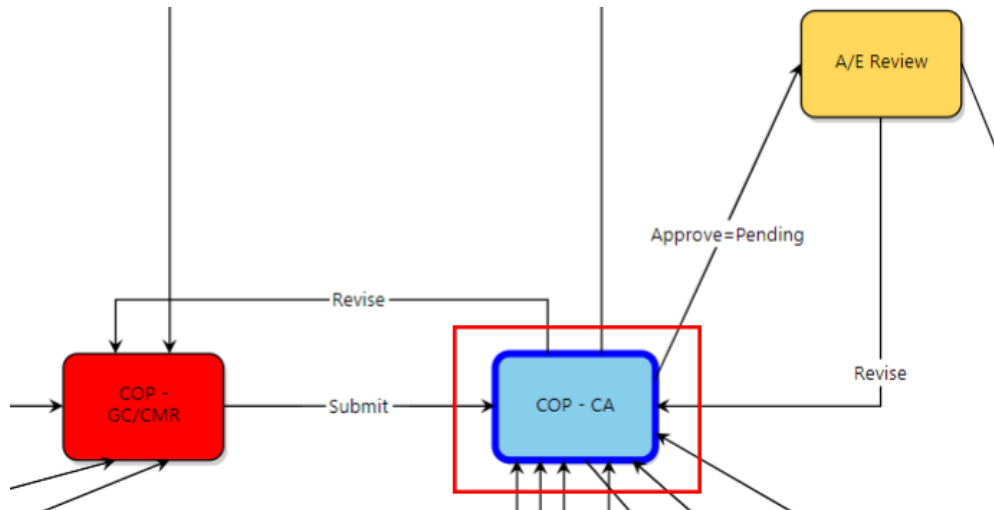
After the second CA step, the process generates a Proposal Request PDF and the process, itself, turns into a Change Order Proposal. See Section 23.



Section 22: Construction Change Directive (CCDs)

22.01 Construction Change Directive Initiation (CAs)

In e-Builder CCD consideration is a side workflow that is a branch of the Potential Change Order (PCO) process. Consideration of a CCD is initiated by the CA at the CA's COP workflow step (see step 23.03).

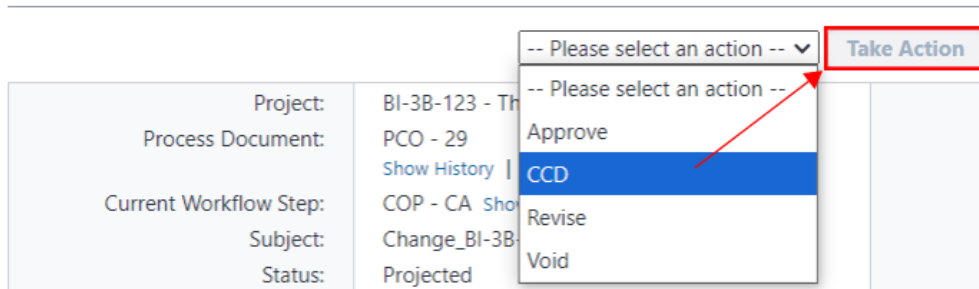


At this workflow step, the CA is required to upload a “CA review and acceptance” file. However, at this step, a placeholder document is sufficient to allow the workflow to progress. Prior to approving the COP, the CA must remove the placeholder and upload their actual review and acceptance letter.

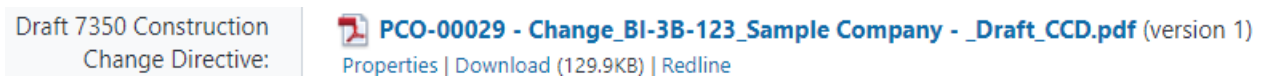


The CA begins CCD consideration by selecting the “CCD” workflow action and clicking “Take Action.”

Potential Change Order (PCO) - 29



This causes a draft CCD to be generated for consideration by subsequent users in the workflow and for the workflow to progress to the DAS Project Manager.

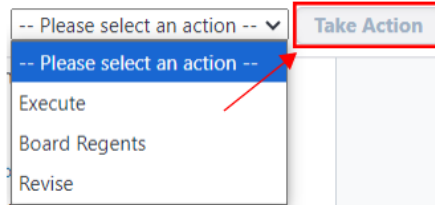




22.02 Project Manager CCD Review (PMs)

After the DAS Project Manager has reviewed the proposed CCD, the PM selects a workflow action and clicks “Take Action”. Workflow actions available are:

1. **Execute**, which approves the CCD and sends it forward in the workflow.
2. **Board Regents**, which sends it the CSCU Agency user(s) for review, if appropriate.
3. **Revise**, which sends it back to the CA for revision or as a rejection.



22.03 CSCU Review (Agency)

After a CSCU Agency user has reviewed a CCD proposal received in the workflow, the user clicks “Take Action” to complete the review.

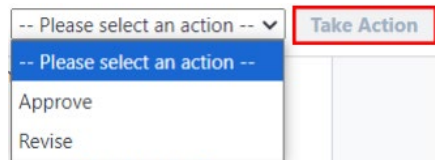


22.04 CCD Review by ADPMs, DPM and Chief Architect or Deputy Commissioner

Depending on the monetary amount or number of days to be changed by the CCD, the CCD may be sent to the ADPM, DPM and Chief Architect or Deputy Commission or Approval. Each has the option to:

1. **Approve**, which approves of the CCD.
2. **Revise**, which sends the CCD back to the CA for revision or as a rejection.

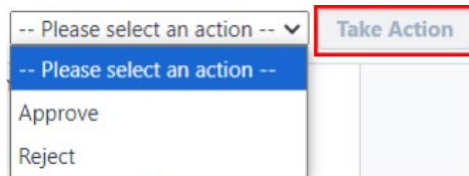
All proposed CCDs go to the ADPMs. In the case of CCDs below \$50,000 and with no schedule change, the ADPMs have the option to “Receive” instead of the option to “Approve”.



22.05 Contractor Review (GC/CMR)

After all other review and approval of the CCD, the GC/CMR user selects a workflow action and clicks “Take Action”. Workflow actions available are:

1. **Approve**, which approves the CCD and causes the workflow to generate a PDF of the approved CCD.
2. **Reject**, which rejects the CCD.





Both workflow actions cause the workflow to return to the GC/CMR COP step in the PCO process (see step 23.02). If the CCD was approved, the PDF of the 7350 Construction Change Directive will appear in the workflow instance.

7350 Construction Change
Directive:



PCO-00029 - Change_BI-3B-123_Sample Company - _CCD_Approved.pdf (version 1)

[Properties](#) | [Download \(130.1KB\)](#) | [Redline](#)



Section 23: COPs

23.02 GC/CMR COP step

After a PCO process instance has advanced from the Proposal Request part of the process, as described in [Section 21](#), the GC/CMR user(s) are the step actor(s).

This is also the workflow step to which the process returns after the approval (or rejection) of a CCD. See [Section 22](#).

The GC/CMR first upload a completed 7341 Change Order Workbook. The 7341 form is available on the [DAS Forms Library](#).

Change Order Proposal

Description of the Work: RFI No.: * 7341 Change Order Proposal Workbook:	This is the response. 19 <i>Drag and drop file here</i> or Browse Computer
--	---

The GC/CMR user then enters the Duration of the project, the number Schedule Change Days proposed by the COP and the New Date of Substantial Completion proposed by the COP. The GC/CMR user reviews the information under “Commitment Change Details and makes any proposed corrections.

Duration (Number of Days):	<input type="text"/>
ScheduleChangeDays:	<input type="text" value="0"/>
New Date:	<input type="text"/>

Commitment Change Details

Commitment:	SAM001-002 - GC test	Company:	*Sample Company
Status:	Projected		
Created:	07.10.2024 (Timothy O'Brien)		
* Date Of Change:	<input type="text" value="07.10.2024"/>	* Reason Code:	<input type="text" value="Scope Change (Changes)"/>

Add a proposed change SOV line using the “Add Additional Scope Commitment Item” part of the form. Start by clicking on “Please Select a Line Item,” and clicking “03.100” for CMR projects or “03.200” for DBB projects.

Budget Line Items

Account Code	Description
01.000	Total Acquisition (Land / Building)
02.000	Total Environmental Remediation & Haz-Mat Abatement By Owner
02.130	On-Call (ENV, HAZ)
03.100	Total CMR Construction Phase (WAOs, Cost of the Work, Allowances, CMR Fee, & Contingency)
03.200	Total DBB Construction Phase



Delete the automatically generated text in the "Commitment Item" field

Add Additional Scope Commitment Item

Item Number	001
Account Code	03.200
Commitment Item	DRAFT - 03.200

Replace the Commitment Item text with the next available Commitment Item number in the SOV.

	A	B
	Item #	Description of Work
	001	Total CMR Construction Phase
	002	Total CMR Construction Phase
	003	Total DBB Construction Phase
	004	This is the example change item
	005	Test test test test

Add Additional Scope Commitment Item

Item Number	001
Account Code	03.200
Commitment Item	006
Description	Total DBB Construction Phase
Retainage Percent	9.50
Current Budget	400,151.00
Change Amount	0.00
Custom Field(s)	

Enter the Description. This is the text that is to appear in the SOV.

Next, select that appropriate Funding Rule for this commitment.

Add Additional Scope Commitment Item

Item Number	001
Account Code	03.200
Commitment Item	006
Description	Example change item
Funding Rule	<div style="border: 1px solid gray; padding: 5px;"> <p>State Bond Funds ▼</p> <p>Agency Transfer of Funds</p> <p>ARPA Funds</p> <p>CHEFA Funds</p> <p>DAS Minor Capital Project Funds</p> <p>Energy Funds</p> <p>Federal Funds</p> <p>HazMat Funds</p> <p>Other Funds (Special Legislation, etc.)</p> <p>School Construction Grant Funds</p> <p style="background-color: #0070C0; color: white;">State Bond Funds</p> </div>
Retainage Percent	9.5
Current Budget	400
Change Amount	0.0
Custom Field(s)	

Construction Change D

CA CCD Approv



Next, check the Retainage Percent, enter the Change Amount and click Add.

Add Additional Scope Commitment Item

Item Number	001
Account Code	03.200
Commitment Item	006
Description	Example change item
Funding Rule	State Bond Funds
Retainage Percent	9.50
Current Budget	400,151.00
Change Amount	1.00
Custom Field(s)	

Add

The Change Item line just entered should appear, above, in the “Commitment Change Items” section. At this point, any field with a pencil icon can be edited.

Commitment Change Items

[Download Schedule of Values Template](#)
[Import Schedule of Values](#)
[Manage Funding](#)
[Add All Existing Items](#)
[Add Existing](#)

	#	Commitment Item	Description	Budget Line Item	Funding Rule	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount
Delete	001	006	Example change item	03.200	State Bond Fun...	9.50	0.00	1.00	1.00
Total							0.00	1.00	1.00

When complete, click the “Take Action” button, at the top or bottom of the form to move the COP to the next CA step. There is also a “Save” button that permits the user to save work, close the process instance, and then return to it later.

Potential Change Order (PCO) - 13

The GC/CMR user will then be prompted to enter an optional comment. Clicking “Submit” completes the workflow action and sends the COP to the CA.

Potential Change Order (PCO) - 13

Add a comment.

Add Comment

Private



23.03 CA COP step

When the CA user(s) receive the COP in the workflow, the CA user checks that the CA name is correct and then uploads the CA review and acceptance letter.

Change Order Proposal

Description of the Work:	This is the response.	
* CA:	O'Brien, Timothy	
RFI No.:	19	
7341 Change Order Proposal Workbook:	7341 Change Order Proposal Workbook (2).xlsx (version 2) Properties Download (97.7KB) Redline	
7330 Proposal Request:	PCO-00013 - Change BI-3B-123_Sample Company.pdf (version 1) Properties Download (123.2KB) Redline	
7350 Construction Change Directive:	<input type="text"/>	
Duration (Number of Days):	0	
ScheduleChangeDays:	0	
New Date:	<input type="text"/>	
* CA review and acceptance:	<input type="text" value="Drag and drop file here"/>	<input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>

After checking all of the other information on the form, the CA selects a workflow action and clicks “Take Action”. The workflow actions are:

- “Approve”, by which the CA user approves the COP and sends it forward in the workflow for further approvals.
- “CCD”, which sends the PCO workflow instance to the CCD workflow. See [Section 22](#).
- “Revise”, which sends the COP back to the GC/CMR for revisions.
- “Void”, which cancels the PCO instance and ends consideration of the COP, without approval. (A Void action cannot be undone.)

Potential Change Order (PCO) - 13

Project:	BI-3B-123 - Th	<input type="button" value="Take Action"/>
Process Document:	PCO - 13	
Current Workflow Step:	COP - CA Sho	<input type="button" value="-- Please select an action --"/>
Subject:	Change BI-3B-123_Sample Company	<input type="button" value="-- Please select an action --"/>

-
-
-
-

23.04 A/E COP step

When the A/E user(s) receive the COP in the workflow, the A/E user checks all of the information in the form, uploads their A/E review and acceptance letter, select a workflow action and clicks “Take Action”.

Workflow actions are:

- “Approve”, by which the A/E user approves the COP and sends it forward in the workflow for further approvals.



- “Revise”, which sends the COP back to the CA for revisions.

e-Builder

Potential Change Order (PCO) - 13

Project: BI-3B-123 - This is a test
 Process Document: PCO - 13
 Show History | Current Actors
 Current Workflow Step: A/E Review Show Workflow Diagram
 Subject: Change_BI-3B-123_*Sample Company
 Status: Pending

Details | Comments (0) | Documents (3) | Attached Processes (1) | Attached Forms (0) | Attached To (0)

Expand All | Collapse All

Change Order Proposal

Description of the Work: This is the response.
 CA: O'Brien, Timothy
 RFI No.: 19
 7341 Change Order Proposal Workbook: [7341 Change Order Proposal Workbook \(2\).xlsx \(version 2\)](#)
 Properties | Download (97.7KB) | Redline
 7330 Proposal Request: [PCO-00013 - Change_BI-3B-123_Sample Company.pdf \(version 1\)](#)
 Properties | Download (123.2KB) | Redline
 7350 Construction Change Directive:
 _7340_COP_doc:
 Duration (Number of Days):
 ScheduleChangeDays: 0
 New Date:
 CA review and acceptance: [supporting test 1b1a.pdf \(version 5\)](#)
 Properties | Download (33.6KB) | Redline

COP - Contractor/Consultant Approvals

GC-CMR COP Approval: O'Brien, Timothy
 CA COP Approval: O'Brien, Timothy
 * A/E review and acceptance: or

23.05 Change Order Proposal Project Manager Review

For COPs that propose an increased cost of \$100,000 or more and/or propose a schedule change of 60 or more days, there are three file fields for PMs to use in attaching the following documents to the COP:

- Project Status Report
- Project Contingency Report
- Funding Source

DAS Project Managers have three workflow actions available on COPs:

- **BOR - COP** sends the item to the Agency user on CSCU projects.
- **COP PM Approve** allows the PM to approve of the COP



- **Reject** sends the COP back to the CA

A screenshot of a web interface showing a dropdown menu. The menu is open, displaying the following options: "-- Please select an action --", "BOR - COP", "COP PM Approve", and "Reject". The first option is highlighted in blue. To the right of the dropdown is a button labeled "Take Action".

23.06 Change Order Proposal Agency Review

When agency users are sent a COP for review, they are able to complete their review and send the COP back to the DAS Project Manager.

A screenshot of a web interface showing a dropdown menu. The menu is open, displaying the option "Reviewed". To the right of the dropdown is a button labeled "Take Action".

23.07 COP Review by ADPMs, DPM and Chief Architect or Deputy Commissioner

Depending on the monetary amount or number of days to be changed by the COP, the COP may be sent to the ADPM, DPM and Chief Architect or Deputy Commission or Approval. Each has the option to:

1. **Approve**, which approves of the COP.
2. **Reject**, which sends the COP back to the Project Manager.

All COPs go to the ADPMs. In the case of COPs below \$50,000 and with no schedule change, the ADPMs have the option to "Receive" instead of the option to "Approve".

A screenshot of a web interface showing a dropdown menu. The menu is open, displaying the following options: "-- Please select an action --", "Approve", and "Reject". The first option is highlighted in blue. To the right of the dropdown is a button labeled "Take Action".



Section 24: Change Orders

24.01 Change Orders – Navigating to the Project Processes Module

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

Follow the instructions provided in [Section 1](#) to access the project and start the invoice process instance.

24.02 Initiating a 7360 Change Order process instance (CA)

In the Processes module click the “Processes” button. Select “7360 Change Order (7360)”, and then click “Start 7360”.

When the Process instance opens, enter a Subject starting with the change order number, then click on the “Potential Change” tab.



7360 Change Order (7360)

Start Process Print Check Spelling Submit Save Draft Cancel

Project: BI-3B-201 - This is a test
 Process: 7360 Change Order
 * Subject:

Details Documents (0) Attached Processes (0) Attached Forms (0) Potential Chang (0)



In the:

1. "Potential Change" tab,
2. Click "Attach Existing".
3. In the pop-up window that appears, check next to the "PCO" process instance(s) that are to be included in the Change Order.
4. Click "Attach Existing" in the same pop-up window.

The screenshot shows the e-Builder interface for a '7360 Change Order (7360)'. The 'Potential Chang (0)' tab is active. A table of PCO's is displayed with the following data:

Process Prefix - Counter	Subject	Status	Created By	Current Step	Commitment Number	Commitment Change Amount	Commitment Change Status
<input checked="" type="checkbox"/> PCO - 2	Change_BI-3B-201_*Sample Company	Pending	O'Brien, Timothy	PCO Hold and Bundle	002	0.00	Pending
<input type="checkbox"/> PCO - 1	Change_BI-3B-201_*Sample Company	Pending	O'Brien, Timothy	PCO Hold and Bundle	002	200,001.00	Pending

The COP, as a "Potential Change Order" instance, should then appear under the "Potential Change" tab.

Note: If no "Potential Change Order" instance is linked to the Change Order instance when the CA submits, the workflow will go into error and the instance will be returned to the CA for correction in the "Initiator Revise" step (see step 24.06).

The screenshot shows the e-Builder interface for a '7360 Change Order (7360)'. The 'Potential Chang (1)' tab is active. The table of PCO's is updated as follows:

Process Prefix - Counter	Subject	Status	Created By	Current Step	Commitment Number	Commitment Change Amount	Commitment Change Status
<input type="checkbox"/> PCO - 2	Change_BI-3B-201_*Sample Company	Pending	O'Brien, Timothy	PCO Hold and Bundle	002	0.00	Pending
						0.00	



Click on the “Details” tab.

Details Documents (0) Attached Processes

Under the Details tab:

1. Enter the Change Order Number.
2. Enter the change order’s description
3. Enter the reason for the change order.
4. Enter the RFI number or Agency Change Request number from which the change order arose. Enter the Proposal Request Number and COP Number the Proposal Request/COP numbers incorporated into this Change Order.
5. Upload/link the COP/PCO PDF document. It should be available for linking from the project’s Documents folders, by clicking on the “Browse e-Builder” button.
6. Any other documentation that needs to be added to the Change Order package can be uploaded in the “Other Documentation” field. Only the COP PDF, which includes its attachments, and the “Other Documentation” file will be appended to the 7360 Change Order form.
7. Identify whether the change order would be a cost change, schedule change or both.
8. If the change order is for a schedule change, complete these fields.

The screenshot shows a web form for entering change order details. The form is divided into several sections. The top section contains three large text input fields: 'Change Order Number:' (1), 'Description of Proposed Change:' (2), and 'Reason For Change:' (3). Below these are four smaller text input fields: 'RFI Number:', 'Agency Change Request Number:' (4), 'Proposal Request Number:', and 'COP Number:'. The next section has two file upload areas: 'COP/PCO PDF:' (5) and 'Other Documentation:' (6), each with a 'Drop and drop file here' placeholder and 'Browse e-Builder' and 'Browse Computer' buttons. The following section contains two radio button questions: '* Proposed Change in Contract Sum?:' (7) and '* Proposed Change in Contract Time?:'. The final section has three text input fields: 'Schedule Change Days:', 'Contract Days After Change:', and 'Substantial Completion Changed To:' (8), with a calendar icon next to the last field.

When this information is correct, click the “Submit” button to send it into the workflow. There is also a “Save Draft” button to allow the CA user to save the process instance and return to it later.

For the COP PDF, as noted in #5, above, this file should be present in the project’s Documents folder. Click “Browse e-Builder” next to this field (rather than dragging and dropping the file or clicking “Browse



Computer”). A pop-up should appear that will allow the user to navigate to the folder, shown below, where the files are located. See step [7A.02](#).

24.03 GC/CMR ready step (GC/CMR) [Deprecated]

This step is no longer in 7360 Change Order workflow.

24.04 Contractor and consultant review of Change Orders

The GC/CMR, CA and A/E, in their respective steps, will be able to review the information on the screen view of the draft change order, including the draft PDF change order, and the linked COP(s) in the “Potential Change Order” tab. The user is then able to select an action and click “Take Action” to cause the action to take effect. The available actions include:

3. **Approve.** This action is the agreement of the user with the Change Order and will cause the user’s name to appear in the signature block of the Change Order.
4. **Revise.** This action sends the draft Change Order back to the CA for further revisions. The action prompts the user for a comment.



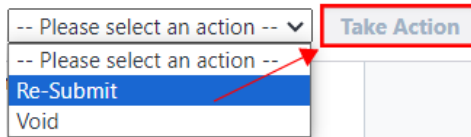
Change Order Form: **7360-00002 - 01 - This change Order - time - _DRAFT.pdf** (version 1)
 Properties | Download (156.5KB) | Redline

24.06 Initiator Revise (CA)

A number of users, at their Change Order steps, have the ability to send the draft change order back to the CA at the Initiator Revise step. The CA can also do this at their step.

At this step, the form is re-opened for editing by the CA.

After any needed changes, the CA may use the “Resubmit” workflow action to return the item back into workflow. This should send the change order back to the GC/CMR review step, referred to in Sec. [24.04](#), and should refresh the PCO instance bundling and draft Change Order PDF creation.



The CA also has the option to “Void” which cancels the Change Order process instance. If the intent in using this option is to use the PCO instances at were attached to this Change Order instance in a different Change Order instance, it is advised to first Remove the PCO instances from the Change Order instance being voided. To do this, go to the “Potential Change Order” tab, check the box(es) next to the PCO instance(s), click “Remove” and then use the “Void” action.

7360 Change Order (7360) - 2 Delete Instance Workflow Override All Fields View

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

Project: BI-3B-201 - TH
 Process Document: 7360 - 2
 Current Workflow Step: Initiator Revise Show Workflow Diagram
 * Subject: 01 - This change Order - time
 Status: Projected

Overall Due Date:
 Step Due Date:

Details | Comments (1) | Documents (2) | Attached Processes (0) | Attached Forms (0) | Attached To (0) | **Potential Chang (1)**

PCO's Remove Attach Existing Add New

<input type="checkbox"/>	Process Prefix - Counter	Subject	Status	Created By	Current Step	Commitment Number	Commitment Change Amount	Commitment Change Status
<input checked="" type="checkbox"/>	PCO - 2	Change_BI-3B-201_*Sample Company	Pending	O'Brien, Timothy	PCO Hold and Bundle	002	0.00	Pending
							0.00	

Remove Attach Existing Add New

As with other workflow steps, a “Save” button is also available to save work and return later.

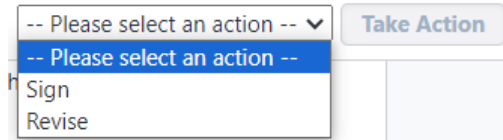
24.07 Change Order Project Manager Review

DAS Project Managers have three workflow actions available on COPs:

- 1. Sign** This action is the agreement of the user with the Change Order and will cause the user’s name to appear in the signature block of the Change Order.



- 2. **Revise.** This action sends the draft Change Order back to the CA for further revisions. The action prompts the user for a comment.



24.08 Change Order Review by ADPMs, DPM and Chief Architect or Deputy Commissioner

Depending on the amount or number of days to be changed by the COP, the COP may be sent to the ADPM, DPM and Chief Architect or Deputy Commission or Approval. Each has the options to:

- 1. **Sign** This action is the agreement of the user with the Change Order and will cause the user’s name to appear in the signature block of the Change Order.
- 2. **Revise.** This action sends the draft Change Order back to the CA for further revisions. The action prompts the user for a comment.

All COPs go to the ADPMs. In the case of Change Orders below \$50,000 and with no schedule change, the ADPMs have the option to “**Receive**” instead of the option to “Approve”.

24.09 Approval of Changes in Cost > Commitments

After the approval, by all required approvers, of the draft Change Order, the 7360 Change Order process causes all of the “PCO” instances linked to it to be approved, leaving the “PCO Hold and Bundle” step and going to their “Final” step. This also causes the changes in the contractor’s commitment to be approved. The changes will have already appeared as potential costs in the contractor’s SOV, and they will now appear as approved and invoiceable in the contractor’s next 7390A Application and Certification for Payment.



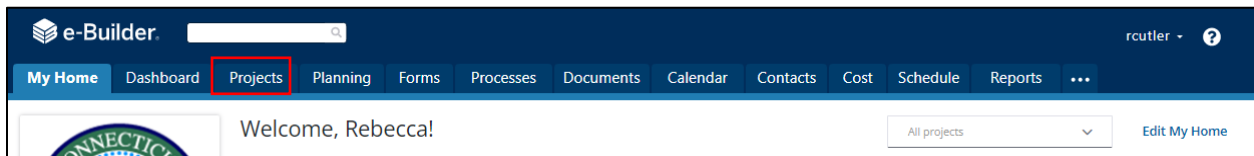
Section 25: Submittals (Revisions Coming Soon)

Note: Revisions Coming soon

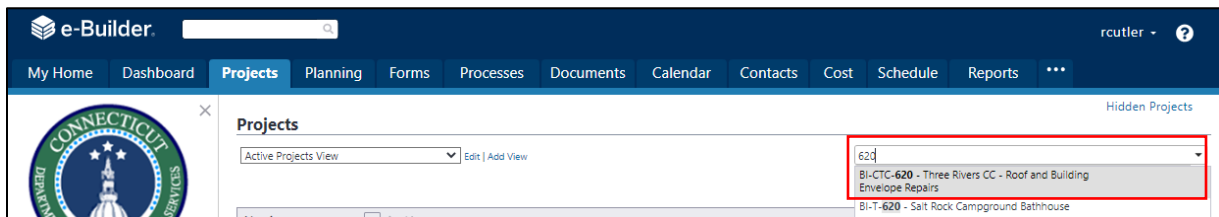
Note that the below relates to a procedure for submittals for which a replacement is planned and will not be relevant after this new process is released. Please see Project Support Services for additional information.

25.01 Accessing the Process

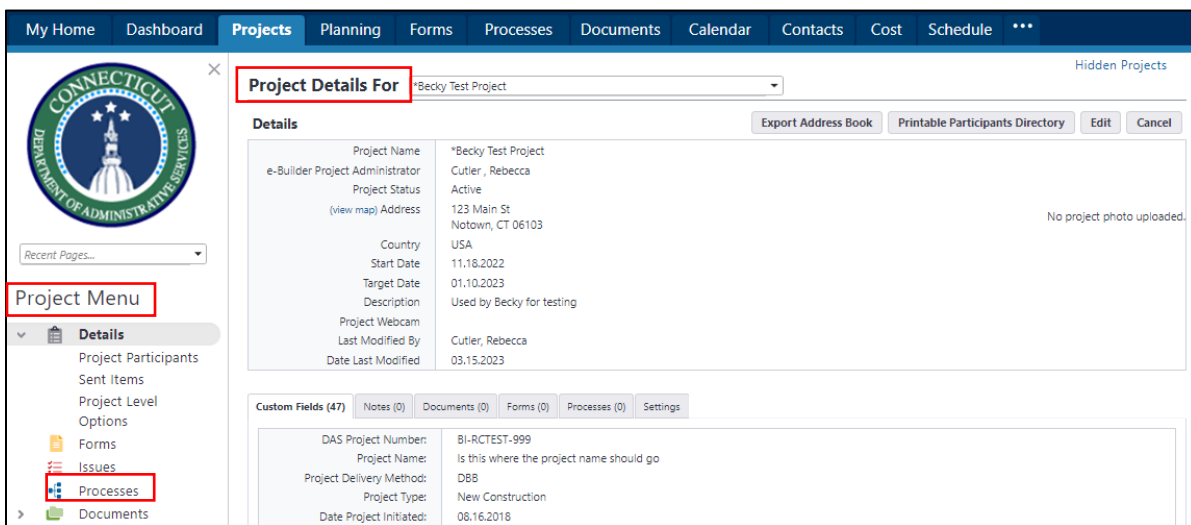
Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f> and click on the “Projects” tab to find the applicable project.



Search for your project by entering the project number. Click on your project to bring up the “Project Details” page.



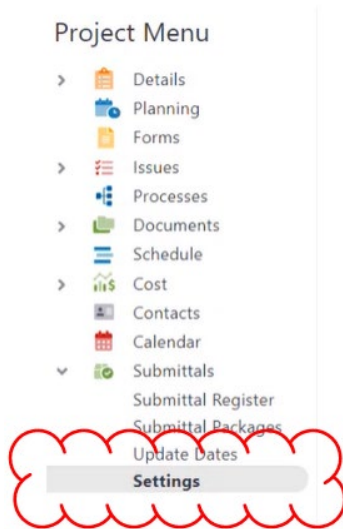
The “Project Details” page is your home page for your project. (Click “Edit” to edit info.). Under the “Project Menu” on the left, click on Processes to find project-specific processes.





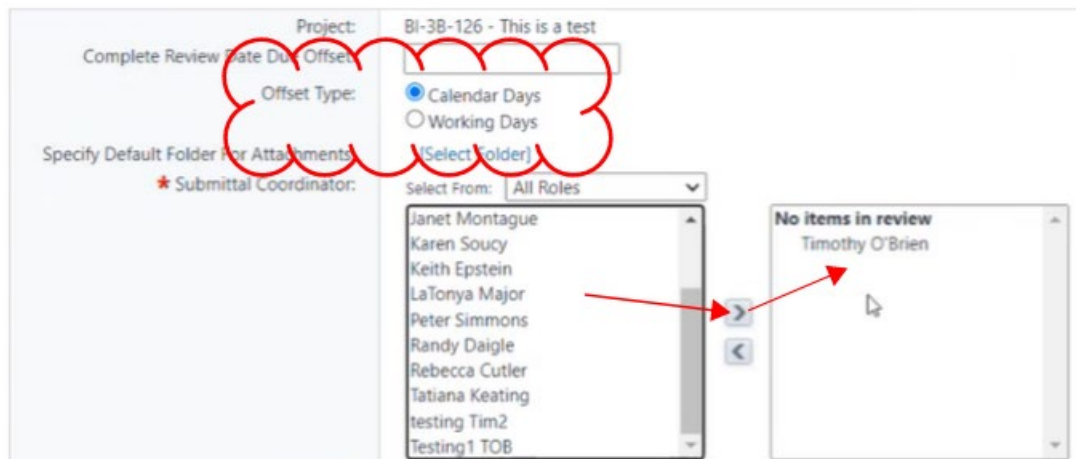
25.02 Submittals Settings (Project Manager or CA)

Before the Submittals begin on a project, click on the settings option for Submittals.



Ensure that the Offset Type setting is set to "Calendar Days." Then select one or more CA staff as Submittal Coordinators by clicking on their names and then clicking the right arrow button.

Submittal Settings for BI-3B-126 - This is a test





Settings should include, "Use CSI List," set to "Yes", "CSI List to Use," set to, "User Defined List," and "Submittal Item Spec Section Populated by CSI Code," checked. Set "General Contractors for Submissions" to "GCs" or "CMRs", ensure that the other settings are correct and click Save.

Submittal Package Options

Use CSI List: Yes No

CSI List to Use: User Defined List System

Submittal Item Spec Section Populated by CSI Code:

Auto Numbering Packages: Per Code Per Project

Honor Auto-Close Status:

Allow items to be added after review starts:

Allow revision items to be added to existing packages:

Subcontractor Options

General Contractors for Submission: CMRs GCs

GC Review Complete Due Date Offset:

Offset Type: Calendar Days Working Days

25.03 Filter Functionality

The processing of Submittals and Submittal Packages involves the changing of their status, as discussed below. Users can filter the Submittal Register and the list of Submittal Packages using the eBuilder filters.

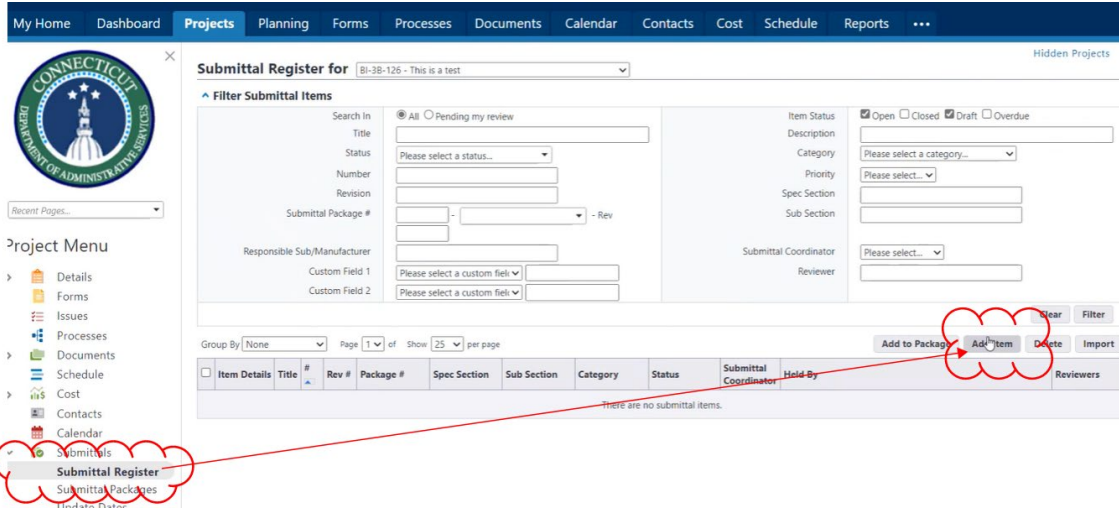
There are a number of filter criteria that are available. These include the ability to toggle different statuses. Select, for example, "Open" and "Draft" to filter only for submittals that have been submitted or have not been submitted yet; or select "Closed" to find items that have been marked as closed. When the filter selections are made, click the "Filter" button and the respective Submittals or Submittal Packages will appear in the grid, as shown below.

The screenshot shows the 'Submittal Register' interface. On the left is a 'Project Menu' with options like Details, Planning, Forms, Issues, Processes, Documents, Schedule, Cost, Contacts, Calendar, and Submittals. The main area is titled 'Submittal Register for BI-38-126 - This is a test'. It features a 'Filter Submittal Items' section with search criteria for Title, Status, Number, Revision, Submittal Package #, Responsible Sub/Manufacturer, and Custom Fields. On the right, there are checkboxes for 'Item Status' (Open, Closed, Draft, Overdue) and a 'Filter' button. Below the filters is a table with columns: Item Details, Title, Rev #, Package #, Spec Section, Sub Section, Category, Status, Submittal Coordinator, Held By, and Reviewers. The table currently displays 'There are no submittal items.' Red circles and arrows highlight the filter settings and the 'Filter' button.

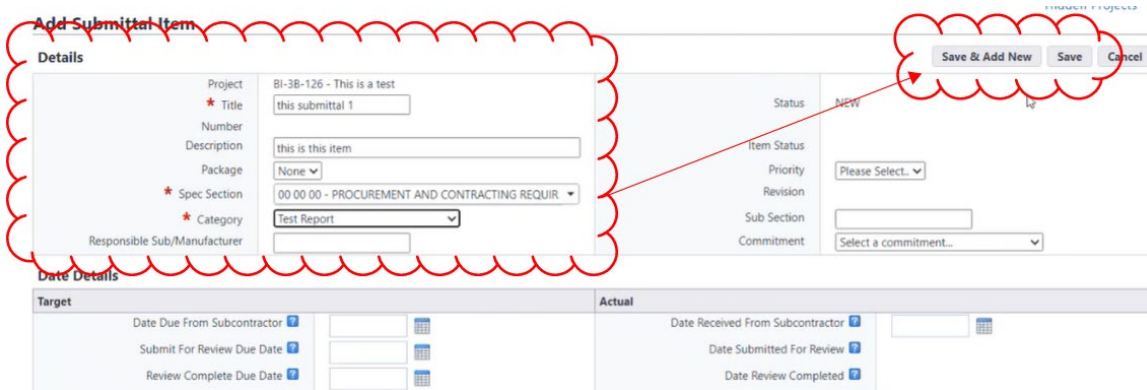


25.04 Creating Submittals in the Submittal Register (GC or CMR)

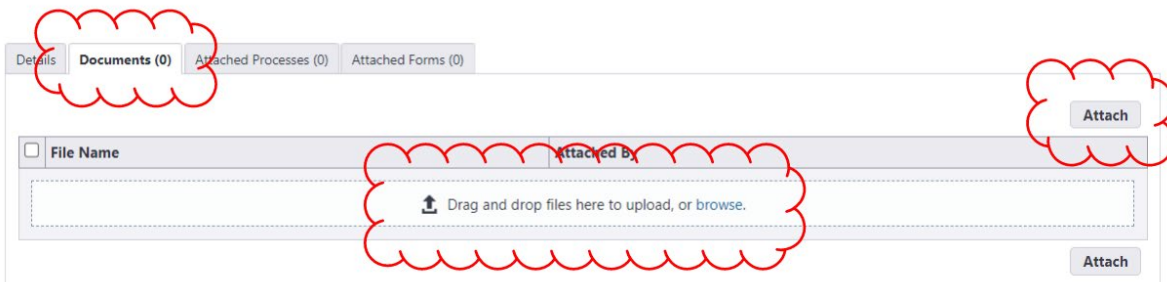
To create new submittals in the Submittal Register, click “Submittal Register” and then the “Add Item” button.



Then complete the required fields. Enter a Title and select the Specification Section and Category. Complete the other fields required by project procedures. Then click either “Save” to complete entering new submittals or “Save & Add New” to save and start another submittal.

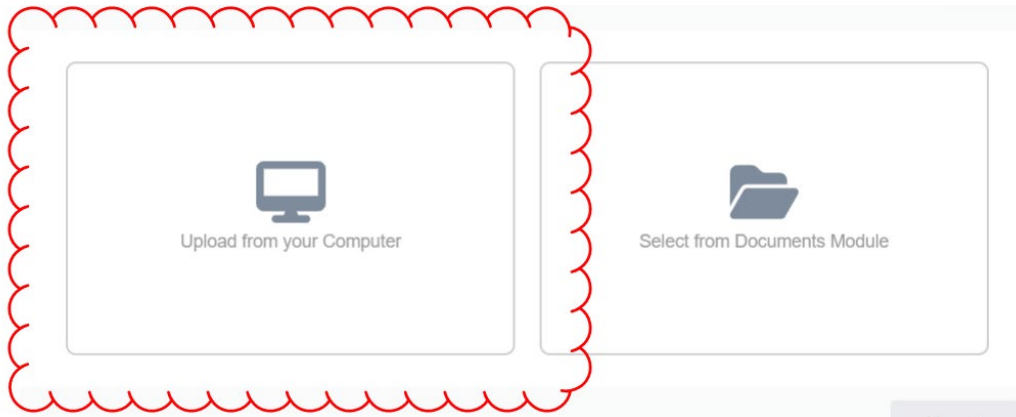


Once a submittal has been saved, the tools for uploading attachments become available. Documents can be uploaded by either using the “drag-and-drop” feature or by clicking the “Attach” button.

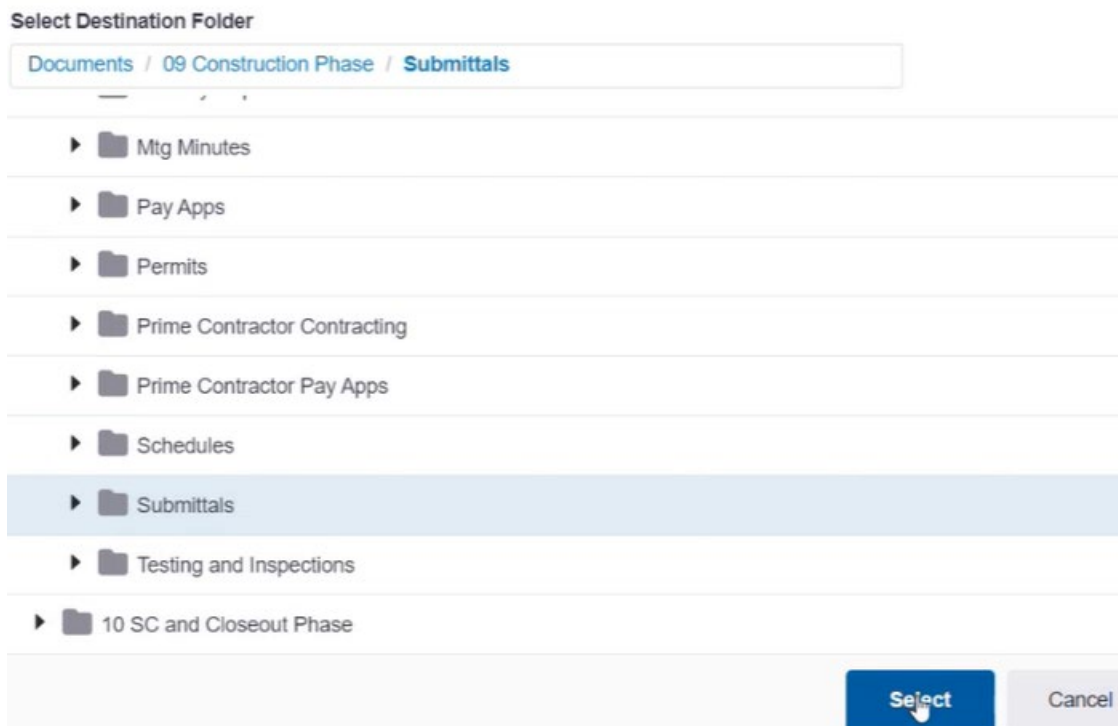




If the “Attach” button is clicked, a pop-up will appear. Click the “Upload from your Computer” button to locate a locally stored document.



When uploading, a dialogue box will appear for the user to select the applicable Submittals folder in the eBuilder Documents module. Click “Select” to use the pre-selected default folder (highlighted in blue font) as the destination folder in the eBuilder Documents module to upload the documents. If applicable, an alternate folder can be selected.





When the upload is completed, click “Done”.

The screenshot shows a file upload interface. On the left, a progress bar indicates '1 of 1 files uploaded successfully'. Below this, a list shows 'Submittals' with '100% of 33 KB uploaded' and a specific file 'supporting test 1.pdf' with the status 'Uploaded successfully'. On the right, a 'Properties for all files' panel is visible, with a 'Description' text area. At the bottom, there is a 'Drag & drop files here or browse' area and a blue 'Done' button.

The file is then attached to the submittal and can be viewed in a pop-up window by clicking on its filename.

The screenshot shows the 'e-Builder' application interface. The top navigation bar includes 'My Home', 'Dashboard', 'Projects', 'Planning', 'Forms', 'Processes', 'Documents', 'Calendar', 'Contacts', and 'Cost'. The 'Projects' tab is active. On the left, there is a 'Project Menu' with options like 'Details', 'Forms', 'Issues', 'Processes', 'Documents', 'Schedule', 'Cost', 'Contacts', 'Calendar', and 'Submittals'. The main content area is titled 'Submittal Item Details' and shows a table with project information. A table of documents is also visible, with one document 'supporting test 1.pdf' highlighted by a red dashed circle. The document table has columns for 'File Name', 'Attached By', and 'Date Attached'. The highlighted document is 'supporting test 1.pdf Version (2)' attached by 'TOB, Testing1' on '11.21.23 11:57AM'. Buttons for 'Download', 'Attach', and 'Remove' are present for each document entry.

File Name	Attached By	Date Attached
supporting test 1.pdf Version (2)	TOB, Testing1	11.21.23 11:57AM



Saving the submittals causes them to appear in brown italic as drafts in the Submittal Register. (Note that this list shows drafts because it is set to include Drafts in the Filter.)

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	this submittal 1	1	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	<i>NEW</i>			
	this submittal 2	2	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	<i>NEW</i>			

The buttons in the “Item Details” column of the Submittal Register allow users to interact with certain details of the submittals without reopening the records.

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	this submittal 1	1	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	<i>NEW</i>			

For example, the paperclip button allows users to bring up a dialogue box allowing users to view or add attachments to the submittal.

Attached Documents - this submittal 2 - #2

File Name	Attached By
supporting test 1.pdf (version 2) Properties Download (33.6KB) Redline Stamp Remove	TOB, Testing1

Buttons: Add, Remove, Download, Close



A submittal may be re-opened by clicking on its Title.

Group By: **None** Page 1 of 1 Show 25 per page

Send to Sub Add to Package Add Item Delete Import Submit to GC

<input type="checkbox"/>	Item Details	Title	#	Rev	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>		this submittal 1	1	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			
<input type="checkbox"/>		this submittal 2	2	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			

25.04A Alternate Option for Submittal Register Upload (GC or CMR).

Open a copy of the “7100 Submittal Register Template” from the DAS Forms Library.

In the template, edit the different columns. Rows may be deleted or duplicated, but the “Spec Section” field should not be changed.

The “Title” column should be changed to refer to each submittal item.

The “Category” field may be changed to one of the following options:

- As-Builts
- Bid Submittals
- Certification
- Mockup
- Operation / Maintenance Manual
- Product Data
- Sample
- Shop Drawing
- Test Report

Save the template with a unique file name.

In the project, navigate to Submittals > Submittal Register, then click “Import”

Submittal Register BI-3B-132 - This is a test

Filter Submittal Items

Search In: All Pending my review

Title:

Status:

Number:

Revision:

Submittal Package #:

Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Item Status: Open Closed Draft Overdue

Description:

Category:

Priority:

Spec Section:

Sub Section:

Submittal Coordinator:

Reviewer:

Group By: **None** Page 1 of 1 Show 100 per page

Add to Package Add Item Delete Import

<input type="checkbox"/>	Item Details	Title	#	Rev	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
There are no submittal items.												



In the next screen, click "Choose File". Navigate to where your import file is located and select it. Then click "Next".

Import Submittal Register - Select Import File Step 1 of 3

Choose your Import File

* Import File: No file chosen

Note: Please select a .xls or .xlsx file to import.

Then click "Next."

Import Submittal Register - Field Mappings Step 2 of 3

Submittal Item Built-In Fields

* Title:	<input type="text" value="Title"/>	* Category:	<input type="text" value="Category"/>
Description:	<input type="text" value="Description"/>	Priority:	<input type="text" value="Priority"/>
Package Number:	<input type="text"/>	Package Name:	<input type="text"/>
* Spec Section:	<input type="text" value="Spec Section"/>	Sub Section:	<input type="text" value="Sub Section"/>
Responsible Manufacturer/Sub-Contractor:	<input type="text" value="Responsible Manufacturer/Sub-Contractor"/>	Commitment:	<input type="text"/>
Date Due From Sub:	<input type="text" value="Date Due From Sub"/>	Date Received From Sub:	<input type="text" value="Date Received from Sub"/>
Date Due Submit For Review:	<input type="text" value="Date Due Submit For Review"/>	Date Due Review Complete:	<input type="text" value="Date Due Review Complete"/>
Date Due Return:	<input type="text" value="Date Due Return"/>	Date Returned:	<input type="text" value="Date Returned"/>
Date Due Delivery:	<input type="text" value="Date Due Delivery"/>	Date Delivered:	<input type="text" value="Date Delivered"/>

Submittal Item Custom Fields

There are no submittal item custom fields.

Then click "Import".

Import Submittal Register - Review Step 3 of 3

Import File Summary

File Name:	Submittal Register template test 1.xls	Rows In File:	4
Rows To Be Imported:	4	Rows With Exceptions:	0

Preview (Row 2) Exceptions (0)

Submittal Item Built-In Fields

Title:	This test Submittal	Category:	Shop Drawing
Description:		Priority:	Normal
Package Number:		Package Name:	
Spec Section:	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS	Sub Section:	
Responsible Sub/Manufacturer:		Commitment:	
Date Due From Sub:		Date Received From Sub:	
Date Due Submit For Review:		Date Due Review Complete:	
Date Due Return:		Date Returned:	
Date Due Delivery:		Date Delivered:	

Submittal Item Custom Fields

There are no submittal item custom fields.



Then click "Finish."

Import Submittal Register

Submittal register has been successfully imported.

Finish

The submittals should appear as drafts in the Submittal Register for the project.

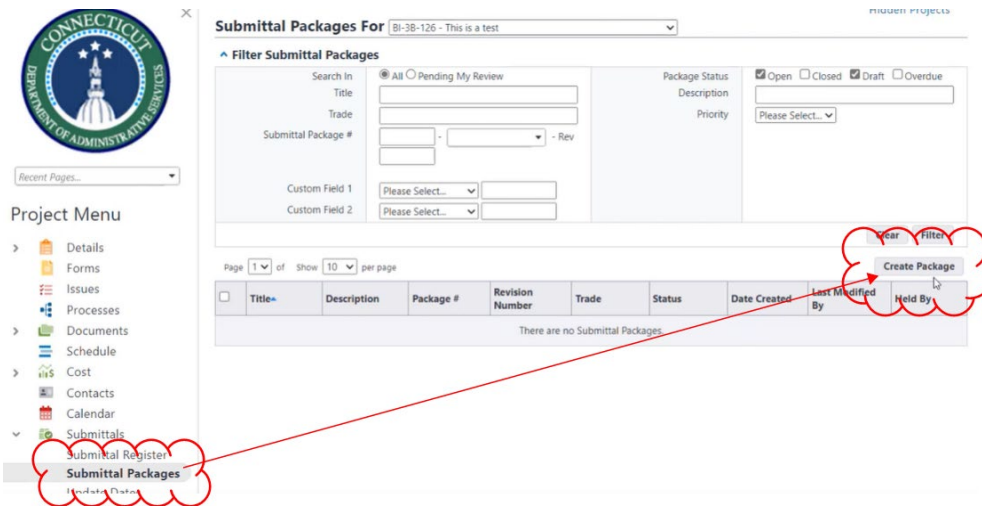
	Schedule
	Cost
	Contacts
	Calendar
	Submittals
	Submittal Register
	Submittal Packages
	Update Dates
	Settings

<input type="checkbox"/>	Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>		This test Submittal	1	0		00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Shop Drawing	NEW			
<input type="checkbox"/>		That submittal	2	0		22 50 00 - POOL AND FOUNTAIN PLUMBING SYSTEMS		Mock Up	NEW			

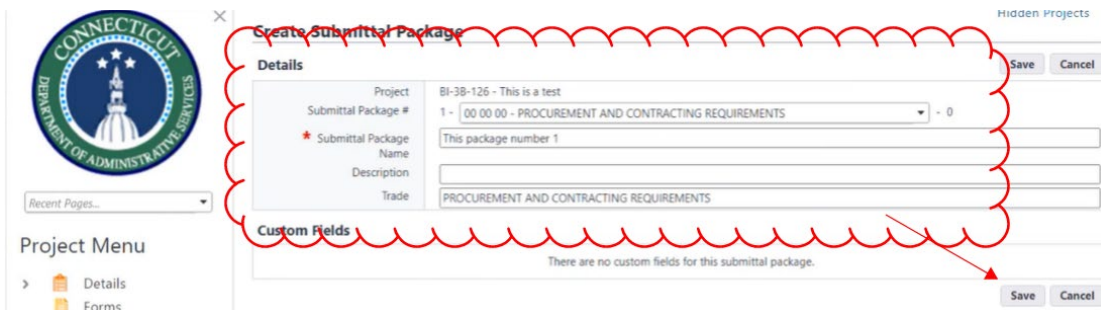
Continue with the instructions in 25.04 for uploading attachments into the draft submittal items.

25.05 Creating Submittal Packages (GC or CMR).

Submittal packages can be created by clicking on Submittal Packages and then clicking the "Create Package" button.



Select the specification section of the package in the "Submittal Package Number" field, enter its "Submittal Package Name" and any other relevant information and click the Save button.





25.06 Adding Submittals to Submittal Packages (GC or CMR).

Once a submittal package is saved, submittals can be added to it by clicking the “Add Items” button.

Submittal Package Details

Submittal Package Overview | History

Request Comment | Update Dates | Generate Transmittal | Delete | Edit

Project Title	BI-38-126 - This is a test	Status	Draft
Description	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB, Testing1
Date Created	11.21.2023 12:01 PM	Baseline Finish Range	
Items Held By			
Baseline Start Range			

Items (0) | Documents (0) | Comments (0) | Custom Fields (0) | Revisions (0)

Group By: None | Page 1 of 1 | Show 10 per page

Add Items | Remove Items

<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
--------------------------	--------------	-------	---	-------	--------------	-------------	----------	--------	-----------------------	---------	-----------

The user will be able to create new submittals but keeping the setting to “Add Existing Items” & clicking “Add” will allow submittals that are in the Submittal Register to be added to the submittal package.

Add Items | Remove

Add to Package

Add Existing Items
 Add New Items

Add | **Cancel**

In the pop-up box that appears, mark the check boxes next to the submittals to be linked to the submittal package and click the “Add to Package” button. (Note that the top of the pop-up box has filters that allow the user to find submittals more easily in the Submittal Register, if there are many.)

Add Items to This package number 1

Filter Submittal Items

Description: [] | Category: Please select a category...
 Title: [] | Spec Section: []
 Number: [] | Sub Section: []
 Responsible: [] | Priority: Please select...
 Sub/Manufacturer: [] | Custom Field 1: Please select a custom field...
 Custom Field 2: Please select a custom field...

Group By: None | Page 1 of 1 | Show 25 per page | 2 item(s) selected

Add to Package

<input type="checkbox"/>	Title	#	Spec Section	Sub Section	Category	Status
<input checked="" type="checkbox"/>	this submittal 1	1	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW
<input checked="" type="checkbox"/>	this submittal 2	2	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW

After clicking “Add to Package”, the user will be asked to confirm the addition, and then the submittals will be added to the submittal package.



Submittal Package Details

Submittal Package Overview History

Request Comment Update Dates Generate Transmittal Edit


Project Title	BI-3B-126 - This is a test	Status	Draft
Description	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB, Testing1
Date Created	11.21.2023 12:01 PM	Baseline Finish Range	
Items Held By			

Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Send for Review Submit to GC Send to Sub Add Items Remove Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			
<input type="checkbox"/>	this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			

Note that the submittals brought into the submittal package now appear in the Submittal Register as “Open”, rather than “Draft”, and show what submittal package they are in.



Recent Pages...

Project Menu

- Details
- Forms
- Issues
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- Schedule
- Cost
- Contacts
- Calendar
- Submittals
- Submittal Register**
- Submittal Packages
- Update Dates
- Settings

Submittal Register for BI-3B-126 - This is a test

Filter Submittal Items

Search In All Pending my review

Item Status Open Closed Draft Overdue

Clear Filter

Group By: None Page 1 of 1 Show 25 per page

Send to Sub Add to Package Add Item Delete Import Submit to GC

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	this submittal 1	1	0	1-00 00 00-0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			
<input type="checkbox"/>	this submittal 2	2	0	1-00 00 00-0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW			

25.07 Sending the submittal package to the CA (GC or CMR).



Click on "Submittal Packages" to see the list of submittal packages, then click the check box next the submittal package containing the submittal item(s) to be sent to the CA.

CONNECTICUT
DEPARTMENT OF ADMINISTRATIVE SERVICES

Recent Pages...

Project Menu

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- Documents
- Schedule
- Cost
- Contacts
- Calendar
- Submittals
 - Submittal Register
 - Submittal Packages**
 - Update Dates
 - Settings

Submittal Packages BI-3B-125 - This is a test

Filter Submittal Packages

Search In: All Pending My Review

Title:

Trade:

Submittal Package #: - - Rev

Custom Field 1: Please Select...

Custom Field 2: Please Select...

Page 1 of 1 Show 10 per page

<input type="checkbox"/>	Title	Description	Package #	Revision Number
<input type="checkbox"/>	awrgwrgert		4-werggwegwert-0	0
<input type="checkbox"/>	awrgwrgf		5-awrfwrfwrfger-0	0
<input type="checkbox"/>	This name		1-10 20 41-0	0
<input type="checkbox"/>	this new package 5		3-00 00 00-0	0
<input type="checkbox"/>	This other package		1-32 13 15-0	0
<input type="checkbox"/>	This other submittal package 1		2-00 00 00-1	1
<input type="checkbox"/>	This submittal package		1-03 10 00-1	1

Click the check box next the submittal item(s) to be sent to the CA and click "Send for Review".

Submittal Package Overview History

Request Comment

Project	BI-3B-125 - This is a test	Status
Title	This submittal package	
Description		
Submittal Package #	1-03 10 00-1	Trade
Date Created	03.14.2024 11:28 AM	Created By
Items Held By	Timothy O'Brien	
Baseline Start Range		Baseline Finish Range
Original Submittal Package #	1-03 10 00-0	

Items (1) Documents (0) Comments (0) Custom Fields (0) Revisions (1)

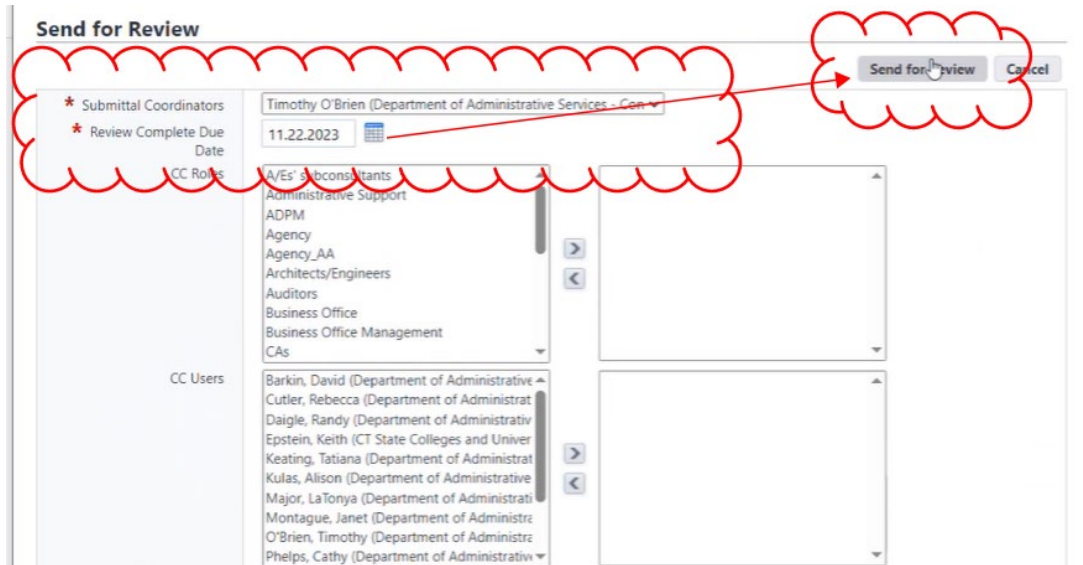
Group By: None Page 1 of 1 Show 100 per page 1 item(s) selected **Send for Review** Submit to C

<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held
<input checked="" type="checkbox"/>		This other submittal	4	1	03 10 00 - CONCRETE FORMING AND ACCESSORIES		Test Report	NEW		Tim

A pop-up box will open after clicking "Send for Review". The Submittal Coordinator(s) will be pre-populated, but the user will be required to enter a "Review Complete Due Date" and will have the option



to cc others, either by user role or by name. In addition, the user can add a message regarding the submittal package in the “Message” box. Upon completion, click the “Send for Review” button.

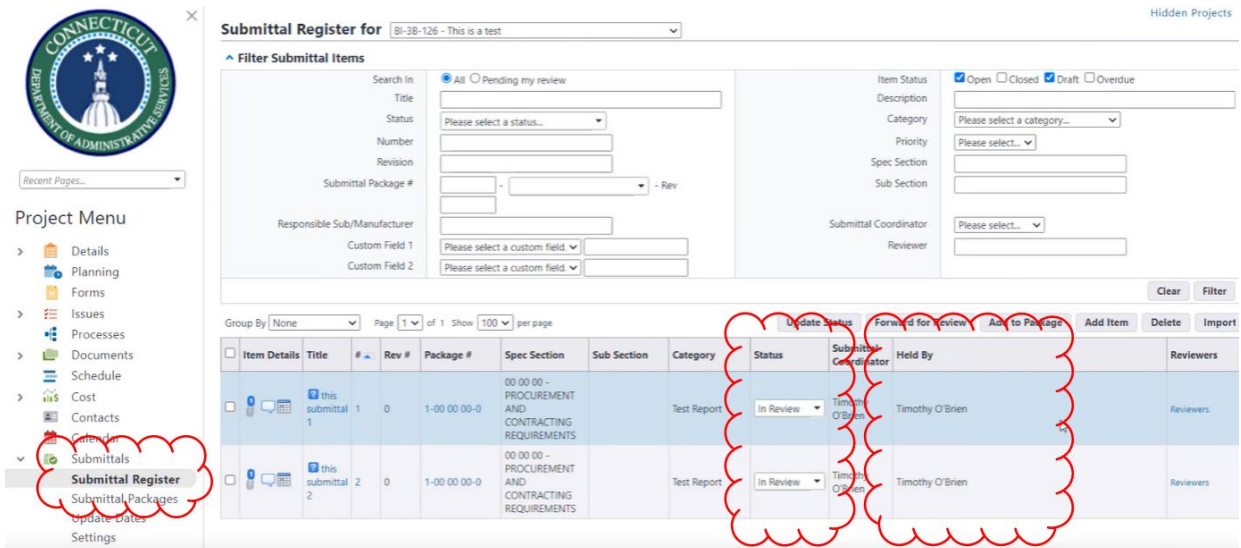


NOTE: DAS does not use the “Send to Sub” button in the e-Builder Submittals module. DO NOT CLICK THE “Sent to Sub” button.

Note to GC/CMR users: Do not click the “Forward for Review” button, if you can see them.

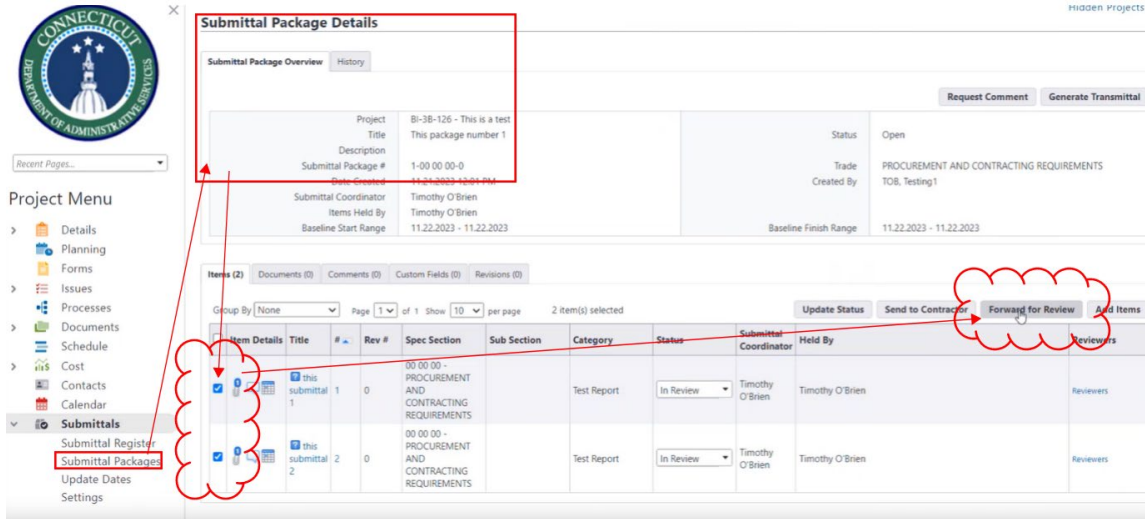
25.08 Sending a submittal package for A/E review (CA).

When the GC or CMR has sent a submittal package to the CA (as Submittal Coordinator), the CA will be able to see, in the Submittal Register, the “Held By” field populated with whoever holds the submittals at the moment and will also see the Status field values for each submittal as toggleable. It is the CA, as Submittal Coordinator, who marks the Status of submittals in the system, based on the A/E’s communication after their review. (See below.)



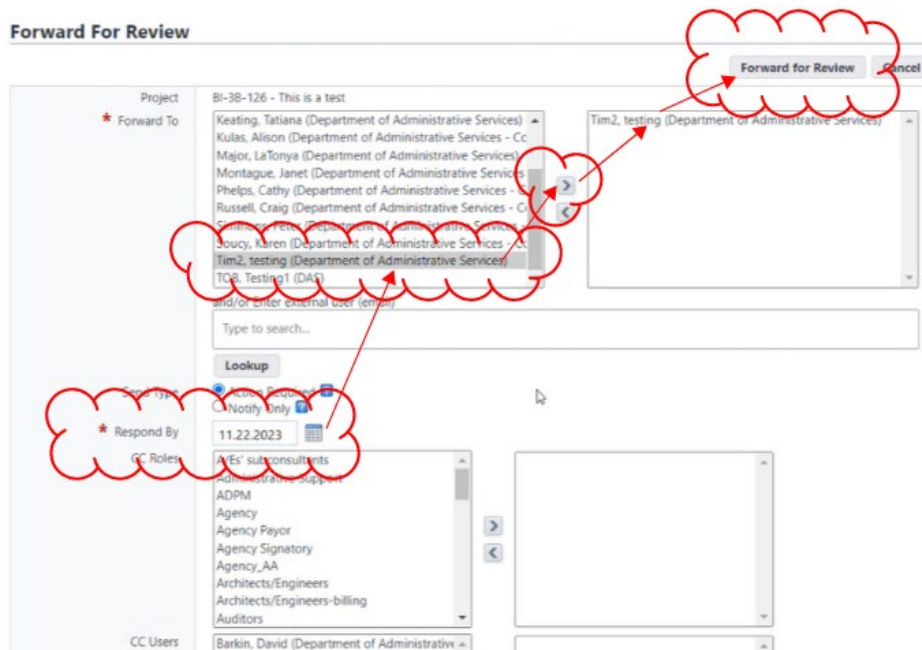


To send submittals to the A/E, the CA will locate the applicable submittal package from the Submittal Packages list and open the submittal package. In the submittal package, the CA marks the check box next to the submittals and clicks “Forward for Review.”



A pop-up box will appear that requires a “Respond By” date to be selected or entered. The “Forward To” box is where the CA enters the A/E users to whom the submittals will be sent for review. Note that only users expected to respond should be selected. Every user who is selected as a user will be expected to complete a review before e-Builder will consider the review to be complete. If reviewers are selected who do not complete a review, the CA will not be shown as the “Held By” user, even after one or some reviewers have completed their review.

To select users, locate and click on their name(s) and click the right arrow button. There are optional boxes to cc others, either by user role or by name and a message box to add a text message. (Note that there is also a “Notify Only” optional choice, as opposed to the “Action Required” option.) To complete the send action, click the “Forward for Review” button.





The links in the Reviewers column show who the reviewers are.

Submittal Package Details

Submittal Package Overview History

Request Comment Generate Transmittal

Project Title	Bi-3B-126 - This is a test	Status	Open
Description	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB, Testing1
Date Created	11.21.2023 12:01 PM		
Submittal Coordinator	Timothy O'Brien		
Items Held By	testing Tim2		
Baseline Start Range	11.22.2023 - 11.22.2023	Baseline Finish Range	11.22.2023 - 11.22.2023

Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 10 per page

Update Status Send to Contractor Forward for Review Add Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Review	Timothy O'Brien	testing Tim2	Reviewers
<input type="checkbox"/>	this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Review	Timothy O'Brien	testing Tim2	Reviewers

Reviewers for this submittal 1

Reviewer	Requested By	Date Requested	Date Due	Review Completed Date
testing Tim2	Timothy O'Brien	11.21.2023	11.22.2023	

The "Held By" column, shown here in Submittal Packages, identifies who has the item, ball-in-court.

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

Submittal Packages For [Bi-3B-126 - This is a test] Hidden Projects

Filter Submittal Packages

Search in: All Pending My Review

Package Status: Open Closed Draft Overdue

Table:

Title	Description	Package #	Revision Number	Trade	Status	Date Created	Last Modified By	Held By
<input type="checkbox"/>	This package number 1	1-00 00 00-0	0	PROCUREMENT AND CONTRACTING REQUIREMENTS	Open	11.21.2023	Testing1 TOB	testing Tim2

25.09 Submittal Review by A/E Users (A/E)

When the CA has sent a submittal package to the A/E, the A/E will be able to see, in Submittal Packages, the "Held By" field populated with whoever holds the submittals at the moment. The A/E user clicks on the Package # to go into the package.

My Home Dashboard **Projects** Planning Forms Processes Documents Calendar Contacts Cost Schedule Reports Time Tracking ...

Submittal Packages For [Bi-3B-126 - This is a test] Hidden Projects

Filter Submittal Packages

Search in: All Pending My Review

Package Status: Open Closed Draft Overdue

Table:

Title	Description	Package #	Revision Number	Trade	Status	Date Created	Last Modified By	Held By
<input type="checkbox"/>	This package number 1	1-00 00 00-0	0	PROCUREMENT AND CONTRACTING REQUIREMENTS	Open	11.21.2023	Testing1 TOB	testing Tim2



In the Submittal Package, individual submittals can be opened by clicking on the Title or # of the submittal.

Submittal Package Details

Submittal Package Overview History

Request Comment Generate Transmittal

Project BI-38-126 - This is a test
 Title This package number 1
 Description 1-00 00 00-0
 Submittal Package # 11.21.2023 12:01 PM
 Date Created Timothy O'Brien
 Submittal Coordinator testing Tim2
 Items Held By 11.22.2023 - 11.22.2023
 Baseline Start Range Baseline Finish Range 11.22.2023 - 11.22.2023

Status Open
 Trade PROCUREMENT AND CONTRACTING REQUIREMENTS
 Created By TOB, Testing1

Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 10 per page Forward for Review Review Complete Add Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	IR	Timothy O'Brien	testing Tim2	Reviewers

In the submittal records, under the “Documents” tab, (A) click on the file name to open a viewer to see the file and (B) click the “Download” link below the file name to download the file. Additional files can be attached by (C) clicking the “Attach” button and (D) click the Comments tab to add or request a comment. In addition to noting the A/E marking/stamp when sending the package back to the CA, the A/E should also note the marking in the comments of each submittal.

While the “Forward for Review” option does allow the A/E user to add subconsultants as reviewers, The A/E user should note that only users expected to respond should be selected. Every user who is selected as a user will be expected to complete a review before e-Builder will consider the review to be complete. If reviewers are selected who do not complete a review, the CA will not be shown as the “Held By” user, even after one or some reviewers have completed their review.

Submittal Item Details

Note: The item is pending review or has been approved by the coordinator or has been closed. It cannot be edited at this time.

Submittal Item Overview Date Details History

Forward for Review Review Complete

Project BI-38-126 - This is a test
 Title this submittal 1
 Number 1
 Description this is this item
 Package # 1-00 00 00-0
 Spec Section 00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS
 Category Test Report
 Responsible Sub/Manufacturer Item Held By testing Tim2

Status IR - In Review
 Item Status Open
 Submittal Coordinator Timothy O'Brien
 Priority
 Revision 0
 Sub Section Commitment

Documents (1) Comments (0) Custom Fields (0) Revisions (0)

File Name: Supporting Test 2.pdf (version 2)
 Attached By: TOB, Testing1
 Date Attached: 11.21.23 12:00PM

Status: Submitted

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

Request Comment Comment

Private Comment Timothy O'Brien, Department of Administrative Services - Construction Services 08.03.2023 10:54 AM



The A/E user may, optionally, use the “Request Comment” option to request review by subconsultants. After clicking “Request Comment”, a pop-up will appear that allows the A/E to select their subconsultant users in the “To” field by selecting their names and pressing the “>” to move them to the right panel. The “Message” field allows the A/E user to provide instructions to the subconsultants. Upon completion, click the “Request Comment” button to send the notification to the subconsultant.

Request Comment

Request Comment Cancel

* To Select from Users on Project

All Users

Cardinale, Jaime (Department of Administrative Services)

Grab, Alexander (State of Connecticut)

Masson, Brianna (Department of Administrative Services)

O'Brien, Timothy (Department of Administrative Services)

Tim2, testing (Department of Administrative Services)

TOB, Testing1 (DAS)

Warren, Allen (DCS)

Tim2, testing (Department of Administrative Services)

TOB, Testing1 (DAS)

Enter External Users Email or Lookup

Type to search...

Allow external users to attach files

* Subject ACTION REQ'D - *Testing6723a Project Name - Timothy O'Brien

Respond By

Message

"Segoe UI", A... 12px B I U abc

Request Comment Cancel

Note - Participants accessing the process externally will see all comments and attachments.

When the subconsultant responds, their comments will be in the Comments tab of the submittal instance.

To complete the review and return the submittals to the CA, the A/E goes into the Submittal Package, (A) selects the applicable submittals and then (B) clicks “Review Complete”.

Submittal Package Details

Submittal Package Overview History

Request Comment Generate Transmittal

Project Title	BI-3B-126 - This is a test	Status	Open
Description	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB, Testing1
Date Created	11.21.2023 12:01 PM	Baseline Finish Range	11.22.2023 - 11.22.2023
Submittal Coordinator	Timothy O'Brien		
Items Held By	testing Tim2		
Baseline Start Range	11.22.2023 - 11.22.2023		

Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By None Page 1 of 1 Show 10 per page 2 item(s) selected Forward for Review Review Complete Add Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	IR	Timothy O'Brien	testing Tim2	Reviewers
<input checked="" type="checkbox"/>	this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	IR	Timothy O'Brien	testing Tim2	Reviewers

A pop-up screen will appear to allow confirmation.



Very important: (A) The A/E needs to note, for each of the submittals being sent back to the CA, what their marking is. The CA controls the toggle on the Status column for submittals, so this message is important to inform the CA what the A/E stamp says. Then, (B) click “Review Complete”.

Review Complete Submittal Items

Review Complete Cancel

Comment:

A

Selected submittal items

Title	#	Package	Status	Reply To
this submittal 1	1	1-00 00 00-0	IR	Timothy O'Brien
this submittal 2	2	1-00 00 00-0	IR	Timothy O'Brien

B

Review Complete Cancel

25.10 Return of submittals to GC/CMR (CA)

When the A/E has returned a submittal package, the CA will click on the “Comments” tab to review the comments left by the A/E. Click the “+” sign to the left of the submittal name, as shown below, to open the comments. The comments will also appear in the submittal items, themselves.

Submittal Package Overview History

Request Comment Generate Transmittal Re-Open

Project Title	BI-3B-126 - This is a test	Status	Closed
Description	This package number 1	Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB, Testing1
Date Created	11.21.2023 12:01 PM	Baseline Finish Range	11.22.2023 - 11.22.2023
Items Held By			
Baseline Start Range	11.22.2023 - 11.22.2023		

Items (2) Documents (0) **Comments (0)** Custom Fields (0) Revisions (1)

Expand All | Collapse All

Comments for Submittal Package Add Comment

There are no comments for this submittal package.

Comments for Submittal Item #1: this submittal 1

This need to the changed to... Timothy O'Brien, Department of Administrative Services - Construction Services, 11.21.2023 12:20 PM

1 is revise and resubmit and 2 is approved. testing Tim2, Department of Administrative Services, 11.21.2023 12:17 PM

This is revise and resubmit. testing Tim2, Department of Administrative Services, 11.21.2023 12:12 PM



While in the submittal package, click on the “Items” tab, then click the arrow in the Status field in the row of a submittal, and then select the marking indicated by the A/E.

Submittal Package Overview

Project Title	BI-3B-126 - This is a test This package number 1	Status	Open
Description		Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB_Testing1
Date Created	11.21.2023 12:01 PM	Baseline Finish Range	11.22.2023 - 11.22.2023
Submittal Coordinator	Timothy O'Brien		
Items Held By	Timothy O'Brien		
Baseline Start Range	11.22.2023 - 11.22.2023		

Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Review	Timothy O'Brien	Timothy O'Brien	Reviewers
<input checked="" type="checkbox"/>	this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	Approved	Timothy O'Brien	Timothy O'Brien	Reviewers

This will prompt the CA to enter a comment about the action.

Update Status - this submittal 1 (#1)

New Status: Revise & Resubmit

Add Comment

Comment:

Private:

In the submittal package, after (A) updating the statuses of the submittal items, the CA then (B) selects all of the submittal items and (C) clicks “Send to Contractor.”

Submittal Package Details

Submittal Package Overview

Project Title	BI-3B-126 - This is a test This package number 1	Status	Open
Description		Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Submittal Package #	1-00 00 00-0	Created By	TOB_Testing1
Date Created	11.21.2023 12:01 PM	Baseline Finish Range	11.22.2023 - 11.22.2023
Submittal Coordinator	Timothy O'Brien		
Items Held By	Timothy O'Brien		
Baseline Start Range	11.22.2023 - 11.22.2023		

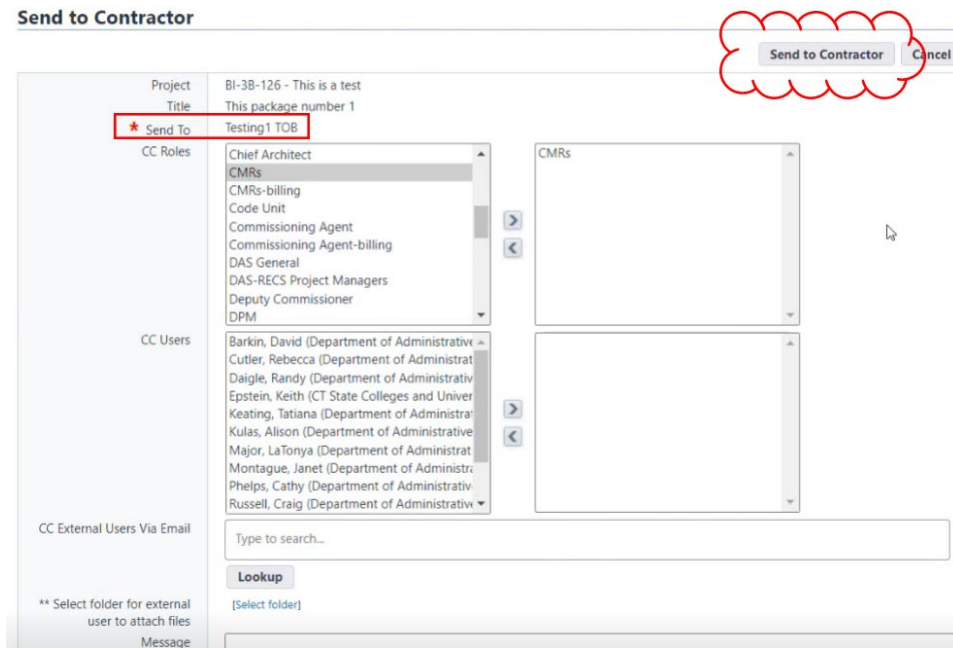
Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 10 per page 2 item(s) selected

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	Revise & Res.	Timothy O'Brien	Timothy O'Brien	Reviewers
<input checked="" type="checkbox"/>	this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	Approved	Timothy O'Brien	Timothy O'Brien	Reviewers

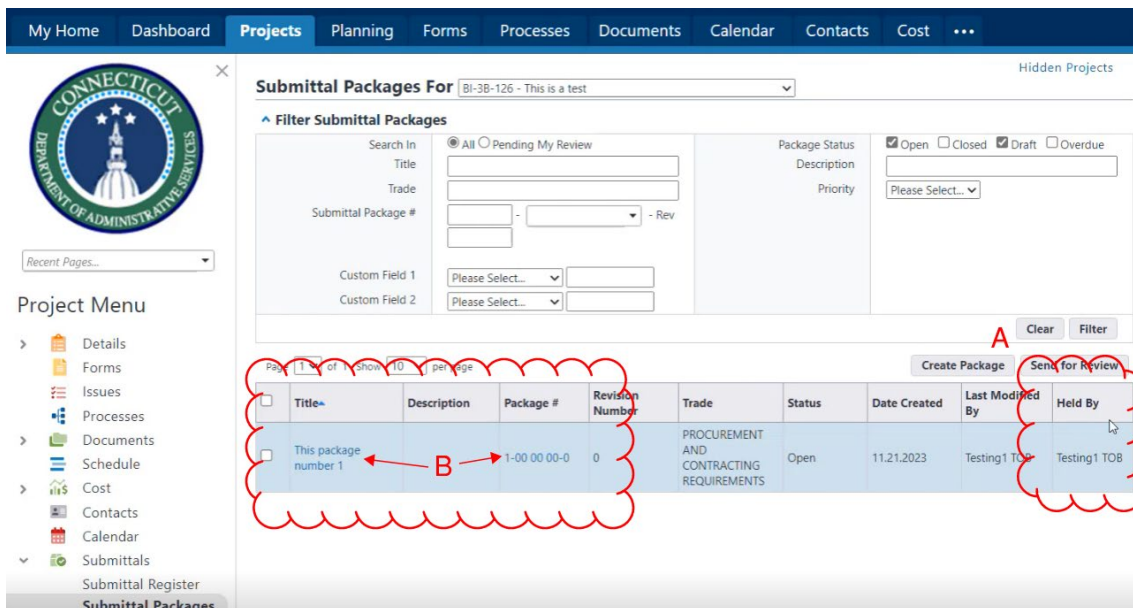


A pop-up will appear. The CA can provide a comment in the message box if applicable, then click “Send to Contractor.”



25.11 Closing Returned Submittals (GC or CMR)

The GC or CMR will receive notification that the submittal package has been returned and can find the submittal package in the Submittal Packages list. Noting that (A) the submittal package is now held by them, as users, (B) the GC or CMR click on the submittal package title or package number.



After opening the package, click on a submittal’s title or # to open the submittal, or open the submittal from the Submittal Register.



Items (1) Documents (0) Comments (0) Custom Fields (0) Revisions (1)

Group By: None Page 1 of 1 Show 10 per page

Update Status Send to Contractor Forward for Review Add Items

<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>		this submittal 1	1	1	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	In Rev	Timothy O'Brien	Timothy O'Brien	Reviewers

If the submittal is approved, it can be marked by the GC or CMR as closed by clicking the “Close” button. (Note that the “Close” button then changes to a “Re-Open” button, allowing for the submittal to be re-opened.)

Submittal Item Details

Note
The item is pending review or has been approved by the coordinator or has been closed. It cannot be edited at this time.

Submittal Item Overview Date Details History

Send to Sub **Close** Submit to GC

Project	BI-3B-126 - This is a test	Status	APP - Approved
Title	this submittal 2	Item Status	Open
Number	2	Priority	
Description	this is the other one	Revision	0
Package #	1-00 00 00-0	Sub Section	
Spec Section	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS	Commitment	
Category	Test Report		
Responsible Sub/Manufacturer			
Item Held By	Testing1 TOB		

Refer to Section 25.03 for instructions on how to use filtering to list submittals that are Draft, Open and Closed.

25.12 Revision Submittals

If a submittal package contains one or more submittals that have a “RAR” (Revise and Resubmit) Status, check the box(es) to the left of the submittal(s) and then click the “Create Revision” button.

Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 10 per page 1 item(s) selected

Send for Review Submit to GC Send to Sub Create Revision Add Items Remove Items

<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>		this submittal 1	1	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	RAR		Testing1 TOB	Reviewers
<input type="checkbox"/>		this submittal 2	2	0	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	APP			Reviewers



That brings up a screen for the creation of a revised submittal package. The revised package (A) has the same package number as the package being revised, except that the revision number is incremented up by 1; (B) contains a newly created revised submittal (or multiple revised submittals, if multiple submittals require revision); and (C) the revised submittal, itself, is identified by an increased revision number, incremented up by 1. If is all correct, (D) click Save.

Create Revision Package

Details Save Cancel

Project: BI-38-126 - This is a test
 Submittal Package #: 1 - 00 00 00 **A**
 * Submittal Package Name: This package number 1
 Description:
 Trade: PROCUREMENT AND CONTRACTING REQUIREMENTS

Custom Fields
 There are no custom fields for this submittal package.

Page 1 of 1 Show 25 per page

Title	#	Rev #	Spec Section	Sub Section	Category	Status
<input checked="" type="checkbox"/> this submittal 1 B	1	1 C	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	RAR

D Save Cancel

The default views in the Submittal Packages list and the Submittal Register will now only show the revised version of each. The original version can still be seen, using the filter controls. For example, (A) in the Submittal Packages list, (B) select the filter options for Open, Closed and Draft to (C) make both the revised and original submittal package visible. The (D) Status of each option will be displayed.

My Home Dashboard **Projects** Planning Forms Processes Documents Calendar Contacts Cost ...

CONNECTICUT DEPARTMENT OF ADMINISTRATIVE SERVICES

Submittal Packages For BI-38-126 - This is a test Hidden Projects

Filter Submittal Packages **B**

Package Status: Open Closed Draft Overdue

Clear **Filter**

Page 1 of 1 Show 10 per page Create Package Send for Review

Title	Description	Package #	Revision Number	Trade	Status	Date Created	Last Modified By	Held By
<input type="checkbox"/> This package number 1		1-00 00 00-1	1 C	PROCUREMENT AND CONTRACTING REQUIREMENTS	Draft D	11.21.2023	Testing1 TOB	Testing1 TOB
<input type="checkbox"/> This package number 1		1-00 00 00-0	0	PROCUREMENT AND CONTRACTING REQUIREMENTS	Closed	11.21.2023	Testing1 TOB	

A Submittal Packages



The GC or CMR can access the revised submittal package and upload attachments and comments to the revised submittal, which is now linked to the submittal package. Upon completion, the GC or CMR would follow the steps outlined in Section 25.07 to send the submittal package to the CA.

Submittal Package Details

Submittal Package Overview
History

Request Comment
Update Dates
Generate Transmittal
Edit

Project	BI-38-126 - This is a test		Status	Draft
Title	This package number 1		Trade	PROCUREMENT AND CONTRACTING REQUIREMENTS
Description			Created By	TOB, Testing1
Submittal Package #	1-00 00 00-1		Baseline Finish Range	
Date Created	11.21.2023 12:25 PM			
Items Held By	Testing1 TOB			
Baseline Start Range				
Original Submittal Package #	1-00 00 00-0			

Items (1)
Documents (0)
Comments (0)
Custom Fields (0)
Revisions (1)

Group By None Page 1 of 1 Show 10 per page

Send for Review
Submit to GC
Send to Sub
Add Items
Remove Items

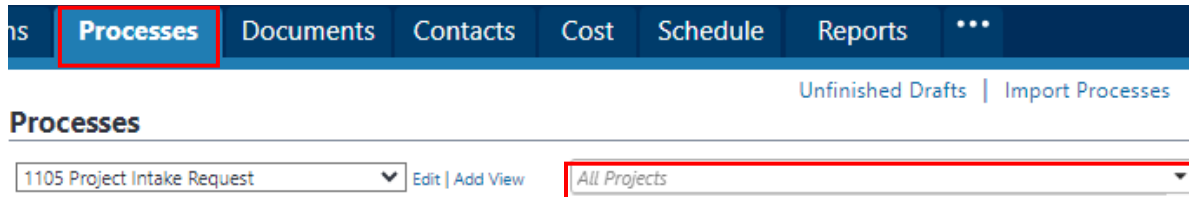
<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>		this submittal 1	1	1	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS		Test Report	NEW		Testing1 TOB	



Section 26: 7989 AA Project Closeout

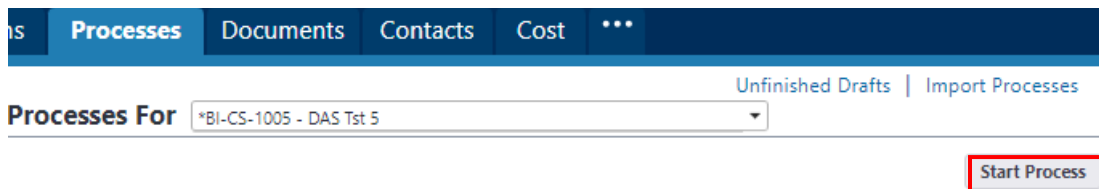
26.01 Accessing the Process

Log in to [e-Builder](#). On your homepage, go to the “Processes” tab and select the AA Project you want to closeout from the “All Projects” dropdown list.



26.02 Form 7989 – AA Project Closeout (Process Initiator)

Click the “Start Process” button.



Click on the link entitled “7989 AA Project Closeout (7989)”.

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

Process Name	Description
1105R Project Import (SRPI) (5R-PI)	For DAS USE ONLY. Process for importing original 1105 submission from an eBuilder report to allow for the Client Agency to prepare a revised 1105.
1105R Project Revision Request (1105R)	Process for submitting a revised Capital Project Initiation Request.
1135 - Task Letter (TL)	This process is used for the creation of the task letters for On-Call contracts.
6010 Bid Release Form (6010)	The “6010 Bid Release Form” process is used as follows: (1) for the DAS/CS Project Manager to submit Bid Files, Bid Information, and Pre-Bid Meeting Information to the DAS/CS Procurement Unit; (2) for the DAS/CS Procurement Unit, the ADPM, and Chief Architect to review and approve the Bid Release; (3) to generate and email an approved 6010 Bid Release Mail Merge; and (4) for the DAS/CS Procurement Unit to document the request for Prevailing Wages, the Bidding Process, and the Construction Contract Award process.
7310 Request For Information (7310)	The RFI process is used for the submission and routing of requests for information. If there is a cost impact, it may spawn a proposal request.
7360 Change Order (7360)	This Process has the code step built in to bundle and approve PCOs.
7390 Application and Certification for Payment (7390A)	
7805 Substantial Completion (7805)	
7989 AA Project Closeout (7989)	Closeout process for Agency Administered Projects.

Read the “General Instructions” and fill in the applicable fields under “Project Information”.

Project Information

DAS Project Number: _____

Project Name: _____

Construction Start Date:

Acceptance Date:

Final Project Cost:



Complete the section entitled “Consultant/Contractor/Supplier Information”. To find and add a vendor, click on the “Lookup” link in the Vendor field. The first vendor input should be the project On-Call Consultant. Then, input the “On-Call Contract No.” and “Task Number” and click the “Add” button.

Next, click on the “Lookup” link to find and add any other Contractors that provided services on the subject project and input the Contract Number and PO Number for the subject Contractor. If the Contractor is not listed in “Lookup”, provide the name of the Contractor in the “Other Vendor” field and click the “Add” button upon completion. Repeat this process for each Contractor having performed Work on the project.

Consultant/Contractor/Supplier Information

Show Filter | Select All Row Height: 1X

Download Template Import Delete

If more than one Consultant/Contractor/Supplier was used on the above referenced project, please provide the requested information below for each. Subcontractor information is not required.

#	Vendor	Other Vendor	On-Call Contract No.	Task Number	State Contract Number	PO Number
Grand Totals (0 items)						

Add New Item for Consultant/Contractor/Supplier Information

Vendor

Other Vendor

On-Call Contract No.

Task Number

State Contract Number

PO Number

Clear Add

Next, complete the “Project Closeout Supporting Documentation” section. Drag and drop executed copies of the subject project closeout forms into their respective fields. If the form submission is not applicable (the project scope of work does not include the construction, repair, alteration or addition to any state building or any other public works of the state), then check the appropriate “Closeout Documents – Not Applicable” field.

Project Closeout Supporting Documentation

The following documents shall be completed, signed, & uploaded as attachments to this form upon completion of the Project. The required documents can only be marked as N/A if the project scope of work does not include the construction, repair, alteration or addition to any state building or any other public works of the state. Once complete, select “Submit” from the dropdown list at the bottom of the page and press the “Take Action” button.

3150A - Certificate of Compliance (AA Pre-Con): or Browse e-Builder Browse Computer

7150A Certificate of Compliance (AA Construction): or Browse e-Builder Browse Computer

7810 Certificate of Substantial Completion: If the Substantial Completion Form was completed outside of eBuilder, upload a copy of the signed Form here. or Browse e-Builder Browse Computer

7820 Certificate of Acceptance: or Browse e-Builder Browse Computer

7987 - Request to Terminate Task Assignment: or Browse e-Builder Browse Computer

7988 - Notice of Project Cancellation: or Browse e-Builder Browse Computer

7995 Archival Data for Project Documents: or Browse e-Builder Browse Computer

745 Contractor Evaluation: or Browse e-Builder Browse Computer

Closeout Documents - Not Applicable:

Please check the box for each form that is considered not applicable to this project.

Form 3150A - Certificate of Compliance (AA Pre-Con)

Form 745 - Contractor Performance Evaluation

Form 7150A - Certificate of Compliance (AA Construction)

Form 7810 - Certificate of Substantial Completion

Form 7820 - Certificate of Acceptance

Form 7987 - Request to Terminate On-Call Assignment

Form 7988 - Notice of Project Cancellation.

Form 7995 - Archival Data for Project Documents



Next, complete the “Fee Confirmation” section. Note that if the subject project was initiated prior to July 1, 2024, and the client agency transferred funding to DAS to support the project, the client agency will need to confirm with the project vendors that there are no outstanding invoices to be submitted on the subject project and confirm with DAS/RECS that Vendor fees are no longer being charged to the project. This information is required so that all POs on the subject can be closed and the project financials can be reconciled.

Fee Confirmation

* Outstanding Invoice Confirmation: If the subject project was initiated prior to July 1, 2024, and the client agency transferred funding to DAS to support the project, has the client agency confirmed with the project vendors that there are no outstanding invoices to be submitted on the subject project?

* Vendor Fees being charged?: Are Vendor Fees still being charged to the project? If applicable, DO NOT SUBMIT until such time that Vendor Fees are no longer being charged to the project.

Upon completion, scroll down to the bottom of the page and click the “Take Action” button to submit your project closeout documentation. If the project closeout submission is considered incomplete, the submission will be returned to the Process Initiator, under this process instance, to provide additional information. Instructions for the additional information required will be noted under the “Comments” tab. If the project closeout submission is complete, no further action is necessary.

26.03 Closeout Package Review (CSS)

CSS will receive an email from eBuilder as notification that a Project Closeout Package has been submitted for review.

To access the process instance, either click on the link provided in the email, or log into eBuilder and select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package”.

*BI-CS-1010 - DAS Test Project

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

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Project	Instance	Subject	Step
*BI-CS-1005 - DAS Tst 5	7989 - 4	*BI-CS-1005 - DAS Tst 5 - Project Closeout Package	Agency Revision

After opening the process instance, review the Form 7989 submission for completeness. Thoroughly review the “Project Closeout Supporting Documentation” section to ensure all applicable documents have



been attached and signed by the respective authorized signatories, and all documents that are not applicable have been checked off accordingly.

Project Closeout Supporting Documentation

The following documents shall be completed, signed, & uploaded as attachments to this form upon completion of the Project. The required documents can only be marked as N/A if the project scope of work does not include the construction, repair, alteration or addition to any state building or any other public works of the state. Once complete, select "Submit" from the dropdown list at the bottom of the page and press the "Take Action" button.

3150A - Certificate of Compliance (AA Pre-Con):	<i>Drag and drop file here</i>	or	Browse e-Builder	Browse Computer
7150A Certificate of Compliance (AA Construction):	<i>Drag and drop file here</i>	or	Browse e-Builder	Browse Computer
7810 Certificate of Substantial Completion:	If the Substantial Completion Form was completed outside of eBuilder, upload a copy of the signed Form here. <i>Drag and drop file here</i> or Browse e-Builder Browse Computer			
Substantial Completion:	If the Substantial Completion Form for this project was completed in eBuilder, click the "Lookup" link to find the process instance of the completed Substantial Completion Form and click on the instance link to add the Substantial Completion Form to the AA Project Closeout Process. [Lookup]			
7820 Certificate of Acceptance:	<i>Drag and drop file here</i>	or	Browse e-Builder	Browse Computer
7987 - Request to Terminate Task Assignment:	<i>Drag and drop file here</i>	or	Browse e-Builder	Browse Computer
7988 - Notice of Project Cancellation:	<i>Drag and drop file here</i>	or	Browse e-Builder	Browse Computer
7995 Archival Data for Project Documents:	<i>Drag and drop file here</i>	or	Browse e-Builder	Browse Computer
745 Contractor Evaluation:	<i>Drag and drop file here</i>	or	Browse e-Builder	Browse Computer
Closeout Documents - Not Applicable:	Please check the box for each form that is considered not applicable to this project. <input type="checkbox"/> Form 3150A - Certificate of Compliance (AA Pre-Con) <input type="checkbox"/> Form 745 - Contractor Performance Evaluation <input type="checkbox"/> Form 7150A - Certificate of Compliance (AA Construction) <input type="checkbox"/> Form 7810 - Certificate of Substantial Completion <input type="checkbox"/> Form 7820 - Certificate of Acceptance <input type="checkbox"/> Form 7987 - Request to Terminate On-Call Assignment <input type="checkbox"/> Form 7988 - Notice of Project Cancellation. <input type="checkbox"/> Form 7995 - Archival Data for Project Documents			

If all required documents are complete with the appropriate signatures and all questions have been appropriately answered, select "Approve" from the dropdown list below and press the "Take Action" button.

If any items are incomplete or missing from the project closeout submission, select "Return" from the dropdown list at the bottom of the page and press the "Take Action" button. You will then be prompted to provide a comment where you should note the incomplete or missing information. After entering the comment, press the "Return" button.

26.04 Closeout Package Revision (Agency PM)

If the project closeout package submitted is incomplete, the Project PM will receive an email from eBuilder as notification that the Project Closeout Package requires additional information.

To access the process instance, either click on the link provided in the email, or log into eBuilder and select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package".

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



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Project	Instance	Subject	Step
*BI-CS-1005 - DAS Tst 5	7989 - 4	*BI-CS-1005 - DAS Tst 5 - Project Closeout Package	Agency Revision

After opening the process instance, refer to the "Comments" tab for specific requirements needed to complete the submission. Ensure these requirements are met before proceeding.

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

After addressing all requirements, click the "Take Action" button. This will prompt you to respond to any previous comments and confirm that the submission is now complete, then click "Submit".

26.05 Closeout Package Review (DAS/RECS PM)

After the Agency PM has submitted the required closeout documents for an AA Project and after CSS has approved the submission as complete, the DAS/RECS PM assigned to the project will receive an email notification from eBuilder to take action.

To access the process instance, either click on the link provided in the email, or log into eBuilder and select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package".

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

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Project	Instance	Subject	Step
*BI-CS-1005 - DAS Tst 5	7989 - 4	*BI-CS-1005 - DAS Tst 5 - Project Closeout Package	PM Closeout Review



The PM should scroll down to the section entitled “Fee Confirmation” section and answer the questions accordingly. If DAS Fees are no longer being charged to the project, click the “Take Action” button.

Fee Confirmation

* Final invoice submitted for DAS Fees?:	Check this box if DAS Fees are no longer being charged to the Project. DO NOT SUBMIT until such time that DAS Fees are no longer being charged to the Project. <input type="checkbox"/> DAS/RECS is no longer charging to the Project.
* Pay period last charged:	Please input the end date of the pay period the PM last charged to the project. <input type="text"/>

26.06 DAS CO Tracking (BO - Accounting)

BO - Accounting will receive an email from eBuilder as notification to add all project vendor POs for the subject project to the DAS Change Order Tracking Sheet so that they can be closed if the Project PM has confirmed that DAS fees are no longer being charged to the project; and the Client Agency has confirmed that Vendor fees are no longer being charged to the project (if funding was transferred by the Client Agency to DAS to support the project).

To access the process instance in eBuilder, either click on the link provided in the email or log into eBuilder, select the “My Home” tab, and click on the link in the “Instance” column for the subject project “Project # - Closeout Package”.

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

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

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*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

After all vendor POs for the subject project have been added to the DAS Change Order Tracking Sheet, scroll down to the bottom of the page and click the “Take Action” button.

Please note that after you submit the process instance to the BO to close the POs, the BO may determine that additional information is required to close the POs and return the instance to your attention. If it is returned to your attention, follow the steps above to open the instance again and click on the “Comments” tab for further instruction.

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



After reviewing the comments, scroll down to the bottom of the page and click "Take Action" to provide a response to the comments. After clicking "Take Action" a prompt will appear to provide your response. Upon completion, click the "Submit" button to return the process instance to the BO.

Add Comment

Private

26.07 Close POs (BO - FAA)

The BO FAA will receive an email from eBuilder as notification to close all vendor Purchase Orders (POs) associated with the subject project after the Project PM has confirmed that DAS fees are no longer being charged to the project; the Client Agency has confirmed that Vendor fees are no longer being charged to the project (if funding was transferred by the Client Agency to DAS to support the project); and after BO – Accounting has added all vendor POs for the subject project to the DAS Change Order Tracking Sheet.

After you receive the notification, refer to the DAS Change Order Tracking Sheet and work to close all POs on the subject project. After you have either closed all of the Vendor POs or determined that additional information will be required to close the POs, open the process instance for the subject project in eBuilder, either by clicking on the link provided in the email notifying you to close the POs or log into eBuilder, select the “My Home” tab and click on the link in the subject project “Instance” column to take action on the process instance in eBuilder.

*BI-CS-1010 - DAS Test Project

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

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Project	Instance	Subject
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*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package



After opening the process instance, scroll down to the bottom of the page and select "Return" from the dropdown list next to the "Take Action" button, to return the process instance to BO – Accounting for additional information, or select "Submit" from the dropdown list to forward the instance to forward the submission to the DAS Associate Accounts Examiner to reconcile the project financials. After making your selection, click the "Take Action" button.

Fee Confirmation

Final Payment:	Provide the date the final payment was made to the GC/CMR. 09.12.2024
Outstanding Invoice Confirmation:	Have you confirmed with each contract vendor that there are no outstanding invoices to be charged to the project? Yes
Vendor Fees being charged?:	Are Vendor Fees still being charged to the project? DO NOT SUBMIT until such time that Vendor Fees are no longer being charged to the project. No
Has the business office been notified that all PO's for the subject project can be closed?:	No

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

If "Return" was selected, a prompt will appear for you to provide a comment to BO - Accounting regarding what will be required to close the POs. Click the "Return" button, after adding your comments, to process the submission.

Add Comment

Private

Check Spelling **Return** Cancel

After DAS Accounting has prepared a response, the instance will be returned to your attention under this process step. After opening the instance again (see above for instructions), refer to the "Comments" tab for the response provided. After all issues have been resolved to your satisfaction, select "Submit" and click the "Take Action" button to complete the process.

Details **Comments (0)** Documents (13) Attached Processes (0) Attached Forms (0) Attached To (0)

[Expand All](#) | [Collapse All](#)

General Instructions

Please note that the final payment application for the subject project has been processed and paid or the project has been cancelled; the DAS/RECS PM assigned to the project has confirmed that Vendor fees are no longer being charged to the project; and the DAS Business Office has added all subject project Vendor POs to the DAS Change Order Tracking Sheet to be closed. Please close all vendor POs for the subject project.

If after reviewing the Vendor POs, you determine that there may still be some outstanding invoices under the specified POs or any other issues that are preventing you from closing the POs, scroll down to the bottom of the page and select "Return" from the dropdown list next to the "Take Action" button, and click the "Take Action" button. After clicking "Take Action", you will be prompted to provide a comment to notify the Project PM of the discrepancy. After the PM has resolved the discrepancy, the process instance will be returned to your attention under this process step. Please refer to the "Comments" tab for corrective action taken.

After all vendor POs have been closed, scroll down to the bottom of the page and select "Submit" from the dropdown list and click the "Take Action" button to forward the submission to the DAS Associate Accounts Examiner to reconcile the project financials.



26.08 Reconciliation Review (Accounts Examiner)

The Accounts Examiner will receive an email notification from eBuilder as notification that the project is ready for internal audit after the client agency has submitted the required closeout documentation; the Project PM has confirmed that DAS fees are no longer being charged to the project; the Client Agency has confirmed that Vendor fees are no longer being charged to the project (if funding was transferred by the Client Agency to DAS to support the project); and after the BO has closed all such vendor POs.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

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

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The Accounts Examiner should now conduct its review of the project financials to reconcile with CORE CT. After completing the review of the project financials, if it is determined that additional input is required from the DAS/RECS PM and/or the Business Office (BO) to complete the reconciliation, the Accounts Examiner should return to the process instance to send it to either the “PM” or the “BO” for the required information. To include documentation for the PM or BO to review as part of this process, click on the “Documents” tab, and drag and drop said documentation into the space provided. Then, click on the “Details” tab to return to the closeout application process.

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

Details Comments (3) Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Show Thumbnails **Attach Documents**

<input type="checkbox"/>	File Name	Attached By	Date Attached	Seq # - Step Name	Attached To
Drag and drop files here to upload, or browse.					

Attach Documents



Next, scroll down to the bottom of the page and either select “PM” or “BO” from the dropdown list next to the “Take Action” button and click “Take Action”. A prompt will then appear so that you can add a comment. In the comment box, provide a description of what information and/or documentation is required to complete the reconciliation. After adding the comment, either click the “PM” or “BO” button to send the process instance to the respective party.

Add Comment

Private

If the reconciliation is complete and the project can be closed in eBuilder, upload a copy of the final reconciliation to the "Final Reconciliation" field in the "Final Reconciliation" section, then select "Complete" from the dropdown list, and click "Take Action".

Final Reconciliation

Final Reconciliation: Drag and drop file here or Browse Computer Browse e-Builder

-- Please select an action --
Take Action
Check Spelling

Note that if the process instance has been returned by either the PM or the BO, you should refer to the “Comments” tab to see comments provided and refer to the “Documents” tab to see additional documents that may have been uploaded to complete the process. Proceed with the steps above until the process is complete.


26.09 PM Reconciliation Review (PM)

The PM assigned to an AA project will receive an email notification from eBuilder if the Accounts Examiner requires additional information and/or documentation to reconcile the project financing.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

Process instance is in your court. To view details or take action, click here.

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After opening the process instance, click on the “Comments” tab to get direction on what information and/or documentation may be required to complete the reconciliation process, and refer to the “Documents” tab if the Accounts Examiner has referred to any documents for your review. If corrective action requires additional documentation be submitted, upload said documentation to the “Documents” tab. Upon completion, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click "Take Action". A prompt will then appear to provide a comment response to the Accounts Examiner regarding the submission. Click “Submit” after providing your response.

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

Drag and drop files here to upload, or browse.

*** Add Comment**

Private

Check Spelling
Submit
Cancel

26.07 BO Reconciliation Review (BO)

The Business Office (BO) will receive an email notification from eBuilder if the Accounts Examiner requires assistance in completing the financial reconciliation of an Agency Administered Project.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package” from the “My Processes” section.

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

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After opening the process instance, click on the “Comments” tab to review comments provided by the Accounts Examiner regarding what is required to complete the reconciliation process . To review related reconciliation documents, click on the “Documents” tab. After completing your review, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click "Take Action". A prompt will then appear to provide a comment response to the Accounts Examiner regarding the submission. Click “Submit” after providing your response.

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

Drag and drop files here to upload, or browse.

*** Add Comment**

Private

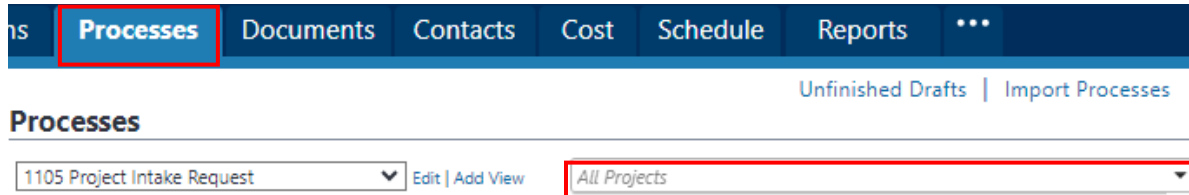
Check Spelling **Submit** Cancel



Section 27: 7990 Project Closeout

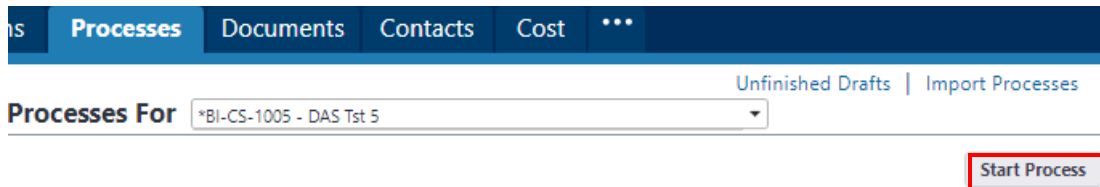
27.01 Accessing the Process

Log in to e-Builder: <https://gov.e-builder.net/auth/www/index.aspx?ReturnUrl=%2f>. Then, go to the "Processes" tab and select the Project you want to closeout from the "All Projects" dropdown list.



27.02 Form 7990 – Project Closeout (PM)

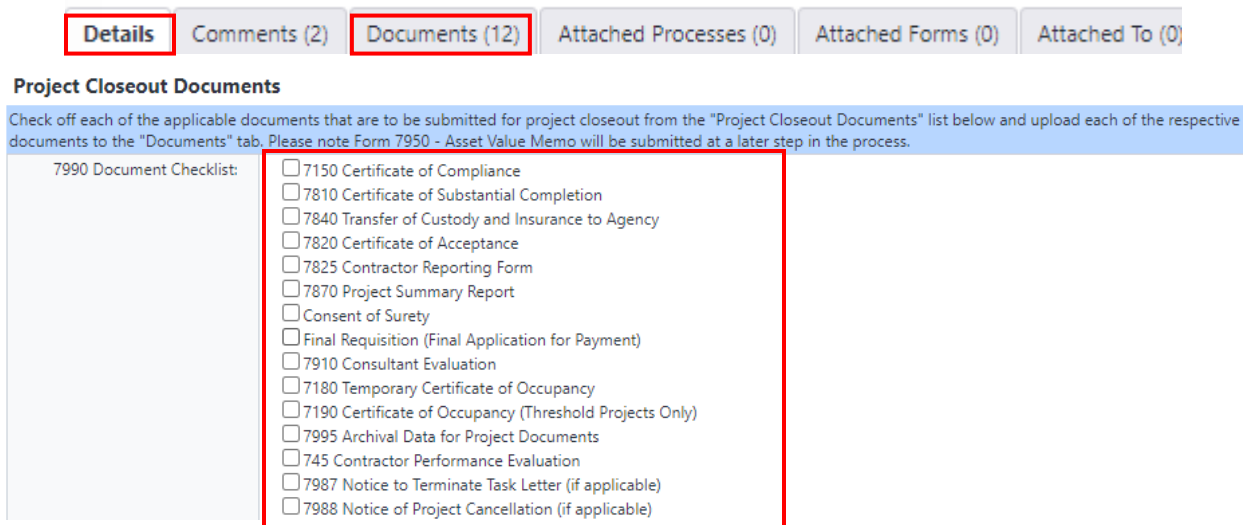
Click the "Start Process" button.



Select "7990 Closeout (7990)" from the list of processes and click the "Start 7990" button.

Begin by filling out the "Subject" line with "Project # - Closeout Package." Follow the "General Instructions" provided and ensure that all sections are completed.

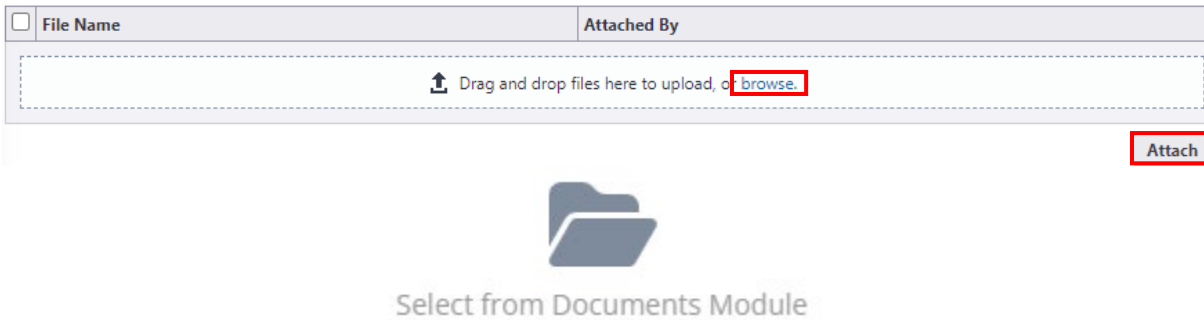
Next, check off each document submitted for project closeout from the list provided in the "Project Closeout Documents" section and upload a copy of each document to the "Documents" tab by dragging and dropping the documents into the "Documents" tab.



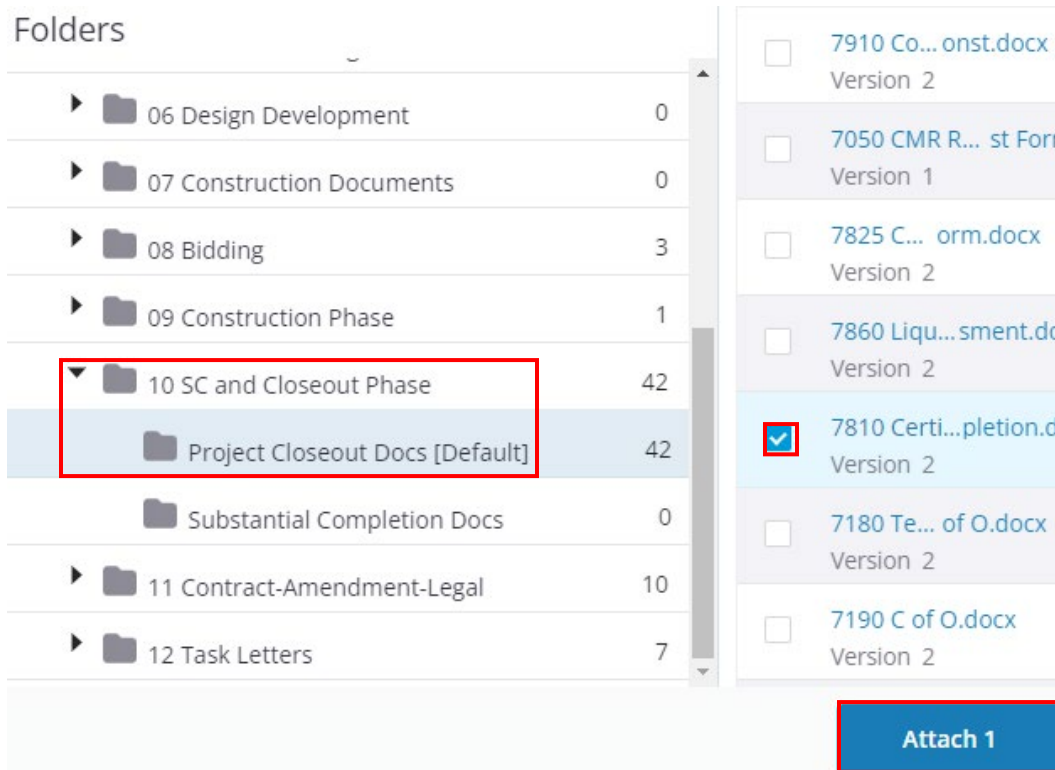
If the "7810 Substantial Completion" or the "Archival Data for Project Documents" form was completed using the "7805 Substantial Completion" or "7995 Archival Data for Project Documentation" process, you



will need to upload the process document by either clicking the “Attach” button or the “browse” link within the “Documents” tab, and then click on “Select from Documents Module”.



Next, select the “10 SC and Closeout Phase”/“Project Closeout Docs” file folder to view the closeout documents that have already been uploaded to the subject project “Project Closeout Docs” file folder. Check the box next to the file you want to upload to the “Documents” tab and click “Attach”.



After all documents have been uploaded, return to the “Details” tab and complete the “Percent for Art” and “CHRO Contract Compliance” sections. Upon completion, click the “Submit” button.



27.03 Closeout Package Review (CSS)

CSS will receive an email from eBuilder as notification that a Project Closeout Package has been submitted for review.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

*BI-CS-1010 - DAS Test Project

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

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After opening the process instance, review the "7990 Document Checklist" to make sure that all of the required documents have been checked off for the closeout submission. Then, click on the "Documents" tab to make sure that all of the 7990 Checklist Documents have been uploaded, that each document submitted has been filled out in its entirety, and that each document has the required authorized signatures.

[Details](#)
[Comments \(0\)](#)
[Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)

Upon completion, return to the "Details" tab and review the "Percent for Art" and the "CHRO Contract Compliance" sections, to verify that all of the question have been fully answered.

If all necessary documents are complete with the appropriate signatures, and all questions are answered as required, proceed to the bottom of the page and select "Approve" from the dropdown list, next to the "Take Action" button and then press the "Take Action" button. If any items are found to be incomplete or missing from the project closeout submission, select "Revise" from the dropdown list and press the "Take Action" button. You will be prompted to provide a comment detailing any incomplete or missing information. Click the "Revise" button after providing your comment.



Add Comment

Private

27.03 Closeout Package Revision (PM)

If the project closeout package submitted is deemed incomplete, the Project PM will receive an email from eBuilder as notification that the Project Closeout Package requires additional information.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

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*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

After opening the Project instance, refer to the "Comments" tab for specific requirements needed to complete the submission. Ensure these requirements are met before proceeding.

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



After all requirements have been met and all comments have been addressed, click the "Take Action" button. This will prompt you to respond to any previous comments and confirm that the submission is now complete, then click "Submit".

Add Comment

Private

27.04 Closeout Package Review (ADPM)

If the project closeout package is deemed complete by CSS, the Project ADPM will receive an email from eBuilder as notification that the Project Closeout Package is ready for their review.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the "Instance" column for the subject project "Project # - Closeout Package" from the "My Processes" section.

*BI-CS-1010 - DAS Test Project

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

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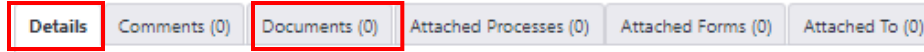
Project	Instance	Subject
BI-Q-733 - Aircraft Maintenance Hangar ADD/ALT (MILCON)	5R-PI - 4	1105R BI-Q-733
*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

After opening the process instance, refer to the "Comments" tab to review previous correspondence regarding the submission.

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



Then, return to the “Details” tab to conduct your own review to verify that the project closeout package is indeed complete and ready for further processing. To review the documents submitted, click on the “Documents” tab.



If everything is in order, return to the “Details” tab, scroll down to the bottom of the page and select "Approve" from the dropdown list next to the “Take Action button and then click "Take Action". If any items are found to be incomplete or missing, or if additional information is required prior to your approval, you can either select "Revise" from the dropdown list to return the package to the Project PM, or “CSS” to return the package to CSS for further action, then click “Take Action”.

If either "Revise" or "CSS" is selected, you will be prompted to provide a comment where you can provide additional direction regarding the closeout package submission. Once you have entered your comment, click the "Revise" or "CSS" button respectively to forward the submission package to the appropriate party.

Add Comment

27.05 Vendor Payment Complete Confirmation (PM)

After the ADPM has completed their review and approved the closeout submission package, the Project PM will receive an email from eBuilder as notification to contact all vendors to input the date the final payment was made on the GC/CMR contract, confirm that there are no outstanding invoices to be charged to the project and confirm that Vendor fees are no longer being charged to the project.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the subject project “Instance” column, under “My Processes” to access the Process instance. (Refer to Section 27.03 for guidance diagrams).

After opening the process instance, scroll down to the “Fee Confirmation” section and complete the section in its entirety. Upon completion, click “Take Action” . This will either direct the process instance to the Business Office (BO) to close all Vendor POs, or if the BO has already been notified, forward the process instance to the Associate Accounts Examiner to do an internal audit and reconcile the project financials.



27.06 DAS CO Tracking (BO - Accounting)

If the final payment application has been processed and paid or the subject project has been cancelled; and the Project PM has confirmed with all Project Vendors that there are no outstanding invoices to be submitted for the subject project and that Vendor fees are no longer being charged to the project, BO - Accounting will receive an email from eBuilder as notification to add all project vendor POs to the DAS Change Order Tracking Sheet so that all vendor POs can be closed.

To access the process instance, either click on the link provided in the email, or log into eBuilder and select the “My Home” tab and click on the link in the “Instance” column for the subject project “Project # - Closeout Package”.

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

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*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

After all vendor POs for the subject project have been added to the DAS Change Order Tracking Sheet, scroll down to the bottom of the page and click the “Take Action” button.

27.07 Close POs (BO - FAA)

After BO – Accounting has added all vendor POs for the subject project to the DAS Change Order Tracking Sheet, and the PM assigned to the subject project has confirmed that Vendor Fees are no longer being charged to the Project, the BO FAA will receive an email from eBuilder with copy to the BO FAO, as notification to close all vendor Purchase Orders (POs) associated with the project.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the subject project “Instance” column, under “My Processes” to access the Process instance.

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

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



- Processes
- Documents
- Contacts
- Cost
- Schedule
- Reports
- Setup

Welcome, Craig!

My Processes

Project	Instance	Subject
BI-Q-733 - Aircraft Maintenance Hangar ADD/ALT (MILCON)	5R-PI - 4	1105R BI-Q-733
*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

If after reviewing the Vendor POs, you determine that there may still be some outstanding invoices under the specified POs or any other issues that are preventing you from closing the POs, scroll down to the bottom of the page and select "Return" from the dropdown list next to the "Take Action" button, and click the "Take Action" button.

Fee Confirmation

Final Payment:	Provide the date the final payment was made to the GC/CMR. 09.12.2024
Outstanding Invoice Confirmation:	Have you confirmed with each contract vendor that there are no outstanding invoices to be charged to the project? Yes
Vendor Fees being charged?:	Are Vendor Fees still being charged to the project? DO NOT SUBMIT until such time that Vendor Fees are no longer being charged to the project. No
Has the business office been notified that all PO's for the subject project can be closed?:	No

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

After clicking "Take Action", you will be prompted to provide a comment to notify DAS Accounting of the discrepancy. Click the "Return" button, after adding comments, to process the submission.

Add Comment

Private

Check Spelling Return Cancel



After DAS Accounting has prepared a response, the process instance will be returned to your attention under this process step. Please refer to the "Comments" tab for the response provided.

Details **Comments (0)** Documents (13) Attached Processes (0) Attached Forms (0) Attached To (0)

Expand All | Collapse All

General Instructions

Please note that the final payment application for the subject project has been processed and paid or the project has been cancelled; the DAS/RECS PM assigned to the project has confirmed that Vendor fees are no longer being charged to the project; and the DAS Business Office has added all subject project Vendor POs to the DAS Change Order Tracking Sheet to be closed. Please close all vendor POs for the subject project.

If after reviewing the Vendor POs, you determine that there may still be some outstanding invoices under the specified POs or any other issues that are preventing you from closing the POs, scroll down to the bottom of the page and select "Return" from the dropdown list next to the "Take Action" button, and click the "Take Action" button. After clicking "Take Action", you will be prompted to provide a comment to notify the Project PM of the discrepancy. After the PM has resolved the discrepancy, the process instance will be returned to your attention under this process step. Please refer to the "Comments" tab for corrective action taken.

After all vendor POs have been closed, scroll down to the bottom of the page and select "Submit" from the dropdown list and click the "Take Action" button to forward the submission to the DAS Associate Accounts Examiner to reconcile the project financials.

After all Vendor POs for the subject project have been closed, select "Submit" from the dropdown list and click "Take Action" to forward the submission to the DAS Associate Accounts Examiner to reconcile the project financials.

27.08 Vendor Payment Complete Confirmation Revision (PM)

If the Business Office (BO) was unable to close all Vendor POs on the subject project, the PM will receive an email from eBuilder as notification that additional information is required to close the POs.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the subject project "Instance" column, under "My Processes" to access the Process instance (Refer to Section 27.03 for guidance diagrams).

After opening the process instance, click on the "Comments" tab for direction from the BO regarding what is required to closeout all POs.

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

After reviewing the comments provided by the BO and, if applicable, after uploading any additional documentation required by the BO, click the "Take Action" button to return the Project Closeout Package to the BO. A prompt will appear, after you click "Take Action", to allow you to respond to the BO's comment with your own comment. Click the "Submit" button after adding your comment.

Add Comment

Private

Check Spelling **Submit** Cancel



27.09 Financial Review/Internal Audit (the CSS Associate Accounts Examiner)

Once all of the required documents have been reviewed and approved for project closeout, the final payment application has been processed, and the Business Office has closed all POs on the project; the CSS Associate Accounts Examiner will receive an email from eBuilder as notification that the Project is ready for internal audit and financial reconciliation.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the subject project “Instance” column, under “My Processes” to access the process instance.

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

Processes Documents Contacts Cost Schedule Reports Setup

Welcome, Craig!

My Processes

Project	Instance	Subject
BI-Q-733 - Aircraft Maintenance Hangar ADD/ALT (MILCON)	5R-PI - 4	1105R BI-Q-733
*BI-CS-1010 - DAS Test Project	7990 - 3	BI-CS-1010 - Closeout Package

After opening the process instance, click on the “Comments” tab to review all previous correspondence regarding the subject Project Closeout Package. Once complete, begin working on reconciling the project financials.

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

After completing your initial review, if it is determined that the reconciliation cannot be completed and/or you need to forward documentation to the PM or BO for their review before you can approve the reconciliation, first, click on the “Documents” tab and drag and drop the file you want to upload into the area where the other closeout docs have been uploaded.

Details Comments (2) **Documents (13)** Attached Processes (0) Attached Forms (0) Attached To (0)

Show Thumbnails Show File Description **Download** **Attach Documents** **Remove Documents**

File Name	Attached By	Date Attached	Seq # - Step Name	Attached To
7810 Certificate Of Substantial Completion.docx (version 2) (Deleted) Properties Download (1.1MB) Redline Undelete Remove Edit	Russell, Craig (Department of Administrative Services - Construction Services)	10.03.2024 9:59 AM	1 - Start	
01_BI-2B-438 - 7150 Certificate Of Compliance - Part II Construction Phase (007).pdf (version 1) Properties Download (183.0KB) Redline Stamp Remove	Russell, Craig (Department of Administrative Services - Construction Services)	10.03.2024 10:15 AM	1 - Start	



After performing the drag and drop, Click the “Select” button to complete the upload to the “Documents” tab and the “Project Closeout Docs – Default” file folder.

Select Destination Folder

Documents / 10 SC and Closeout Phase / Project Closeout Docs [Default]

Select Cancel

After the document(s) have been uploaded, return to the “Details” tab, scroll down to the bottom of the page and either select "Revise" from the dropdown list next to the "Take Action" button, to return the closeout submission to the PM to request additional information and/or documentation to complete the financial review, or select "BO" if you require Business Office input prior to completing the reconciliation. If the reconciliation is complete, select "Submit" from the dropdown list and click the “Take Action” button to forward the process instance to the PM to confirm DAS fees are no longer being charged to the project.

-- Please select an action -- Take Action Check Spelling

If "Revise" or "BO" was selected, a prompt will appear to allow you to add comments regarding the financial review and/or provide direction on the requirements to complete your review. If you uploaded document(s) for the PM or BO to review, be sure to note in your comments the name of those documents you uploaded for their review. Once you have entered your comment, click the "Revise" or "BO" button respectively to forward the submission package to the appropriate party.

Add Comment

Private

Check Spelling Revise Cancel

After the PM and/or BO has reviewed your comments, completed the corrective action (if applicable), and provided a response to your comments, the process instance will be returned to you attention to repeat this process step until such time that the reconciliation is complete.

27.10 Reconciliation Review (PM)

If the CSS Associate Accounts Examiner is unable to reconcile the project financials for the subject Project, the PM will receive an email from eBuilder as notification that additional information is required to complete the financial reconciliation.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the subject project “Instance” column, under “My Processes” to access the process instance (Refer to Section 27.03 for guidance diagrams).

After opening the process instance, click the "Comments" tab to review the requirements to complete the financial reconciliation and, if applicable, click on the “Documents” tab to review any documents the CSS Accounts Examiner forwarded to your attention for review. After you have completed your review and



made the required revisions, return to the "Details" tab, scroll down to the bottom of the page and click the "Take Action" button. You will then be prompted to provide a comment where you can provide an explanation of the corrective actions taken to complete the project reconciliation process.

27.11 Reconciliation Review (BO)

If the CSS Associate Accounts Examiner is unable to complete a financial reconciliation for the subject Project, the Business Office (BO) will receive an email from eBuilder as notification that the CSS Associate Accounts Examiner requires assistance from the BO to complete the reconciliation process.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the subject project "Instance" column, under "My Processes" to access the process instance (Refer to Section [27.06](#) for guidance diagrams).

After opening the process instance, click the "Comments" tab to get direction from CSS Associate Accounts Examiner regarding the assistance needed to complete the reconciliation process and, if applicable, click on the "Documents" tab to review any documents the CSS Accounts Examiner forwarded to your attention for review. Once you have completed your review, and are ready to respond, scroll down to the bottom of the page and click the "Take Action" button. You will then be prompted to provide a comment where you can respond to CSS Associate Accounts Examiner .

27.12 DAS Fee Confirmation (PM)

After the CSS Associate Accounts Examiner has completed an internal audit and financial review of the subject project, the PM assigned to the project will receive an email from eBuilder as notification to confirm that DAS fees are no longer being charged to the project.



To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the subject project "Instance" column, under "My Processes" to access the Process instance. (Refer to Section 27.03 for guidance diagrams).

After opening the process instance, scroll down to the "Fee Confirmation" section and complete the section in its entirety. Upon completion, click the "Take Action" button to forward the process instance to the Associate Accounts Examiner to complete the final reconciliation for the subject project.

Fee Confirmation

Vendor Fees being charged?:	Are Vendor Fees still being charged to the project? DO NOT SUBMIT until such time that Vendor Fees are no longer being charged to the project. No
Has the business office been notified that all PO's for the subject project can be closed?:	No
* DAS Fees Charged:	Are DAS Fees still being charged to the project? DO NOT SUBMIT until such time that DAS Fees are no longer being charged to the project. Yes
* Pay period last charged:	Input the end date that the PM last charged to the project. 09.26.2024

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

27.13 Final Reconciliation (the CSS Associate Accounts Examiner)

Once the DAS/RECS PM assigned to the project has confirmed that DAS fees are no longer being charged to the project, the CSS Associate Accounts Examiner will receive an email from eBuilder as notification to complete the final reconciliation for the subject project.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the subject project "Instance" column, under "My Processes" to access the process instance (Refer to Section 27.09 for guidance diagrams).

After opening the process instance, click on the "Comments" tab to review all previous correspondence regarding the subject Project Closeout Package.

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

After reviewing the comments, return to the "Details" tab. Confirm that DAS fees are no longer being charged to the project.

If it is determined that DAS fees are still being charged to the project, scroll down to the bottom of the page and select "Return" from the dropdown list next to the "Take Action" button and click "Take Action" to return the submission to the PM. If there are deficit fees on the subject project or any other issues requiring corrective action from the Business Office, and/or you need to forward documentation to the BO for their review before you can complete the final reconciliation, first, click on the "Documents" tab and drag and drop the file you want to upload into the area where the other closeout docs have been uploaded (Refer to Section 27.09 for guidance diagrams), then select "BO" from the dropdown list and click "Take Action" to forward the submission to the Business Office.

Final Reconciliation

Final Reconciliation: or

-- Please select an action -- | **Take Action** | Check Spelling



If "Revise" or "BO" was selected, a prompt will appear to allow you to add comments regarding the financial review and/or provide direction on the requirements to complete your review. Once you have entered your comment, click the "Revise" or "BO" button respectively to forward the submission package to the appropriate party.

Add Comment

Private

27.14 Reconciliation Review II (PM)

If the CSS Associate Accounts Examiner has determined that the final financial reconciliation cannot be completed and that DAS Fees are still being charged to the project, the PM will receive an email from eBuilder as notification to resubmit the process instance after the PM is done charging fees to the project.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the subject project "Instance" column, under "My Processes" to access the process instance (Refer to Section 27.03 for guidance diagrams).

After opening the process instance, click the "Comments" tab to review the requirements to complete the financial reconciliation.

Then, return to the "Details" tab, scroll down to the "Fee Confirmation" section and update the "Pay period last charged" field. After taking any required corrective actions and updating the "Pay period last charged", scroll down to the bottom of the page and click the "Take Action" button.

Fee Confirmation

Vendor Fees being charged?:	Are Vendor Fees still being charged to the project? DO NOT SUBMIT until such time that Vendor Fees are no longer being charged to the project. No
Has the business office been notified that all PO's for the subject project can be closed?:	No
* DAS Fees Charged:	Are DAS Fees still being charged to the project? DO NOT SUBMIT until such time that DAS Fees are no longer being charged to the project. Yes
* Pay period last charged:	Input the end date that the PM last charged to the project. 09.26.2024

You will then be prompted to provide a comment to explain the corrective actions taken to complete the financial reconciliation process.

Add Comment

Private

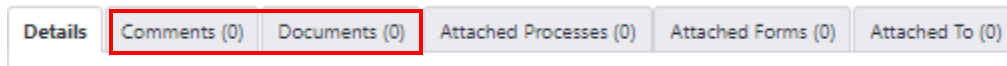


27.15 Reconciliation Review II (BO)

If the CSS Associate Accounts Examiner is unable to complete the final financial reconciliation for the subject Project, the Business Office (BO) will receive an email from eBuilder as notification that the CSS Associate Accounts Examiner requires assistance from the BO to complete the reconciliation process.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the subject project "Instance" column, under "My Processes" to access the process instance (Refer to Section 27.06 for guidance diagrams).

After opening the process instance, click the "Comments" tab to get direction from CSS Associate Accounts Examiner regarding the assistance needed to complete the reconciliation process and, if applicable, click on the "Documents" tab to review any documents the CSS Accounts Examiner forwarded to your attention for review.



Once you have completed your review, and are ready to respond, scroll down to the bottom of the page and click the "Take Action" button. You will then be prompted to provide a comment to respond to the CSS Associate Accounts Examiner. After providing your comment, click the "Submit" button.

27.16 Asset Value Memorandum (PM)

After the final financial reconciliation has been completed, the PM assigned to the project will receive an email from eBuilder as notification to complete the top portion of the Asset Value Memo for submission to the Business Office.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the "My Home" tab and click on the link in the subject project "Instance" column, under "My Processes" to access the process instance (Refer to Section 27.03 for guidance diagrams).

The PM should now complete the top portion of Form 7950 – Asset Value Memo and upload a copy of said document to the "Asset Valuation Memo (7950)" field in the "Project Closeout Documents" section. To upload Form 7950, drag and drop the form into the "Asset Valuation Memo (7950)" field. Upon completion, click the "Take Action" button to submit Form 7950 to the Business Office to complete the bottom portion of said document.



27.17 Asset Value Memo (BO)

After the final financial reconciliation has been completed and the PM assigned to the subject Project has completed their portion of the Asset Valuation Memo, the Business Office (BO) will receive an email from eBuilder as notification to complete their portion of the Asset Value Memo.

To access the process instance, either click on the link provided in the email or log into eBuilder, select the “My Home” tab and click on the link in the subject project “Instance” column, under “My Processes” to access the process instance (Refer to Section 27.06 for guidance diagrams).

After opening the process instance, click on the “Documents” tab and scroll down to the bottom of the page to select the attached Form 7950 – Asset Value Memo for the subject project.

Details | Comments (9) | **Documents (15)** | Attached Processes (0) | Attached Forms (0) | Attached To (0)

Show Thumbnails Show File Description **Download** **Attach Documents** **Remove Documents**

<input type="checkbox"/>	File Name	Attached By	Date Attached	Seq # - Step Name	At To
	7950_Asset_Valuation_Memorandum.xlsx (version 1) Properties Download (78.6KB) Redline Edit	Russell, Craig (Department of Administrative Services - Construction Services)	10.04.2024 9:10 AM	0 - Asset Value Memo (PM)	Ass Val Me (79)

Download **Attach Documents** **Remove Documents**

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

To complete the "DAS Accounting" section of the form, click on the “Edit” link below the Asset Value Memo (see diagram above) and then click the “Open” button, when prompted to open the excel document.

After opening the document, click “Enable Editing” in the “Protected View” warning prompt to begin your data input.

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. **Enable Editing**

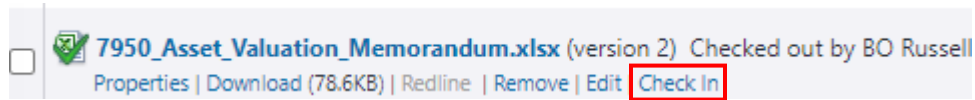
Complete the “Project Accounting” section of the Asset Value Memo for the subject project.

To Be Completed by Project Accounting Only	
Design Fees:	<input type="text"/>
DAS Fees:	<input type="text"/>
Other Project Costs:	
Acquisition:	<input type="text"/>
Consulting Services:	<input type="text"/>
Other Construction Costs:	<input type="text"/>
Arbitration/Claims:	<input type="text"/>
Total Other Costs:	\$ <input type="text"/> -
Total Project Cost (Excluding Equipment):	\$ <input type="text"/> -

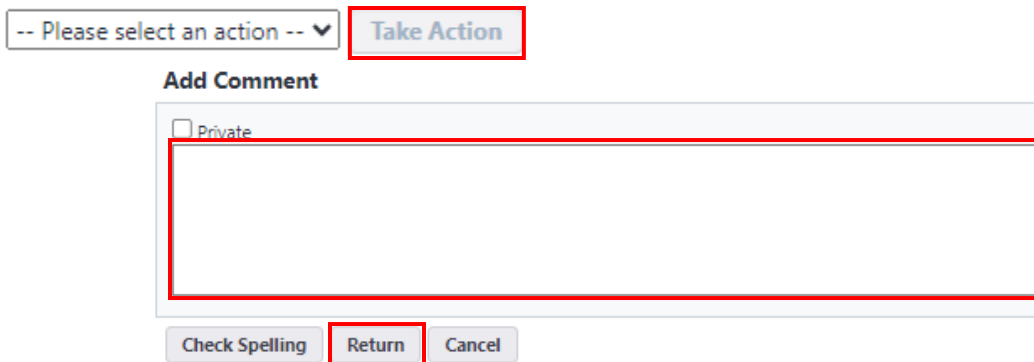
Save the document, upon completion, and then close the document. Next, return to the “Documents” tab in the eBuilder process instance and again, scroll down to the bottom of the page where the Asset Value Memo is located.



Click the “Check In” link below the Asset Value Memo to upload your edits to the memo, and then click “OK” when prompted.



After Form 7950 has been uploaded, scroll down to the bottom of the page and select "Submit" from the dropdown list next to the "Take Action" button and click "Take Action". If Form 7950 was filled out incorrectly or if additional information is needed to complete the form, select "Return" from the dropdown list and click "Take Action" to return the form to the PM. After clicking "Take Action", a prompt will appear to allow you to provide a comment for the PM on what information is required to complete Form 7950. After adding a comment, click the "Return" button.





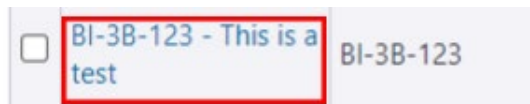
Section 27A: 7995 Archival Data for Project Documentation

27A.01 Navigating to the Project Processes Module

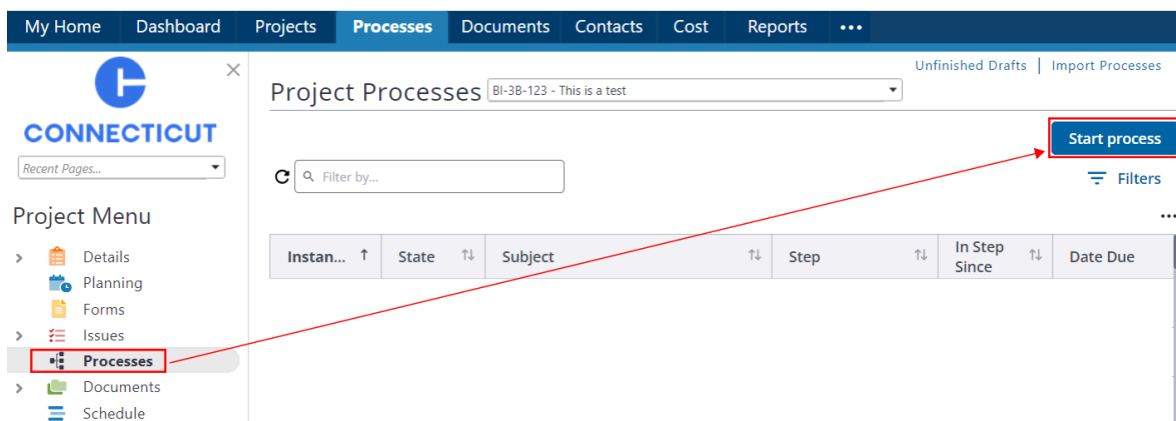
Log in to e-Builder: <https://gov.e-builder.net>. On your homepage, click on “Projects”:



In the list that appears, click on the name of the project you would like to access:

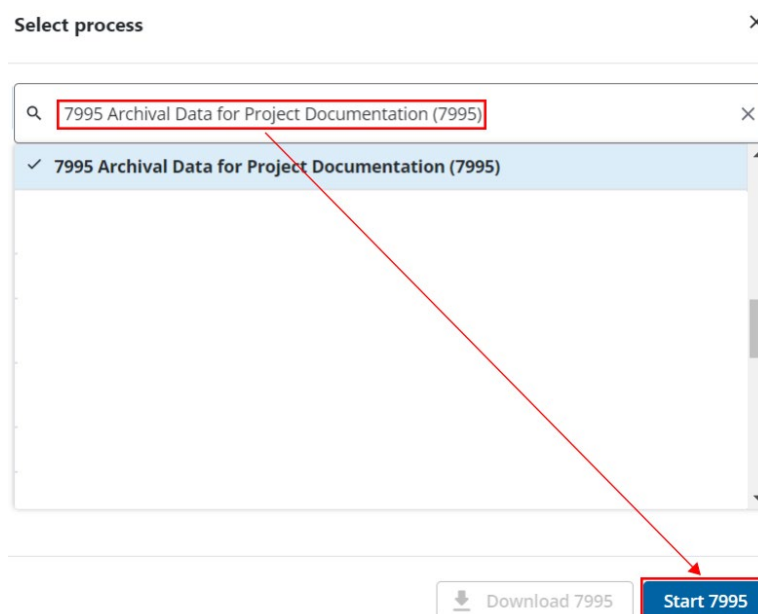


The Project Menu will appear in the left panel. Click “Processes.” Then, click “Start process.”



27A.02 Start 7995 Archival Data for Project Documentation instance (PMs)

In the “Select process” pop up window, the project manager is to search for and select “7995 Archival Data for Project Documentation (7995)”. Then click “Start 7995.”





27A.03 Complete 7995 Archival Data for Project Documentation form (PMs)

The project manager then completes the 7995 form:

- A. Note the project number and name in the Subject field.
- B. Write a Detailed Description of the work done in the project.
- C. Check the box next to the document type(s) submitted.
- D. Enter the Document Date.
- E. Upload the document(s). Note that there are two fields available to allow more than one document in the submission.
- F. Check the box for each file format included in the submission.
- G. Enter the number of drawings of different types.
- H. Enter the building number(s) of the buildings included in the project. If there is only one, enter its building number as "Building Number 1". Other fields are available if there is more than one building number.
- I. Enter the land number of the project site.
- J. When done, click "Submit". There is also a "Save Draft" button, allowing the project manager to save a draft of the form and return later.

The screenshot shows the '7995 Archival Data For Project Documentation (7995)' form in the e-Builder system. At the top, there is a navigation bar with the 'e-Builder' logo and utility icons. Below the title, there are buttons for 'Instructions', 'Print', 'Check Spelling', 'Submit', 'Save Draft', and 'Cancel'. The form is divided into sections: 'Start Process' with fields for Project (BI-3B-123 - This is a test), Process (7995 Archival Data for Project Documentation), and Subject (A); 'Details' with tabs for Documents (0), Attached Processes (0), and Attached Forms (0); and '7995 General Information' which includes a rich text editor for the 'Detailed Description of the Work' (containing 'B'), a list of document types for 'Type of Document' (containing 'C'), and a date field for 'Document Date' (containing 'D').



Document Information

* Document 1: Drag and drop file here or

Document 2: Drag and drop file here or

* Document Medium: F

PDF/A
 PDF/E
 .dwg
 .dxf
 .rvt
 .jpg
 .tiff
 .gif
 Other

Document Medium if Other:

No. of Drawings For Title Sheet:

No. of Drawings For Site-Civil:

No. of Drawings For Plumbing:

No. of Drawings For Equipment:

No. of Drawings For Demolition:

No. of Drawings For Architectural:

No. of Drawings For Sprinkler:

No. of Drawings For Fire Alarm:

No. of Drawings For Structural:

No. of Drawings For Mechanical (HVAC):

No. of Drawings For Electrical:

No. of Drawings For Other:

Description of Other Drawings:

Total No. of Drawings:

Project Pertains To Buildings:

* Building Number 1: Building Number 2:

H Building Number 3: Building Number 4:

Building Number 5: Building Number 6:

Building Number 7: Building Number 8:

Building Number 9: Building Number 10:

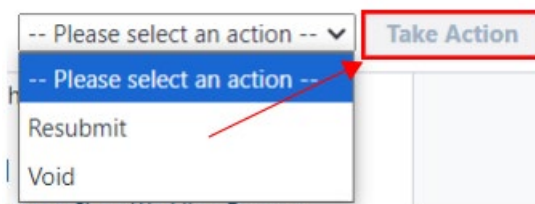
Project Pertains To Land:

* Land Number:

J

27A.04 Resubmitting (PMs)

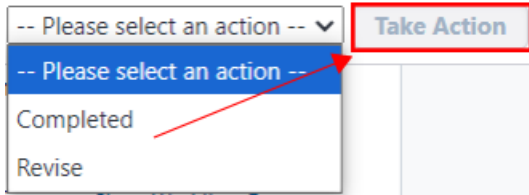
Technical Services may send the 7995 back to the project manager for changes. If so, the project manager is able to make any needed changes and then select a workflow action and click the “Take Action” button. The “Resubmit” workflow action sends the instance back to Technical Services. There is also a “Void” option, allowing the project manager to void and close the 7995 instance with no action taken.





27A.05 Review and Upload to FileNet (Tech Services)

Technical Services receives the 7995 submission from the PM for possible upload to FileNet. When ready, the Technical Services user selects a workflow action and clicks “Take Action”. The “Completed” workflow action closes out the 7995 instance. The “Revise” action allows the Technical Services user to send the item back to the project manager for changes.



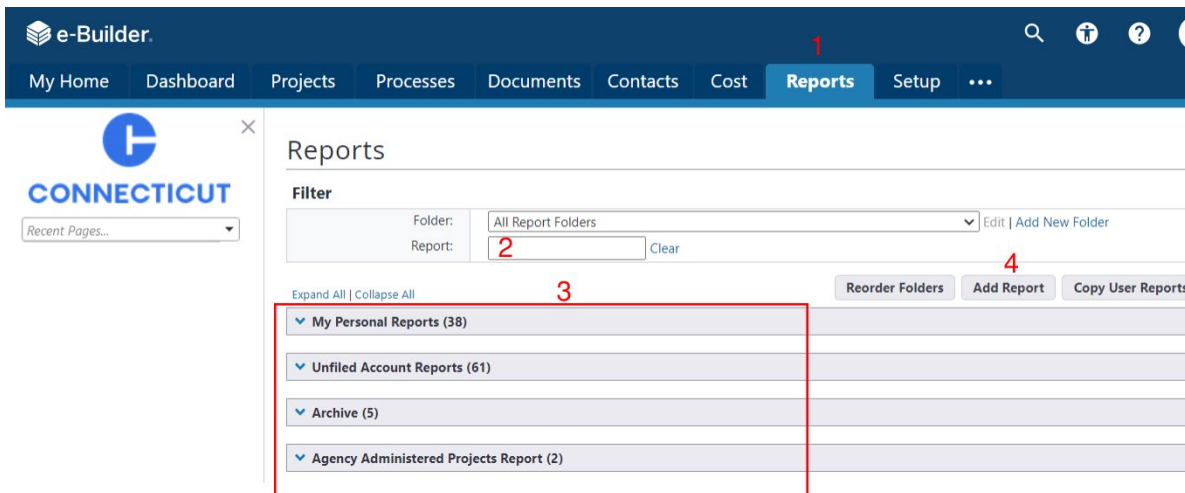


Section 28: Reports

28.01 Navigating to the Reports Module and Accessing Reports

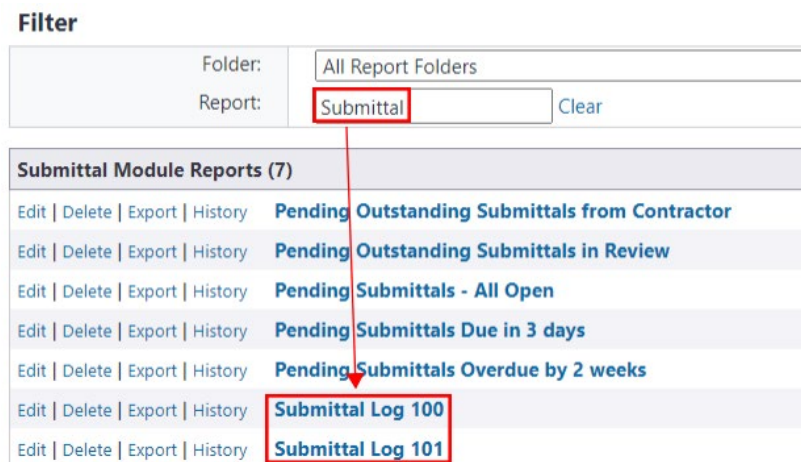
To access and use the Reports module:

1. Click on the Reports tab to access the Reports module.
2. In the Reports module, reports can be accessed easily by typing part or all of the report name in the search block and clicking enter. The search will return a list of reports fitting the search criteria. See step 28.02 for how to open project-specific reports.
3. Users may also wish to browse the list of generally-available pre-built reports. Click on the arrow to the left of each section to open or close the list of reports in each. Click on the name of the report to open each.
4. Users are also able to build their own reports or save-as their own modified copies of existing reports. These reports are only available to the user creating them, and there is flexibility about the datasets to be searched, filter criteria and formatting.



28.02 Searching for and Opening Project-Specific Report Data

In the example, below, the user searched for the word “submittal”. The search returned a list of reports, including a number built by e-Builder. The two at the bottom are reports built by DAS.





When the user clicks on “Submittal Log 100”, for example, that report opens. However, this is report for project-specific information, so it does not show any data until the user uses the “Select a project” pull-down menu to select a project.

Report Results Select a project...

Report Options

Columns:	<input type="text" value="Create Date"/>	S
Duration:	<input type="text" value="Custom"/>	
Dates:	Start Date: <input type="text"/> <input type="text" value="Calendar"/>	
	End Date: <input type="text"/> <input type="text" value="Calendar"/>	Clear

This shows the report on the screen in e-Builder. Also note that there is an “Export” button that allows the user to download the data from the report in Excel or other data formats. (There is no option to generate a PDF report.)

Report Results BI-3B-123 - This is a test

Report Options Re-Run Report

Columns:	<input type="text" value="Create Date"/>	Sorting:	<input type="text" value="Number"/>
Duration:	<input type="text" value="Custom"/>	<input type="text" value="Reset"/>	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending
Dates:	Start Date: <input type="text"/> <input type="text" value="Calendar"/>		<input type="text" value=""/>
	End Date: <input type="text"/> <input type="text" value="Calendar"/>		<input checked="" type="radio"/> Ascending <input type="radio"/> Descending
			<input type="text" value=""/>
			<input checked="" type="radio"/> Ascending <input type="radio"/> Descending

Submittal Log 100 Hide Details Print View Send Export Edit Save Save As

Filter By:
Project Name equals BI-3B-123 - This is a test
Package Number has a value

Number	Title	Spec Section	Revision Number	Status	Date Due Submit For Review	Date Submitted For Review	Date Due Review Complete	Consultant Respond By Date
Package Number: 1-09 01 00-0 (2 records)								
4	09 01 00 - This new item 1	09 01 00 - Maintenance of Finishes	0	Approved As Noted		06.07.2024	06.07.2024	06.06.2024
5	09 01 00 - This new item 2	09 01 00 - Maintenance of Finishes	0	Revise & Resubmit		06.07.2024	06.07.2024	06.06.2024
Package Number: 1-09 01 00-1 (1 records)								