Boston University Campus Planning & Operations





January 2024 Working Draft

Contents

PROJECTS@BU LOGIN	
PROJECTS@BU LOGIN PAGE (INTERNAL USERS ONLY)	3
projects@BU Login Page (External Users Only)	4
Logging into projects@BU (PMWeb)	4
Updating your Password in projects@BU (PMWeb)	4
PROJECTS@BU GENERAL NAVIGATION AND TIPS	6
PROJECTS@BU HOME PAGE	6
Controls Tab	7
Workflow Inbox	7
GENERAL TERMS AND NAVIGATION	8
GENERAL TERMS	8
GENERAL SYSTEM ELEMENTS	8
General Navigation	8
PROJECTS@BU BASICS	10
Selecting and Editing Fields	
TABLE OPTIONS IN PROJECTS@BU	
Sorting, Filtering, Grouping and Reordering Tables in projects@BU	
Exporting the current Layout to Excel	15
CREATING NOTES ON RECORDS IN PROJECTS@BU	
Creating a Note	
Uploading to the Document Manager	
Submitting a Record to Workflow	
Workflow Inbox	
Completing a Workflow Action	
PROJECT REQUESTS	31
Creating a Project Request and Submitting to Workflow	
PROJECTS AND COMPANIES	36
Projects	
Updating and Reviewing a Project	
Adding Team members to the Project and Workflows	
Companies	45
General Navigation	45
PROJECT SCHEDULE AND GANTT CHART OVERVIEW	49
Schedules	49
Reading the Gantt Chart	
Copying a Template Schedule and Updating Tasks	51
ESTIMATES AND BUDGETS	55
ESTIMATES	55
Creating an Estimate	55
Submitting all or Part of an Estimate for Approval Workflow	60

BUDGET REQUESTS	61
Budget Requests – Submitting to Workflow	61
Work Order (FSR) Entry	70
Cost Worksheets	71
Running a Cost Worksheet	71
BIDDING AND PROCUREMENT	73
Pre-Bid	73
Creating a Pre-Bid Record	73
BID PACKAGES (FORMERLY PROCUREMENT)	80
Generating a Bid Package Record from an Estimate	80
Populating a Bid Package Record without a Pre-Bid or Estimate	83
Setting up the Bidder Matrix, Bid Items, Clauses and Scoring	85
Issuing a Bid and Responding to Questions during the Bid Process	96
Reviewing Submitted Bids	97
Online Bidding	102
Accepting an Online Bid	
Responding to an Online Bid	
ENGINEERING FORMS	
RFI's	
Creating an RFI	
Meeting Minutes	
Creating the record	
Entering Tasks from a Meeting	
Drawing Sets	
Creating a Record	
Adding Drawings to the Set	
SUBMITTAL SETS	
Creating the Header	
Adding Items to the Submittal Set	
Completing lines on the Submittal Set and attaching Documents	
TRANSMITTALS	
Creating a Transmittal Package	
Adding Records to the Transmittal Package	
Adding Documents to the Transmittal	
CORRESPONDENCE	134
Creating a Correspondence Record	
Punch Lists	
Creating a Punch List Record Header	
Entering Individual Punch List lines	

projects@BU Login

3.

projects@BU Login Page (Internal Users Only)

For Boston University employees, you will need to log into projects@BU using your Kerberos Username and Password.

- 1. Navigate to the URL: <u>https://bu.pmweb.com/PMWeb</u>
- 2. Click on the link stating, "If you are a member of the BU Community click here to use your BU login credentials (Kerberos).

PM/eb
PMWeb ~
User
Enter your username
Password
Login
Login
Forgot Your Password?
Remember Me
Members of the BU Community <u>click here</u> to use your BU login credentials (Kerberos)
You will see a standard Boston University Login Screen
BU login name
password
Continue
You have asked to login to bu.pmweb.com

4. Enter your BU Username and Password

5. Click the "Continue" button.

Note: projects@BU has a timeout feature on the site. If you have not SAVED any information in projects@BU for two (2) hours, the system will automatically log you out, though you will not notice this until you try and click on something.

6. Once you have been auto logged out you will be returned to the default projects@BU login page. To return to the KERBEROS page, simply refresh your browser window.

projects@BU Login Page (External Users Only)

For non-Boston University employees, you will need to log into projects@BU using your case-sensitive email address and password provided to you in the welcome email.

Logging into *projects*@BU (PMWeb)

- 1. Navigate to the URL: <u>https://bu.pmweb.com/pmweb</u>
- 2. On the left-hand side of the page, locate the User Login Section.



User login box indicated

- 3. Enter your email address into the "User" box, and the password provided to you in the "Password" box.
- 4. Click the "Login" button.

Updating your Password in projects@BU (PMWeb)

Follow these steps to update your password from the default (external users only).

1. In the left-hand menu of the page click the <u>Profile</u> icon.



2. In the Login section of that page enter "pmweb2" as your Old Password (1) then a new password twice in the New Password (2) and Confirm Password (3) boxes.

	SETTINGS
PROFILE	
Last Login	09-07-2021 11:34:00 AM
First Name*	Jonathan
Last Name	Smith
Email*	jsmith@bu.edu
Cell	
Image	(***)
Image	
Image	
Image LOGIN	···
Image LOGIN Old Password	····
Image LOGIN Old Password New Password	····
Image LOGIN Old Password New Password Confirm Password	···· ····· 1) ····· 2) ····· 3)
Image LOGIN Old Password New Password Confirm Password LOGOUT	···· 1) ······ 2) ······ 3)
Image LOGIN Old Password New Password Confirm Password LOGOUT When I Log Out of PM	****** 1) ****** 2) ****** 3) Web, If I Chose "Remember Me" at Login:
Image LOGIN Old Password New Password Confirm Password LOGOUT When I Log Out of PM	
Image LOGIN Old Password New Password Confirm Password LOGOUT When I Log Out of PM	(***)

3. Click the "Save & Exit" button at the top of the page to return to the projects@BU home page.

PROF	FILE	- JS -	- Jonathan	Smith
B		\otimes	\odot	

projects@BU General Navigation and Tips

projects@BU Home Page

The Home page is visible both when you first log in to projects@BU or click the PMWeb button. Simply click the **PMWeb Logo** and you will be brought back to the **Controls** or last visited **Tab**. The menu bar contains the eight modules that make up projects@BU (Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, Workflow, Portfolio, and Toolbox). Below these are the Profile, Recent records, and Exit buttons.

<p< th=""><th>M/eb</th><th>Controls</th><th></th><th>Project Center</th><th></th><th>Portfo</th><th>slio View</th><th colspan="2"></th></p<>	M/eb	Controls		Project Center		Portfo	slio View		
		LINKS	ø X	WORKFLOW INBOX			Due	• C # ×	
*	PLANNING	Projects Project Remuest		No records to display.					
a		Schedules Estimates		M 4 1 M PAGE SIZE 1 V					
		Euder Repuests Cost Worksheets Companies Document Manager		NOTIFICATION INBOX				ø X	
\$				Save Layout Load Default Layout Dismiss	Selected Reminders				
=		Feedback		ID DOCUMENT TYPE	PROJECT/LOCATION	DUE DATE	DESCRIPTION	_	
				No records to display.	· · · · ·			-	
	ASSET MANAGEME			A A D PAGE SIZE 5 -					
~									
۲									
-									
•									
ອ									
۵									

projects@BU Home page

The Profile pop up menu allows quick access to update your Event Reminders, pin reports to your home page, and adjust your general options.

	SETTINGS	HOME PAGE SETTINGS			
PROFILE		OFTIONS		EVENTS	
last Login	09-07-2021 11:34:00 AM	English	-	TROGER	SUMMARIES ONLY
rst Name*	Jonathan			Alerts	
st Name	Could be	Prompt to Save When Navigating Away From Records		Reminders	
and a		Open With Menu Collapsed Advanced Grid Filtera	8	Subscriptions	
nger.	jsmith@bu.edu		2	Workflow	
age (Summarize Every Day	/
nige (DOIN d Password w Password	······			Summarize Every	/
NI				Summarize Every	<i>.</i>
di age (d Password d Password mirm Password nfirm Password				Summarize Every Og	1
ell OGIN Glassword onfirm Password ocourt hen i Log Out of PMM (()				Summarize Every Day	<i>.</i>

projects@BU Profile

One option that is recommended is that you turn on "Prompt to Save when Navigating Away From Records."

OPTIONS	
Prompt to Save When Navigating Away From Records	
Open With Menu Collapsed Advanced Grid Filters	00

Prompt option indicated

Turning this option on sets it so that the system reminds you to save if you attempt to leave a page that you have been updating without saving first.

Controls Tab

Upon Login, the Controls tab is the first you see. It contains a list of Workflows and Notifications that need your attention.

<u>ن</u>	Controls	Project Center	Portfolio View

Controls Tab and other Home Tabs

Workflow Inbox

The **Workflow Inbox** contains records that are waiting for your review or approval. To immediately access the record, click the <u>grey hyperlink</u> in the Record field.

WORKF	LOW INBOX		Due	• C % X
Record Description Instruction	Project Requests - 01052 To Demonstration Request as This request has been sent to you for review and approval. Should you require additional information, you can comment and select "return request" to the submitter. If you would like to deny the request, select "reject request" so the request is not able to proceed or be edited. Should you have any questions, please do not hesitate to contact me. Thank you.	Project/Location 595 COMMONWEALTH AVENUE	Due 10-13-2021 ProgressStep 3 of 5	
+ +	8 0 9			//
€ € 1	PAGE SIZE 1			

Workflow Inbox

General Terms and Navigation

General Terms

This guide makes use of several terms that are defined here to help with understanding the processes that follow.

Term	Definition
Module	Modules are the major sections in projects@BU, in the main menu on the left hand side. For example Planning, Engineering Forms, and Portfolio are all Modules in projects@BU.
Record	A Record Type is a section of one of the modules. For instance in the Planning
Туре	Module, Initiatives and Estimates are both Record Types
Record	A record is a single instance of a record type within projects@BU. For instance in the Planning Module, a record would be an individual Estimate.

General System Elements

projects@BU's page design incorporates several common elements. This guide refers to them to help Users navigate through the various tasks and pages in the system.

General Navigation

Main Menu

The Main Menu is on the left of every page in projects@BU, it is divided into the Module Sections, Personal Controls, Recent Locations, and Exit Button. When you click on a Module, a box pops out over your current view with the listing of the Record types. Clicking one of these names navigates to the record in the system.



Main Menu

Header Bar

The Header bar is at the top of every Record Type or Record page. The buttons available change depending on if you are on a Record Type or individual Record page.

(<u>)</u>	() (Portfolio) > Portfolio > Records > PROJECTS							
Drag a colun	Drag a column header and drop it here to group by that column							
Ð	Programs *	All*	Projects	*All*	*All*	·	ß	

Header for the project record list.

• **Breadcrumb Bar** – This shows a breadcrumb list of locations in projects@BU showing your location in the system.

Ex: (Portfolio) > Portfolio > Records > PROJECTS – this indicates that this image was taken on the main Projects page.

- The list header contains several common features:
 - **Recent** Click this button to bring up a list of your recently accessed records for this record type. For example if you are viewing the Project list, clicking this button will bring up a list of the recently accessed Projects.
 - **Programs** This is a drop-down list of all the Programs (Academic or Business Units). Selecting one filters the list of Records by that Program.
 - **Projects** This is a dropdown of all Projects in projects@BU that you have access to. Selecting a Project in this list filters the list by that Project.
 - + Click this button to add a new instance of that record (Estimate, Schedule, Project Request).

Note: Depending on your access level to that record you may not see the add button.

- **Refresh** Click this button to refresh the list of Records, and display newly created records in the list.
- **Layouts** See the "Sorting and Filtering" section of the Guide for a description of the use of this button.

Record Header Bar

00556 - 120ASH Demonstration Proje ▼	B	+⊦ ₪	8	

Example Record Header bar from the Project Module

The Record header bars have several common features, as well as record-specific options.

- List view = Click this button to return to the list view.
- **Recent Records** Click this button to bring up a list of your recently accessed records for this record type. For example, if you are viewing the Project list, clicking this button will bring up a list of the recently accessed Projects.
- Record selector This is a list of all Records of this type that you have access to. You can quickly select a record from this list.
 Note: Clicking the down arrow next to this button shows a small menu that also contains the Copy command.
- Save 🖾 Click this icon to save the current record.

Note 1: Creation functionality is not always available for all records, and is based on your access level to the system.

Note 2: Clicking the arrow next to this button brings up a sub-menu that allows you to copy the record.

- Delete Click this icon to delete the record.
 Note: Deletion functionality is not always available for all records, and is based on your access level to the system.
- Link Schedule This button is Disabled
- Print Click the arrow next to this button down to run a report on this record type.
- Generate The down arrow next to this button opens a list of connected record types you can generate from the basic record type if you have permission, for example a Project from a Project Request

Note: This button is not available on all record types.

projects@BU Basics

projects@BU is made up of multiple modules, each with individual tools that will be explained in the sections of the User Guide. The instructions below apply to all modules, and will help you with general navigation of the site.

Selecting and Editing Fields

In order to modify any of the lists of fields in the various modules throughout projects@BU, you must first select the lines that you wish to modify. Selecting these lines can be done in several ways.

Clicking and Editing

(Recommended for editing Individual Fields)

1. Click the line that you wish to edit.



2. Click the "Edit" button at the top of the list to begin editing the line, or double click the line.

Core Team	🖉 Edit
	SPEC

3. The line will turn yellow and the data fields can now be edited.

Core Team	Dupdate Records 🛞 Cancel						
	SPEC						
Internal Stakeholders	Project Executive						
	Project Manager		· ·				

4. Enter your changes into the line.

Core Team	🖺 Update Records 🛛 🛞 Cancel	
	SPEC	
Internal Stakeholders	Project Executive	
	Project Manager	Jonathan Smith (Boston University)

5. Click the "Update Records" button once you are complete.

Core Team	Update Records 🛞 Cancel	
	SPEC	
Internal Stakeholders	Project Executive	
	Project Manager	Jonathan Smith (Boston University)

Double-Clicking

(Recommended for editing Individual Fields)

Double click the line that you wish to edit. Enter your changes into the line. Click the **Update Records** button once you are complete.

Shift/Control-Clicking

(Recommended for editing multiple fields at once)

- 1. Click the first line that you want to edit.
- 2. Either:
 - Hold shift and click the last in the set of lines that you want to edit.
 - Hold Control and click each line that you want to edit.
- 3. Click the "Edit" button, and enter your changes into the line.
- 4. Click the "Update Records" button once you are complete.

Drag-Selecting

(Recommended for editing multiple fields at once)

1. Left-click and drag your mouse over the whole section of lines that you wish to select, and then release the mouse button. (The lines you have selected will be highlighted in dark grey.)

/ Edit							
SPEC	иом						
Project Executive							
Project Manager							
Designer							
Planner - Permitting and Master Planning							
OPM							
QA QC							

- 2. Click the "Edit" button, and enter your changes into the line.
- 3. Click the "Update Records" button once you are complete.

Table Options in projects@BU

Every Table and List in projects@BU can be easily sorted, filtered, and grouped by any of the columns of that table. Once a desired sorting is achieved, users can then save their "Layouts" in the system so that they do not need to re-do the sorting process upon each login.

Attention: If you sort or filter columns after ordering they will revert back to the original order. To keep your column order you must first save your current column order by creating a "layout" (see <u>Creating a</u> <u>Custom Table Layout in projects@BU</u>)

Sorting, Filtering, Grouping and Reordering Tables in projects@BU

Tables in projects@BU can be sorted or filtered by any column in the table. Users are also able to adjust the order of the columns that appear in each table to better fit their needs.

Ordering Columns

To order any Column in projects@BU click and drag the name of the column, to another position in the table. You can tell where the column will "land" by the two light grey boxes at the top and bottom of the column border. (see screenshot below).

Note: Sorting or filtering will reset your column order back to the current "Default." Which is whatever layout your currently have selected. To keep your column order, you must first save your

Sorting

To sort by any Column in projects@BU click the name at the top of the Column, and the column will sort alphabetically. To sort by reverse alphabetical order, click the name again and the order will reverse.

PROJECT NAME	RECORD #	PROJECT STATUS	PROGRAM			
120ASH - CPO Reorgani	<u>1036</u>	8) Frozen	Informatics & Strat			
120ASH - Testing Projec	00557	3) Active	Testing Program			
120ASH Demonstration	00556	3) Active	Testing Program			
120ASH Jason Review P	00558	2) Assigned	Testing Program			
Current Level 1 - 2 Proj	00001					
Current Level 3 - 5 Proj	00002					
Demonstration Project	00559		Testing Program			
Tyler Testing Project	00560	2) Assigned	Testing Program			

Projects sorted alphabetically by Column Name.

Filtering

You can filter by any Column in projects@BU by first clicking the icon just below the name of any column, and then clicking your filtering method, for example Contains, Does Not Contain, or Equal To.

	RECORD # PROJECT STATUS
Current Level 1 - Current Level 1 - Current Level 3 - 120ASH - CPO Rec 120ASH Demonstr 120ASH Demonstr 120ASH Jason Rev Demonstration Pro Tyler Testing Proje	RECORD # PROJECT STATUS NoFliter Contains DoesNotContain StartsWith EndsWith EqualTo Greater/Than Greater/ThanOrEqualTo LessThan Greater/ThanOrEqualTo Between NotBetween IsEmpty
	IsNull NotIsNull

Filtering method

Once the filtering method has been selected, enter the criteria you want to filter on into the box, and press enter. The List will then update filtered by the criteria you chose.

PROJECT NAME	RECORD #	PROJECT STATUS	PROGRAM				
demo							
120ASH Demonstration	00556 3) Active		Testing Program				
Demonstration Project	00559		Testing Program				
4	•						
AGE SIZE 20 V							

Projects filtered by names that <u>Contain</u> the word "New".

Grouping Tables in projects@BU

Follow these steps to Group the Tables in projects@BU.

1. Click and drag the Header of the Column, the name at the top, which you want to group your table by up to the white bar at the top of the table, where it says "Drag a column header and drop it here to group by that column."

Note: Make sure that your pointer is in the white bar at the top for the group to be created.

Drag a colum	PROJECT	STATUS	nn ▼ Projects ★			
PROJECT	NAME	RECORD #	PROJECT STATUS	PROGRAM		
demo	-			*		
120ASH Dem	onstration	00556	3) Active	Testing Program		
Demonstration Project		00559		Testing Program		
•						
AGE SIZE 20 ▼						

Table view showing the grouping bar at the top.

2. Once you have dragged the header to the bar, the system will automatically group the table by that column. If you want to undo the grouping you can then drag the Column name back off the grouping bar and it will reset.

Pr	Project Status *						
	9 Programs	*All*	•	Projects *All*			
	PROJECT NAME	RECORD #	PROJECT STATUS	PROGRAM	TYPE		
			-		-		
	Project Status:						
	Current Level 1 - 2 Proj	00001					
	Current Level 3 - 5 Proj	00002					
	Demonstration Project	00559		Testing Program			
	Project Status: 2) As	signed					
	120ASH Jason Review P	00558	2) Assigned	Testing Program			
	Tyler Testing Project	00560	2) Assigned	Testing Program	New Construction		
	Project Status: 3) Ac	tive					
	120ASH - Testing Projec	00557	3) Active	Testing Program	Renovation/Rene		
	120ASH Demonstration	00556	3) Active	Testing Program	Renovation/Rene		
	Project Status: 8) Fr	ozen					
	120ASH - CPO Reorgani	<u>1036</u>	8) Frozen	Informatics & Strat	Renovation/Rene		
×		7E 20 -					
P	PAGE SIZ	20 +					

Note: You can group by multiple columns at once, and they will be grouped in the order of columns that you chose.

List of Estimates in projects@BU grouped by Estimate Status.

Creating a Custom Table Layout in projects@BU

Once you have sorted and filtered a table, you can then save that setup as a Layout in projects@BU, by clicking the "Layouts" button on the top of the table.

1. Click the "Layouts" button.

Pr	Project Status 🔺							
	9 Programs	*All*	•	Projects *All*		▼ *All*	-	C III
			PROJECT STATUS				PROJECT MANAGER	
		-	-				-	
	Project Status:							
	Current Level 1 - 2 Proje	00001						
	Current Level 3 - 5 Proj	00002						
	Demonstration Project	00559		Testing Program				
	120ASH Jason Review P	00558	2) Assigned	Testing Program			99 - John Smith	
	Tyler Testing Project	00560	2) Assigned	Testing Program	New Construction	Athletic	91 - Tyler Malone	
	120ASH - Testing Projec	00557	3) Active	Testing Program	Renovation/Renev	Office/Tenant Fit-	06 - Colleen McG	
	120ASH Demonstration	00556	3) Active	Testing Program	Renovation/Renev	Office/Tenant Fit-	99 - John Smith	
	120ASH - CPO Reorgani	<u>1036</u>	8) Frozen	Informatics & Strat	Renovation/Renev	Office/Tenant Fit-	24 - Lisa Hynes	
	_							
ŀ	PAGE SIZ	E 20 🔻						

- Layouts button indicated
- 2. In the list that appears, click the "Save As" button.



Save as button

3. In the "New Layout" window that appears, enter the name of your layout, and click the "Save and Exit" button.

NEW LAYOUT		9		×
Layout Name	My Custom Layout		 	

"Save and Exit" button

Note: The new layout that you created is now set as the "Default" layout, to change your default layout, click on the "Layouts" button and click a different layout.

Exporting the Current Layout to Excel

After you have created your new Layout (or using the system default), you can export it to Excel, using the "Export to Excel" button at the top of the list page.

(<u>Po</u>	() (Portfolio) > Portfolio > Records > PROJECT REQUESTS										
Drag a column header and drop it here to group by that column											
୬ + 2 🖩 🗵											
LOCATION		LOC	CATION ID	RECO	RD #	DESCRIPTION	CAMPUS				
	-		-		-						

This functionality can be accessed by:

- 1. Navigate to any record type that you have access to.
- Ensure that the filters on the record are set correctly for the data set you want to export or remove all filters to export all records of that type you have access to.
 Note: Running a full export of all records you have access to will take some time to export.
- Click the "Excel" button above the column names to start the export process.
 Note: Please do not navigate anywhere else in PMWeb until after the export has completed. Clicking on any record or record type while the export is working may cause unexpected behavior in the system.

Creating Notes on Records in projects@BU

All records in projects@BU have a Notes tab that allow users in the system to attach notes.

Creating a Note

1. From any record in projects@BU click the **Notes** tab.

<►	MAIN		SPECIFICATIONS			WBS	USERS	NOTES
Drag a column	n header and drop it he	re to group by that (column					
🖉 Edit	+ Add 🗊 Dele	te 📿 Refresh	I Layouts					
ITEM								
	-	-			-	_		
No records to	display.							
								/
	ما ما «الم			£ + + - + -	مامام			
the +	Add Du	tton at 1	the top c	or the ta	abie.			

Drag a column	Drag a column header and drop it here to group by that column										
/ Edit	+ Add	前 Delet	te 📿 Refresh	🛄 Layouts							
ITEM	DESCRIPTION		CREATED BY	CREATED DATE	EDITED BY	EDITED DATE					
		-									
No records to d	lisplay.					·					

- 3. A box will open with the current date and your username automatically populated.
- 4. In the **Description** field enter a title for your note.

		B	Ţ.	(\mathbb{X})	
		Item			1
		Descrip	tion		Demonstration Note
5.	Туре	your n	ote into	the wo	rd box below.

NOTES - 1 - NOTE 1				
Item Description	1 Demonstration Note	Created By Edited By	20489-jsmith@bu.edu 20489-jsmith@bu.edu	09-07-2021
This is a sample note!	* Izpx *			
Design III HTML	Q Preview			

- 6. Click the **"Save and exit"** button at the top of the window.
- 7. To preview a Note that was already created click on the note in the list, and a preview of the note will appear in the box to the right.

4	Þ	MAIN		SPECIFICATIONS		WBS	USERS	NOTES (1)
Dr	ag a colum	n header and drop it h	ere to group by that (column				
	🖉 Edit	🕂 Add f Del	ete 📿 Refresh	I Layouts	This is a sample note!			
		1 Demonstration No	t 20489 - jsmith@bu	09-07-2021	20489 - jsmith@bi	. 09-07-2021		

Previously created note with preview

Document Manager

projects@BU's **Document Manager** tool acts as a central repository for all Documents for each **Project**. The **Document Manager** allows easy sharing of documents amongst the entire Project Team. (Note: Larger CAD files cannot be uploaded to the Document Manager.)

The template Projects in projects@BU have a folder structure that is passed down to all **Projects** created using those templates. This allows for a consistent folder structure and ease of locating any Documents.

All project documents should be loaded/saved into the document manager, and then attached to the record. This allows for ease of searching, visibility, and reporting. Attaching a document directly to a record does not meet this need.

Uploading to the Document Manager

8. In the Main Menu navigate to *Engineering Forms > Document Manager*.



Engineering Forms > Document Manager

9. When you open the Document Manager it will open to the last Project that you were looking at.

Note: This view will default to the top level of the document manager if it is your first time viewing it, and the tree will show all Projects that you have access to. You can limit the tree view by following the instructions in step **10 C** below.

		+ Ad	d	① Latest Versions ① Details		Card View	III Layouts					
Document Manager Root Folder			ACTION	NAME		DESCRIPTION	DN		BOOKMARK	CHECKED OUT	SUBSCRIBE	PMWEB VIEWER
🔸 🖈 Locations						_		-				
 T Projects D 000002 - Current Level 3 - 5 Project Template (Don't 			۲	01 Administrative					\Box		2	
Delete) 4 D 000292 - 05385R - GDPC Additional Space - 22			۲	02 Existing Conditions					\Box		2	
Level 3-5 Standard Folder Structure (1)			۲	03 Permitting and Public Approva	5				\Box		2	
 D 004046 - UPDT120ASH Testing Project - 23 D004048 - Initiative Date Test 			۲	04 Design					\Box		2	
			۲	05 FFE					\Box		2	
			0	06 Construction _Implementation					\Box		2	
			0	07 Close Out					\Box		2	
		X	0	GDPC Space Options_5_1 (1).xlsx		GDPC Spac	e Options_5_1 (1)	\Box	\checkmark		
	4											
									Drop) files here or (lick the Add b	utton

Document Manager > Overview

10. From here there are five different ways to access the Documents for your Projects.

- To find a Project that already has files attached to it:
 - A. List Search
- i. Click the List Button to bring up the Document Manager file list.

i do	CUMENT MANAGE	R > Projects > 00001	- Current Level 1 - 2 Project Template (Do	n't Delete) >							
			×								
+ Add	① Latest Versions	🗇 Details 🛛 🚍 List View	sort								
Folders											
	Level 1-2 Standard Folder Structure										

List Button Indicated

ii. In the "Project" Column of the file list, type in the name of your Project and hit enter.

 Docu 	MENT MANAGE	.r >				
Drag a column he	ader and drop it her	e to group by	that column			
C 9		3	Show Files In	All Folders	•	
ROOT FOLDER PROJECT NAME		NAME	FOLDER NAME	RECORD #	DESCRIPTION	
-		÷			=	
<u>Shared</u>	Shared Folders		Project Team Meetings	1	2018-08-23 Collaboration - Proje	
Shared	Shared Folders		Project Team Meetings	2	2018-08-28 Collaboration Meetin	
Shared	Shared Folders		Project Team Meetings	3	2018-08-28 Collaboration Meetin	
Shared	Shared Folders		Project Team Meetings	4	2018-09-04 Collaboration Meet	
Shared	Shared Folders		Project Team Meetings	5	2018-09-11 Collaboration - Reca	

Project Column Indicated

- iii. Click Project name in the list to open up the top-level file in the Project Document Manager.
 - B. Project List
 - i. Click "DOCUMENT MANAGER" at the top of the page.

í	DOC	UMENT N	MANAGER	> Projec	ts > 00001 -	- Current Lev	el 1 - 2 Projec	ct Template	(Don't
1 2 3	Э	\Box	Q	1				×	Ð
+ A	dd) Lates	t Versions	① Details	List View	🜲 Sort			
Folde	ers								
Double	-click	the "Pro	piects" Fo	der Alio	sting of all th	ne Projects v	ou have		

ii. Double-click the "Projects" Folder. A listing of all the Projects you have access to will appear.

í	DOCUMENT MANAGER >		
	ک ا	×	Ð
	NAME		
	LOCATIONS		
	PROJECTS		
	SHARED		

 Double-click the name of the Project, the double click the "Level 1-2" or "Level 3-5 Standard Folder Structure" file to open the top level of the folder structure.

(i) DO	CUMENT	MANAGER > Pro	ects > 1080 - 10LENO - Chil	dren's Center Renova	tion - 19 >	Level 4 Star	dard Folder S	Structure >
		Q		×	Ð	- 1-1-		
+ Add	① Late	st Versions 🛛 Deta	ils 📲 Card View 🖽 Layouts					
ACTION	NAME		DESCRIPTION	DOCUMENT #	EXT.	UPDATED	SIZE	VERSION
	O1 Administrative							
• •	02 Exis	02 Existing Conditions						
0 📀	🗀 03 Per	mitting and Public App	rovals					
	🗀 04 Des	04 Design						
0 💿	05 FFE	05 FFE						
0 🥥	06 Cor	06 Construction _Implementation						
□ ⊘	07 Clos	se Out						

Standard Folder Structure (List View) – Card view button indicated

Folders									
ing Conditions	O3 Permitting and Public Approvals	🗅 04 Design							
truction _implementation	D 07 Close Out								
	ing Conditions	Ing Conditions C 03 Permitting and Public Approvals truction _umplementation of Close Out							

Standard Folder Structure (Card View) – List view button indicated

- C. To locate a Project that does not have any files attached, you can either select your project from the "tree" at the left of the window, or use the breadcrumbs at the top of the page to search for your project.
 - a. To use the "tree view"
 - i. Click the Options button 📑 at the top of the tree window.
 - ii. In the window that opens, uncheck the box next to All.



- iii. Navigate to the Program(s) or Project(s) that you wish to view and check the box next to them.
- iv. Click the "Save and Exit" button at the top of the window to save your selections.



- v. You can now navigate through the tree view to find the specific Project and folder you are looking for. Your currently selected folder location will appear in the right side of the document manager window.
- b. To navigate using the "bread crumbs":
 - i. Click the down arrow next to "Projects" in the top of the document manager window.

()	<u>DOCU</u>	MENT I	MANAGER 🗸	Projects 🗸	
1 2 3	Ð	\Box	Q		
-1-1-					 ayouts
	ocument	Manager I	Root Folder	_	ACTION
• *	Locatio	ns			
- T	Projects	5			۲

ii. In the drop down that appears, enter either your project number,

()	DOCL	JMENT	MANAGER 🗸	Projects 🗸
1 2 3	Ð		Q	4047 004047 - 25BUIC Testing Project v2 - 23
-1-1-				▼1-1 out of 1 Layouts

Or project name



- iii. Click the Project Name in the list and the Document Manager will automatically open on the top level of that Project's folder structure.
- D. To search for a particular Project/File
 - i. Type the name of the Project/File in the Search bar at the top of the page, and press the "Enter" key.

Note: Unless you have renamed the folders in your project, do not search for a general folder name such as "01 Administrative," or the search will pull up

all "01 Administrative" folders for **all** Projects that you have access to, and you will not be able to differentiate between projects.



Search Bar

ii. A listing of files with your search in their name will appear. **Note:** If you switch the search results to "List View" you can see which Project each returned folder/document is listed under.



6) ос	CUMENT	T MANAGER > Search Res	ult >							
(E 🗉	Q 120ASH			×	Œ				
	① Details Card View										
	ACTION	ROOT	ENTITY	FOLDER		NAME	DESCRIPTION				
	۲	<u>Project</u>	00169 - 120ASH-Construction St	1		00169 - 120ASH-Construction Standard					
	۲	<u>Project</u>	00425 - 120ASH - Design Guideli	1		00425 - 120ASH - Design Guidelines - 2	2				
	۲	<u>Project</u>	00632 - 120ASH Demonstration]		00632 - 120ASH Demonstration Training	2				
	۲	<u>Project</u>	<u> 1036 - 120ASH - CPO Reorganiza</u>	1		1036 - 120ASH - CPO Reorganization - 2	2				
	۲	<u>Project</u>	<u> 1121 - 120ASH - PMWeb Impleme</u>	1		1121 - 120ASH - PMWeb Implementation	1				

Document Manager view and Project List

To enable details for all files in the folders, make sure the details switch is turned on. When you click a file icon, a details window will appear on the right hand side of the screen.

E 'D □ □ C	× Q	<u>++</u> +				
+ Add Datest Versions Details List View	Sort					
Folders			01 Administra	ative		
O1 Administrative	02 Existing Conditions		o 0	\Box		۳
🗅 04 Design	06 Construction_implementation		Added Added By Default Type	9/15/2021 geraldb@bu.edu	- Gerry Broderick	
			Default Category Enable Versions Instructions	R		
				ADD COMMENT		

Details window with details switch indicated.

You can also revert to the older, list, view by clicking **List View**. To get back to the new folder view, click **Card View**.

If you click the **Recent** button, you will see a list of the latest files that you have accessed and can pull up any of them from that menu.

Drag-and-Drop

- 1. Locate the file on your computer.
- 2. Navigate through the document manager to the folder you want to put the file in.
- 3. Drag the file from the folder on the desktop to the PMWeb window and it will upload automatically.



Dragging folder from your computer to PMWeb

Browse and Upload

1. Click the "File" icon in the center of the page, and a file navigation window will open.



Add button indicated

- 2. Navigate through your folder structure to the file you wish to add.
- 3. Click "Open"

File Options

1. Right-click on any file in the Document Manager to bring up the file options window.

	View
X 14282 - Project Estima	PMWeb Record
	Download
	Check In
	Check Out
	Cancel Check Out
	Bookmark
	Copy URL
	Add
	Copy/Move To

File options window

- 2. In this window you will have eleven options, detailed below
 - i. View View the full image file.
 - ii. PMWeb Record If this file has been attached to a specific record (Estimate, Engineering Form, Budget Request) this will open that record.
 - iii. Download Download the file to your desktop
 - iv. Check In If the file is checked out, update it and check it back in.
 - v. Check Out Check the file out so that it can be edited.
 - vi. Cancel Check Out Cancel the checkout
 - vii. Bookmark Add this file to your list of Bookmarked files to make them easy to find.
 - viii. Copy URL Open a window which has the direct URL to this file to be shared with anyone who has access.
 - ix. Add Add a new file/folder to this folder location.
 - x. Copy/Move To Copy or Move this file to a different location within the
 - xi. Delete Delete the file from the Document Manager

Linking Documents from the Document Manager to a projects@BU Record

- 1. Navigate to the Record you wish to attach the file to.
- 2. Select the <u>Attachments</u> view.

1 D	00556 - 120ASH Demonstration Proje •		8 🖶 🗈			
F	MAIN	SPECIFICATIONS	WBS	USERS	NOTES (1)	ATTACHMENTS
+Add I	Layouts					

3. Click the + Add button.

<u> </u>		• • • • • •	0111				
	(i)	<u>(Por</u>	tfo	<u>lio)</u> > Portfolio > Records > PR	OJEC	:TS >
		123	9)	00556 - 120ASH Demonstration Proje	•	C
					MAIN	SPEC	IFICA
		+ A	dd	▦	Layouts		

4. In the pop-up window click "From Document Manager"

From Your Computer	
From Document Manager	
Link PMWeb Record	-
Link Project Email	
Link Web URL	
SharePoint	
Aconex	

5. In the window that opens, navigate or search through the document manager folder structure to the file(s) that you wish to attach.

Selected 0 Files	inistrative > 103 Contracts >
Files	
🐹 14283 - Mock-up Data.xisx 🛛 🔣 14282 - Project Estimate Ex	

Folder navigation window

- 6. Click the file.
- 7. Click the "Save and Exit" button to close the window and link the file to the Record.

Workflows and Workflow Inbox

Multiple record types including Budget Requests, Online Change Requests, and RFIs must all go through a Workflow approval process.

Submitting a Record to Workflow

Steps

- 1. Click the "Workflow" tab on your record (for example Budget Request).
- 2. Click the "Submit" button.

() (Portfolio) > Cost M	anagement > Budgets > B	UDGET REQUESTS > 003 - Work	flow Demonstration		
	nstration Project - 21 - 💌	₿ +ŀ @ ■ €			
MAIN	ADJUSTMENTS	SPECIFICATIONS	NOTES	ATTACHMENTS	WORKFLOW
ACTIONS					
SUBMIT					
- BUSINESS PROCESS					
- WORKFLOW LOG					

Workflow tab with "Submit" button

3. In the "Comments" section type any comments or notes that you would like to provide to the next Approver in the Workflow.

Note: These comments appear in the "Workflow Log" visible to all users who have access to the record.

4. To send a copy of the workflow request to another user, type their email address into the **Add CC** field.

Note: You can add multiple addresses to the "CC" to copy on the Workflow by manually typing in their emails, with a semi-colon (;) between the addresses.

MAIN	ADJUSTMENTS	SPECIFICATIONS	NOTES	ATTACHMENTS	WORKFLOW	NOTIFICATIONS
ACTIONS		EMAIL PREVIEW				
		Subject	PMWeb Approval Request: Budget R	equests 003 - 120ASH Demonstratio	n Project - 21 - Workflow Demonstrat	on
		Comments		Email Body		
CANCEL		This is a comment on a WorkI	ow Process	Budget R Project 00558 12 Document set to Approval Workflo View Record Documents: 003 Document Type: B Submitted By: Ger	equests #003 ANAN Demonstration Project - 21 REVIEWARPONAL by Geny Broderic w Information: udget Requests ry Broderick	k.
		Additional CC	jsmith@bu.edu;janedoe@bu.edu			
				DROP FILES HERE OR CLICK TO ADD		

Comments and CC'ed Addresses Added to Workflow Tab

5. Click the "Save" button to submit the Request to Workflow.

MAIN MAIN	ADJUSTMENTS	SPECIFICATIONS	NOTES	ATTACHMENTS	WORKFLOW	NOTIFICATION
ACTIONS		EMAIL PREVIEW				
		Subject	PMWeb Approval Request: Budg	et Requests 003 - 120ASH Demonstration	Project - 21 - Workflow Demonstrati	on
		Comments		Email Body		
CANCEL		This is a comment on a Workflow P	rocess	Budget Re Project - dosse two Document sent for Approval Workflow View Record Document Proce Ju Submitted by: Gerr	ASH Demonstration Project - 21 REVIEW/APPROVAL by Gerry Broderic / Information: dget Requests / Broderick	k
		Additional CC	smith@bu.edu;janedoe@bu.edu			
				DROP FILES HERE OR CLICK TO ADD		

 Budget Request Example Workflow tab after pressing "Submit" button with "Save" button now showing.

 Note 1: Once the workflow has been submitted and saved to Workflow it cannot be modified unless it is sent back for revision by one of the Approvers in the Workflow.

 Note 2: You can check the status of the workflow request by viewing the status list in the "Business Process" section of the Workflow tab.

Workflow Inbox

The Workflow Inbox contains records that are waiting for your review or approval.

Controls Project Center Project List Project Generation Sta	etus Project Request Operations Request To Project Admin WF Error E-Desk Report Trainee Status Weekly - Completion W	leekly - Budget Vs
LINKS ØX	WORKFLOW INBOX	€∞×
Project Requests Schedules Extinct Requests Quident Requests Cost Workhests Cost Workhests Cost Workhests Security LoAz Int. Manager Security Reporting Manage_Cost Center	Becord Budget Beougsta - 003 00556 - 1204SH Demonstration Project * 0 ur 00+12-021 Description Workflow Demonstration Project/Location 21 Progress Step 2 of 5 Instruction This Project is one and to syou for eview and approxit. Should you require additional requires to othe request, tables the submitter. If you would like to deny the request, tables the submitter. If you would like to deny the request, tables the submitter. If you would like to deny the request, tables. The cost object must be a depaided in the content account beginning with 1, 2 or 3.1 this is funded by the Provost or other entral of proceed or the existent or other of account request To the function of the other of reacount creation. Should you have any questions, please do not hesitate to contact me. Thank you.	

Completing a Workflow Action

Follow these instructions to complete the step of the workflow(s) that you have been assigned.

1. In the Workflow Inbox on the home page Controls Tab click on the <u>Workflow Inbox</u> link to open the whole list of Workflow steps you have been assigned.

Controls Project Center Project List Project Generation Stat	us Project Request Operations Request To Project Admin WF Error E-Desk Report Trainee State	s Weekly - Completion Weekly - Budget V
LINKS #X	WORKFLOW INBOX	Due 🝷 🕃 🚿 🗙
Policità Projecti Requesta Schubulus Extinuate Bulorate Destinate Desti	Peccel Budget Department - 003 Departicible Wild Micro Permeteration - 003 Project ULoration - 00554 - 12045H Demonstration Project - Due model between sent Ry by 6 for relevant united wild specific between sent Ry by 6 for relevant information, you can commerce and select "return requirest to the subject metal address would like to deey the majorst, select "repect record" on desker Hanne select "repect record" on desker Hanne Select The estimation to the desker Hanne Select The description on the select the select the description on the select the select the description on the select Hanne Select The commers Rids. This information is required for allocator creation, Should you have any questions, please do not hereitate to contact ree. Thank you.	08-12-2021 Step 2 of 5
	+ + ⊗ Ø	
	K () PAGE SIZE : •	

Workflow Inbox Indicated

2. Click on the grey Document ID link to open the Workflow.

WORKFLOW INBOX		Due	• C % X
Record <u>Budget Requests - 003</u> Description Workflow Demonstration	Project/Location 21 Project/Location Project - Due 05 21 Progress St	9-12-2021 tep 2 of 5	
Instructions This request has been sent to you for review and approval. Should you require additional information, you can comment and select "return request" to the submitter. If you would like to deny the request. Select "reject request" so the request is not able to proceed or be edited. Please include the 10 (ten) digit SAP cost object in the comments section that will fund this request. The cost object must be a department operating			

3. The record will open with the *Workflow* tab selected.

€1	MAIN	ADJUSTMENTS	SPECIFICATIONS	NOTES	ATTACHMENTS	WORKFLOW (2/5)
	ACTIONS APPROVE BUDGET APPROVE BUDGET REJURN REQUEST REJECT REQUEST WITHORAW FINAL APPROVE USER DELEGATE COMMENT	This request has been sent to you for a review and approval. Should you require additional information, you can comment and select return request to the submitter. If you would like to deny the request, select request to the submitter if you would like to deny the request, select include the 10 (ten) digit sar cost object in the comments section that will fund this request. The cost object must be adepartment	SPECIFICATIONS	NOLES	ALIACHMENIS	WORK+LUW (2/3)
	TEAM INPUT					

Workflow Actions

- 4. On the left side of the tab you will see a list of options.
 - i. <u>Approve</u> Approve the workflow and send it to the next step.
 - ii. <u>Return</u> Return the workflow for comment.
 Note: This does not stop the workflow progress, but simply returns it back to the previous approver or submitter.
 - iii. <u>Reject</u> Reject the request completely.
 Note: This option completely closes out the Workflow, and locks the record for editing. In order for a Rejected request to be re-submitted a new, duplicate, record must be created and re-submitted.
 - iv. <u>Withdraw</u> Back the record out of Workflow. The submitter can edit and re-submit the record for approval.
 - v. <u>Final Approval</u> This option is only available if you are the last step in the Workflow. This option closes out the entire Workflow and sets the status of the record to "Approved."
 - vi. <u>Comment</u> Add a comment to the record.
 - vii. <u>Team Input</u> The <u>blue</u> team input link will allow you to send the request to another member of the project team for their input.
 - *Note:* Team input does <u>not</u> allow the person to approve the workflow, only comment on it, and send it back to you for approval/rejection.
- 5. Once you have selected an option a preview of the Email that projects@BU will send to the next person in the Workflow will be visible. Next to this is a comments section where you can enter any comments for the next approver to read.

()	MAIN	ADJUSTMENTS	SPECIFICATIONS	NOTES	ATTACHMENTS	WORKFLOW (2/5)	NOTIFICATIONS
	ACTIONS APPROVE BUDGET REJURN REQUEST REJECT REDUEST WITHORAW FINAL APPROVE USER DELEGATE COMMENT TAKE ACTION	This request has been sent to you for - review and approxi. Should you request a solitonic dimension, you request to the submitter. If you would like to day the request, peak able to proceed or the solita. These include the sit (leve) gift able cost able to proceed or the solita. These will find the request. The cost will find the request. The cost object must be advertised on the solitance of the include the site of the solitance of the solita	EMAIL PREVEW	PMWeb Approval Request:	Budget Requests 003 - 120ASH Demons Email Body Projek com Report Approval Vere Reard Document R Bodemitted P	tration Project - 21 - Workflow Demonstration Requests #003 80 Stockst Seventarialion Project - 21 ent for BROWARD Provent by Genry Brodenick withow Information: 003 pp: Budget Requests . Genry Brodenick	
	TEAM INPUT						

Workflow email preview

6. Once you have made your selection and entered any comments hit the *"Save"* button at the bottom of the selection to send the Workflow to the next person in the chain.

Pinning Reports to your Home Page

One of the most useful functions of the Home Page is the ability to "Pin" Reports from PMWeb to tabs that appear at the top of the page. This makes these reports quickly accessible to you, rather than needing to navigate to the "BI Reporting" section of PMWeb and find them in there.

1. Click on the "Profile" icon on the bottom left of the main menu.

- 2. In the window that opens, click on the "Home Page Settings" tab at the top of the window.
- Click the "+ Add" button at the top of the list on the "Home Page Settings" tab. A new line will be created at the bottom of the list.
 Note: Depending on how many tabs you have already "pinned" you may need to scroll through the list to find your new line. The line can be identified with the title:

4.

Project Requests

Creating a Project Request and Submitting to Workflow

Project Requests are submitted in projects@BU for review and approval by the appropriate entities. These Project Requests can be entered by anyone permissioned in the system, but must go through workflow before they can be approved and turned into active projects. This section of the guide will show you the process for creating a Project Request, and submitting it for approval.

Steps

- 1. In the Main Menu on the left, click on the Portfolio Module.
- 2. In the window that appears click on Project Requests.

		RECORDS
- `	PLANNING	Programs
۵	ENGINEERING FOR	Projects Project Requests
\$	COST MANAGEMENT	Companies PMWeb Calendar
=	SCHEDULING	REPORTS
	ASSET MANAGEME	Portfolio View Bl Reporting Center
~	WORKFLOW	PMWeb Reporting Center
	PORTFOLIO	

Portfolio > Records > Project Requests

- 3. The Project Requests Manager page opens.
- 4. In the toolbar click the "**+**" button.



Project Request List

5. An empty **Project Requests** record opens. The Contact information is auto-populated based on your login information.

Important Message: If this is an emergency, please contact management or the authorities by telephone. Do not use this form to report an emergency.						
CONTACT INFO						
Contact Name* John Smith-Test						
Phone (Day) / Extension						
Cell						
Phone (Night) / Extension 0						
Email pmTest@bu.edu						

Project Request Contact Info

- 6. In the Location drop down select the street address of the building that you would like the work to be done in. This list contains every building on campus and can be searched by entering either the street name, number or building number by starting to type in the field. Note: The number in parenthesis before the street address is the building code.
- 7. The **Record #** field is a greyed out and is auto-populated by the system. This number is to identity your project request throughout its lifecycle.
- 8. In the **Category** List select the Level of the Project

Note 1: This field is not visible to individuals in the Requestor Role. **Note 2:** Emergency projects should only be selected by Facilities staff. **Note 3:** Select "Space Request Only" if this is a space change request without any construction work.

- 9. In the **Type** field select the type of project based off of who your unit reports to.
 - i. Academic (Unit Reports to Provost)
 - ii. Non-Academic (Unit Reports to Administration)
 - iii. Infrastructure (Building Renewal)
- 10. In the **Description** field type a brief, informative description for the project, ex: "Office paint and carpet".
- 11. In the **Scope** section enter a general overview of the work that you wish to have done, and the areas that will be impacted.
- 12. In the toolbar click the *"Save"* button.

Note: The main view must be filled out and saved for the Required Fields to be editable.

Important Message : If this is an emergency, please contact management or the authorities by telephone. Do not use this form to report an emergency.						
CONTACT INFO						
Contact Name* ••••	John Smith-Test					
Phone (Day) / Extension						
Cell						
Phone (Night) / Extension	0					
Email	pmTest@bu.edu					
REQUEST						
Location	(BLDG# 758) - 120 ASHFORD STREET 🔻					
Record #*	00945					
Category	Level 3 (Elaborate)					
Туре*	1- Academic (Unit Reports to Provost 💌					
Description	Demonstration Project Request					
Scope - brief description	Need to create a Project Request for					
of the work requested &	the user guide.					
why necessary/required.	This is needed so that the user guide represents the full process.					
Linked Assets	0					

Completed Project Request header.

13. In the header bar at the top of the page click the right-most option <u>Specifications</u>. This view opens with the "Required Fields" tab selected.

í	(<u>Portfolio</u>) > Portfolio > R	tecords > PROJECT REQUESTS > 00945 - E	Demonstration Project Reque	st					
12	③ 00945 - Demonstration Project Requ •								
\leftarrow	MAIN	NOTES	ATTAC	CHMENTS (1)	SPECIFICATIONS				
	Required Fields	Update Records 🛞 Cancel							
		SPEC							
	Scope	What would be the ideal construction start date							
		What is your anticipated funding source							
		What is your anticipated cost object							
		is this related to a faculty new hire							
		If yes, what is the position number							
		What is the requesting unit							

Specification View Open showing Required Fields

14. Open the fields for editing and in the Data column enter in the requested information. Note 1: If you cannot access these fields, click the "Save" button at the top of the page, and that will allow you to edit them. The record must be saved prior to editing the Required Fields tab.

Note 2: Fields listed below with an asterisk (*) are required, all others are optional.

- What would be the ideal construction start date* The date you would like construction to begin in an ideal situation.
- What is your anticipated funding source* The Funding source you think the project will be funded by.
- What is your anticipated cost object The Cost Object you think this project will be applied to.
- Is this related to a faculty new hire* If this is a new faculty hire project click yes, otherwise select no.
- **New Employee Number** if this is a new faculty hire project, enter the ID of the new hire, otherwise leave blank.
- What is the requesting unit* Select your department.
- Note: Once you submit your Project Request to workflow you cannot change the Requesting Unit. To alter a Project Request's Requesting Unit, you must first Withdraw the Project Request, copy it, change the Requesting Unit, and Resubmit.

- Are you looking for additional space or square feet* If you are looking to expand the size of your space, or additional square footage elsewhere, click yes.
- If yes, how much additional space are you asking for If you answered yes to the above question, give an estimate of the number of square feet you wish to add, if known.
- Will you require Design Assistance* Will you need design help with your project? Such as assistance from an architect or designer?
- Do you plan on implementing this Project once it is Approved?*
 - Yes: The request is for a Project that will be approved and implemented upon acceptable scope of work and estimate.
 - No: The request is to try and define a scope of work and get an estimate for a project that may be pursued at a future date.
 - Maybe: Unsure if Project will be implemented. Decision to be based on amount of estimate.
- The next four required questions ask if the scope of your request includes any of the following
 - Demolition* Will your project require the removal of walls or redo of ceilings or floors?
 - Systems Furniture or Work Stations* Will you need any new cubicles or work stations?
 - Heating, ventilation, AC* will your project modify any heating, ventilation or AC?

Note: If ceilings are being impacted, click "Yes"

• Walls to be moved or built* – Will your project require any walls to be either moved or created?

15. Click the "Update Records" button at the top of the list of Specification Fields.

(i) <u>(Por</u>	<u>rtfolio)</u> > Portfolio > Re	cords > PROJECT REQU	ESTS > 00	0945 -	Demonstra	ation Pro	oject Reque	est
1 O0945 - Demonstration Project Requ 💌		Project Requ 🔻	++	Ŵ		4 -		
<►	MAIN	NOTES	ŝ				ATTA	CHMEN
Re	auired Fields	💾 Update Records 🛞	Cancel					
	Scope What wou		vhat would be the ideal construction start date					
		What is your anticipated fund	ing source					

Update Records button indicated

- 16. Click on the "Scope" tab.
- 17. Open the fields for editing and click the check-box next to any types of work that you believe your project will require.
- 18. Click the Update Records button.
- 19. Click the *Submit* button in the top bar of the page and the Submission window will open.

() (Portfolio) > Portfolio > Records > PROJE	CT REQU	ESTS > C	0945 -	- Demonstr	ation Pr	oject Request
3 O0945 - Demonstration Project Require		+ -			4 -	SUBMIT

Submit button

This window is made of 4 sections

i. **Header** – Click the button to move this Request forward.

Click the Cancel button to go back and alter the request prior to submitting.

- ii. Comments Add any comments you would like to the request here.
- Additional CC Enter the email addresses, separated by a comma without a space, of anyone you would like to notify of the project request submission.
 Note: You do not need to include the Approvers in this list as they are automatically notified by the system.
- iv. **File Attachment and List** Click the green file bar to add any additional attachments to the request, which then appear in the box below.

SUBMIT - 00945 - Demonstration Proje 🤝 🗕 🗖 🗙
1
2 Comments
This is the Demo request we talked about earlier
Additional CC 3 mjane@bu.edu.jdoe@bu.edu
drop files here or click to add
PMWeb v7-1.pdf × 4

Submit Window

- 20. Click the Submit button to move the request forward.
- 21. The **Project Request** is submitted to Workflow.

Note: The fields in the Project Request will be locked once the request has been submitted.
Projects and Companies

Once a Project Request has been approved it is assigned to a Project Manager to begin the Project Lifecycle. projects@BU will store the estimates, budget, designs and documents for all projects.

Projects

Updating and Reviewing a Project

A project should only be created manually if an exception has been made to the Project Request workflow. Usually, these project requests come from University Leadership.

All other Projects must go through the Project Request Workflow, including emergency maintenance projects, to ensure proper approvals have been made.



1. Use the main menu to navigate to Portfolio > Records > Projects.



Portfolio > Records > Projects

2. The Projects list page opens.

(i) (Port	() (<u>Portfolio</u>) > Portfolio > Records > PROJECTS								
Drag a column	Drag a column header and drop it here to group by that column								
Programs *All* *All*						•			
PROJECT N	IAME	RECORD #	PROJECT STATUS		PROGRAM	ТҮРЕ	CATEGORY		
	÷								
120ASH - Testi	ing Projec	00557	3) Active	Draft	Testing Program	Renovation/Renev	Office/Tenant Fit-		
Demonstration Project 00556		00556	2) Assigned	Draft	Testing Program				

Project List

- 3. Select the Project that you wish to update, and double-click on the line in the list.
- 4. The Project record opens.

() (Portfolio) > F	Portfolio > Records > PROJECTS > 00556 - Demon	stration Project - 2			
i≣ 'D 00556	- Demonstration Project - 2 💌 📳 🕂	8 🖶 🖸			
MAIN	SPECIFICATIONS	WBS	USERS	NOTES	ATTACHMENTS
ExgRam Project ID* Name* Location Project Status Project Status Currency (Project Manager Program Wits (Program Wits Program Wits (Plaseholder Budget Tanget Drainon Tanget Start Tanget Start Tanget Start Tanget Start	0000000 - Teating Program • 00050 00050 Demonstration Project - 2 (8LDGE 759) - 120 ASHFORD STREET (8LDGE 759) - 120 ASHFORD STREET • (9) AshFORD STREET • </td <td>SAP DATA</td> <td></td> <td>USER DEFINED FIELDS Project Phase Additional Space Requested</td> <td></td>	SAP DATA		USER DEFINED FIELDS Project Phase Additional Space Requested	
Linked Assets (Logo (BOSTON UNIVERSITY				

Project Record Main View

- 5. The **Program** is the University academic or business unit of the project client. This also controls security access and workflows for the project.
- 6. The **Project ID** field auto-populates and cannot be modified by the user.
- 7. The Project **Name** conforms to a specific standard to make searching and identifying specific projects much easier for the whole team.

The project name consists of several pieces of information separated by dashes:

- i. 6-character number/letter address
- ii. A very brief (three or four words) project description
- iii. Calendar year the construction is expected to start

Program	99999999 - Testing Program 🔻
Project ID*	00556
Name*	120ASH - Demonstration Project - 21
Location	(BLDG# 758) - 120 ASHFORD STREET 🔻

Properly Formatted Project Name

- 8. The **Project Status** has multiple options
 - i. Unassigned This project has been generated from project request and has not yet been assigned to a Project Manager.
 - ii. Assigned This project has a Project Manager assigned. A kickoff meeting with the client is required to define the scope.
 - iii. Active This project has a Project Manager assigned. Resources are being utilized. Refer to the project phase for more detail on this project status.
 - iv. Closed All work associated with this project has been completed. This project is closed in SAP.
 - v. Hold This project had a Project Manager assigned. Due to some circumstance the project resources are not performing work. Refer to the notes view for more information.
 - vi. Canceled Work associated with the project has concluded. The project was not implemented. Any SAP account is closed.
 - vii. Duplicate This project exists as another project; this is a duplicate project and will not be used. Refer to the other project.
 - viii. Frozen This project has a Project Manager assigned. This project has been put on hold due to a capital funding freeze.

Note: This status was used during the Covid-19 crisis to indicate projects on hold due to Covid-19 budget concerns.

- 9. The **Project Type** and **Category** fields help structure projects@BU views and reports so that similar Projects can be grouped together.
- 10. **Project Manager** holds the name of the Project Manager for sorting purposes.
- 11. The **Placeholder Budget** field holds the estimated budget of the project prior to any Scoping, Planning or Design work having been completed, the actual budget of the project is entered in the **Budget** module.
- 12. Target Start, is the targeted start date of work on the project.
- 13. Target Finish, is the targeted completion date of the project.
- 14. The **Scope** field holds the starting scope of the project. This field remains the same throughout the project lifecycle. Current Scope is documented under the Specifications tab in the **Current Scope** tab.
- 15. The **Project Phase** dropdown shows the current phase that the project is in.
- 16. Once any changes have been made in the toolbar click the **"Save"** button.

4	MAI	N		SPEC	IFICATION
	Program		999999999 - Testing F	Program	-
	Project ID*		00556		-
	Name*		Demonstration Project	ct - 2	_
	Location		(BLDG# 758) - 120 AS	HFORD STREE	T -
	Project Status		2) Assigned		•
	Project Type		Renovation/Renewal		•
	Category		Office/Tenant Fit-Out	t	-
	Status		Draft	•	0
	Currency	•••	USD - Dollars (USA)		-
	Project Manager		99 - John Smith		*
	Program WBS	•••			*
	Placeholder Budget			150	,000
	Target Duration		0		-
	Target Start			09-03-202	1 🗂
	Target Finish			03-11-2022	2 🗂
	Percent Complete				0%
	Scope		Demonstration projec	ct Record	
	Linked Assets	•••			0
	Logo	••••	BOSTO	N TY	

Updated Projects Record

17. Under the "SAP Data" section is the **Project Account** code for the project. **Note:** This is updated automatically after the Budget Request is successfully approved and integrated into SAP.

SAP DATA	
Project Account	

Project Account field

18. The **Capital Freeze Exception** field indicates if this project was noted as an exception during the 2020 – 2021 COVID-19 Capital Freeze.

N/A	
Capital Freeze Exception	

Capital Freeze Exception

19. Click on <u>Specifications</u> at the top of the page to view the Project Specification fields. To access the different Specification tabs, click on the tab names to the left.

0	MAIN	SPECIF	ICATIONS		WBS	USE	RS	NOTES
	Core Team	/ Edit						
_								
	Internal Stakeholders	Project Executive						
		Project Manager						
		Designer						
	External Stakeholders	Planner - Permitting and	d Master Planning					
-		 OPM						
	Project Level	QA QC						
_								
	Current Scope							

Specifications Tab with sub-sections shown

These values can be changed by anyone with write access to Projects (Project Managers and Executives) by highlighting the line or lines that you want to change and clicking the

Edit button.

Note: Core Team, Internal Stakeholders, and External Stakeholders tabs do **not** control access to the project. They are used for reporting and as a quick reference. Access to the Project is granted through the "Users" tab.

- 20. The **Core Team** tab tracks who are in the main roles of the Project Team. **Note:** If the <u>Project Manager</u> field in this tab is not blank, any <u>Budget Requests</u> submitted will be rejected by SAP, slowing down the approval process.
- 21. Internal Stakeholders are BU employees who are outside the core team but still involved with the project. (For example: BUPD, EH&S, and IS&T)
- 22. **External Stakeholders** are people or organizations outside of BU that are involved with the project. (For example: Architect, General Contractor)
- 23. The **Project Level** tab holds the level of the project.
- 24. The Current Scope tab holds:
 - i. If scope changes, an updated scope of the project can be entered in the **Current Scope** field to be compared to the **Original Scope**.
 - ii. The checkmark on the **SPACE Report** row specifies if a project is to be included on the SPACE report.
 - iii. The size of the Project:
 - **Project Size Net/Gross** The Total Size of the Project in both Net and Gross Square Feet. In most cases, only Net square footage is needed.
 - LEED Square Footage Net/Gross The LEED size of the Project in both Net and Gross Square Footage.
 - iv. The **Special Schedule** drop down indicates if a project is specifically scheduled to occur during:
 - Intercession During the school break from the end of December through January
 - Summer During the school break from the end of June to August.
 - N/A Select this option for neither.
 - v. Once a project is complete use the **Placed in Service Date** to record the point in time when a property or long-term asset is first placed in use for the purpose of

accounting, primarily to calculate depreciation or grant a tax credit. The date the asset is placed in service marks the beginning of the depreciation period.

- vi. The Capital Project Status drop down indicates if a project is:
 - Capital
 - Non-Capital

Note: This determination is usually made with the assistance of Budget Planning & Business Affairs.

- vii. Once a Project has reached Closed Status the **Project Close Reason** indicates if it was closed due to:
 - 1. Project Complete The work has been done and the accounts are closed.
 - Client not Proceeding Client decided not to proceed with the project.
 Note: This option is in addition to the "Canceled" status, since it indicates that the Project was closed due to the client specifically.
- viii. The next four (4) selections are grouped as a series and apply directly to the LEED status of a Project.
 - 1. **LEED Project** This field indicates if we are seeking LEED status for the project.
 - Yes
 - No

Note: If this is set to "No" then none of the following fields are required.

- 2. **LEED Submission Status** This field tracks where the project is in the LEED submission process.
 - Not Submitted Project has not yet been submitted for LEED Certification, but will be.
 - Submitted Project has been submitted for LEED Certification
 - Not Achieved Project has been reviewed and not given a LEED Certification.
 - Achieved Project has been reviewed and given a LEED Certification.

Note: Once a project has been submitted for LEED, the rating field is required to show what rating the project is following.

- 3. **LEED Rating System** This field indicates the rating system being used for the project. The options are:
 - V4 BD&C
 - V4 Homes
 - V4 ID&C
 - V4-0&M
 - V4.1 BD&C
 - V4.1 Homes
 - V4.1 ID&C
 - V4.1-0&M

Note: This field is required if LEED Submission Status is "Submitted."

- 4. **LEED Certification (Sought)** This field indicates the certification level that we are seeking for the project.
 - LEED Certified
 - LEED Silver
 - LEED Gold
 - LEED Platinum

- 5. **LEED Certification (Achieved)** This field indicates the certification level that a project has achieved. The available options are:
 - LEED Certified
 - LEED Silver
 - LEED Gold
 - LEED Platinum

Note: This field is not required if the Submission Status is "Not Achieved."

25. The Users tab gives Project Managers the ability to assign a GC, Sub-Contractor, Architect, and Project Executive (if applicable) to the workflow approval roles for a Project.

WARNING: If these roles are not assigned properly the workflows will not route to the proper approvers, and this can lead to delays in the approval process.

Note 1: By default, BU users can only view those projects that are assigned to their Academic or Business unit.

Note 2: To request a user to be added to projects@BU, first add them as a contact to their Company (see Company Section), and then submit a ticket to ithelp@bu.edu for the User to be granted access to projects@BU.

26. The **Notes** tab allows permissioned users to add project notes. These can be ordered and filtered by Creator, Creation Date, Description or Edit Date.

Note: See the "Creating a Note" section under projects@BU Basics for instructions on adding a note to Record in projects@BU.

27. The **Attachments** tab allows you to attach documents to a project.

Note: See the "Using the Document Manager and Attaching Files to Records" section under projects@BU Basics for instructions on how to load documents into projects@BU and then link them to a record.

Adding Team members to the Project and Workflows

All **Projects** in projects@BU have several roles that must be assigned prior to processing Commitment and Change Orders. The roles correspond to team members on projects including the Project Manager, Architect, Project Executive, and the General Contractor.

••	MAIN	SPECIFICAT	IONS	WBS		USERS	NOTES	ATTACHMENTS
P	ROJECT ACCESS (a))	WORKFLOW ROLES	(b)				
)))	Basic Users BU Implementation Ti Core Team - Architec	Conly display users with access	Users admin (admin) Gerry Broderick (gerald	lb@bu.edu)	Uiew U	Jnlocked Roles Only Roles in Use Only		
•	🚉 Core Team - External	System Admins (Full)	💄 Jason Test (jasontest@)bu.edu)				
)	🚓 Core Team - Internal	Project Managers (Fu	💄 Jonathan Smith (jsmitl	h@bu.edu)	•	System	Central Administration	admin (admin)
,	Core Team - OPM (Fu				•	System	Contract Specialist	Gerry Broderick(geraldb@bu.edu)
,	🚉 Core Team - Project E				•	System	CRC subSPACE	Gerry Broderick(geraldb@bu.edu)
-	🔐 Core Team - Project !					System	Departmental Approver	Gerry Broderick(geraldb@bu.edu)
	🚢 Core Team - Sourcing				•	System	Departmental Approver 101000	admin (admin)
	👬 Core Team - Sourcing				•	System	Departmental Approver 102010	admin (admin)
	🚜 Guest User (Guest)				•	System	Departmental Approver 102015	admin (admin)
	🚜 Implementation Team				•	System	Departmental Approver 102025	admin (admin)
,	Revealed A Project Director (Full)				•	System	Departmental Approver 102030	admin (admin)
	** Project Managers (Ful				•	System	Departmental Approver 102050	admin (admin)
4	Trojece malagels (rul	4 •			ŀ	1 2 3 4 5 6	8 7 8 9 10 🕨 M PAGE SIZE 10	•

Users tab shown with list of Project users on the left (a) and Workflow Roles (b) on the right.

The following image key shows how to read the icons next to the users' names which show how they have or have not been granted access to the Project.

Icon	Access Level	Description	User Group Examples
			Project Managers,
W.	System	Access to all system	System Admins
N		Access to all Projects	
, r		in one Program	Sponsors (Departmental
	Program	(School/Department)	Approvers)
0		Access to only Projects	External Service
25		they have been added	Providers (Engineers,
	Project	to	GCs)

User access icon key

Adding a User to a projects@BU Project

- 1. With a **Projects** record open click on the <u>Users</u> tab.
- 2. In the "Project Access" section of the window, click the checkbox next to "Only display users with Access".

The left-hand side of this tab shows all users in projects@BU as well as the list, by role, of all users who have access to this Project. The right-hand side of the tab shows the Workflow roles for the **Project** as well as the Users that have been assigned to those roles.

Warning: Prior to entering any Engineering Form record into workflow through projects@BU you must fill out the appropriate roles for the workflow to route as intended, otherwise your document will be rejected and will need to be re-submitted.



Project Access section with "Only display users with access" indicated.

Validate that the user you wish to add does not already have access to the project by:
 Click the arrow button next to the role of the user



Project Access List highlighted with arrow button indicated.

Note: If you do not know the role of the user, contact the System Administrator through ithelp@bu.edu, and they can tell you.

ii. Check to see if the user's name is present in that list. If name is present, then move to "Configuring Project level Workflow Roles for a projects@BU Project." If not proceed to step 4.

Note: By default, all Project Managers have access to all Projects, and Sponsors have access to all Projects in their department(s).

- 4. Open the drop down on the user's role in the full user list on the left.
- 5. Drag the user from the full user list and drop it on the <u>name of the project</u> on the project list to grant them access to the project.



Granting a User access to the Project.

Adding users to project workflows

In the **Project** window click on the <u>Users</u> tab.

Click the "View Unlocked Roles Only" checkbox to limit the list to the roles you can assign for the project.

Users admin (admin) Gerry Broderick (geraldb@bu.edu)	View View	Unlocked Roles C Roles in Use Only	inty	
💄 Jason Test (jasontest@bu.edu)	LOCKED	LEVEL	ROLE*	USER*
💄 Jonathan Smith (jsmith@bu.edu)		System	Planner/Architect	admin (admin)
		System	Project Director	admin (admin)
		System	Project Executive	admin (admin)
		System	Project Manager	admin (admin)
	ł	(∢ 1))	PAGE SIZE 10 V	



Locate the Workflow Roles section on the right-hand side.

WORKFLOW ROLES						
 Users admin (admin) Gerry Broderick (geraldb@bu.edu) 		☑ View Unlocked Roles Only □ View Roles in Use Only				
Lason Test (jasontest@bu.edu)	LOCKED	LEVEL	ROLE*	USER*		
💄 Jonathan Smith (jsmith@bu.edu)		System	Planner/Architect	admin (admin)		
		System	Project Director	admin (admin)		
		System	Project Executive	admin (admin)		
		System	Project Manager	admin (admin)		
	A PAGE SIZE 10 V					

Workflow Roles section highlighted

In the "Users" section locate the name of the user you wish to add to a role.

Note: This list is alphabetical by First Name and only contains users who have access to the Project. To put someone in a workflow role, they must first be granted access to the project in the step above.

In the "Workflow Roles" section, locate the role you wish to add the user to.

LOCKED	LEVEL	ROLE*	
(Fa)	System	Planning	Gerry Broderick(geraldb@bu.edu)
V	System	Planning, Design & Construction Manag	Gerry Broderick(geraldb@bu.edu)
	System	Project Director	admin (admin)
_(b)	System	Project Executive	admin (admin)
	System	Project Manager	admin (admin)

Workflow roles list highlighted with both "locked"(a) and "unlocked"(b) roles indicated.

Note 2: Many roles are locked at the system level because these roles are system wide. The roles that can be changed by the Project Manger are those that vary by project. These are:

- Planner/Architect
- Project Director
- Project Executive
- Project Manager

Click-and-drag the name of the Project User you wish to add to a specific role from the "Workflow Roles" user list, to the role list.

WORKFLOW ROLES				
🖌 🚢 Users	🗹 View	Unlocked Roles Only	/	
💄 admin (admin)	🗆 View	Roles in Use Only		
Leven Gerry Broderick (geraldb@bu.edu)				
💄 Jason Test (jasontest@bu.edu)	LOCKED			
💄 Jonathan Smith (jsmith@bu.edu)		System	Planner/Architect	admin (admin)
		System	Project Director	admin (z 💄 Jonathan Smith (jsmith@bu.edu)
		System	Project Executive	admin (admin)
		System	Project Manager	admin (admin)
			GE SIZE 10 -	

Dragging a User to the appropriate role.

Repeat steps 3 – 6 for each Project Level Role.

Companies

Companies in projects@BU are created by the System Administrators and must first be verified as Suppliers through Boston University's Souring & Procurement department as well as added to SAP. Once a company is created, any Project Manager can add **Contacts** to that Company, and request that those **Contacts** be created as Users by emailing ithelp@bu.edu.

General Navigation

1. Use the menu to navigate to *Portfolio/Records/Companies*.



Portfolio -> Records -> Companies

2. Click the grey <u>Record #</u> link to access the Company record.

(<u>) (Portfolio)</u> >	Portfolio > Re	cords > COMP	ANIES		
Drag a column header an	d drop it here to g	group by that colun	าท		
All	•	3 ⊞			
COMPANY	RECORD #	ABBREVIATION	TYPE	FED TAX	STATE TAX
-				-	
Boston University	BU				
2020 Engineering LLC	<u>1001</u>				
3M Company	<u>1002</u>				
A & M Associates Ltd	<u>1003</u>				
A C & R Supply Co Inc	<u>1004</u>	Johnstone Suppl			
A Maintenance Supply C	<u>1005</u>	AMSCO			
A&P Woodworking, Inc.	<u>1006</u>				

Company List

- 3. In the Record Main view you will see several fields.
 - i. Company ID This is the auto-generated record number for the Company.
 - ii. **Name** The full name of the Company, and the primary way you will search for the company in any lists.
 - iii. **Type** The type of work that the Company performs, for example Architect, Contractor, Life Safety
 - iv. **Abbreviation** A shortened version of the Company's name, this can be used in either Reports or Forms in projects@BU to save space on longer company names.
 - v. Reference This field indicates the Company's Bidding Status:
 - 1. Registered Vendor This company **has** gone through BU's vendor approval process, and is a registered company.
 - 2. Bidding Company Only This company **has not** gone through BU's vendor approval process, and will be required to go through that process prior to starting work at BU.
 - vi. Account # The Company's Account number in the Procurement system.

() (<u>Portfolio</u>) > F	Portfolio > Records > COMPA	ANIES >	Test-Arch-123	- Archi	tecture Testing	Company
123 D Test-A	Arch-123 - Architecture Testing 💌		+ 🗇	•	i - ©	
MAIN	SPECIFICATIONS	ADE	RESSES	DE	EPARTMENTS	CONTACTS
Company ID* Name* Type Abbreviation Reference <u>PMWeb Account ID</u> Account # Federal Tax ID State Tax ID State Tax ID Country Billing Terms Occupant Approved Bidder	Test-Arch-123 Architecture Testing Company Approved Vendor 12345678		PRIMARY ADDRE Address Phone Ext Fax Email Website TAGS Latitude Longitude	:SS	Main 123 Some way Boston, MA, 02481	
			Geolocation			

Company Main View

- 4. Next to the main Company information you will also see the <u>Primary Address</u>. This is the main address of the company (see #6 right below).
- 5. **Specifications** This view has several tabs that define any Specialties, Scope Areas, Professional Services, or Certifications that the Company has, as well as their Labor Type (Union vs non-Union).
- Addresses This is the address for the Company as provided by either their Vendor Registration Form (for Approved Companies) or directly by the vendor (for Unapproved Companies). If multiple, one of these addresses is selected as Primary and is the address displayed on the Details tab.

Note: The ID column at the left of the address fields is very important as it is what identifies the mailing address for each Company Contact in projects@BU.

(j) (j	<u>Portfolio)</u> > Portf	olio > Records	> COMPANIES	S > Test-Ar	ch-123 -	Archite	ecture Testing C	ompany
1 2 3	D Test-Arch-1	23 - Architecture Tes	sting 💌	8 +		Ð	• •	
<	MAIN	SPECIFICATIONS		ADDRESSES		DEP	ARTMENTS	CO
Drag a colu	umn header and drop	it here to group by	that column					
/ Edit	🕂 Add 🗎 🗈	Delete 📿 Refres	h 🌐 Layouts	3				
ID*		ADDRESS 2	CITY		ZI		COUNTRY	Pŀ
-				F 📃 च	-	-		
Main	123 Some way		Boston	MA	02481		USA	

Completed Address Record in projects@BU, with Primary Address Checked

- 7. **Departments** Though largely unused, if there is specific contact information for a department within a Company, that information is listed here.
- 8. **Contacts** These are the names, phone numbers, and email addresses of BU's contacts at the company.

Note: Any individual who needs to be a user in projects@BU must first be set up as a contact. Once they are a contact in projects@BU a ticked must be submitted to the helpdesk (ithelp@bu.edu), for them to become a user

Note 2: For external vendors the ID field in the contacts list will be the user ID. Please use their email address for this field.

Creating a Contact

Follow these steps to create a new Contact for a Company in projects@BU.

Note: A Contact must be trained and be set up as a User to access the system. After creating the contact record, please send an email to <u>ithelp@bu.edu</u> and request that a Contact be trained and granted access to the system.

Use the menu to navigate to Portfolio/Records/Companies

- 9. In the list view, in the whit box below the Company column header, type in the name of the Company you wish to add a Contact to and hit Enter.
- 10. Click on the grey <u>Record #</u> link to enter the Company Record.
- 11. In the list of tabs in the top of the page click "Contacts."
- 12. Click the "Add" button at the top of the list.

(i) (Portfo	lio) > Portfolio > R	ecords > COMPANI	ES > Test-Arch-123	- Architecture Test	ing Company	
1 D	Test-Arch-123 - Archit	tecture Testing 💌	B + 🖻	ē: o		
MAIN	SPECIFI	CATIONS	ADDRESSES	DEPARTMENTS	CONTACTS	
Drag a column he	ader and drop it here to	group by that column				
🖉 Edit 🕂	Add 🗎 Delete	📿 Refresh 🛛 🖽 Layou	uts			
ID						
=	÷	-	-			
archTestingUser	Architecture	Update Test		Main		
[PAGE SIZE 20	•				

Contacts View with Add Button Indicated

- 13. A new line will be created with a yellow background to distinguish it from the previously existing contacts.
- 14. In the ID field enter the email address of the Contact
- 15. Enter the **First Name** and **Last Name** in the appropriate fields.
- 16. Select an Address ID from the drop-down list that corresponds with the correct Address for
 - the Contact.

Drag a column h	eader and drop it here to	group by that column			
🖺 Save 🧕	Cancel				
	FIRST NAME	LAST NAME	DEPARTMENT	ADDRESS	TITLE
newuser@tes	Demonstration	Architect	-	1073 - Main 💌	
archTestingUser	Architecture	Update Test		Main	
4					

Newly created Contact with yellow background shown.

17. Click the "Save" button at the top of the list to add the Contact to the Company.

Drag a column h	eader and drop it here to	group by that column			
🖺 Save 🤅	Cancel				
ID	FIRST NAME	LAST NAME	DEPARTMENT	ADDRESS	TITLE
					-
newuser@tes	Demonstration	Architect	-	1073 - Main 💌	
archTestingUser	Architecture	Update Test		Main	

Show the correct save button to be used to save contacts.

Project Schedule and Gantt Chart Overview

Schedules

projects@BU scheduling allows you to track project schedules, milestones, and critical paths appropriate to the needs of the project.

To gr	oup by, a	drag colu	umn caption here												
/		0	× ¬ ~ +	$\pm \equiv \equiv \bigcirc$	⊕ ⊕ sta	art 🦳	08-26-2021		Finish	02-25-	2022 🗒	Page	size 10	Sho	w Filter 🖟
			⊖ Task O	Start 🗘	Finish		0 TF	08	09						
×	NaN	×	×	×	×	≌ ×	×								
	23777	100	Team Assigne	08-26-2021 🗮	08-26-2021	1	0%		Þ						
	23778	200	Approval of P	08-27-2021 🗮	09-10-2021	11	0%		° D						
	<u>23779</u>	300	Approval of D	09-11-2021 🗎	10-30-2021	11	0%		l>⊏						
	<u>23780</u>	400	Bidding	10-31-2021 🗮	11-11-2021	11	0%					5			
	<u>23781</u>	500	Final Design (11-12-2021 🗮	11-17-2021	1	0%				2	D			
	<u>23782</u>	600	Contractor Se	11-18-2021 🗮	11-24-2021	11	0%								
	<u>23783</u>	700	Construction	11-25-2021 🚞	11-26-2021	111	0%					12D			
	<u>23784</u>	800	Construction	11-27-2021 🗎	01-03-2022	11	0%							44	
	23785	900	Furniture Inst	01-04-2022	01-04-2022	121	0%	4					16	b-	
<	<< [2/2) >> >) i												

Typical Milestone Schedule in projects@BU

Reading the Gantt Chart

The visual format of an element in the projects@BU Gantt chart signifies the type and/or status of the element. It is important to understand what each format means to correctly interpret the schedule.

Task Bars



- A task not on the critical path which is 0% complete
- A task not on the critical path which is 30% complete
- A task which is 100% complete
- A task on the critical path which is 0% complete
- A task on the critical path which is 80% complete

Dependency Connectors

This is a **Start-To-Start(SS)** dependency:

The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2

٢	<u>18649</u> 1	Task 1	Oct-03-2016 🗎 Oct-07-2016 🗎	0%	0	5.00	
0	<u>18650</u> 2	Task 2	Oct-03-2016 🗒 Oct-07-2016 🗒	0%	0	5.00	

This is a **Start-To-Finish(SF)** dependency:

The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2

0	<u>18649</u> 1	Task 1	Oct-03-2016 📋 Oct-07-2016 📋	0%	0 5.00
\odot	18650 2	Task 2	Oct-03-2016 🔛 Oct-07-2016 🔛	0%	0 5.00

This is a Finish-To-Start(FS) dependency:

The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2

	<u>18649</u> 1	Task 1	Oct-03-2016 🗎 Oct-07-2016 🖺	0%	Ο	5.00	
۲	<u>18650</u> 2	Task 2	Oct-08-2016 🗒 Oct-12-2016 🗒	0%	0	5.00	Lo.

This is a **Finish-To-Finish(FF)** dependency:

The arrowhead indicates that it is a successor for Task 1 and a predecessor for Task 2

<u>1864</u>	<u>9</u> 1	Task 1	Oct-03-2016 📋 Oct-07-201	5 🔛	0%	0	5.00
0 2		Task 2	Oct-03-2016 📋 Oct-07-201	5 🔛	0%	0	

Red dependency connectors indicate that the schedule needs to be recalculated:

0	<u>18649</u> 1	Task 1	Oct-03-2016 🖺 Oct-07-2016 🗎	0%	-5	5.00	
	<u>18650</u> 2	Task 2	Oct-03-2016 📋 Oct-07-2016 🗒	0%	0	5.00	L)

The dashed line segment of a connector indicates a lag, in this example a lag of +2 days:

Oct-	Oct-03-2016 🖺 O	07-2016 🔛 09	%	0 5	00
Oct-	Oct-10-2016 📋 O	14-2016 📋 09	%	٥	5.

The **dashed line segment** of a connector indicates a lag, in this example the lag is **-2 days**:

Constraints

This example shows a task with no constraints:

D 0	Code C			C Finish				Duration (Se; 1 5		00 3 4 M T	tober 2016 5 6 W T	
○ <u>18649</u>	1	Task 1	Oct-03-2016	[발] Oct-07-2	016 🗎	0%	0	5.0					
K K General	1/1 Deper) >> >) ndencies R	esources	Project Code	s N	otes							
Select Task Code	1	3649 - 1 - Task 1			Constr Constr	aint aint Date		None		•	Atta	chments (0)	Critical Early St

Constraint - None

The following screen shots show various constraints and their constraint dates. Notice how each constraint is displayed in the Gantt chart:



Constraint - Finish No Later Than

D 🗢	Code 🗘 Tas						O Duration	Ser 1 5	October 2016 4 5 6 T W T	7 8
<u>18649</u>	1 Tas	k1	Oct-03-2016	Oct-07-2016	iii)	0%	0 5.0			=
General	1/1 Dependen	ncies Res Delete	ources Pr	oject Codes	Notes					
Select Task Code	18649) - 1 - Task 1			onstraint onstraint D)ate	Must Finish Oct-07-201	On 6	Attachments (0)	— Critical I Early St

Constraint - Must Finish On

🗆 ID 🗢 C		Start			C Duration C 1 S	2 3	Оссовег 2016 4 5 6 Т W Т	
0 <u>18649</u> 1	Task 1	Oct-03-20	16 📋 Oct-07-20)16 🗒 🛛 🕅	0 5.0	F	-	
General	Dependencies	Resources	Project Codes	Notes		_		
Select Task Code	Save Delete 18649 - 1 - Tas 1	k 1		Constraint Constraint Date	Must Start On Oct-03-2016	-	<u>Attachments (0)</u>	— Critical I Early Sta

Constraint - Must Start On

•									on (1 S	2 3	October 2 4 5 T W	1016 6 7 8 T F 5
0	18649	1	Task 1	Oct-03-2016	🗎 Oct-07-20	016 🔛	0%	0	5.0	0		
	General	1/1 Deper) >> >> ndencies Re	sources	Project Codes	Notes						
C	New	Save	Delete			3					1	
Se	elect Task	1	8649 - 1 - Task 1		*	Constraint		Start N	o Earlier Than	-	Attachmen	ts (0) Critical
0	ode	1				Constraint	Date	Oct-03-	2016			Early St

Constraint - Start No Earlier Than

Copying a Template Schedule and Updating Tasks

Creating a **Project Schedule** from a *Template* allows for enhanced client communication through both access to a shared schedule and enhanced Project reporting.

In this lesson, you will copy a template schedule and then learn how to modify scheduled durations.

Steps

1. Use the menu to navigate to Scheduling / Schedules.

	Controls
PLANNING	Schedules
	Estimates Budget Requests
S COST MANAGEMENT	<u>Cost Worksheets</u> <u>Companies</u> <u>Document Manager</u>
SCHEDULING	Feedback

Scheduling Schedules

2. Click the "+" button.										
		(<u>Po</u>	<u>rtfolio)</u> > Sched	uling > SCHEE	DULES					
		Drag a colum	in header and drop i	t here to group by	that column					
		Ð	Programs *All	*	Projects *All*					
							DESCRIPTION			
			-			-				
		120ASH - Te	sting Project - 21	00557	10948	Draft	Level 1 - 2 Project Template (Don't D			
		120ASH Dem	onstration Project -	00556	10949	Draft	Level 3 - 5 Project Template (Don't (
		4								
		€ € 1 ▶	PAGE SIZE 20	-						

Schedule List with + button indicated

- 3. In the **Project field** select your project.
- 4. In the Description field enter "Project Milestone Schedule."
- 5. In the **Type** field select "Overall Project."
- 6. In the Calendar field select "001 Standard."
- 7. Click the "Save" button to save your settings prior to loading the template. **Note:** This step is <u>essential</u>. Loading a template onto an unsaved schedule will overwrite both the Project Name and Description fields with the name and description from the template schedule.
- 8. In the Header, click the arrow next to the plus "+" icon, and click "Copy from Schedule"

(i)	<u>(Portfolio)</u> > Scheduling > S	SCHEDULES > 1094	9 - Le	evel 3 - 5	Project	Templa	ate
123	010949 - 120ASH Demor	nstration Proj 💌	B	+ I+ T	Î	S	
\leftrightarrow	MAIN		NOT	New (Alt+r Copy From	n) n Schedule	9	

9. The Select a Schedule dialog opens.

SELECT A SCHEDULE									
F									
	—		Ŧ						
000001		Current Level 1 - 2 Project Template (Don't Delete)							
000002		Current Level 3 - 5 Project Template (Don't Delete)							
000002		Current Level 3 - 5 Project Template (Don't Delete)							
000002		Current Level 3 - 5 Project Template (Don't Delete)							

 Select the project number hyperlink of the project you want to copy your schedule from. This can be either a template (Indicated as Level 1-2, Level 3, Level 4, Level 5 Template, or Facilities Template), or any other schedule in the system.

			DESCRI
		temp -	
003462		Template Schedule Project (Don't Delete)	Level 1-2 Template Schedule
003462		Template Schedule Project (Don't Delete)	Level 3 Schedule Template
003462		Template Schedule Project (Don't Delete)	Level 4 Scheduled Template
003462		Template Schedule Project (Don't Delete)	Level 5 Schedule Template
003462		Template Schedule Project (Don't Delete)	Facilities Schedule Template
[4 4 1 ▶ 6] PAGE SIZE 5 .	•		

Project number hyperlink indicated

projects@BU (PMWeb) will load the selected schedule into the schedule window below with all tasks having the base start and end date populated matching the template you chose.

Tog	roup by, a	drag coli	umn caption here																	
~		(0)	x • ~ + H - I Q	Ð	⊕, Start		01-09-2023		Finish (03-2	4-2023 🖺	Page siz	10	Show	Filter	2 🚢				
- 10				٥																
) *	NaN	×	×		×	Ë	×	Ë	×	×	×	E								
Ø	104297	1000	Project Manager Selected		01-09-2023	Ë	01-22-2023	Ë	0%		0	E	P							
9	104298	1100	Project Kickoff		01-23-2023	Ë	02-05-2023	Ē	0%		0	E	Loc	2						
O	104299	1200	Planning & Programming		02-06-2023	世	02-19-2023	Ë	0%		0	E		6	5					
Ð	104300	21000	- Design		02-20-2023	Ë	03-12-2023	Ë	0%		0	E		6	_	5				
Ð	104301	59000	Bidding		03-13-2023	Ë	03-26-2023	Ë	0%		0	E			b					
D	104302	64000	Budget Approval		03-27-2023	Ë	04-09-2023	Ë	0%		0	E				b	5			
Ð	104303	68000	Construction		04-10-2023		05-09-2023		0%		0	E				Lo	_	-		
Ð	104304	72000	FF&E, A/V, Security		05-10-2023		05-23-2023		0%		0	Œ						6)	
D	104305	81000	Occupancy		05-24-2023	Ü	05-30-2023		0%		0	Œ						1	0	
O	104305	85000	Close Out		05-31-2023	Ë	06-29-2023	Ē	0%		0	E							Ь	
					4															

11. In the schedule controls bar enter the start date of the project by clicking on the calendar icon and selecting the day in the calendar that opens.

To group by, drag column caption here .

	⊕ (⊕(s	tart 🗌	01-03-2023 🗎	Finish	08-09	-2023 🗎
ID 💠 Code 🗢	Start				TF 🗘	

Start and Date Indicated

12. Click the "Save" button on the schedule controls bar to update the schedule with your new start date.

✓ <mark>믤</mark> ХС×∽~+⊞⊟	2 (⊕)	Start	10-04-2022 🗒	Finish (06	01-2023 🗒
ID 🗘 Code 🗢 Task	Start				TF	06

Save Button

13. To update the duration of a specific task, click on the ID of that task in the list, and the "Details" tab below will display details for it. Alternatively you can select each task from the "Select Task" dropdown in the details tab below the schedule.

	Select Task	50404 - 11000 - Pro	ect Kickoff 👻	Constraint
DEPENDENCIES	Code	11000		Constraint Date
	Task	Project Kickoff		% Complete
RESOURCES	Summary		-	Remaining Durati
	Туре	Task	-	Status
ROJECT CODES	Curve			
NOTES				
NOTES		START	FINISH	DURATION DAYS
NOTES	Current	START	FINISH	DURATION DAYS
NOTES	Current Baseline	START 01-03-2023 📛	FINISH 01-16-2023	DURATION DAYS

- a. The Start Date updates automatically based on the end date of the previous task.
- b. On the "Current" line, update the <u>Duration Days</u>, or update the <u>Start/End Date</u> field. **Note:** If you need to back date (set a date prior to the creation date of the schedule template), then you need to enter the start and finish dates of the task in the "Actual" date fields, otherwise the system will automatically adjust tasks back to the templated start date.
- c. Click the "Save Task" button in the Details tab to save your changes.

🕂 Add Task	💾 Save Task 🛛 🍿 Delete T	Task	
Select Task	50555 - 77000 - C		Constraint
Code	77000		Constraint
Task	Construction		% Comple
Summary		•	Remaining
Туре	Task	-	Status
Curve		•	
	START	FINISH	DURATION DAYS

	START	FINISH	DURATION DAYS
Current	04-07-2023 🛗	06-05-2023 🛗	60
Baseline	<u> </u>	<u> </u>	0
Actual	<u> </u>	<u></u>	0

Date fields and Save Task Indicated.

- d. Click the Check Mark 🚩 to update the dependent tasks on the schedule.
- 14. Repeat Steps 13 for each task as needed.
- 15. Click the Save button at the top of the Schedule to save all your updates.

~		×	C	5	1	÷	+ -		Q	⊕ ⊕	Start	01	-03-2023 🖺	1	Finish	08-09	-2023 🗎
	D	\$	Cod€							Start				%C		٥	

Save button on schedule

Estimates and Budgets

Estimates

The Estimates record gives Project Managers a tool to either create a proposed budget, or to request prebudgeting funds, such as site surveys or Architecture and Engineering. A Budget Request can be generated from an individual line item or the entire Estimate.

The Budget Request is then submitted to Workflow for approvals. Once the submission is approved the requested lines become the original budget.

Note: Estimates are seen only by the Project Manager and Project Director Roles in projects@BU, they are where PMs can experiment with various project budgets before requesting their final budget. While it is possible to create a Budget Request directly without going through the Estimate Process, the Procurement and Bidding Process is based off of the Estimate Record, not the Budget Request.

Note 2: The process for moving money from one cost code/line in a budget to another, for instance moving money out of contingency into a line that requires more for a commitment, is through a <u>Zero-Dollar Budget Request</u>. This process is detailed at the end of this section.

Creating an Estimate

Follow these steps to create an Estimate in projects@BU.

- Creating the Header
- 1. Use the main menu to navigate to Planning/Portfolio Planning/Estimates.



Planning / Portfolio Planning / Estimates

2. The Estimates page opens.

(<u>)</u>	() (<u>Portfolio</u>) > Planning > Portfolio Planning > ESTIMATES												
Drag a colun	Drag a column header and drop it here to group by that column												
Programs *All* * + L +													
PROJECT I													
	-	-		-		-	- -						
120ASH - Te	sting Pr	00557	10757	Testing Estimate	Approved	Days	USD						
4													
€ € 1 ▶	A C PAGE SIZE 20 V												

Estimate List

- 3. In the toolbar at the top of the list click the + **button**.
- 4. A blank Estimate record opens.
- 5. In the **Project** field select the Project you wish to create an estimate for.
- 6. In the **Description** field describe the Estimate.
- 7. In the Estimate Unit of Measure select the Unit of Measure used for the Estimate.
- 8. In **Category** drop-down select the basis of the estimate, for example "Rough Order of Magnitude (WAG)."
- 9. In the toolbar click the *"Save"* button.

Note: Once the Estimate is saved, the estimate details will now be displayed.

() <u>(Portfolio)</u> > Pla	nning > Portfolio Planning > E	STIMATES > 10758 - Dem	nonstration Estimate	
10758 - 12	20ASH Demonstration Proje 💌		a e - 4 -	3DI -
MAIN	ADJUSTMENTS	S	PECIFICATIONS	NOTES
Project* Description* Category Reference Status / Revision	00556 - 120ASH Demonstration Project Demonstration Estimate Rough Order of Magnitude Draft	RECAP Estimate Unit of Measure Estimate Units Cost/Unit Price/Unit	Days	▼ 1 \$0 \$0
Drag a column header an	d drop it here to group by that column	B	<i>a</i>	
Edit + Add	Add Items 🛄 Add Assembly	Add Resource(s)	elete 🔀 Refresh	X Export To Excel
ATTACHMEN ITEM	DESCRIPTION			QUANTITY EXT. QUAN
	-		F	=
No records to display.				
· .				0
AGE	SIZE 20 -			

Completed Estimate screen with Details indicated.

Adding Template Items to an Estimate.

While it is possible to create an **Estimate** by manually adding **Items**, projects@BU has two templates, called **Assemblies**, which have a collection of **Items** commonly found in either a Level 1-2 or 3-5 Project. To add an **Assembly** to the **Estimate**, follow these steps.

1. In the toolbar of the Estimate Details click the "Add Assembly" button.

Drag a column h	neader and c	drop it here to gr	oup by that colur	nn				
🖉 Edit 🚽	Add	Add Items	🔄 Add Assemb	ly 📃 💄 Add Reso	urce(s) 👘 Del	lete 🛛 📿 Refre	sh 🛛 🗙 Expor	t To Exce
		DESCRIPT	TION	COST CODE 🔺	TYPE	UOM	QUANTITY	
	=		-	-	-	-		-
No records to di	splay.							
•								
	PAGE SIZ	E 20 🔻						

Add Assembly button indicated

The Assemblies window opens.



In the **Select Assembly** drop-down select the "Level 1-2 Estimate Template" for Level 1 or 2 Projects, or the "Level 3-5 Estimate Template" for Levels 3 to 5 Projects. **Note:** While these **Assemblies** contain a collection of items, it is just a starting list. Once an **Assembly** has been added to an **Estimate** record, it can be further customized by adding or removing **Items**.

ASSEM	IBLIES			
B	C.	\otimes	Select an Assembly	
				1 - Design Fees Template Level 1 - 2
				2 - Construction Fees Level 1 - 2
				3 - Level 1-2 Estimate Template
				4 - Level 3 -5 Estimate Template
			Assembly Options shown	

In the top left of the window, click the "Save and Exit" button.

Manually Adding Items to an Estimate

The **Estimate** is made up of **Items** and can either be approved as a whole, or on a per-item basis. projects@BU has an extensive catalog of **Items** representing the *CSI Cost Codes*. The instructions below show how to add those line items to an **Estimate**.

- 1. In the toolbar of the **Details** table click the "Add Items" button. Add Items
 - 2. The **Items** dialog box opens.

ITEMS				
🖺 📴 🋞 🎹 💿 MOBILE/BROWSE 🤇	SCAN/TYPE Choose File No file chosen Barcode Setting	5		
Catalog	Phase	Company Type Period		• •
	🖊 Edit 📋 Delete 📿 Refresh			
	# ITEM DESCRIPTION	PHASE	COST CODE	TYPE
	No records to display.			
	M ◀ 1 ▶ M PAGE SIZE 5 ▼			

Items window shown with Items Catalog indicated

3. Expanding the **Items Catalog** folder shows the general categories that Items are broken into by the type of *Costs* they represent, either Construction, Owner Controlled or Contingency.

Note: For projects created previous to 9/2019 you will need to use the "Old" set of Cost Codes.

 Expanding, for example, the **Owner Controlled Costs** folder by clicking the arrow next to it, shows the three phases that Cost Codes are separated into.
 Note: For single-phase Projects, pick the "Phase 1" folder.



5. The next set of sub-folders contain all the Owner Controlled Cost Groups, including Design Fees, FF&E, Security, and Insurance.



6. Expanding, for example, the sub-folder 03 Concrete holds Concrete-related cost centers.



Expanding the 03 Concrete Folder

7. Click the appropriate cost item(s) and drag them from the Catalog on the left to the table on the right.

ITEMS		d.		
	MOBILE/BROWSE SC	AN/TYPE Choose File	No file chosen Barcode Settin	<u>gs</u>
🖌 🗋 📋 Items Catalog	g			
🖌 🗋 📋 01 Constru	uction	Phase		•
🔺 🗋 🗋 Phase	01	Cost Code		•
• 🗆 🗀 00	Procurement and Contracting Requiremen	Cost Code		•
▲ □ □ 01	General Requirements	🖉 Edit 🕅 Delete	C Refresh	
0	010000 - General Requirements	# ITEM	DESCRIPTION	F
0 0	012100 - Allowances	No record 1		
0 0	012116 - Contingency Allowances	· 010	000 - General Requirements	
0 0	012119 - Testing and Inspecting Allowance	KAINN		
0 0	012300 - Alternates			
0 0	012400 - Value Analysis			
0	013000 - Administrative Requirements			



ITEMS				
MOBILE/BROWSE O SC	AN/TYPE Choose File	No file chosen Barcode Settin	88	
Circless Catalog Construction Dr On Construction Dr Phase 01 D 00 Procurement and Contracting Requirement D 01 General Requirements	Phase Location Cost Code	C Refresh	Company Type Period	
010000 - General Requirements	# ITEM	DESCRIPTION	PHASE	COST COD
012100 - Allowances	1 616	010000 - General Requirements		01-010000-01-01
012116 - Contingency Allowances	T			
012119 - Testing and Inspecting Allowance	K a D a M			
012300 - Alternates	N 4 1 P N	FAGE SIZE 5		
O12400 - Value Analysis				

The Cost code(s) now appear in the table.

- 8. Click the "*Save and Exit"* button in the Items dialog box.
- 9. The **Items** dialog closes and the new items appear in the **Details** section on the **Estimate**.

Note: If the Cost Codes do not auto populate, contact the PMWeb System Admin as this project may be associated with the older Cost Code set.

Adding Companies, Bid Categories and Costs to the Estimate

- 1. Select the items in your **Estimate** and click the "Edit" button.
 - In the Bid Category field select the type of bid for each line in the Estimate. Note: This field is how projects@BU separates your Estimate lines into individual

Procurement (bidding) records.

Drag a colum	nn header	and drop it here to group by that colu	imn									
🖺 Update	🖺 Update Records 🛞 Cancel											
ATTACHME												
-	-											
(0)	614	007200 - General Conditions	00-007200-01- 🔻	•	•	•	1	1	\$0.00			
(0)	616	010000 - General Requirements	01-010000-01-0 🔻	•	Construction Consultant	•	1	1	\$0.00			
(0)	663	020000 - Existing Conditions	02-020000-01- 💌	•	Services Design	•	1	1	\$0.00			
(0)	670	028213 - Asbestos Abatement	02-028213-01-0 🔻	•	Direct Trade	-	1	1	\$0.00			
(0)	816	095000 - Ceilings	09-095000-01- 🔻	-			1	1	\$0.00			
(0)	827	096800 - Carpeting	09-096800-01- 🔻	•	•	•	1	1	\$0.00			
(0)	834	099000 - Painting and Coating	09-099000-01- 🔻	-	•		1	1	\$0.00			
(0)	922	260000 - Electrical	26-260000-01- 💌	•	•	•	1	1	\$0.00			

Procurement Types

- 3. Type the Quantity of services or materials you need for the Estimate.
- Type the Unit Cost of the Service or material Note: When you enter a Unit Cost and Quantity the system generates an Ext. Cost, for instance a Quantity of 7 times a Unit Cost of \$70.00, generates an Ext. Cost of \$490.00.

095000 - Ceilings	09-095000-01- 🔻	-	-	-	7	7	\$70.00	\$490.0
096800 - Carpeting	09-096800-01- 💌	•	•	•	90	90	\$300.00	\$27,000.0
099000 - Painting and Coating	09-099000-01- 🔻	•	-	•	150	150	\$10.00	\$1,500.0

5. In the toolbar of the Details table click the "*Update Records*" button.

🚽 Update Records

Edit	+ Add	Add Items 🔄 Add Assemb	ly 🙎 Add Resou	rce(s) 👘 Dele	te 🦪 Refresh	X Export To E	xcel 📋 Paste	From Excel	I Layouts			
- -												
<u>(Q)</u>	614	007200 - General Conditions	00-007200-01-01		Construction		1	1	\$2,500.00	\$2,500.00	\$0.00	\$2,50
<u>(Q)</u>	616	010000 - General Requirements	01-010000-01-01		Construction		1	1	\$1,600.00	\$1,600.00	\$0.00	\$1,60
<u>(0)</u>	663	020000 - Existing Conditions	02-020000-01-01		Construction		1	1	\$2,000.00	\$2,000.00	\$0.00	\$2,00
<u>(Q)</u>	670	028213 - Asbestos Abatement	02-028213-01-01		Construction		1	1	\$3,500.00	\$3,500.00	\$0.00	\$3,50
<u>(Q)</u>	816	095000 - Ceilings	09-095000-01-01		Construction		7	7	\$70.00	\$490.00	\$0.00	\$49
<u>(0)</u>	827	096800 - Carpeting	09-096800-01-01		Construction		90	90	\$300.00	\$27,000.00	\$0.00	\$27,00
<u>.(Q)</u>	834	099000 - Painting and Coating	09-099000-01-01		Construction		150	150	\$10.00	\$1,500.00	\$0.00	\$1,50
<u>(Q)</u>	922	260000 - Electrical	26-260000-01-01		Construction		1	1	\$1,500.00	\$1,500.00	\$0.00	\$1,50
<u>.(Q)</u>	932	265000 - Lighting	26-265000-01-01		Construction		1	1	\$1,500.00	\$1,500.00	\$0.00	\$1,50
<u>(Q)</u>	983	500000 - Design Fees	<u>50-500000-02-01</u>		Design		1	1	\$15,000.00	\$15,000.00	\$0.00	\$15,00
<u>.(0)</u>	1015	510000 - FF&E	<u>51-510000-02-01</u>		FF&E		1	1	\$750.00	\$750.00	\$0.00	\$75
<u>(Q)</u>	1045	530006 - Moving	53-530006-02-01		Direct Trade		1	1	\$400.00	\$400.00	\$0.00	\$40
<u>.(Q)</u>	1053	540002 - Network	54-540002-02-01		Direct Trade		1	1	\$1,200.00	\$1,200.00	\$0.00	\$1,20
<u>(0)</u>	1060	590000 - Permits	<u>59-590000-02-01</u>		Direct Trade		1	1	\$200.00	\$200.00	\$0.00	\$20
<u>(Q)</u>	1083	900000 - Contingency	90-900000-03-01				1	1	\$3,140.00	\$3,140.00	\$0.00	\$3,14

Figure 1 – Estimate Record with all required Fields filled out

Submitting all or Part of an Estimate for Approval Workflow

Once **Items** have been added to an **Estimate** either the entire **Estimate** or specific Items can be used to generate a **Budget Request** record, which is then submitted to Workflow for Approval. The following steps show you how to generate a **Budget Request**.

Note: Only Items with associated **Cost Codes** can be submitted to Workflow. If you do not have **Cost Codes** associated with the Items in your **Estimate**, you need to contact the PMWeb system admin to resolve this issue prior to generating a budget request.

1. Change the status of the Estimate in the header from "Draft" to "Approved", and then Save the Estimate.



Status dropdown location shown.

2. In the toolbar of the Estimate header click on the down-arrow next to the

"Generate" button to bring up the options. Select the "Generate Budget Requests" option.

	1213	10758 - 120	ASH Demonstration Proje 💌		+ -	Ŵ	\sim		4 - 3DI -
4	MAIN ADJUSTMENTS					SPECIF	ICATIONS	Generate Budgets Generate Commitments	
	Projec	ct* (00556 - 120ASH Demonstration Proje	ect · 💌	RECAP -				Generate Procurements Generate Budget Requests

Generate menu opened with Generate Budget Requests highlighted.The Budget Request window will open.

BUDGET REQUESTS					
4					
Project Budget Requests Total Estimate Description Combine Cost Codes Date / Revision	00556 - 120ASH Demonstration Project \$62,280.00 Demonstration Estimate 8/31/2021 0				
C Undo				_	
INCLUDE					
	01-010000-01-01 - General Requirements	•	General Requirements]	\$1,600.00
	00-007200-01-01 - General Conditions	•	General Conditions]	\$2,500.00
	02-028213-01-01 - Asbestos Abatement	•	Asbestos Abatement]	\$3,500.00
	02-020000-01-01 - Existing Conditions	•	Existing Conditions]	\$2,000.00
	09-095000-01-01 - Ceilings	•	Ceilings]	\$490.00
	09-096800-01-01 - Carpeting	•	Carpeting]	\$27,000.00
	09-099000-01-01 - Painting and Coating	•	Painting and Coating]	\$1,500.00
	26-260000-01-01 - Electrical	•	Electrical]	\$1,500.00
	26-265000-01-01 - Lighting	•	Lighting]	\$1,500.00
	50-500000-02-01 - Design Fees	•	Design Fees]	\$15,000.00
	51-510000-02-01 - FF&E	•	FF&E	1	\$750.00

Budget Request pop-up window.

- 4. If you wish to submit all of you Estimate to Workflow, then click the "Generate"
 - button st the top of the list to submit the whole Estimate to Workflow.
- 5. If you wish to submit individual lines to workflow, either unclick the check-boxes next to the lines you do not wish to submit, or click the check-box at the top of the list to unclick <u>all</u> the lines, and then click the check boxes next to the lines you wish

to submit only, and then click Generate . **Note:** You will know that the lines were properly submitted when the green "The action has been successfully completed" message appears.

6. Close the window by clicking the "X" in the upper-right corner.

Budget Requests

Budget Requests can either be directly generated from an **Estimate** record, or in the case of a Budget Adjustment, created directly from the record menu. The steps below show you how to complete both processes.

Budget Requests – Submitting to Workflow

1. Once you have generated your **Budget Request** use the menu to navigate to *Cost Management/Budgets/Budget Requests.*



Cost Management / Budgets / Budget Requests

- 2. In the list that appears, open the **Budget Request** that you just created.
- 3. In the **Type*** dropdown select the type of Budget Request that you are submitting.

roject*	00556 - 120ASH Demonstration Proje 💌						
ecord #*	001						
escription	Demonstration Estimate						
ype*		-					
ost As	1 Planning Funding Request						
stimate	3 Schematic Design						
tatus / Revision	4 Design Development 5 Construction Documents						
ate	6 Budget Adjustment						

Type selection

- **Planning Funding Request** A request to do initial planning before any kind of design can begin.
- **Cost Model** A space has been identified, the square footage of space to be affected is known, and the kind of work (tenant build out, wet lab, dry lab) Numbers are assigned based on benchmarking.
- Schematic Design Pricing based on Schematic Design Documents Soft Costs are not well defined. Contingency could be 15-25%
- Design Development Pricing based on Design Development Documents Soft Costs starting to be identified and priced; but still most not well defined. Contingency could be 10-20%
- Construction Documents Pricing based on Construction Documents; Soft costs well defined and majority of hard numbers in hand. Contingency – 5-15%
- **Budget Adjustment** Post-Commitment Budget Adjustments only, do not select this option for a non-adjustment Budget change.
- 4. Click the "Save" button at the top of the record.
- 5. From here you have two paths, you can either Quick submit, or go through the Workflow View.

Quick Submit

1. Click the Submit button in the top bar of the page and the Submission window will open.



Submit button

2. This window is made of 4 sections

•

- Header Click the Submit button to move this Request forward. Click the Cancel button to go back and alter the request prior to submitting.
- Comments Add any comments you would like to the request here.
- Additional CC Enter the email addresses, separated by a comma without a space, of anyone you would like to notify of the project request submission.
- Note: You do not need to include the Approvers in this list as they are automatically notified by the system.
- File Attachment and List Click the green file bar to add any additional attachments to the request, which then appear in the box below.

SUBMIT - 00945	- Demonstration Proje	\$ -	۰	×
T.	1			
Comments	2			
This is the Demo re	quest we talked about earlier			
Additional CC mjane@bu.edu.jdoe	3 @bu.edu			
. t	DROP FILES HERE OR CLICK TO ADD			
PMWeb v7-1.pdf	× 4		1	×

Submit Window

3. Click the Submit button to move the request forward.

Workflow View

Click the "Workflow" view at the top right of the record.

i	O (Portfolio) > Cost Management > Budgets > BUDGET REQUESTS > 001 - Demonstration Estimate										
1213	E 3 120ASH Demonstration Project - 21 •										
\leftarrow	MAIN	ADJUSTMENTS	SPECIFICA	TIONS	NOTES	ATTACHMENTS	WORKFLOW				

Workflow View

Click the "Submit" button.

()	(<u>Portfolio</u>) > Cost	Management > Budgets :	> BUDGE	ET REQUE	ESTS >	001 - D	emonstra	ation Estimate
12	120ASH De	monstration Project - 21 - 💌	B	+-		\sim	$\mathbf{e}_{\mathbf{r}}$	SUBMIT
•	MAIN	ADJUSTMENTS		S	PECIFICA	TIONS		NOTES
ACT								

Workflow view with "Submit" button

In the "Comments" section type any Comments or notes that you would like to provide to the next Approver in the Workflow.

Note: You can add one or more email addresses to the "CC" to copy on the Budget Request by manually typing in their emails, with a semi-colon (;) between the addresses.

(Portfolio) > Cost Management > Budgets > I	UDGET REQUESTS > 001 - De	monstration Estimate			
E S 120ASH Demonstration Project - 21 - •	🖹 + F 🗊 🔛	тан (> surmit			
MAIN ADJUSTMENTS	SPECIFICATIONS	NOTES	ATTACHMENTS	WORKFLOW	NOTIFICATIONS
ACTIONS		PMWeb Approval Request: Budg	et Requests 001 - 120ASH Demonstration	Project - 21 - Demonstration Estimat	
Concurrent	Comments		Email Rody Budget Re Poject «Obbet R Approval Workflo View Record Documents (po) Documents (po) Body (po)	equests #001 2014 Demonstration Project - 21 Environmentation: Information: Viget Requests Hoan Smith	b
	Additional CC				
			DROP FILES HERE OR CLICK TO ADD		

Comments and CC'ed Addresses Added to Workflow Tab Click the "Save" button to submit the Request to Workflow.

(<u>Portfolio</u>) > Cost Management > Budgets :	> BUDGET REQUESTS > 001 - D	emonstration Estimate
120ASH Demonstration Project - 21 -	≞ +⊦ ඕ ⊻	
MAIN ADJUSTMENTS	SPECIFICATIONS	NOTES ATTACH
ACTIONS	EMAIL PREVIEWSubject Comments	PMWeb Approval Request: Budget Requests 001 - 1
	Additional CC	
		Drop files hef

Workflow tab after pressing "Submit" button with "Save" button now showing. **Note:** Once the workflow has been <u>submitted and saved</u> to Workflow it <u>cannot be</u> <u>modified</u> unless it is sent back for revision by one of the Approvers in the Workflow. **Note:** You can check the status of the workflow request by viewing the status list in the "Business Process" section of the Workflow tab.

Budget Adjustment Process

Unlike Project Budget Requests, Budget Adjustments do not need to start with an Estimate record. Follow these steps to submit a Budget Adjustment to transfer money in an approved budget from one line item to another, ex: From contingency to a construction line item.

1. Navigate to Cost Management > Budgets > Budget Requests



Cost Management > Budgets > Budget Requests

Click the "+" is button in the toolbar at the top of the list. Select your **Project** from the drop-down.

In the **Type** field, select "Budget Adjustment" Enter in a **Description** that you will recognize.

Leave the **Estimate** field blank.

Click the "Save" button at the top of the record.



Completed Budget Adjustment Header with fields shown.

In the toolbar on the <u>Details</u> tab, click the "+ Add Cost Codes" button.

() <u>(Portfolio)</u> > Co	st Management > Budgets	> BUDGET REG	QUESTS > 002 - 1	Budget Adjustment I	Demonstration
120ASH [Demonstration Project - 21 - 💌	B +1	• 🛍 🔛		
MAIN	ADJUSTMENTS		SPECIFICATIONS	NOTE	s
Project* Record #* Description Type* Post As <u>Estimate</u> Status / Revision Date	00556 - 120ASH Demonstration P 002 Budget Adjustment Demonstratio 6 Budget Adjustment Original Budget Draft 08-3	roje USER D Respons Center	EFINED FIELDS		•
Drag a column header ar	nd drop it here to group by that col	umn			
🖋 Edit 🕂 Add	+ Add Cost Codes 🗎 Delete	e 📿 Refresh	X Export To Exce	l 📋 Paste From Excel	🔽 Use Units
ATTACHMEN COS	ST CODE* A DESCRIPTIO		QUANTITY UNIT COST		MENT 2 PROJECT BUDGET
-	-	=	= =	-	= =
No records to display.					
			0 \$0.00	\$0.00	\$0.00 \$0.00
PAGE	SIZE: 20 💌				

Details toolbar with "+ Add Cost Codes" button indicated.

In the window that appears, navigate through the left-hand folder tree to the Cost Code you need to move money to, and then drag it to the right-hand list.

COST CODES	
≞ ⊈ ⊗	
• 🗋 60 - Insurance	
• 🗋 62 - Other Comp.	any 🗸
Period	•
A D 90 - Contingency Locati	on 🗸
	rce
90-900000-03-02 - Contingency Classi	fication
□ 🖞 90-900000-03-03 - Contingency Includ	e Notes
90-900001-03-01 - Construction Contingency	
90-900001-03-02 - Construction Contingency	te
90-900001-03-03 - Construction Contingency	COST CODE
90-900002-03-01 - Owner Controlled Contingency	S 12-00 90-900000-03-01 - Contingency
90-900002-03-02 - Owner Controlled Contingenc	
90-900002-03-03 - Owner Controlled Contingency	

Moving cost codes from the tree to the list.

Repeat step 9 for any further codes you need to transfer money to. In the window that appears, navigate through the left-hand folder tree to the Cost Code you need to move money from, and then drag it to the right-hand list. Click the "Save and Close" link at the bottom of the window.

COST CODES	
60 - Insurance	
• 🗋 🛅 62 - Other	Company
80 - Alternate	Period
4 🗌 🗋 90 - Contingency	Location
90-900000-03-01 - Contingency	Resource
90-900000-03-02 - Contingency	Classification
90-900000-03-03 - Contingency	Include Notes
90-900001-03-01 - Construction Contingency	
90-900001-03-02 - Construction Contingency	III Delete
90-900001-03-03 - Construction Contingency	COST CODE
90-900002-03-01 - Owner Controlled Contingency	No records to d 90-900000-03-01 - Contingency
90-900002-03-02 - Owner Controlled Contingence	14
90-900002-03-03 - Owner Controlled Contingency	
"Save and Close" link indicated.	

Open all chosen lines for editing.

Note: See "Selecting and Editing Fields" in projects@BU Basics for how to edit these lines.

Enter a positive (+) dollar value in the **Unit Cost** field for the lines you are moving money to.

Enter a negative (-) dollar value in the **Unit Cost** field for the lines you are moving money from.

G) <u>(Portf</u>	<u>olio)</u> > Co	st Management	> Budgets > B	UDGET RE	EQUESTS		Budget Adjus	tment Demon	
1019	≣ "Э	120ASH I	Demonstration Project	: - 21 - -	B +	• M	\sim		SUBMIT	
••	M	AIN	ADJUST	MENTS		SPECIF	ICATIONS		NOTES	
P R C T P <u>E</u> S S	roject* lecord #* Description ype* rost As <u>istimate</u> itatus / Revi	sion	00556 - 120ASH De 002 Budget Adjustment 6 Budget Adjustment Original Budget Draft	Demonstration Proje	USER Respo Center	DEFINED F nsible Cost	ields —			Ŧ
	Drag a colur	nn header ai	nd drop it here to grou	up by that column						
	🥒 Edit	+ Add	+ Add Cost Codes	前 Delete	C Refresh	XEx	port To Exc	el 📋 Paste From	m Excel 🛛 🗹 Use	Units
						QUANTITY	UNIT COST	ADJUSTMENT 1		PROJECT BUDGET
	-				-	1				-1
	<u>(Q)</u>	09-095000	<u>-01-01</u>	Ceilings		1	\$500.00	\$0.00	\$0.00	\$500.00
	<u>(O)</u>	90-900000	-03-01	Contingency		1	\$-500.00	\$0.00	\$0.00	\$-500.00
	2 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00									

Moving from (-) Contingency to Ceilings.

- 2. Click the "Update Records" button.
- 3. Click the "Workflow" tab.
- 4. Click the "Submit" button.
- 5. In the "Comments" section type any Comments or notes that you would like to provide to the next Approver in the Workflow.
- Click the "Save" button to submit the Request to Workflow.
 Note: Once the Budget Request has been submitted to Workflow it <u>cannot be</u> <u>modified</u> unless it is sent back for revision by one of the Approvers in the Workflow.

You can also "Withdraw" the request from workflow, but this close it and it will need to be re-created.

Note: You can check the status of the Request by viewing the list in the "Business Process" section in the Workflow tab.

Approving a Budget Request and Adding the Cost Center

After a Budget Request has been submitted it goes through several approval steps, the first of which is completed by the Departmental Approver who adds the appropriate cost center and then Approves the Budget Request to be passed on to the Financial Administrator. The steps below detail this process.

1. Click on the "Budget Request" item in your Workflow Inbox.

LINKS ØX	WORKFLOW INBOX
Project Requests Project Requests Schedules Estimates Estimates Cost Worksheets Cost Worksheets Cost Morksheets Security LOAP LISt Manager	Record Project Requests - 00945 Uescription Demonstration Hroject Request Instructions This request has been sent to you for review and approval. Should you require additional information, you can comment and select "return request" to the submitter. If you would Like to deny the request, select "reject request" so the request is not able to proceed or be edited. Should you have any questions, please do not hesitate to contact me. Thank you.
specification manager settings BL Reporting Manage Cost Center	

Workflow inbox with Budget Request Indicated

Click on the Main view to review the amount of the Budget Request.



Main View

MAIN	ADJUSTMENTS	SPECIFICATIONS	NOTES
Project*	00556 - 120ASH Demonstration Proje 💌	USER DEFINED FIELDS	
Record #*	001	Responsible Cost	9999999999 - Centrally Funded
Description	Demonstration Estimate	Center	SSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSS
Туре*	1 Planning Funding Request 🔹		
Reference			
Post As	Original Budget 🗸 🗸]	
Estimate	Demonstration Estimate - 0		
Status / Revision	Returned 👻 0		
Date	08-31-2021]	

Centrally Funded Project

Note 2: If you do not see a Cost Center that you believe you should have access to, contact the PMWeb Admin by emailing ITHelp@bu.edu to have your access validated and granted.

2. Click the "Save" button at the top of the record to save your entry from step 3.

(i) <u>(Portfolio)</u> > C	ost Management > Budgets	> BU	DGET REQUESTS >	001 - Demonstration Estimate	
120ASH	Demonstration Project - 21 - 💌	E			
MAIN	ADJUSTMENTS		SPECIFICATIONS	NOTES	
Project* Record #* Description Type* Reference Post As <u>Estimate</u> Status / Revision	00556 - 120ASH Demonstration P 001 Demonstration Estimate 1 Planning Funding Request Original Budget Demonstration Estimate - 0 Returned	roj∈ ▼ ▼ ▼	USER DEFINED FIELD Responsible Cost Center	9999999999 - Centrally Funded	
Date	08-3	1-2021			

Save button Indicated

3. Click the <u>Workflow</u> view to show the workflow options.

(<u>) (Portfo</u>	<u>lio)</u> > Cost Management > Budgets		001 - Demonstration I		
C II	120ASH Demonstration Project - 21 - 💌				
MAIN	ADJUSTMENTS	SPECIFICATIONS	NOTES	ATTACHMENTS	WORKFLOW (2/5)

"Workflow (Step 2 of 6)" tab Indicated

4. Approve the Budget Request by clicking the circle next to "Approve Budget Request" and then click the "Take Action" button at the bottom of the list.

() (Portfolio) > Cos	st Management > Budgets > I	BUDGET REQUESTS > 001 - [Demonstration Estima	ite
120ASH D	emonstration Project - 21 - 💌	₿ +ŀ @ ⊻		
MAIN	ADJUSTMENTS	SPECIFICATIONS	NOTES	ATTACHMENTS
ACTIONS APPROVE BUDGET RETURN REQUEST REJECT REQUEST WITHDRAW FINAL APPROVE USER DELEGATE COMMENT TAKE ACTION	This request has been sent to you fo review and approval. Should you require additional information, you can comment and select "return request" to the submitter. If you would like to deny the request, select "reject request" so the request is not able to proceed or be edited. Please include the 10 (ten) digit SAP cost object in the comments section that will fund this request. The cost object must be a department	EMAIL PREVIEWSubject Comments	PMWeb Approval Req	uest: Budget Requests 001 - 120/
TEAM INPUT				DROP FILES HERE C

Approve Option and Save button Indicated

Reviewing a Budget Request and Updating Centrally Funded Cost Objects

Once the Budget Request reaches the "Financial Approver" stage, Business Affairs will receive a notification email from *projects*@BU to review the Budget Request.

- 1. Select the Budget Request from the list of notifications. (See step 1 above)
 - If the Budget Request has "999999999 Centrally Funded" as the Responsible Cost Center, go to step 9, if not proceed to step 10.
 - 3. Review the Budget Request with the Provost's Office to determine if the project will be funded by that office.
 - If the Project <u>will</u> be funded by the Provost's Office, select the "Office of the Provost" Cost Center from the drop down list, and then click "Save" at the top. On the <u>Workflow</u> tab, select "Approve Budget Request" from the list of workflow actions.

MAIN	ADJUSTMENTS	SPECIFICATIONS	NOTES
Project* Record #* Description Type* Reference Post As <u>Estimate</u> Status / Revision Date	ADJUSIMENTS 00556 - 120ASH Demonstration Proje 001 Demonstration Estimate 1 Planning Funding Request original Budget Original Budget Quenostration Estimate - 0 Returned V 08-31-2021	USER DEFINED FIELDS Responsible Cost Center	9999999999 - Centrally Funded

Centrally funded Cost Center Selected

- ii. If the Project <u>will not</u> be funded by the Provost's Office, on the <u>Workflow</u> tab select "Return Request" from the list of workflow actions to send the request back to the Departmental Approver as well as adding a note saying they must select a Cost Center they have access to.
- 4. Validate the selected Cost Center for this Project.
 - i. If the Cost Center is appropriate, on the <u>Workflow</u> tab select "Approve Budget Request" from the list of workflow actions
 - ii. If the Cost Center is not appropriate, on the <u>Workflow</u> tab select "Return Request" from the list of workflow actions to send the request back to the Departmental Approver as well as adding a note saying they must select an appropriate Cost Center.
- 5. Click the Save button on the Workflow tab.

Note: Once the Budget Request has been fully approved, it will be automatically submitted to SAP at 8pm that night, and an "Approve: Create Internal Order Request" will appear in your SAP worklist.

6. After the Project Account has been created in SAP, the account number will be pulled from SAP into *projects*@BU at 9pm the next night, and the Account Number will be automatically populated to the Project record.

Work Order (FSR) Entry

Work Orders associated with projects are still being processed through CAMMS. Follow the screenshot below to find the **<u>PM Web Work Order Entry</u>** link.



Cost Worksheets

Once a **Budget Request** has been approved, you can view the Budget in the **Cost Worksheets** section of projects@BU. Currently this allows you to view all the Budgeted Costs for the Project, as well as the origin of those Costs within the system.

Once Phase 3 of the Implementation Project has been completed you will also be able to use **Cost Worksheets** to compare the Current Budget vs any Change Orders or Costs booked against the Budget as they are submitted by the vendors.

Running a Cost Worksheet

1. Open the Cost Worksheet list by navigating to Cost Management/Budgets/Cost Worksheets.



Cost Management > Budgets > Cost Worksheets

- 2. In the Project Dropdown select the name of your Project.
- 3. In the Worksheet Dropdown select the type of Cost Worksheet that you wish to view. Currently only "Level 5 Worksheet" is available but more may be added at a later date.
- 4. The Budget Worksheet is divided into several standard Columns, these are:
 - Cost Code The Cost Code that ties to that line item.
 - Budget Description The Description of Cost Code.
 - Original Budget (A) The <u>Approved</u> Budget for that Cost Code.
 Note: If you have any Unapproved Budget Requests or Estimates they will not appear here until they have been approved through Workflow.
 - **Pending Budget Changes (B)** Any Change Orders that are currently being processed in workflow for this Budget Line.
- Approved Budget Changes (C) Any Change Orders that have been approved for this Budget Line.
- Current Budget (D = A + C) The Approved Original Budget Plus the Current Budget
- Anticipated Budget (E = B + D) The Current Budget plus the Pending Budget Changes
- Original Commitments (F) Commitments that have been approved.
- **Pending Commitment Changes (G)** Commitment records that are currently being processed through Workflow.
- Approved Commitment Changes (H) Commitment CO's that have been Approved through Workflow.
- **Current Commitments (I = F + H)** Original Commitments Plus Approved Commitment Changes
- Anticipated Commitments (J = G + I) Pending Commitment Changes plus Current Commitments.
- Pending Exposure (K)
- Approved Exposure (L)
- Total Exposure (M = K + L)
- Forecasts Pending The total amount from the Forecasts record.
- Budget Remaining (N = D I) Current Budget minus Current Commitments.
- 5. Any line on the Worksheet can be expanded by clicking on either the arrow icon to the left of the Cost Codes or the grey values on the line.
- 6. The expanded view show the source of the value that you clicked on, for now this is just the Budget, but in the future both Commitments and Change Orders will be linked here.

Project* Worksheet	00632 - 120ASH Demonstratio	n Training 👻	Period From Period To	*All*		• •	Currency (
Drag a column head	er and drop it here to group by the	at column					
		A	8	c	D = A + C	E = B + D	r
> 00-000000-01-	Procurement and Contracting Re	\$5,000.00	\$0.00	\$0.00	\$5,000.00	\$5,000.00	\$0.00
01-010000-01-0	General Requirements	\$25,000.00	\$0.00	\$0.00	\$25.000.00	\$25,000.00	\$0.00
> 03-030100-01-0	Maintenance of Concrete	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
> 03-032500-01-0	Composite Reinforcing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
> 03-033500-01-0	Concrete Finishing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
> 05-050300-01-0	Conservation Treatment for Perio	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
> 22-220000-01-0	Plumbing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
> 26-260000-01-0	Electrical	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
> 50-500000-02-	Design Fees	\$70,000.00	\$0.00	\$0.00	\$70.000.00	\$70,000.00	\$0.00
50-500001-02-0	Architect	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
51-510000-02-0	FF&E	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Typical Cost Worksheet

Bidding and Procurement

The bidding process in projects@BU occurs in the **Planning** module where the **Bid Package** record is created as well as holding the **Online Bidding** records. Invitations to bid are also sent out from the **Bid Package** which directs the firms to log into the system to submit their bids. When that is complete, the Project Manager uses the **Bid Packages** record again to level the bids and select the winning bidder.

Note: Architects and OPMs are not bid through projects@BU, they are bid out directly through Sourcing & Procurement, as the selected Architect/OPM has full access to the bidding record and would be able to see their competitor's bids.

Warning: While companies who are bidding on Projects do not have to be authorized vendors at Boston University, they must be created as Companies, Contacts, and Users in projects@BU. If a vendor is not available for selection in the system, contact the projects@BU System Administrator through ithelp@bu.edu and they can set up the Company, and their contact, in the system as a "bidding-only" Company, and provide the contact with the access they will need to respond to the bid.

Note: If a non-authorized Company is selected as the winner of the bid, they will need to go through Sourcing & Procurement's authorization process. <u>Winning a bid through projects@BU does not guarantee that they will be authorized by Sourcing & Procurement.</u>

Pre-Bid

While you do not have to start your bidding process in the module, it is recommended if you are bidding out multiple types of work, or would like to send different sets of Cost Codes to different companies. The **Pre-Bid** module allows you to create one bid package, and then divide it up amongst your bidders by type of work being performed.

Creating a Pre-Bid Record

1.	Navigate	to	Planning > I	Procurement > Pi	re-Bid.
		٩V	Mleb	<u>،</u>	ontrols
		С С	PLANNING ÉNGINEERING FOR	PORTFOLIO PLANNING Initiatives Portfolio Planning Worksheet Estimates	CUSTOM FORMS
		(\$	COST MANAGEMENT	PROCUREMENT	
			ASSET MANAGEME	Bid Packages Online Bids	
		~	WORKFLOW	SETUP	
		۲	PORTFOLIO		

Planning > Procurement > Pre-Bid

2. At the top of the list click the "+" the button.

(<u>Por</u>	<u>tfolio)</u> > Planning	> Procuremer	nt > PRE-BID				
Drag a column	header and drop it he	ere to group by tha	t column				
'Ð	Programs *All*		▼ Projec	ts All*	•	+ 🛍	2 ⊞
PROJECT NAM		RECORD #					TYPE
	Ŧ 🔤 Ŧ				=	=	
Tyler Testing F	Proje 00560	001	Test	Approved	USD	Construction	BU Consulting Ag
[4 4 1 ▶ ●	PAGE SIZE 20	·					

Pre-Bid list.

- 3. In the **Project*** field select the name of the Project you are creating the Pre-Bid for.
- 4. In the **Description** field, type a name for the Pre-Bid that will help you identify this record.
- 5. **Bid Category** is a drop-down list that helps with sorting of the records, the options are.
 - Construction
 - Consultant Services
 - Design
 - Direct Trade
 - FF&E
- 6. In the **Solicited By** drop-down list select "Boston University" as the source of the Bid Package.

Solicited By	Boston University	•
Project Manager	Boston University	-
i Toject Mariager	2020 Engineering LLC	
Status / Revision	3M Company	
Solicited By Lis	t Opened & BU selected	

- 7. In the **Project Manager** list select your name.
- 8. Enter the date and time that Bids must be entered into the **Bids Due** fields **Note:** You cannot enter these until after you have completed the remainder of the process. If you do not want to start the bidding at this time, then leave these fields blank.

Bids Due	<u> </u>
Bids Due Time	()

Bids Due Date & Time

- 9. Select the Anticipated Agreement type from the list in that drop-down field, the types are:
 - BU AIA
 - Master Service Agreement
 - BU Consulting Agreement
 - Standard PO Terms
 - Purchase Order
 - Subcontract
- 10. The Procurement drop-down list will hold links to any Procurement records linked to this Pre-Bid.
- 11. Click the "Save" button at the top of the page.

Note: The Options section is locked to just the System Administrator, if you wish to change these options, please submit a Ticket through @ITHelp, as some options cannot be modified due to procurement policies at BU.

roject*	00556 - 120ASH Demonstration Project 👻	OPTIONS		_
re-bid #*	001		ALL	
escription	Demonstration Pre-Bid	This is a Sealed Bid		
id Category	Construction 💌	Lock Online Bids After Bids Due		
olicited By	Boston University 💌	Include Days Column in Online Bids		\checkmark
roject Manager	Boston University - Jonathan Smith 🔻	Include MWDBE % Column in Online Bids		\checkmark
tatus / Revision	Draft 🔹 0	Include Manufacturer Columns in Online Bids		\square
ids Due	<u> </u>	Include Bid Item UDFs in Online Bids		\checkmark
ids Due Time	0	Require Acknowledgements		\checkmark
nticipated Agreement	BU AIA 👻	Require Nondisclosure Agreement	•••	
rocurement	•	Show Bid Due Countdown Clock		\checkmark
		Lock Quantity in Online Bids		

Completed header

- 12. The **Bidder Matrix** view is where you select the bidders you will be sending the Bid Package to
 - a) Click the "+ Add Bidders"

Drag a colu	ımn header and d	rop it here to	group by that column			
Dedit 🖉	🕂 Add Bidders	前 Delete	CRefresh Display	All	•	E Layouts
BI	D CATEGORY		COMPANY	NOTES		INACTIVE
	-		÷		-	
No records	to display.					
[4 4]	PAGE SIZ	E 20 🔻				

Buttons above Bidder Matrix with Add Bidders indicated

b) In the window that opens click the box next to the bidders you wish to add to this Pre-Bid.

Note: This window has two different tabs, Companies/Contacts and Distribution Lists. Companies/Contacts can be selected individually while Distribution Lists must be configured in the **Distribution Lists** section of projects@BU. The Select Companies/Contacts window will open.

		COMPANIE	S/CONTACTS	
orag a o	column header and drop it here to group	by that column		
Spe	cs		Save and Close Save Layou	ut Load Default Layout
	2020 Engineering LLC		Registered Vendor	-
	3M Company		Registered Vendor	-
	96pt.		Registered Vendor	-
	A & M Associates Ltd		Registered Vendor	-
	A C & R Supply Co Inc		Registered Vendor	-
	A Maintenance Supply Co., Inc.		Registered Vendor	-
	A&P Woodworking, Inc.		Registered Vendor	-
	A. J. Rose Carpets		Registered Vendor	-
	A. Vozzella & Sons, Inc.		Registered Vendor	
	A1 Automatic Transmission, Inc.		Registered Vendor	-
	A-1 Lighting Service Company		Registered Vendor	-
	ABC Imaging		Registered Vendor	-
	ABC MOVING & STORAGE CO., LLC.		Registered Vendor	-
	ABC Moving Services, Inc.		Registered Vendor	
	ABC Window Shade CO Inc.		Registered Vendor	-
	ABCO Refrigeration Supply Corp.		Registered Vendor	-
	AC Electric		Registered Vendor	-
	ACCENT BANNER LLC		Registered Vendor	-
	Accutemp Engineering		Registered Vendor	-
	Acella Construction Corporation	Contractor - Ge	Registered Vendor	

"Select Companies/Contacts" window.

c) Click the Checkbox to the left of the bidders that you wish to add to the bid.

		COMPANIE	S/CONTACTS	
Drag a	column header and drop it here to group	by that column		
Spe	ecs		 Save and Close 	Save Layout
	COMPANY	TYPE	REFERENCE	
		-		-
	2020 Engineering LLC		Registered Vendor	
	3M Company		Registered Vendor	
	96pt.		Registered Vendor	
	A & M Associates Ltd		Registered Vendor	
	A C & R Supply Co Inc		Registered Vendor	
	A Maintenance Supply Co., Inc.		Registered Vendor	
	A&P Woodworking, Inc.		Registered Vendor	
	A. J. Rose Carpets		Registered Vendor	
	A. Vozzella & Sons, Inc.		Registered Vendor	
	A1 Automatic Transmission, Inc.		Registered Vendor	
	A-1 Lighting Service Company		Registered Vendor	
	ABC Construction Test	Contractor - Ge	Bidding Only Vendor	
	ABC Imaging		Registered Vendor	
	ABC MOVING & STORAGE CO., LLC.		Registered Vendor	
	ABC Moving Services, Inc.		Registered Vendor	
	ABC Window Shade CO Inc.		Registered Vendor	
	ABCO Refrigeration Supply Corp.		Registered Vendor	

d) After you have selected the bidders, click the "Save and Close" button.

Spe	cs		•	🖺 Save and Close	Save Layout
	COMPANY	TYPE		REFERENCI	
	testing company				-
\square	Architecture Testing Company		Tes	ting Company	
\searrow	Construction Testing Company	Contractor - Ge			
	A A DAGE SIZE 20 -				

Note: While BU requires that a minimum of three (3) bids be received for each project, not all bidders will accept the bid. It is recommended you send out more than the required number of bids.

Project*	00556 - 120ASH Demonstration Project	•
Pre-bid #*	001	
Description	Demonstration Pre-Bid	
Bid Category	Construction	-
Solicited By	Boston University	-
Project Manager	Boston University - Jonathan Smith	•
Status / Revision	Draft 🔹	0
Bids Due		ĉ
Bids Due Time		0
Anticipated Agreement	BU AIA	-
Procurement		-

Completed Bidder Matrix (with fields indicated)

- 13. Click the **Bid Items** view to add the Items from the Estimate to the Pre-Bid record.
 - a) Click "+ Add Estimate Items"



Bid Items view and Add Items Indicated.

b) In the window that opens select the Estimate Items you wish to add to this Pre-Bid. **Note:** If you have created multiple Estimates for this project they are sortable in the "Record" column of the Estimate list.

Note 2: You can also select all items by clicking the box at the top left of the list to select all at once.

	re items						
	¥ ×						
re-bid	c	001-Demonstration P	re-Bid				
roject	c	00556 - 120ASH Dem	ionstration Project				
id Categ	ory	Construction					
Drag a co	olumn header and	drop it here to group	by that column				
C u	ndo						
	ESTIMATE / INITIATIVE						
	-	_			_		
						-	-
	Estimate	10758 - Demonst	1	616	010000 - General Requirem	120ASH Demonstration Proj	Construction
	Estimate	10758 - Demonst 10758 - Demonst	1	616	010000 - General Requirem 007200 - General Condition	120ASH Demonstration Proj 120ASH Demonstration Proj	Construction Construction
12 12 12	Estimate Estimate Estimate	10758 - Demonst 10758 - Demonst 10758 - Demonst	1	616 614 670	010000 - General Requirem 007200 - General Condition 028213 - Asbestos Abateme	120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj	Construction Construction Construction
	Estimate Estimate Estimate Estimate	10758 - Demonst 10758 - Demonst 10758 - Demonst 10758 - Demonst	1 2 3 4	616 614 670 663	010000 - General Requirem 007200 - General Condition 028213 - Asbestos Abateme 020000 - Existing Condition	120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj	Construction Construction Construction Construction
	Estimate Estimate Estimate Estimate Estimate	10758 - Demonst 10758 - Demonst 10758 - Demonst 10758 - Demonst 10758 - Demonst	1 2 3 4 5	616 614 670 663 816	010000 - General Requirem 007200 - General Condition 028213 - Asbestos Abateme 020000 - Existing Condition 095000 - Cellings	120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj	Construction Construction Construction Construction Construction
	Estimate Estimate Estimate Estimate Estimate Estimate	10758 - Demonst 10758 - Demonst 10758 - Demonst 10758 - Demonst 10758 - Demonst 10758 - Demonst	1 2 3 4 5 6	616 614 670 663 816 827	010000 - General Requirem 007200 - General Condition 028213 - Asbestos Abateme 020000 - Existing Condition 095000 - Ceilings 096800 - Carpeting	120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj	Construction Construction Construction Construction Construction Construction
	Estimate Estimate Estimate Estimate Estimate Estimate Estimate	10758 - Demonst 10758 - Demonst 10758 - Demonst 10758 - Demonst 10758 - Demonst 10758 - Demonst 10758 - Demonst	1 2 3 4 5 6 7	616 614 670 663 816 827 834	010000 - General Requirem 007200 - General Condition 028213 - Asbestos Abateme 020000 - Existing Condition 095000 - Ceilings 096800 - Carpeting 099000 - Painting and Coat	120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj	Construction Construction Construction Construction Construction Construction Construction
	Estimate Estimate Estimate Estimate Estimate Estimate Estimate Estimate	10758 - Demonst 10758 - Demonst	1 2 3 4 5 6 7 8	616 614 670 663 816 827 834 922	010000 - General Requirem 007200 - General Conditor 028213 - Asbestos Abateme 020000 - Existing Conditior 0958000 - Cellings 096800 - Carpeting 099000 - Painting and Coat 260000 - Electrical	120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj 120ASH Demonstration Proj	Construction Construction Construction Construction Construction Construction Construction
	Estimate Estimate Estimate Estimate Estimate Estimate Estimate Estimate Estimate	10758 - Demonst 10758 - Demonst	1 2 3 4 5 6 7 8 9	616 614 670 663 816 827 834 922 932	010000 - General Requirem 007200 - General Condition 02213 - Asbestos Abateme 020000 - Existing Condition 085000 - Ceilings 096800 - Carpeting 099000 - Painting and Coat 2650000 - Lighting	120ASH Demonstration Proj 120ASH Demonstration Proj	Construction Construction Construction Construction Construction Construction Construction Construction

Estimate Items window opened with Check Box and Save buttons indicated

- c) Select all the Estimate Items and then click the "Save and Exit."
- 14. The *Clauses* view needs to be set up with standard clauses included in every BU procurement. To do this:
 - i. Click on the <u>Clauses</u> tab.
 - ii. Click on the "+ Add Clause(s)" button.

Drag a colur	nn header a	nd drop it here t	o gro	up by that column			
N Edit	+ Add	前 Delete	+	Add Clause(s)	C Refresh	Layouts	
INCLUDE IN BID		PARAGRAPH					
			-		-		

Add Clause(s) button

iii. In the window that opens, select "Group ID" from the "Group by" dropdown.



Group By > Group ID

iv. Select the "001 – Completeness of RFP" and "002 – Contract Terms" folders on the left hand side of the page, and then drag them over to the right-hand side



Moving the folders from the list on the left to the right.

Click the "Save" button at top of the window.

SELECT CLAUSES				
Group By Group ID • Image: I	Paragraph Category Type	×	Responsible Start End	
	Delete			
	PARAGRAPH			
			Respondent has include	Respondent has include
			Respondent has reviewe	Respondent has review
			Respondent has include	Respondent has include
			Respondent has reviewe	Respondent has review
			Respondent has acknow	Respondent has acknow
			Respondent has acknow Respondent has include	Respondent has acknow Respondent has include
			Respondent has acknow Respondent has include Respondent has include	Respondent has acknow Respondent has include Respondent has include
			Respondent has acknow Respondent has include Respondent has include Respondent has include	Respondent has acknow Respondent has include Respondent has include Respondent has include
			Respondent has acknow Respondent has include Respondent has include Respondent has include Respondent has include	Respondent has acknow Respondent has include Respondent has include Respondent has include Respondent has include

Open the Clauses for editing and check off the "Include in Bid" box.

Note: If you do not complete this step the Clauses won't be properly displayed on the "Online Bid" records for the Project.

CLAUSES										
Drag a colun	Drag a column header and drop it here to group by that column									
🖺 Update	💾 Update Records 🛛 🛞 Cancel									
INCLUDE IN BID	LINE #	PARAGRAPH	CATEGORY	TYPE	DESCRIPTION	TEXT				
		-	-	-						
	1		•	•	Respondent has i	Respondent has				
	2		•	•	Respondent has I	Respondent has				
	3		•	•	Respondent has i	Respondent has				
	4		•	•	Respondent has ı	Respondent has				
	5		•	•	Respondent has a	Respondent has				
	6		•	•	Respondent has i	Respondent has				
	7		•	•	Respondent has i	Respondent has				
	8		-	-	Respondent has i	Respondent has				
	9		-	-	Respondent has i	Respondent has				
	10		-	-	Respondent has	Respondent has				

"Include in Bid" column and selection boxes indicated

15. Change the **Workflow Status/Revision** drop-down on the Main window to "Approved," and save the record.



Workflow Status/Revision

16. In the top bar click the down-arrow next to Generate and click on "Procurement."

i ⇒ 3 6 - 120A	SH Demonstration Project - 💌		+ 🖻	ēl - 4 - Procurement	
MAIN	BID ITEMS			SPECIFICATIONS	NOTES
Project*	00556 - 120ASH Demonstration Project	•	OPTIONS		
Pre-bid #*	001				ALL 🗌
Description	Description Demonstration Pre-Bid			d	
Bid Category	Construction	•	Lock Online Bids /	After Bids Due	
Solicited By	Boston University	•	Include Days Colu	mn in Online Bids	
Project Manager	Boston University - Jonathan Smith	-	Include MWDBE %	Column in Online Bids	
Status / Revision	Approved 💌	0	Include Manufactu	urer Columns in Online Bids	\checkmark
Bids Due		<u> </u>	Include Bid Item L	JDFs in Online Bids	
Bids Due Time		0	Require Acknowle	dgements	
Anticipated Agreement	BU AIA	-	Require Nondisclo	sure Agreement	•••
Procurement		•	Show Bid Due Cou	intdown Clock	
			Lock Quantity in C	Online Bids	

Generate > Procurement.

17. In the window that opens click the box next to the types of Procurements you wish to generate from this Pre-Bid, and click the lightning bolt to Generate Records.

GENERA	TE PROCUREMENT RECORDS						
4 (8						
Project 00558 - 120ASH Demonstration Project Line Total \$56,590.00							
Pre-bid	Demonstration Pre-Bid	Selected Line Total \$0.00					
Date	Date Rex 0						
C Und	0						
	BID CATEGORY	DESCR	IPTION	# OF BIDDERS	# OF LINES	TOTAL	
	Construction			2	0	\$0.00	
	Design	Design		0	1	\$15,000.00	
	Construction	Construction		0	9	\$41,590.00	

Generate Procurement Records window and Lightning Bold

18. Click the "X" button to close the window afterwards.

The system has now generated a new **Bid Packages** record for each of the Categories that you indicated. The system will break down each Bid Package by the Category(s) that were selected for the Estimate Items.

Bid Packages (formerly Procurement)

The **Bid Packages** record holds the Bid Matrix, as well as where you manage the bids that you have sent out. From here you can add in both Clauses and Scoring to the Bid Package, as well as issue and level the bids.

A **Bid Package** record can either be created through a Pre-Bid record, directly from an **Estimate** Record, or by adding the lines of an Estimate to a pre-existing Procurement Record. Each method is detailed below.

Generating a Bid Package Record from an Estimate

Use the main menu to navigate to Planning / Portfolio Planning / Estimates



			1				-		
(<u>Po</u>	(i) (Portfolio) > Planning > Portfolio Planning > ESTIMATES								
Drag a colum	Drag a column header and drop it here to group by that column								
Ð	Programs *All* Projects *All* + • + • + • + • + • + • + • + • + • + • + • + • + • + • + • + • + • + • + • • + • • + • • + • <								
	-	-			-	-	-		
120ASH - Te	sting Pro	00557	10757	Testing Estimate	Approved	Days	USD		
4									
€ € 1)•	▶ P/	AGE SIZE 20 -							

2. In the header of the **Estimate**, check to make sure that the **Estimate** is "Approved" by checking the **Status** field.

() (<u>Portfolio)</u> > Plan	ning > Portfolio Planning > ESTIN	MATES > 10757 - Testi	ng Estimate
10757 - 120	DASH - Testing Project - 21 💌	+ - 🖻 🛛	2 🗗 - 🗲 - 🏹 -
MAIN	ADJUSTMENTS	SF	PECIFICATIONS
Project* Description*	00557 - 120ASH - Testing Project - 21 💌 Testing Estimate	RECAP	Days 🗸
Category	•	Estimate Units	1
Reference		Cost/Unit	\$240,628
Status / Revision	Approved 🔹 0	Price/Unit	\$240,628

Approved Estimate Record

Note: If the Estimate is not "Approved", change the Status to "Approved" and

- save the change, by clicking the "Save" 🖹 button.
- 3. In the toolbar at the top of the record, click the down arrow next to

"Generate." Select "Generate Procurements" from that list.

(<u>Portfolio</u>) > Pla	nning > Portfolio Planning >	> ESTIMATES > 10757 -	Testing Estimate	
10757 - 11	20ASH - Testing Project - 21 💌	🖺 🕂 I- 🗇		4 - 3DI -
MAIN	ADJUSTMENTS		SPECIFICATIONS	Generate Budgets Generate Commitments
				Generate Procurements
Project*	00557 - 120ASH - Testing Project - 21	▼ RECAP		Generate Budget Requests
Description*	Testing Estimate	Estimate Unit of Me	asure Days	•
Category		▼ Estimate Units		1
Reference		Cost/Unit		\$240,628
Status / Revision	Approved 👻	0 Price/Unit		\$240,628

Generate Procurements

4. The "Procurements" window opens.

PROCUREMENTS				
4				
Project 00857 - 120A5 Estimate Description Teating Estim Date / Revision 8/26/2021 Total	H - Testing Project - 21 te 0 \$240,628.00			
C Undo				I : Already sent
				TOTAL
	Construction	•	4	\$114,250.00
	Construction	•	7	\$126,378.00

Procurement window

5. Click the blue box, removing the check mark, next to the Bid Categories that you do not want to send bids out for.

PROCUREMENTS				s – n x
4				
Project 00557 - 12 Estimate Description Testing Est Date / Revision 8/26/2021 Total	AG54 - Testing Project - 21 imate \$240,628.00			
C Undo				I: Already sent
INCLUDE BID CATEGORY		DESCRIPTION	# OF LINES	TOTAL.
	Construction 🔹		4	\$114,250.00
	Construction		7	\$126,378.00

Single Bid Category selected

 Click the "Generate" button at the top-left of the window to create the Bid Packages record(s). Navigate to Planning > Procurement > Bid Packages



Planning > Procurement > Bid Packages

7. Locate your generated **Bid Package** by filtering the list by your Project Name or Number, and then looking for the record with a blank Description field..

(<u>)</u>	(<u>Portfolio</u>) > Planning > Procurement > BID PACKAGES								
Drag a column header and drop it here to group by that column									
Ð	Programs *All* * Projects *All* + Im C								
	-	testing							
Testing Prog	gram	120ASH - Testing Projec	00557	003		Draft	Construction	Testing Estimate	
4									
4 4 1 ▶	PAGE	SIZE 20 -							

"Generated" record on Bid Package List

- 8. Open the record by double-clicking on the line.
- 9. Enter a **Description** of the Bid Package that you will recognize.
- 10. In the Solicited By drop-down select Boston University.
- 11. In the **Project Manager** drop-down, select your name.
- 12. In the **Commitment Type** selection, choose the Type of Agreement that will be signed once this **Bid Package** is completed.
- 13. The **Revision Date** field is auto-populated by the system, to track versioning.
- 14. In the **Bids Due** field select the date that the bid is due.
- 15. In the **Time** field select the time that the bid is due.

Note 1: The countdown clock on the bid starts when this value is saved. If you don't know the exact due date of the bid, when you are creating the record, <u>do not</u> enter these values until after completing the record.

WARNING: Do **not** enter the Bids Due Date and Time until you are ready to Issue the bid. These fields cannot be modified once information is entered, and the record is saved.



Completed Bid Package Header 16. Click the "Save" button at the top of the page.

Populating a Bid Package Record without a Pre-Bid or Estimate

Note: If you have created a **Pre-Bid** record and then "Generated" **Bid Package** records from the **Pre-Bid**, or "Generated" a **Bid Package** record from an **Estimate**, skip this section and go to "Setting up the Bidder Matrix, Items and Scoring."

1. Navigate to Planning > Procurement > Bid Packages



- Planning > Procurement > Bid Packages
- Click on the "+Add" button at the top of the list page.
 Note: If this is the first Bid Package record created that you have access to, then you will be brought directly to the Bid Package screen.

	······································								
(<u>Po</u>	() (Portfolio) > Planning > Procurement > BID PACKAGES								
Drag a colum	Drag a column header and drop it here to group by that column								
Ð	Progr	ams *All*	•	Projects *All*		→ + m	Q	⊞	
PROG									
	Ī	testing	-				-	-	
Testing Prog	(ram	120ASH - Testing Projec	00557	003		Draft	Construction	Testing Estimate	
4									
[4 4] ▶	A A 1 A PAGE SIZE 20 V								
e.									

"+" button on the Bid Package List

- 3. Select the **Program** of the Project from the drop-down list.
- 4. Select the name of the **Project** from the drop down list.
- 5. Do not modify the **Procurement #** as it will affect all future records created in the system.
- 6. Enter a **Description** of the Bid Package that you will recognize.
- 7. In the **Solicited By** drop-down, select Boston University.
- 8. In the **Project Manager** drop-down, select the name of the Project Manager.
- 9. In the **Commitment Type** selection, choose the Type of Agreement that will be signed once this **Bid Package** is completed.
- 10. The Revision Date field is auto-populated by the system, to track versioning.
- 11. In the **Bids Due** field select the date that the bid is due.
- 12. In the **Time** field select the time that the bid is due.

Note 2: The countdown clock on the bid starts when this value is saved. If you don't know the exact due date of the bid, when you are creating the record, <u>do not</u> enter these values until after completing the record.

WARNING: Do **not** enter the Bids Due Date and Time until you are ready to Issue the bid. These fields cannot be modified once information is entered, and the record is saved.

13. Click the "Save" button at the top of the page.

Program*	Testing Program	Ŧ
Project*	00557 - 120ASH - Testing Project - 2	•
Procurement #*	003	
Description	Testing Bid Package	
Bid Category	Construction	•
Solicited By	Boston University	•
Project Manager	Boston University - Jonathan Smith	•
Commitment Type	BU AIA	Ŧ
Revision Date	09-01-2021	<u></u>
Status / Revision	Draft 🔹	0
Bids Due	09-17-2021	140
Time	5:00 PM	D
(UTC-05:00) Eastern Time	(US & Canada)	
Pre-bid		•
Estimate #	1075	57
Commitment		

Completed Header with fields indicated

14. Validate that the default "Options" in that section of the record are correct for your project. If not they can only be modified by the system administrator.

OPTIONS	
	ALL 🗆
This is a Sealed Bid	
Lock Online Bids After Bids Due	
Include Days Column in Online Bids	
Include MWDBE % Column in Online Bids	
Include Manufacturer Columns in Online Bids	
Include Bid Item UDFs in Online Bids	
Require Acknowledgements	
Require Nondisclosure Agreement	🗆
Show Bid Due Countdown Clock	
Lock Quantity in Online Bids	

- This is a Sealed Bid Seals bids until after they are due (defaults to checked)
- Lock Online Bids After Bids Due Bidders cannot modify their bids after the due date (defaults to checked).
- Include Days Column in Online Bids
- Include MWDBE % Column in Online Bids
- Include Manufacturer Columns in Online Bids
- Include Bid Item UDFs in Online Bids
- Require Acknowledgements
- **Require Nondisclosure Agreement** Bidders must sign an NDA before
- Show Bid Due Countdown Clock
- Lock Quantity in Online Bids

Setting up the Bidder Matrix, Bid Items, Clauses and Scoring

Setting up Bidder Matrix

15. The Main View is where you add your bidders and award the winner. To add bidders to this list.

MAIN	BID ITEMS	SPECIFICATI	ONS	sco	DRING	Ν	IANAGE BIDS	NOTES	
Program*	Testing Program	•	OPTIONS -						
Project*	00557 - 120ASH - Testing Pro	oject - 2' 💌					ALL		
Procurement #*	003		This is a Sealed	l Bid					
Description	Testing Bid Package		Lock Online Bio	ls After Bio	ds Due				
Bid Category	Construction	-	Include Days C	olumn in C	Online Bids				
Solicited By	Boston University	-	Include MWDB	5 % Colum	in in Online	Bids			
Project Manager	Boston University - Jonathan S	mith 💌	Include Manufa	cturer Col	lumns in Or	nline Bids			
Commitment Type	BU AIA	-	Include Bid Iter	n UDFs in	Online Bids	3			
Revision Date	09-	01-2021 🛗	Require Acknow	vledgemer	nts				
Status / Revision	Draft	• 0	Require Nondis	closure Ag	greement				
Bids Due	09-	17-2021 🚞	Show Bid Due	Countdow	n Clock				
Time		5:00 PM 🕓	Lock Quantity i	n Online B	lids				
(UTC-05:00) Eastern Time	(US & Canada)		0.000				05001100		
Pre-bid		-	DAYS	HO	UKS	MINUTES	SECONDS		
Estimate #		10757	16		1	30	36		
<u>Commitment</u>									
							_		
Drag a column header an	nd drop it here to group by tha	t column	aeb Diepleu				Lavauta		
	ers 🗸 Award 📗 Dete	ite 🥏 Kell	esh Display	All		▼ ⊞	Layouts	_	
AWARD		INVITA	US BE	ST BID			US ED TOT	TAL LEVELED DAYS TOTAL TOTAL	•
	-		Ŧ				-	= =	
No records to display.									
M	SIZE 20 V								

Main View with Bidder List shown

Note: As you add bidders to the list **Online Bidding** records will be created. When the bids are Sealed, only the contact from the assigned company will be able to view the bid. **Not even the system admin can see Sealed bids in projects@BU Prior to the close of Bidding.**

Drag a column header and drop it here to group by that column									
/ Edit + A	Add Bidders 🛛 🗸 Award	前 Delete	📿 Refresh Dis	splay All		▼ III Layou	ts		
	COMPANY		INVITATION STATUS			BID STATUS			
		-	-						
No records to dis	splay.								
4									
	PAGE SIZE 20 -								

Bidder Matrix List a. On the table header click "+ Add Bidders."

Drag a column header and drop it here to group by that column									
🖉 Edit	+ Add Bidders	🗸 Award	前 Delete	📿 Refresh Di	splay All		▼	ts	
AWARD		COMPANY		INVITATION STATUS	BEST BID	NDA		BID TOTAL	
			-						
No records t	o display.								
[(∢ 1)	PAGE SIZE	20 ▼							

"+ Add Bidders" button indicated

b. The Select Companies/Contacts window will open.

		COMPANIE	S/CONTACTS					
Drag a d	column header and drop it here to group	by that column						
Specs								
	2020 Engineering LLC		Registered Vendor	-				
	3M Company		Registered Vendor	#1				
	96pt.		Registered Vendor	-				
	A & M Associates Ltd		Registered Vendor	-				
	A C & R Supply Co Inc		Registered Vendor	-				
	A Maintenance Supply Co., Inc.		Registered Vendor	-				
	A&P Woodworking, Inc.		Registered Vendor	-				
	A. J. Rose Carpets		Registered Vendor	-				
	A. Vozzella & Sons, Inc.		Registered Vendor	-				
	A1 Automatic Transmission, Inc.		Registered Vendor	-				
	A-1 Lighting Service Company		Registered Vendor	-				
	ABC Imaging		Registered Vendor	-				
	ABC MOVING & STORAGE CO., LLC.		Registered Vendor	-				
	ABC Moving Services, Inc.		Registered Vendor	-				
	ABC Window Shade CO Inc.		Registered Vendor	-				
	ABCO Refrigeration Supply Corp.		Registered Vendor	-				
	AC Electric		Registered Vendor	-				
	ACCENT BANNER LLC		Registered Vendor	-				
	Accutemp Engineering		Registered Vendor	-				
	Acella Construction Corporation	Contractor - Ge	Registered Vendor					

"Select Companies/Contacts" window.

c. Click the Checkbox to the left of the bidders that you wish to add to the bid. After you have selected the bidders, click the "Save and Close" button.

Note: While BU requires that a minimum of three (3) bids be received for each project, not all bidders will accept the bid. It is recommended you send out more than the required number of bids.

Drag a c	olumn header and drop it here to group	by that column							
Spe	cs		 Save and Close 	Save Layout	Load Default Layout				
	COMPANY TYPE REFERENCE PROJECT								
	test	cont =		Ŧ					
	ABC Construction Test	Contractor - Ge	Bidding Only Vendor		-				
	Construction Testing Company	Contractor - Ge			-				

Bidders checked off, with checkbox indicated, and "Save and Close" button indicated.

Bid Items

Click on the <u>Bid Items</u> View to add either Items from your **Estimate** to the **Bid Package** record, or add Items directly to the Bid.

() (Portfolio) > Planning > Procurement > BID PACKAGES > 003 - Testing Bid Package									
3 OO3 - Testing Bid Package	+	- 🛍 🖬 🗗	• 4 •						
MAIN BID ITEMS	SPECIFICATIONS	SCORING	MANAGE BIDS						
Drag a column header and drop it here to group by t	that column								
🖋 Edit 🕂 Add 🗌 Add Items 😁 Add	Estimate Items 🛛 🗎 Delet	e 📿 Refresh 🛛 All	-						
INCLUDE IN BID LINE # ATTACHMENTS									
No records to display.									
PAGE SIZE 10 V									

- Bid Items View
- 16. To add Items from your **Estimate**:
 - a. Click on the "Add Estimate Items" button on the top of the list.

(i) (Portfolio)	> Planning > Pro	curement > BID	PACKAGES > 00	03 - Testing Bid Packa	ge
	03 - Testing Bid Packa	ge 💌		İ	• 4 •
MAIN	BID ITEMS	SPE	CIFICATIONS	SCORING	MANAGE BIDS
Drag a column header	and drop it here to g	oup by that column			
🖋 Edit 🛛 🕂 Add	Add Items	💮 Add Estimate Iten	ns 🔟 Delete	CRefresh All	-
No records to display.					
•					
	GE SIZE 10 🔻				

"Add Estimate Items" button Indicated

b. In the "Estimate Items" window that opens, click on the checkbox next to the Estimate line(s) that you wish to add to the Bid.

311170/241	TETTEMS											9 - D
rocurem roject id Categ Drag a co	ory c	003-Testing Bid Packag 10557 - 120ASH - Testi Construction drop it here to group B	ge ing Project - 21 by that column]]								
20	ndo											
	ESTIMATE / INITIATIVE	RECORD	UNE #	ПЕМ	DESCRIPTION	PROJECT	BID CATEGORY	COST CODE	QUANTITY	UOM	UNIT COST	TOTAL COST
	-		Ŧ					-	-	1	-	
	Estimate	10757 - Testing E	1	983	500000 - Design Fees	120ASH - Testing Project -	1	50-500000-02-0	1		\$75,000.00	\$75,000.
	Estimate	10757 - Testing Et	2	984	500001 - Architect	120ASH - Testing Project -		50-500001-02-01	1		\$35,000.00	\$35,000.
	Estimate	10757 - Testing Es	3	1059	580000 - LEED	120ASH - Testing Project -		58-580000-02-01	1		\$2,500.00	\$2,500.
	Estimate	10757 - Testing Er	4	1060	590000 - Permits	120ASH - Testing Project -	-	59-590000-02-0	1		\$1,750.00	\$1,750.
	Estimate	10757 - Testing Et	5	616	010000 - General Requirem	120ASH - Testing Project -	Construction	01-010000-01-01	1		\$50,000.00	\$50,000.
	Estimate	10757 - Testing Es	6	674	030000 - Concrete	120ASH - Testing Project -	Construction	03-030000-01-01	1		\$25,000.00	\$25,000.
	Estimate	10757 - Testing Et	7	722	060000 - Wood, Plastics, ar	120ASH - Testing Project -	Construction	06-060000-01-01	1		\$16,750.00	\$16,750.
	Estimate	10757 - Testing Er	8	725	061000 - Rough Carpentry	120ASH - Testing Project -	Construction	06-061000-01-01	1		\$18,200.00	\$18,200.
	Estimate	10757 - Testing Er	9	726	062000 - Finish Carpentry	120ASH - Testing Project -	Construction	06-062000-01-01	1		\$7,590.00	\$7,590.
	Estimate	10757 - Testing Er	10	756	080000 - Openings	120ASH - Testing Project -	Construction	08-080000-01-01	1		\$5,620.00	\$5,620
	-											

"Estimate Items" window open, with checkbox indicated.

c. Click on <u>Save and Exit</u> at the top of the page to close the window and add the items to the **Bid Package**.

ESTIMATE ITEMS	
Procurement	003-Testing Bid Package
Project	00557 - 120ASH - Testing Project - 21
Bid Category	Construction

17. To add Items from the Items List.

a. Click the "Add Items" button

🔹 🕨 MAIN		BID ITEI	MS	SPECIF	ICATIONS	SCORING
Drag a column head	ler and drop i	t here t	o group by th	iat column		
🖉 Edit 🛛 🕂 Ac	Add 🗌 Add Items 💮 Add Estimate Items 🕅 Delete		lete 📿 Refresh 🛛 All			
INCLUDE IN BID						DESCRIPTION
	1		<u>.(Q)</u>	00557 - 120A	616	010000 - General Requirements
	2		<u>.(0)</u>	00557 - 120A	674	030000 - Concrete
	3		<u>.(O)</u>	00557 - 120A	722	060000 - Wood, Plastics, and Co

"Add Items" button indicated.

b. The **Items** dialog opens.

ITEMS			
	Choose File No file chosen Barcode Settings		
C Items Catalog	Phase	Company Type Period	
	🖋 Edit 🗎 Delete 📿 Refresh		
	No records to display.		

c. Expanding the **Items Catalog** folder shows the general categories that Items are broken into by the type of *Costs* they represent, either Construction, Owner Controlled or Contingency.

1		Ite	ms Catalog
	Þ		01 Construction
	×		02 Owner Controlled Costs
	Þ		03 Contingency

d. Expanding, for example, the **Owner Controlled Costs** folder by clicking the arrow next to it, shows the three phases that Cost Codes are separated into.

Note: For single-phase Projects, pick the "Phase 1" folder.



e. The next set of sub-folders that contain all the Owner Controlled Cost Groups, including Design Fees, FF&E, Security, and Insurance.



f. Expanding, for example, the sub-folder 50 Design Fees shows the Design-related cost centers.

Items Catalog
I Construction
- D Phase 01
D 00 Procurement and Contracting Requirement
O1 General Requirements
D D2 Existing Conditions
4 🗌 🛅 03 Concrete
030000 - Concrete
030100 - Maintenance of Concrete
031000 - Concrete Forming and Accesso
032000 - Concrete Reinforcing

18. Click the appropriate cost item(s) and drag them from the Catalog on the left to the table on the right.

ITEMS	
B C S MOBILE/BROWSE S	CAN/TYPE Choose File No file chosen Barcode Settings
Items Catalog O1 Construction D Phase 01 O 0 Procurement and Contracting Requirement	Phase Location Cost Code
O1 General Requirements	🖌 Edit 🛍 Delete 📿 Refresh
Orocoo - General Requirements Orocoo - Allowances O12100 - Allowances O12116 - Contingency Allowances	# ITEM DESCRIPTION I No Texace I 010000 - General Requirements
012119 - Testing and Inspecting Allowance 012300 - Alternates	K < 1 ► M PAGE SIZE 5 ▼
O12400 - Value Analysis O12000 - Administrative Requirements	

Drag the Cost Codes you have selected on the left to the table on the right.

ITEMS			
🖺 📴 🛞 🛄 💿 mobile/browse 🔾 s	CAN/TYPE Choose File No file chosen	Barcode Settings	
Items Catalog Of Construction Phase 01 O 00 Procurement and Contracting Requirement O 01 General Requirements	Phase	Compan Compan Type Period	y
O10000 - General Requirements	# ITEM DESCR	IPTION PHASE	COST COD
012100 - Allowances	1 616 010000 - Genera	al Requirements	01-010000-01-01
012116 - Contingency Allowances			
012119 - Testing and Inspecting Allowance	M d 1 M PAGE SIZE 5	•	
🗆 🖞 012300 - Alternates			
012400 - Value Analysis			
The Cost codes now an	near in the table		

19. Click the *Save and exit* button in the Items dialog box.

Adding Clauses to a Bid Package Record

20. The *Clauses* view needs to be set up with standard clauses included in every BU procurement to do this:

a. Click on the <u>Clauses</u> view.

Image: The starting Bid Package Image: The starting Bid Package <thimage: bid="" package<="" starting="" th="" the=""> Image: The sta</thimage:>	()												
▲ MAIN BID ITEMS SPECIFICATIONS SCORING MARAGE BIDS NOTES ATTACHMENTS CLAUSES (10)	1 2 3	9 m	- Testing Bid Package	•	B	+ .	〕	\simeq	- -	<i>4</i> -			
	(\bullet)	MAIN	BID ITEMS	SPE	CIFICATION	s	5	CORING		MANAGE BIDS	NOTES	ATTACHMENTS	CLAUSES (10)

Clauses View



✓ Edit + Add 🛍 Delete + Add Clause(s) 🤁 Refresh ⊞ Layouts									
INCLUDE IN BID	LINE #	PARAGRAPH		CATEGORY		ТҮРЕ	DESCRIPTION	т	
		-	-	-	-	-			

"+ Add Clause(s)" button

c. In the window that opens, select "Group ID" from the "Group by" dropdown.

SELECT CLAUSES							
₿ 🗜 🏵							
Group By	Category						
• 🗋 🗀 (None)	Category Group ID Responsible						
Type							

d. Select the "001 – Completeness of RFP" and "002 – Contract Terms" folders on the left hand side of the page, and then drag them over to the sight hand side.



- 21. Click the "Save and Exit" button at the bottom of the window.
- 22. Click the selection box on the far left of each line under "Include in Bid." *Note:* If you do not complete this step the Clauses won't be properly displayed on the "Online Bid" records for the Project.

CLAUSES										
Drag a column header and drop it here to group by that column										
N Edit	+ Add	前 Delete 🕂	Add Clause(s)	🕽 Refresh 🛛 🖽	Layouts					
INCLUDE IN BID	LINE #	PARAGRAPH	CATEGORY	ТҮРЕ	DESCRIPTION	TEXT				
					-					
	1				Respondent has in	Respondent has in				
	2				Respondent has re	Respondent has re				
	3				Respondent has in	Respondent has in				
	4				Respondent has re	Respondent has re				
	5				Respondent has ac	Respondent has a				
	6				Respondent has in	Respondent has in				
	7				Respondent has in	Respondent has in				
	8				Respondent has in	Respondent has in				
	9				Respondent has in	Respondent has in				
	10				Respondent has re	Respondent has re				
4										

"Include in Bid" column and selection boxes indicated

Add Documents to the Bid Package

23. After adding Bid Documents to the **Document Manager** they need to be attached to the Bid Package record through the <u>Attachments</u> view, and then shared with Bidders to be visible.

Note: These steps can also be followed to add documents during the bidding process.

a. Click on the Attachments view.



Folder Icon

c. After clicking on the <u>Folder</u> icon you will get a list of options in the center of your screen. Click on "From Document Manager"

+ Add	
	From Your Computer From Document Manager Link PRWeb Record Link Project Email Link Web URL SharePoint Aconex
	Drop files here or click the Add button

Add Document Options

d. The Document Manager window will open displaying the top folder of the project.



Document Manager window

e. Navigate through the folder structure by double-clicking on the folder you wish to open to where the bid documents are stored.



Sample in 01 Administrative > 101 Proposals shown

f. Single click on the files you wish to add to the bid. As you do a checkmark will appear on each file showing that it has been selected.

	× •
Selected 1	
Files	

File Selection: Right file is selected, left is not

- g. Click the "Save and Exit" button at the top of the window to save these files to the bid.
 - i. To share these documents with your Online Bidders.
 - Select the Document that you would like to share, and click the "Details" switch at the top of the window.



Details switch

ii. The Details window will open on the right-hand side of the screen.



Details window iii. Click the Edit button on in the details window.



Edit Details Button iv. Click the "Include in Bid" switch.



"Include in Bid" switch

v. Click the "Save" button in the Details window to save your change.

Add Scoring questions to the Bid Package Record

- 24. The final step before launching the Bid is to add **Scoring** to the bid package. **Scoring** is a set of questions, broken down by bid type, for example Architect, that the Bidders must complete which help you rate the Company sending you the bid, the team from that Company, and any other criteria you need to evaluate to select a vendor. You add and manage this from the *Scoring* tab.
 - a. Click on the Scoring view.

Scoring tab.

b. In the toolbar at the top of the list, click the "+ Add Scoring" button.

(E	<u>Portfolio)</u> > I	Planning > Pro	curement > BI	D PACKAGE	S > 003 - Te					
12 23	3 003 - Testing Bid Package									
<►	MAIN BID ITEMS SPECIFICATIONS									
Drag a colu	Drag a column header and drop it here to group by that column									
🎤 Edit	✓ Edit + Add + Add Scoring Delete CRefresh Layouts									
LINE # GROUP QUESTION QUESTION A										
				-						

Toolbar shown, with "+Add Scoring" indicated.

c. In the "Group By" dropdown select "Group Description" to group the Scoring questions by type of Bidder.



d. Drag the **folder** for the appropriate type of bidder from the list on the left to the right hand side of the window.



Dragging scoring questions from the List to the Bid

- e. Click the "Save and Exit" button at the bottom of the window.
- f. The window will close, and the scoring questions will be added to the bid.

(<u>P</u>	<u>ortfolio)</u> > Pla	Inning > Pro	curement > BID PACKAGE	S > 003 - Testing Bid Pa	ckage	
123	D 003 - Te	sting Bid Packa	ge 🔻 💾	+1- 🛍 🖬 🤞	-	Ŧ
•	MAIN	BID ITEMS	SPECIFICATIONS	SCORING	MAN	IAGE BIDS
Drag a colur	mn header and di	rop it here to gr	oup by that column			
🥒 Edit	+ Add +	Add Scoring	前 Delete 🛛 📿 Refresh	Layouts		
	GROUP	QUESTION ID	QUESTION	ANSWER		POINTS AVAILABLE
		-				
1		1	Have you provided all the require		0	5
2		2	On how many projects has this t	(0	5
3		3	What is the project team approa		0	5
4		4	Who is the project executive?		0	5
5		5	Who is the project manager?		0	5
6		6	Who is the site superintendent?		0	5
7		7	Is there any other office support		0	5
8		8	Please comment on the propose		0	5
9		9	Were there any notable issues w		0	5
10		10	Please provide your total bid valu	(0 0	5
11		11	Please confirm your bid includes		0	5
12		12	Please provide a list of your excl		0	5
	Sco	oring quest	ions added to bid.			

Note: If you have specific questions for bidders that are **not** covered by either Clauses or Scoring, you can add them through the scoring tab, in the "Online Bid User Defined Fields" Section in the Clauses View.

25. Bid documentation or notes should be added to either the <u>Attachments</u> or <u>Notes</u> tabs of the bid, making sure to click the "Include in bid" checkbox to include them in the **Online Bidding** records. This is where Drawings, Specs, or other project information should be included in the Bid Package.

Issuing a Bid and Responding to Questions during the Bid Process

Once a bid package has been completed, follow these steps to start the bid clock, and issue the invitations to the bidders.

Note: You can use these same steps to send out updates and answers to bidder questions during the bidding process.

Steps

26. Find the **Bids Due** and **Time** fields in the Main View and select the appropriate date/time the bids are due, and click the "Save" button. Once this step is complete you will see the "Bid Due" countdown clock appear at the left.

DAYS	HOURS	MINUTES	SECONDS
15	6	49	33

Bid Due Clock

27. Once you have saved the **Bids Due** date and time, click on the "Notifications" loon in the toolbar at the top of the page.

()	<u>(Portfo</u>	<u>lio)</u> > Planning > Procuren	nent > BIC	PACKA	GES > 00	3 - Te	sting Bid	Package	
1 2 3	Ð	003 - Testing Bid Package	•		+1.	Ŵ			4 -

Notifications Icon Indicated mary contact for each bidder will be auto-populated in

a. The Primary contact for each bidder will be auto-populated in the BCC section of the **Notification**.

NOTIFICATION			
From	Jonathan Smith		Use System Address
То			
сс			
BCC	John Smith [ABC Construction Test] x Construction Upd	ate Test [Construction Testing Company] x	
Manual CC			
Subject	PMWeb Notification: Bid Packages 003 - 120ASH - Testing Project -	21 - Testing Bid Package	
Status	¥	Due Date	09-02-2021 🗂 12:00 PM 🕓
Notification type	v	Reminder	
Reference		Completed	
		Completed Date	Ö 🗎
	Bidders in BCC.		

Add your name to the **To:** section so that you will be copied on the notification

using the ellipsis	artheta on the left side of the To section.
From	Jonathan Smith
то	Jonathan Smith [Boston University] x

To section with PM Name

b. From the Notification Type select "Invitation to Bid"

Status			·
Notification type	Invitation to Bid	-	-
Poforonco	Addemda		
Kelefelice	Alternate		1
	Invitation to Bid		
			_

Notification Type set to "Invitation to Bid"

- c. The text of the Notification populates with the default version, but this can be deleted and replaced with the BU standard invitation to bid text.
- d. Click the "Send" button at the top of the window.

Reviewing Submitted Bids

Once the bid clock has finished running down, if the bids are sealed, they will be unsealed and you will be able to read the submissions as well as level the bids. Otherwise Bids are viewable by the Project Manager throughout the Bidding Process.

This next section shows you how to review and level the bids as well as award the winning bid.

Steps

Navigate back to the **Bid Package** record that you created previously.

28. Click on the <u>Bid Items</u> view to see the line-by-line comparison of each bid. *Note:* You may need to scroll to the right to see the Bid Totals (shown below).

ESTIMATED TOTAL	ABC CONSTRUCTION TEST	CONSTRUCTION TESTING
\$50,000.00	\$12,500.00	\$15,000.00
\$25,000.00	\$17,540.00	\$2,500.00
\$16,750.00	\$6,500.00	\$1,300.00
\$18,200.00	\$4,300.00	\$1,850.00
\$7,590.00	\$1,257.00	\$675.00
\$5,620.00	\$675.00	\$250.00
\$3,218.00	\$542.00	\$175.00
\$126,378.00	\$43,314.00	\$21,750.00

Bid Items view with three sample bids represented, as well as estimate baseline.

29. The "..." button next to the name of each bidder allows you to change the selected bid from each bidder, if they were reissued bids, as well as check which bid is currently being displayed.

ESTIMATED TOTAL		CONSTRUCTION TESTING
\$50,000.00	\$12,500.00	\$15,000.00
\$25,000.00	\$17,540.00	\$2,500.00
\$16,750.00	\$6,500.00	\$1,300.00
\$18,200.00	\$4,300.00	\$1,850.00
\$7,590.00	\$1,257.00	\$675.00
\$5,620.00	\$675.00	\$250.00
\$3,218.00	\$542.00	\$175.00
\$126,378.00	\$43,314.00	\$21,750.00

"..." button indicated.

30. To navigate to the individual bids, click on the <u>Manage Bids</u> tab, and then click on the blue **Bid #** link to go directly to the individual bid.

Note 1: If you need to level the bids or rate their scoring questions, click on the checkbox in the **Lock** column to unlock the bids for editing. If you do not unlock them you will not be able to make any modifications to the bids post-submission.

≣ 'D	003 - Testing Bid H	Package	- 8	+ • 🗎		· 4 ·					
MAIN	BID ITE	MS	SPECIFICATIONS	so	ORING	MANAGE BID	s N	OTES	ATTACHMENTS (1)	CLAU	SES (10)
ag a column hea	ader and drop it here	to group by that	column								
Reissue Bid(s)) 📿 Refresh	III Layouts	Latest Revision	Only							_
											LOC
Ŧ	-		-								
	Construction Test	90	0	09-01-2021	\$21,750.00	\$21,750.00	Submitted	09-17-2021			
	ABC Construction	<u>91</u>	0	09-02-2021	\$43,314.00	\$43,314.00	Submitted	09-17-2021			

Lock column indicated.

Note 2: If you only want to view the latest bid from each click on the "Latest Revision Only" checkmark at the top of the list.



Manage Bids with bid links shown, and "Latest Revision Only" indicated.

- 31. Once you have navigated to an individual Online Bidding record, you have several pieces to review.
 - a. The <u>Main</u> view holds the numeric values of the Bidders entry.
 - a. Read through each line of the bid, and note any outlying bid values.
 - b. Click on the ellipsis icon next to the **Leveled Total** value, and the "Bid Leveling" window will open with a graph comparing the Estimate, Bid, and Leveled values against each other.

BID QUANTITY	UNIT PRICE	TOTAL AMOUNT	LEVELED TOTAL
1	\$15,000.00	\$15,000.00	••• \$ 15,000.00
1	\$2,500.00	\$2,500.00	···· \$2,500.00
1	\$1,300.00	\$1,300.00	•••• \$1,300.00
1	\$1,850.00	\$1,850.00	•••• \$1,850.00
1	\$675.00	\$675.00	\$675.00
1	\$250.00	\$250.00	\$250.00
1	\$175.00	\$175.00	\$175.00
	Total	\$21,750.00	\$21,750.00

"Leveled Total" with leveling ellipsis indicated



Bid Leveling Window

- c. This window has several important sections, and pieces of information. The sections are divided into:
 - i. <u>Estimated</u> The original **Estimate** for that **Cost Code**.
 - ii. <u>Bid</u> The current **Online Bid** values for that **Cost Code** on this bid.
 - iii. <u>Leveled</u> The Leveled value of the **Online Bid** for that **Cost Code**, if applicable.
- d. Each section has several fields:
 - i. **UOM** The unit of measure for that line.

- ii. Quantity The Quantity of the line from the Estimate or Online Bid
- iii. Unit Price The price per unit of the line from the Estimate or Online Bid.
- iv. Estimated/Bid/Leveled Total The Quantity x Unit price of that line in the Estimate or Online Bid.

ESTIMATED		BID		LEVELED	
UOM		иом		UOM	
Quantity	1	Quantity	1	Quantity	
Unit Price	\$50,000.00	Unit Price	\$15,000.00	Unit Price	
Estimated Total	\$50,000.00	Bid Total	\$15,000.00	Leveled Total	\$15,000.00

Bid Leveling Window Sections indicated.

- e. If there are any outlying values, if needed, reach out to the bidder to confirm that they wished to submit the value entered. If they did not you can either *Level* the bid if one or two values need to be adjusted, or re-issue the bid if the entire bid needs to be changed.
 - i. To Level the bid:
 - 1. Click on the ellipsis next to the value in the Leveled Total column.
 - 2. Click the "+ Add" button at the top of the leveled list.
 - 3. In the line that appears enter the:
 - a. **Description** The reason why leveling is being applied.
 - Leveled Amount The amount the bid is being leveled by. Enter a positive (+) value to increase the amount of the bid, a negative (-) value to decrease the amount.
 - c. Click the "Save" button.

BID LEVELING						
ESTIMATED		BID		LEVELED		-
UOM		UOM		UOM	Days	
Quantity	1	Quantity		1 Quantity		1
Unit Price	\$50,000.00	Unit Price	\$15,00	00.00 Unit Price	\$7,500.	.00
Estimated Total	\$50,000.00	Bid Total	\$15,00	00.00 Leveled Total	\$22,500.	.00
🖋 Edit 🕂 Add	📋 Delete 🛛 🎜 Refresh					
LINE #						
	1 Adjusting for higher than average labo	er c Days	1	\$7,500.00	\$7,500.00	_
	AGE SIZE 20 -					

Bid Leveled with a positive (+) value.

f. Close the Bid Leveling window by clicking the "X" at the top right of the window.

Note: Once you close the window, you will notice that the line you just edited is now highlighted in black. This indicates to anyone reviewing the bid that this line has been leveled.

BID QUANTITY	UNIT PRICE	TOTAL AMOUNT	LEVELED TOTAL
1	\$15,000.00	\$15,000.00	 \$22,500.00
1	\$2,500.00	\$2,500.00	•••• \$2,500.00
1	\$1,300.00	\$1,300.00	•••• \$1,300.00
1	\$1,850.00	\$1,850.00	•••• \$1,850.00
1	\$675.00	\$675.00	\$675.00
1	\$250.00	\$250.00	\$250.00
1	\$175.00	\$175.00	\$175.00
	Total	\$21,750.00	\$29,250.00

Bid Leveled indicated with highlight

- 32. The <u>Scoring</u> view holds the bidders answers to the *Scoring* questions. To review and rate these answers:
 - a. Click on the <u>Scoring</u> tab.
 - b. Click on the first line, hold shift and click on the last line, then click the "Edit" button to open all the lines for rating.
 - c. Review the Bidder's answers in the **Answer** column, and then add your own score to the **Score** column.

Note: Do not exceed the *Points Available* for each line, as this will skew the final score.

<u>(Pa</u>	<u>ortfolio)</u> > Pla	nning > Pro	curement > BID PACKAGE	S > 003 - Testing Bid Pacl	kage								
	1 🔁 🔊 003 - Testing Bid Package 🔹 🖺 ┿│+ 📾 🖬 👘 + / -												
MAIN BID ITEMS SPECIFICATIONS SCORING MANAGE BIDS													
Drag a colur	mn header and dr	op it here to gr	oup by that column										
✓ Edit + Add + Add Scoring 🛍 Delete 📿 Refresh ⊞ Layouts													
		QUESTION ID											
	-					•1							
1		1	Have you provided all the require		0	5							
2		2	On how many projects has this t	0	0	5							
3		3	What is the project team approa		0	5							
4		4	Who is the project executive?		0	5							
5		5	Who is the project manager?		0	5							
6		6	Who is the site superintendent?		0	5							
7		7	Is there any other office support		0	5							
8		8	Please comment on the propose		0	5							
9		9	Were there any notable issues w		0	5							
10		10	Please provide your total bid value	0	0	5							
11		11	Please confirm your bid includes		0	5							
12		12	Please provide a list of your excl		0	5							

Answer, Score, and Points Available Columns Indicated.

d. Click the "Update Records" button.

Awarding the Winning Bid, and notifying all Bidders of their Status

After you have leveled and reviewed the current bids, click on the Main window.

33. Click on the line of the winning Online Bid, and then click the "Award" button.

Drag a column I	header and drop it here to group by that co	olumn					
/ Edit +	Add Bidders 🖌 Award 👘 Delete	📿 Refresh Di	isplay All	0	▼ III Layou	uts	
AWARD		INVITATION STATUS			BID STATUS		LEVELED TOTAL
□ -				<u> </u>		-	
	ABC Construction Test	Accepted	<u>91</u>		Submitted	\$43,314.00	\$43,314.00
~	Construction Testing Company	Accepted	90		Submitted	\$21,750.00	\$29,250.00
4							
	PAGE SIZE 20 -						

Bid Selected, "Award" button indicated.

- 34. Click on the **Notification** button in the toolbar at the top of the record.
- 35. In the **BCC**, remove the name of the winning bidder.
- 36. In the **To** field add your name.
- 37. Click the **Send** button at the top of the page.

Note: This process may change in the future after the integrations with SAP and Ariba have completed.

Note: After awarding the bid, go to the "Generating a Commitment from an Awarded Procurement Record" section of this user guide for steps to create the associated **Commitment** record.

Online Bidding

The **Online Bidding** record is where external vendors bid on BU construction projects. Vendors can only see bids they have been offered. If a bid is sealed, not even the System Administrator is able to view the Bids.

Accepting an Online Bid

The first step to reply to a bid is to review the Bidding information and accept the online bid.

Note: For any questions during the Bidding process, please send an email to the Project Manager issuing the bid. They will reply back with a Notification from PMWeb linking you to the document containing your question and answer.

Steps

 In the menu on the left-hand side of the page, navigate to Planning > Procurement > Online Bids.



Planning > Procurement > Online Bidding

2. You will be brought to the list of Online Bids that you have been invited to. (This list includes bids you have previously responded to.)

(<u>)</u>	<u>rtfolio</u>)	> Planning > Procu	rement > ONI	INE BIDS				
Drag a colum	nn headei	r and drop it here to grou	p by that column					
ē	Pro	grams *All*	•	Projects *All*		•	C ⊞	
							PROCUREMENT #	
	-		-	-		-		
Testing Prog	ram	120ASH - Testing Projec	00557	<u>90</u>	Draft	Testing Bid Packa	003	USD
< { ₹ 1}	PA PA	GE SIZE 20 🔻						

Online Bid List

3. Double click the line that corresponds to the bid you are entering to open the record.

) 1 1	119 - Architer	cture Testing Comp	any 🔻	Ð			D VIEW NDA							
< F	IAIN	CLAUS	SES (10)		SCORING		RATIN	GS		SUBMISSION		NOTES		ATTACH
Program Project Bid # <u>Procurement :</u> Description Bid Category Status / Revis Bids Due Date Bids Due Time (UTC-05:00) E	E OC	sting Program 3556 - 120ASH Dem 31 onstruction raft 5 & Canada)	09-30 6:0	Project C C	BIDDER INFORMATIC Company Bid Total 0.00 Amount Lines Acknowledged 0.04YS 0 DECLINE INVITA	HOUF O	Architecture Testing Co	mpany \$0.00 9 46 SECONDS 0 INVITATION						
C Refresh						_		_		_		POT		
NUMBER	ATTACHMENTS	PROJECT	ITEM	DES	CRIPTION		SCOPE OF WORK	MANUFAC	TURER	MFR. #	UOM	QUANTITY	BID QUANTITY	UNIT PRICE
1	(0)	00556 - 120ASI	616	010000 - Gei	neral Requirements							1	1	\$0.00
2	(0)	00556 - 120ASI	614	007200 - Ge	neral Conditions							1	1	\$0.00
3	(0)	00556 - 120ASI	670	028213 - Ast	estos Abatement							1	1	\$0.00
4	(0)	00556 - 120ASI	663	020000 - Exi	isting Conditions							1	1	\$0.00
5	(0)	00556 - 120ASI	816	095000 - Ce	ilings							7	7	\$0.00
6	(0)	00556 - 120ASI	827	096800 - Ca	rpeting							90	90	\$0.00
7	(0)	00556 - 120ASI	834	099000 - Pa	inting and Coating							150	150	\$0.00
8	(Q)	00556 - 120ASI	922	260000 - Ele	ectrical							Ĭ	1	\$0.00

Initial bid view

- 4. The **Bid #** and **Procurement** number correspond to your bid and Project, and are locked and cannot be edited.
- 5. The **Program** is the group (Department or School/College) within Boston University that the project is for.
- 6. The **Project** is the BU name of the construction project.
- 7. Type in a **Description** holds the name of your bid, entered after accepting the invitation.
- 8. The **Bid Category** tells you what type of bid you will be entering.

		• • •	,		0		
	() (<u>Portfolio)</u> > Pl	anning > Procurement > ONLINE E	BIDS > 003 -				
	1 23 90 - Co	nstruction Testing Company 💌	•		N NDA		
4	MAIN	CLAUSES (10)		SCORI	NG		SUBMISSION
	Program Project Bid # <u>Procurement #</u> Description Bid Category	Testing Program 00557 - 120ASH - Testing Project - 21 003 Construction	BIDDER INFORM Company Bid Total 0.00 Amount Lin Acknowledged DAYS	ATION Const es HOURS	43 Of MINUTES	ompany \$0.00 7 43 SECONDS	
	Status / Revision Bids Due Date	Draft ♥ 0 09-17-2021 ♠	15	2	12	20	
	Bids Due Time	5:00 PM 🕓	DECLINE IN	/ITATION	ACCEP		
	(UTC-05:00) Eastern Tim	e (US & Canada)					

Completed Description with Program, Project, and Bid Category fields indicated.

9. The **Revision** line tracks the date and time you last revised this bid.

10. The **Bids Due** line tells you when the bids are due.

Note: This information can also be obtained from the bid **Countdown Clock** on the right side of the header.



11. Countdown Clock

i.

- 12. In the Bidder Information section of the header are several key pieces of data.
 - i. The name of your **Company** in the system.
 - ii. The **Bid Total** that you are submitting. (This value is the sum of all the lines entered in the Bid)
 - iii. The **0.00 Amount Lines** tells you the number of lines in the bid that you have not yet entered a value for.
 - iv. The "Acknowledged" section shows you the number of **Acknowledgements Remaining** that you must fill out and/or accept prior to submitting the bid.

BIDDER INFORMATION	
Company	Construction Testing Company
Bid Total	\$0.00
0.00 Amount Lines	7
Acknowledged	43 Of 43

Bidder information section

Click on the "Accept Invitation" button to begin entering the bid.
 Note: If you do not wish to accept this invitation, click the "Decline Invitation" button. In the pop-up window that opens, click the "OK" button to confirm.

Note 2: If you do not wish to be contacted by BU on <u>any</u> future bids, click the checkbox on this page, and it will inactivate your account in projects@BU, and not allow you to be added to bids unless you request the removal of the flag.

MAIN	CLAUSES (10)		S	CORING		
Program	Testing Program	BIDDER INFORM	ATION —			
Project	00557 - 120ASH - Testing Project - 21	Company	(Construct	tion Testing Co	ompany
Bid #		Bid Total	[\$0.00
Procurement #	003	0.00 Amount Line	es			7
Description		Acknowledged	[43 Of	43
Bid Category	Construction	DAYS	HOUR	S	MINUTES	SECONDS
Status / Revision	Draft 🔹 0	15	2		12	20
Bids Due Date	09-17-2021 🛗			_		
Bids Due Time	5:00 PM 🕓	DECLINE INV	/ITATION		ACCEPT	
(UTC-05:00) Eastern Time	e (US & Canada)					



Responding to an Online Bid

The tabs below the header are where you enter your response to the bid.

Steps

- 14. In the **Description** field, enter a name for your bid that both yourself and the BU Project Manager will recognize, and then **Save** the record.
- 15. The <u>Main</u> view holds the line items that you will be bidding on separated by Cost (CSI) Codes. To respond to each of these lines:
 - i. Click on the **Unit Price** field and enter your value for each of the lines. *Note:* The **Total Amount** column will auto-update with the Unit Price x Bid Quantity once the Price has been entered.
 - ii. If you have additional information about these lines, enter it into the **Notes** column.
 - iii. Click the "Save" button at the top of the page to save your entries into these lines.

Note: If you move away from this view <u>before</u> clicking the save button all your changes will be lost.

You can tell when this is saved by the Bid totals being updated, and the number of "0.00 Amount Lines" value is 0.

	100												
Program	Te	sting Program		BIDDER INFORMATIC	DN								
Project	00	557 - 120ASH - Tes	ting Proje	ect - 21 Company	Cons	truction Testing Corr	pany						
Bid #				Bid Total			\$21,750.00						
Procurement	# 00	3		0.00 Amount Lines			0						
Description				Acknowledged		43 Of	43						
Bid Category	Co	instruction		DAYS	HOURS	MINUTES	SECONDS						
Status / Revis	sion Dr	aft	*	0 10	0	2	FC						
Bids Due Dat			09-17	7-2021 🗂 ID	2	3	00						
Bids Due Tim	• [5:1	DO PM () DECLINE INVITA	TION	ACCEPT	IVITATION						
(UTC-05:00) I	Lastern Time (US	& Canada)											
C Refresh													
LINE NUMBER	ATTACHMENTS	PROJECT	ITEM	DESCRIPTION	sco	PE OF WORK	MANUFACTURER	MFR. #	иом	EST. QUANTITY	BID QUANTITY	UNIT PRICE	TOTAL AMOUNT
1	(0)	00557 - 120AS+	616	010000 - General Requirements						1	1	\$15,000.00	\$15,000.00
2	(0)	00557 - 120AS	674	030000 - Concrete						1	1	\$2,500.00	
3													\$2,500.00
	(0)	00557 - 120ASI	722	060000 - Wood, Plastics, and C						1	1	\$1,300.00	\$2,500.00
4	(0) (0)	00557 - 120ASi 00557 - 120ASi	722 725	060000 - Wood, Plastics, and C 061000 - Rough Carpentry						1		\$1,300.00	\$2,500.00 \$1,300.00 \$1,850.00
4	(0) (0) (0)	00557 - 120ASI 00557 - 120ASI 00557 - 120ASI	722 725 726	060000 - Wood, Plastics, and O 061000 - Rough Carpentry 062000 - Finish Carpentry	 					1	1	\$1,300.00 \$1,850.00 \$675.00	\$2,500.00 \$1,300.00 \$1,850.00 \$875.00
4	(0) (0) (0) (0)	00557 - 120ASI 00557 - 120ASI 00557 - 120ASI 00557 - 120ASI	722 725 726 756	060000 - Wood, Plastics, and C 061000 - Rough Carpentry 062000 - Finish Carpentry 080000 - Openings	 					1		\$1,300.00 \$1,850.00 \$875.00 \$250.00	\$2,500.00 \$1,300.00 \$1,850.00 \$675.00 \$250.00
4 5 6 7	(0) (0) (0) (0) (0)	00557 - 120ASI 00557 - 120ASI 00557 - 120ASI 00557 - 120ASI 00557 - 120ASI	722 725 726 756 802	060000 - Wood, Plastics, and C 061000 - Rough Carpentry 062000 - Finish Carpentry 080000 - Openings 090000 - Finishes						1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		\$1,300.00 \$1,850.00 \$675.00 \$250.00 \$176.00	\$2,500.00 \$1,300.00 \$1,860.00 \$675.00 \$250.00 \$175.00
4 5 6 7	(0) (0) (0) (0) (0)	00557 - 120ASI 00557 - 120ASI 00557 - 120ASI 00557 - 120ASI 00557 - 120ASI	722 725 726 756 802	060000 - Wood, Plastics, and C 001000 - Rough Carpentry 062000 - Finish Carpentry 080000 - Openings 090000 - Finishes						1 1 1 1		\$1,300.00 \$1,850.00 \$475.00 \$250.00 \$175.00	\$2,500.00 \$1,300.00 \$1,850.00 \$675.00 \$250.00 \$175.00

Completed Bid lines

16. Click the Clauses view to review the standard Clauses for any BU Construction Contract

•	MAIN	C	LAUSES (10)		SCORING
CLAUSES					
Drag a colur	nn header and drop	it here to group b	y that column		
LINE #	PARAGRAPH	CATEGORY	TYPE	DESCRIPTION	
1				Respondent has in	Respondent has included
2				Respondent has in	Respondent has included
3				Respondent has re	Respondent has reviewe
4				Respondent has re	Respondent has reviewe
5				Respondent has a	Respondent has acknow
6				Respondent has in	Respondent has included
7				Respondent has in	Respondent has included
8				Respondent has in	Respondent has included
9				Respondent has in	Respondent has included
10				Respondent has re	Respondent has reviewe
<	□ ► ► PAGE S	IZE 20 🔻			4

Clauses Tab

To view the full text of each clause, click the ellipses in the "TEXT" column to get a window with the full text.

	MAIN	CLAU	JSES (10)		SCORING
CLAUSES					
Drag a col	umn header and drop	it here to group by th	nat column		
LINE #					TEXT
	1			Respondent has in	Respondent has included
:	2			Respondent has in	Respondent has included
:	3			Respondent has re	Respondent has reviewed
	4			Respondent has re	Respondent has reviewed
	5			Respondent has ac	Respondent has acknowl
	6			Respondent has in	Respondent has included
	7			Respondent has in	Respondent has included
4	в			Respondent has in	Respondent has included
9	9			Respondent has in	Respondent has included
10	D			Respondent has re	Respondent has reviewed
< 	AGE S AGE S	IZE 20 V			•

17. Click to the <u>Scoring</u> view to answer standard Scoring questions regarding your company, project approach, and team. Enter these answers by double-clicking on the **Answer** field for each line, and entering in your response, and then clicking on the "Update Records" button.

12/3	1 90 - Construction Testing Company VIEW NDA												
٠.	MAIN		CLAUSES (10)	SCORING	SCORING								
Drag a colur	Drag a column header and drop it here to group by that column												
🥒 Edit	✓ Edit 2 Refresh												
LINE #	GROUP	QUESTION ID	QUESTION	ANSWER	SCORE	POINTS AVAILABLE	WEIGHT						
					=	-							
1		1	Have you provided all the require		0	5	100%						
2		2	On how many projects has this t	0	0	5	300%						
3		3	What is the project team approa		0	5	300%						
4		4	Who is the project executive?		0	5	300%						
5		5	Who is the project manager?		0	5	300%						
6		6	Who is the site superintendent?		0	5	300%						

Scoring Tab

18. On the <u>Attachments</u> view you will find the Bid Documentation for the Project you are bidding on. To download the documents on the Bid, click the double-down arrows on the right side of the file name, and a Save window will open prompting you to choose where to save the file.

(i) (I	Portfo	<u>olio)</u> > Planning > Pro	ocurement > (ONLINE BID	S > 001 -						
	123	Ð	119 - Architecture Testi	ng Company 💌				VIEW NDA]			
•		M	AIN	CLAUSES (10)		SCO	RING		RATINGS		SUBMISS	SION
	+ Add	ł	🗇 Details 🛛 📲 Card V	ew 🔲 Layouts	3							
	ACTIC	DN	NAME		DESCRIPTION*			ID	EXT.	MODIFIED	SIZE	VERSIC
	0		ZANALYSIS_PATTERN		ZANALYSIS_PATT	FERN		13796	xls		4.70 M B	1

Attachments view with download icon indicated.

- 19. Click on the <u>Submission</u> view to accept the BU standard clauses, as well as enter in the Bidding Contact and Expiration information.
 - i. In the <u>Bidder Information</u> section enter:
 - 1. The **Contact** name for your bid.
 - 2. The date the **Bid Expires** by click on the calendar icon next to the field.

Bid Expires*		[ć
Change Order Fe				ptem	ber 2(021		••	0%
Available To Sta									ć
Phone*		S	Μ	Т	W	Т	F	S	-
Ext.	36	29	30	31	1	2	3	4	
Email	37	5	6	7	8	9	10	11	
Comments	38	12	13	14	15	16	17	18	
	39	19	20	21	22	23	24	25	
	40	26	27	28	29	30	1	2	
	41	3	4	5	6	7	8	9	

Bid Expires with calendar indicated.

- 3. The date you are **Available to Start** work on the Project.
- 4. The **Phone** number, and extension if applicable, your contact can best be reached at.
| BIDDER INFORMATION - | |
|----------------------|------------------------------|
| Company | Architecture Testing Company |
| Contact* | Johnathan Smith |
| Bid Expires* | 10-22-2021 🛗 |
| Change Order Fee | 0% |
| Available To Start | 10-20-2021 🗎 |
| Phone* | 617-123-4567 |
| Ext. | |
| Email | |
| Comments | |
| | |
| | |
| | |

Completed <u>Bidder Information</u> section

- ii. In the <u>Acknowledgements</u> section locate the "Clauses" in the **Type** field and click the check box on the left of each clause.
 Note: This section can be located after the "Bid Items" list, and contains standard Clauses for all BU construction bids.
- 20. Click the "Save" button at the top of the page to save these entries.
- 21. Once all sections have been completed, the **Acknowledgements Remaining** number will drop to zero (0), click the "Submit Bid" button to submit you bid for the project.
- 22. In the pop-up window that opens, click the "Ok" button to confirm your submission. **Note:** If you have not yet completed any sections, clicking the "Accept" button will bring you to the <u>Acknowledgements</u> section under the <u>Submissions</u> view where you can review the outstanding items.

WARNING: Once you **SUBMIT** your bid you **will not** be able to modify it unless it is reissued to you by the BU Project Manager.

(i)	<u>(Portfolio)</u> > Planning	> Procurement > ONL	INE BID	S > 003 -		
123	90 - Construction	Testing Company 🔻		- el-	VIEW NDA	SUBMIT BID
	MAIN	CLAUSES (10))		SCORING	SUBMISSION
		"Submit" bi	utton.			

Engineering Forms

The Engineering Forms Module in projects@BU holds forms and transmittals that are generated as a Construction Project progresses. Submittals, Meeting Minutes, Drawing Sets, and Punch Lists are all stored here and are available to reference for anyone who has access to these sections of the system. The Document Manager, the central repository for all files generated by/for all projects is also located in this Module.

This section of this User Guide goes through each of the record types that BU is using in this Module and walks through how they are used at Boston University.

RFI's

RFI's track questions and answers from either the Internal Service Providers or External Service Partners which may have a Scope, Schedule and/or Cost impact to the overall Project.

Cre	atin	q an	RFI

1.	Navigate	to Eng	gineering Forms >	RFIs	
		×Р	M/eb	<u>()</u>	Controls
		-¥-	PLANNING	RFIs	CUSTOM FORMS
				Untine Submittats	Monthly Project Update
			ENGINEERING FOR	Submittal Items	Permit Summary
				Submittal Sets	
		\$	COST MANAGEMENT	Meeting Minutes	
		-	SCHEDULING	Drawing Lists	
				Drawing Sets	
			ASSET MANAGEME	Punch Lists	
				Transmittals	
		✓	WORKFLOW	Correspondence	
			PORTFOLIO	Document Manager	
			Enai	neerina Forms > RFIs	

2. Click on the "+" + button at the top of the list page.

NOTE: 1 directly	ole: If this is the first KFI created that you have access to, then you will be brought irectly to the RFI screen									
	ortfolio) >	Engineering F	orms > RFIS							
Drag a colum	nn header ar	id drop it here to g	group by that colun	nn						
Ð	Progra	ms *All*		▼ Projects *All*		· + 🖮 🕇	3 ⊞			
PROJEC										
	-	-	-				-			
120ASH - Te	sting Project	00557	001	RFI Test	Approved	Boston University - Gerald Broo	Construction Testing Company			
4										
4 4 1 ▶	PAGE	SIZE 20 -								

"+" button on RFI List

- 3. Select the **Project** from the dropdown list at the top of the Page.
- 4. The **RFI #** field is not locked, but should be left at the system generated value. *Note: If you override this field, subsequent RFIs will follow the overridden sequence.*
- 5. In the **Description** field type in an easy-to-recognize name for this RFI.

6. Click the "Save" button at the top of the page to save this RFI and link it to the project data.

	> Engineering Forms > RFIS				
i≣ Ɗ		+ ŀ 前		5 - 4 - 2	
•	Los				
Project*	00556 - 120ASH Demonstration Proje 👻	TESTQUESTION -			
Project* RFI #*	00556 - 120ASH Demonstration Proje 👻	TESTQUESTION -		• 16px	•
Project* RFI #* Description	00556 - 120ASH Demonstration Proje v 001 Demonstration RFI	TESTQUESTION →	EII	- 16px	•

Save button indicated

- 7. In the **RFI Date** field, enter in the date the question causing the RFI was first raised.
- 8. In the **CSI Code** dropdown select the CSI group that this RFI record pertains to.
- 9. In the From dropdown select your name/company.
- 10. In the **To** dropdown select the person you are sending this RFI to.

From ••••	Construction Testing Company - Constru	Design 🖽	нт	MI
То	Company	Contact		
	A&P Woodworking, Inc.			^
Priority	A. J. Rose Carpets			
Task	A. Vozzella & Sons, Inc.		1	
Affects Scope of Work	A1 Automatic Transmission, Inc.			
Aneeds beope of work	A-1 Lighting Service Company		1	
Affects Cost	ABC Construction Test	John Smith		
Affects Schedule	ABC Construction Test	John Doe-Test		
Change Event	ABC MOVING & STORAGE CO., LLC.			
onango crone	ABC Moving Services, Inc.		•	~
Date Required	<		>	
Date Answered	✓ Contact 1-20 out of	1530		
_				

From and To Dropdown list shown.

- 11. Select the **Priority** of the RFI that you are submitting.
- 12. Select the schedule **Task** that this RFI impacts.

Note 1: If there is not a **Schedule** for this Project, then the task list will be blank. **Note 2:** If this list does not populate and there is a **Schedule**, click the **Save** button at the top of the screen to save the record and link it to the project.

- 13. The next three checkboxes indicate if the RFI:
 - i. Affects Scope of Work
 - ii. Affects Cost
 - iii. Affects Schedule
- 14. Click the calendar icon next to Date Required to select the date you require an answer by.

RFI Date					e				1
CSI Code		1	Se	eptem	ber 2(021	•	*	•
From		S	М	т	W	т	F	S	n 🔻
То	36	29	30	31	1	2	3	4	•
Priority	37	5	6	7	8	9	10	11	•
Task	38	12	13	14	15	16	17	18	et 🔻
Affects Scope o	39	19	20	21	22	23	24	25	
Affects Cost	10	00	07	2.		20		20	
Affects Schedul	40	26	21	28	29	30	1	2	
Change Event	41	3	4	5	6	7	8	9	
Date Required									Ê

Calendar open.

15. Click the **Save** button at the top of the page.

Project*	00556 - 120ASH Demonstration Proje 🔻
RFI #*	001
Description	Demonstration RFI
Reference	
Status / Revision	Draft 🔹 0
RFI Date	<u> </u>
CSI Code	09 - Finishes 💌
From	Construction Testing Company - Constru
то	Boston University - Jonathan Smith 💌
Priority	1- High 💌
Task	800 - Construction Substantial Complet 🔻
Affects Scope of Work	
Affects Cost	
Affects Schedule	
Change Event	
Date Required	<u> </u>
Date Answered	<u> </u>
Linked Records	0
Transmittals	0
L	

Completed RFI Main Data

16. In the **Question** box, enter in the full description of your request. *Note: This box has full formatting functionality for ease of entering.*

QUEST	ΓΙΟΝ												
RBC	"We	ork S	ans"					•	12	рх		•	
В	Ι	U	5	\equiv	$\overline{\equiv}$	\equiv	\equiv	A	÷	<u>è</u> , -	A *	[;;;] [;;]]	
John	;												^
The proceed of the pr	olans vith a urem s upd	we j a grey ent r lated	ust re BU eques or ar	eceiv icon. sts w re the	ed ca The ere k ese p	all for initial based lans i	the vers on t n err	lobb ion, he o or.	y to and ppo	be p l our osite?	ainted Were	l in the	
Mark													¥
	esig	ו ≣	∎нт	ML	Ð	Previ	ew						

Formatted RFI Question Entry

17. In the **Proposed Solution** box on the "Details" enter in the solution for the issue this RFI pertains to if one is known or being considered.

PROP	OSED	SOL	UTIO	N							
RBC	ser	if						• 1	6рх		•
В	Ι	U	5	Ξ	$\overline{\equiv}$	\equiv	\equiv	A		* *	C:::3
Best the r	to fo red fo	ollow or the	origii BU s	nal pl symb	ans, ol ac	and u cent.	ise gr	ey pa	int for w	valls, a	and
	esig	n	≣нт	ML	Ð	Previ	ew				

RFI Solution Entry

- 18. Save this record by clicking the **Save** button in the toolbar at the top of the page.
- 19. Click the **Submit** button at the top of the page.

i	(<u>Portfolio</u>) > Engineering Forms > RFIS > 001 - Demonstration RFI								
123	120ASH Demons	tration Project - 21 - 💌	- - 🔟 🖬 🖷 - 4 - 💄 🕞 SUBMIT						
	MAIN	SPECIFICATIONS	NOTES ATTACHMENTS						

Save and "Submit" buttons indicated.

- 20. The SUBMIT window will appear, and you can enter any Comments needed in the box.
- 21. Click the **Save and Exit** button to submit the Request to Workflow.

SUBMIT - 001 - Demonstration RFI		×
E		
Comments		
Additional CC		
DROP FILES HERE OR CLICK TO ADD		

SUBMIT window with Save and Exit button indicated.

Responding to a Submitted RFI

If an RFI has been submitted to you for your commentary, you will receive a workflow notification.

22. Navigate to Engineering Forms > RFIs

WORKFLOW INBOX		Due	• 2 ∞ ×
Record <u>RFIs - 001</u> Description Demonstration RFI Instructions	Project/Location 21 Project - Due Project/Location 21 Prog	09-15-2021 ressStep 2 of 3	
			1
$\Rightarrow \leftarrow \odot \checkmark >$			

Controls Page with RFI notification

- 23. Note: If you are in the system you can navigate directly to the RFI submitted to you via the Workflow Inbox.
- 24. Read through the **Question** and **Proposed Solution** section of the RFI, and respond back in the **Answer** section of the page.

Note: This box has full formatting for ease of entering.

- 25. Enter in the date you answered the question in the **Date Answered** box to the left the **Answer** section.
- 26. If this answer effects the Scope of Work, Cost, and/or Schedule, then check off the appropriate marks below the **Answer** section.

	Date Answered		09-10-2021 🛗	ANSWER	
	Linked Records	•••	0	RBC "Times New Roman" - 16px -	
	Transmittals	•••	0	$B \ I \ \sqcup \ \mathfrak{S} \equiv \Xi \equiv \equiv A \cdot \diamond \cdot \blacksquare \blacksquare$	
				Agreed, go with the original Plans.	
				Design III HTML 🔍 Preview	
	Answer enter	ed with Date Answere	ed and Effects se	section highlighted	
27. Click the	"Save" butto	n at the top of the	page.		
		120ASH Demonstration Proj	ect - 21 - 🔻	🖹 +l· 🛍 🛛 🗗 🗲 - ᆂ	
	A MAI	IN	SPECIFICATIONS	NOTES ATTACHMENTS	

Save button

Meeting Minutes

The **Meeting Minutes** record type in projects@BU allows you to record Project Tasks in a centralized, reportable location. This allows everyone who has access to the project to have the same task list from all meetings. **Meeting Minutes** records can be generated by several roles including the Project Manager, Architect and General Contractor, allowing individuals outside of the Project Manager to input their own task list from meetings where the Project Manager may or may not have been in attendance, allowing the PM a more informed view of their project.

Creating the record

1. Navigate to Engineering Forms > Meeting Minutes



Engineering Forms > Meeting Minutes

2. In the top of the list that appears click the "+" to button.

Note: If this is the first **Meeting Minute** record you have generated or have access to then this step will not be necessary, you will be brought directly to the record view.

123	120ASH Den	nonstration Project - 21 - 💌		+ -	Ŵ	\sim	4 -	•
<▶	MAIN	SPECIFICATIONS				NOTES		ATTACHMENTS
	Meeting	minute toolbar with "+" butto	n at the i	top.				

Note 2: If you wish to generate a new **Meeting Minute** record for a project, select the last **Meeting Minute** record for that project and then click the "Create Next Button

(j)	<u>(Portfo</u>	<u>lio)</u> > Engineering Forms > MEETING	G MINUT	ES > 1 - De	esign	Review			
123	Э	120ASH Demonstration Project - 21 - 💌	B	++ (Î	\sim	$\oplus [\cdot]$	4 • 💄	CREATE NEXT

Create Next Button Shown

- 3. In the **Project*** dropdown search for the name of your Project.
- 4. Select the Phase of the project in the **Phase** dropdown.
- 5. In **Type** select the meeting type the minutes are for.

Туре	Design	•
Record #*	Budget	
	Close-Out	
Meeting #	Commissioning	
	Design	
Description	LEED	
Location	OAC	
	Other	
Vendor Project Number	Permitting	
	Predesign	
Category	Procurement	

Type drop-down open showing options.

- 2. The **Record #** is automatically created by the system and should be left at the system generated value.
- 3. The Meeting # field populates automatically.
- 4. Enter the name of the meeting in the **Description** field.
- 5. Enter the location of the meeting in the **Location** field.

Note: This is a free-text field and does not link with the list of building addresses at *BU*.

- 6. If known, enter the project number from the vendor in the Vendor Project Number field.
- 7. The **Category** field is not currently in use.
- 8. The **Meeting Date** field auto-populates with the current date, but can be changed by clicking on the calendar icon and selecting a different date.



9. Enter in the Start and End time of the meeting in the **Started** and **Ended** fields, by clicking on the clock and selecting the appropriate time.

Started				0
Ended		Time Picker]0
Status / Revision	40.00.414	4.00.414	0.00.414	
Transmittals	12:00 AM	1:00 AM	2:00 AM	0
mansmittats	3:00 AM	4:00 AM	5:00 AM	
NEXT MEETING	6:00 AM	7:00 AM	8:00 AM	
Next Location	9:00 AM	10:00 AM	11:00 AM	
Meet Date	12:00 PM	1:00 PM	2:00 PM	1
Start	3:00 PM	4:00 PM	5:00 PM	0
	6:00 PM	7:00 PM	8:00 PM	
	9:00 PM	10:00 PM	11:00 PM	

Clock highlighted and options shown.

10. In the *Next Meeting* section, enter in the **Location**, **Date and Start Time** of the next project meeting, if known.

Next Location	120 Ashford Street
Meet Date	09-13-2021
Start	11:00 AM

11. Click the **Save** button at the top of the record.

(Portfolio) > Engineering Forms > MEETING	G MINUTES		
	+ • m	\sim	4 • 🚊

Save button indicated.

12. The *Participants* section of the header holds a list of the potential attendees of the meeting.

PARTICIPANT	rs ——			
N Edit	- Add	+ Add Multiple	前 Del	ete
	C	ONTACT		PRESENT
No records t	o display.			
		PAGE SIZE 5 -		
	Pa	rticipants List		

- i. Click the "+ Add Multiple" button + Add Multiple to add attendees to the meeting.
- ii. The "Select Companies/Contacts" window opens.

SE	ELECT COMPANIES/CONTACTS (0 SELECTED)									
	COMPANIES/CONTACTS DISTRIBUTION LISTS									
Drag	ig a column header and drop it here to group by that column									
S	Spacs 🔹 🔛 Save and Close Save Layout Load Default Layout									
						EMAIL				
	testing					@test 👳				
	Architecture Testing Company		Testing Company	-	Architecture Update Test	archTestingUser@test.com				
	Construction Testing Company	Contractor - Ge		-	Construction Update Test	constTestingUser@test.com				
Construction Testing Company Contractor - Ge - OPM Update Test					OPM Update Test	opmTestingUser@test.com				
	[4 4 1 ▶ ▶ PAGE SIZE 20 ▼									

- iii. Click the check box to the left of the contact row to select the participants, the box will be then filled in to show selected attendees.
- iv. Click the "Save and Close" button at the top of the list to close the window and add the Participants to the header.
- v. Highlight the rows in the participant list and click the "Edit" button.
- vi. Click the box to the right of each Participant in the "Present" column to mark them as attending the meeting, and then click "Update Records"



Participant marked as "Present"

13. Click the "Save" button in the toolbar at the top of the page.

MAIN	SPECIFICATIONS	NOTES	
Project*	00556 - 120ASH Demonstration Proje	PARTICIPANTS	
Phase	3) Design -	🖋 Edit 🕂 Add 🕂 Add Multiple 💼 Del	ete
Туре	Design 🔻	CONTACT	PRESEN
Record #*	001	Architecture Testing Company - Architecture Update	
Meeting #	1	Construction Testing Company - Construction Update	•
Description	Design Review	Construction Testing Company - OPM Update Test	
Location	120 Ashford Street	Boston University - Jonathan Smith	
Vendor Project Number			
Category	-		
Meeting Date	09-09-2021		
Started	11:00 AM		
Ended	1:00 PM 🕓		
Status / Revision	Draft 👻 0		
Transmittals	0		
NEXT MEETING			
Next Location	120 Ashford Street		
Meet Date	09-13-2021		
Start	11:00 AM		

Header completed, "Save" button highlighted.

Entering Tasks from a Meeting

14. In the task list at the bottom of the page click the "+ Add" button.

NEXT MEETING			_					
Next Location	120 Ashford Stree	ət]					
Meet Date		09-13-2021 🛗						
Start		11:00 AM 🕓						
Drag a column header	and drop it here to g	roup by that column						
🖋 Edit 🕂 Add	🗎 Delete 🧲	Refresh 🛛 🗙 Expor	rt To Excel	📋 Paste From Excel	Layouts			
ITEM #	SEQ # ATTAC			DESCRIPTION				
No records to display.								
<								

Details table with "+ Add" button highlighted.

- 15. Enter the order of tasks in the **Seq #** field.
- 16. In the **Description** field, enter in the description of the Task.

Note: This field has full formatting capability for ease of entering information.

Drag a column header and drop it here to group by that column
🖺 Save 🛞 Cancel
ITEM # SEQ # ATTACHMEN "Work Sans" • 12px •
〒 〒 [◙ ◙ A· À· B I ⊻ ᢒ Ξ Ξ Ξ Ξ
Update plans with proposed changes.

Description field selected with options shown.

17. In the Assigned To field, select the name of the person who the Task is assigned to.

Note: Tasks can only be assigned to those who are set up as a contact in the system. 18. The **Category** field is not currently in use.

- 19. In the **Subject** field, give the Task a name.
- 20. The Status field is not currently in use.
- 21. Enter the due date of the Task in the **Due** field.
- 22. If this Task is associated with a line from the Project Schedule, click the **Task** drop down and select the appropriate entry.

			·							
Drag a column he	rag a column header and drop it here to group by that column									
🖺 Update Reco	E Update Records 🛞 Cancel									
ITEM #										
1.1			Update plans with proposed changes.	Architecture Update Test 🔹 👓	-	Architecture Update	09-24-2021 🛗	<u> </u>		
		(0)								
K A D N	PAGE 8175 00	-						>		
N 4 1 P PI	PAGE SIZE 20	·								

Completed Task entry

23. Click the "Update Records" button at the top left of the list.

Drag a column header and drop it here to group by that column							
🖺 Update Reco	rds 🛞 Cancel						
ITEM #	SEQ #	ATTACHMEN	DESCRIPTION				
1,1		(0)	Update plans with proposed changes.				
<		_					
	PAGE SIZE 20	·					
Save button indicated							

24. Repeat steps 18 – 28 for each additional Task line.

Completing Tasks

Once Task(s) have been completed, follow these steps to complete them in the system.

- 25. Navigate to the meeting your Task is associated with.
- 26. Select the line for your Task, and click the "Edit" button.
- 27. Enter in the Completion date in the **Completed** field.
- 28. If you have any comments about the completion of the Task, enter them into the **Notes** field.
- 29. Click on the check-box in the **Done** column.

Drag a column header an	d drop it h	ere to group by th	nat column							
🖺 Update Records	Cance	L. C.								
ASSIGNED TO					DUE	COMPLETED				DONE
	-			Ŧ					Ŧ	
Architecture Update Test	•••	•	Architecture Update		09-24-2021 🗂	09-23-2021 🗂	•	•		
	SIZE 20	•								
		_								

Completed Task

30. Click the "Update Records" button at the top left of the list.

Γ	Drag a column header and drop it here to group by that column							
	🖺 Update Recor	rds 🛞 Cancel						
	ITEM #	SEQ #	ATTACHMEN	DESCRIPTION				
			-					
	1.1			Update plans with proposed changes.				
			(0)					
	<			L]				
		PAGE SIZE 20	•					

Drawing Sets

Drawing sets allow users in projects@BU to group together multiple drawings from the Document Manager into a single transmittal that can be reported on and easily located.

Creating a Record

1. Navigate to Engineering Forms > Drawing Sets.

<pm eb<="" th=""><th>0</th><th>Controls</th></pm>	0	Controls
	RFIS	CUSTOM FORMS
	Online Submittals Submittal Items	
\$ COST MANAGEMENT	Submittal Sets Meeting Minutes	
SCHEDULING	Drawing Lists Drawing Sets	
ASSET MANAGEME	Punch Lists	
V WORKFLOW	Correspondence	
	Document Manager	

Engineering Forms > Drawing Sets

2. In the top of the list that appears click the "+" + button.

Note: If this is the first **Drawing Sets** record you have generated or have access to then this step will not be necessary, you will be brought directly to the record view.

<u>(Po</u>	() (Portfolio) > Engineering Forms > DRAWING SETS									
Drag a colum	n header ar	nd drop it here to g	roup by that colur	nn						
Programs *All* Projects *All* + Image: Contract of the second secon										
PROJECT										
demon	-									
120ASH Dem	20ASH Demonstration 00556 001 Demonstration Drawing Set Draft 3) Design -									
∢										
4 4 1 ▶										

Drawing Sets toolbar with "+ Add" button at the top.

3. In the **Project*** dropdown search for the name of your Project.

- 4. Select the current **Phase** of the Project.
- 5. The Set # field is locked and populated by the system
- 6. Enter in a title of the **Drawing Set** in the **Description** field.
- 7. In the **From** drop-down search for your name.

From	•••	jonath	-	•	
CSI Code		Company			Contact
		Boston University			Jonathan Gavin Wilkie
CSI Division		Boston University			Jonathan Smith
Category					
Reference					
Transmittals					
			 Contact 1-2 out 	: 0	f 2

From drop-down open showing options.

8. In the CSI Code drop-down select the appropriate values for the Drawing Set.

CSI Code	007200 - General Conditions	•
CSI Division	007200 - General Conditions	*
Category	007300 - Supplementary Conditions 010000 - General Requirements	
Reference	012100 - Allowances 012116 - Contingency Allowances	
Transmittals	012119 - Testing and Inspecting Allow 012300 - Alternates	
Desc a solution has descended	012400 - Value Analysis 013000 - Administrative Requirement	_
Edit + Add	013100 - Project Management and Co 013113 - Project Coordination	, F
LIST # LINE # ATTACH	013119 - Project Meetings 013123 - Project Web Site	λ.Τ.
	013126 - Electronic Communication F 013200 - Construction Progress Docu	
No records to display.	013213 - Scheduling of Work 013216 - Construction Progress Sche	
₩ ◀ 1 ► ► PAGE S	CSICode 1-40 out of 200	

CSI Code list highlighted with options shown.

9. In the CSI Division select the division this Drawing Set applies to.

CSI Division	04 - Masonry	•				
Category	04 - Masonry	^				
Reference	05 - Metals 06 - Wood, Plastics, and Composites					
Transmittals (•••	07 - Thermal and Moisture Protection	r				
\bigcirc	09 - Finishes					
Drag a column header and	10 - Specialties					
Edit + Add	12 - Furnishings					
LINE	13 - Special Construction 14 - Conveying Equipment					
LIST # # ATTACH	15 - RESERVED FOR FUTURE EXPANS					
	16 - RESERVED FOR FUTURE EXPANS					
No records to display.	18 - RESERVED FOR FUTURE EXPANS					
	19 - RESERVED FOR FUTURE EXPANS					
		-				
	CSIDivision 1-40 out of 50					
CSI Division list						

10. Click the "Save" button at the top of the record.



Completed Header with Save button Highlighted.

Adding Drawings to the Set

11. If you have added Drawings to the **Drawing Lists** record:i. In the list, click on the "+ Link Drawings"

				, 			5		
Drag a c	Drag a column header and drop it here to group by that column								
🖉 Edi	t +	Add 🔗	Link Drav	wings	前 Delet	te 📿 Refresh	ϟ Generate Transmittal		
LIST #	LINE #	ATTACHME		REVISION			DESCRIPTION		
			=	_		-	-		
<u>001</u>	1	<u>(0)</u>		0		09-23-2021	Structural Drawing		
•									
		PAGE SIZE	20 🔻						

"Link Drawings" button indicated.

ii. A list of all the Drawings in the **Drawing Lists** record for the Project will appear.

LINK DF	RAWINGS												
B	×												
Project* Phase Drag a c	sjore* 00058 - 100.00 r Generalitation Project 30 Design Design & Galamin Reader and drog it Nates to group by that column												
SELECT	LIST #	LINE #	SHEET	REVISION	ITEM	DATE	DESCRIPTION	CSI DIVISION	CSI CODE	CATEGORY	TASK	LOCATION	STATUS
	- -												
	001	1		0		09-23-2021	Structural Drawing	05 - Metals			700 - Constructio		
	K (] ▶ N PAGE SIZE (S •												

Link Drawings Window

- iii. Click on the Check Mark next to the Drawings that you want to add to the set.
- iv. Click the "Save to Record" button to save the lists to the
- 12. If you have not added Drawings to the **Drawings List** record:
 - Click the "+ Add" button at the top of the list, a new line will be added shaded in a yellow color.

Drag a column header and drop it here to group by that column										
🖊 Edit 🕂 Add 🔗 Link Drawings 🌐 Delete 🤁 Refresh 🦩 Generate Transmittal 🏢 Layouts										
LIST # LINE # ATTACHME! SHEET REVISIO! ITEM DATE DESCRIPTION CSI DIVISION										
		Ī	-							
No records to display.										

- ii. In the **Date** field select the date of the drawing.
- iii. In the **Description** Field enter a brief description of the drawing.
- iv. Select the appropriate **CSI Division** and **CSI Code** in the next drop-downs.
- v. The **Category** dropdown has been left blank at this time and will be populated later.
- vi. If this drawing is related to a particular **Schedule** task, select it from the **Task** dropdown.

Drag	rag a column header and drop it here to group by that column												
	E Save 🛞 Cancel												
LIS													
	-			- 3	-	-	=						
							09-23-2021 🛗	Structural Drawing	05 - Metals 👻	-	•	700 - Construc 💌	· ·
No re	cords	s to dis	olay.										
M	∢1	•	PAGE SIZE	20 🔻									

- vii. Click the "Save" 🖺 Save button to save this line.
- viii. Click the grey document link, and the "View Attachments" window will open.

Drag a column header and drop it here to group by that column										
/ Edit	+	Add 🔗	Link Dra	wings	前 Delete	C Refresh	🐓 Generate Transmittal	Layouts		
LIST # LINE # ATTACHMEN		ENSHEET REVISION		ITEM	DATE	DESCRIPTION	CSI DIVISION			
			-		-					
<u>001</u>	1 <u>(0)</u> 0		09-23-2021	Structural Drawing	05 - Metals					
	(1)									
€ € 1		PAGE SIZE	20 🔻							

Attachments link Indicated

vo records to display.									

View Attachments window

- ix. You have two options from here.
- x. Drag and Drop
 - 1. Locate the file on your computer.
 - 2. Click-and-drag the file to the "Drop Files Here to Upload" green box.

Note: You will know you have dragged correctly when your cursor turns into an expanded version of the file icon.

DROP FILES HERE OR CLICK TO ADD
ATTACH FROM DOCUMENT MANAGER

- xi. Attach from Document Manager
 - 1. Click the "Attach from Document Manager" button
 - 2. In the window that opens navigate to your file and click "Open"
 - 3. Once a file has been uploaded to projects@BU it will appear in the list above the green upload box.
- xii. Click on the "Save & Exit" button on the toolbar at the top of the page to save the record.

13. Click on the "Save" button on the toolbar at the top of the page to save the record.

Submittal Sets

Submittal Sets are how BU processes Submittals from vendors through projects@BU. This provides a central location of all Submittals for one project, and also allows groups of these records to be bundled into a Transmittal (see Transmittals section).

Note: If the lines you are adding <u>do not</u> correspond to a Cost Code, after completing the "Creating the Header" steps, jump directly to "Completing lines on the Submittal Set."

Creating the Header

1. Navigate to Engineering Forms > Submittal Sets.

×P	M/eb	(i)	Controls
÷	PLANNING	RFIs	CUSTOM FORMS
۵	ENGINEERING FOR	Submittal Items	Monthly Project Update Permit Summary
\$	COST MANAGEMENT	Submittal Sets	
-	SCHEDULING	Drawing Lists Drawing Sets	
	ASSET MANAGEME	Punch Lists Transmittals	
✓ ∰	WORKFLOW	Correspondence Document Manager	
₩	PORTFOLIO		

Engineering Forms > Submittal Sets

2. In the top of the list that appears click the "+" \square button.

Note: If this is the first Submittal Set record you have generated or have access to then this step will not be necessary, you will be brought directly to the record view.

(<u>Po</u>	() (Portfolio) > Engineering Forms > SUBMITTAL SETS										
Drag a colum	Drag a column header and drop it here to group by that column										
ē	Programs *All* •										
PROJECT											
	-										
120ASH - Te:	sting Projec	00557	001	Testing Project	Draft						
<											
4 4 1 ▶	A 1 PAGE SIZE 20 V										

Submittal Sets toolbar with "+ Add" button at the top.

- 3. In the **Project*** dropdown search for the name of your Project.
- 4. The **Set #*** field is populated by the system and should be left at the generated value.
- 5. Enter a Description of the Submittal Set that will be recognizable by both yourself and other members of the project team.
- 6. In the **From** drop-down, select your name.
- 7. In the **To** drop-down, select name of the person you are sending the **Submittal Set** to.

		▼ Contact 1-20 (out of 1530	
		A. Vozzetta & Sons, Inc.		F.
		A Vozzella & Song Inc		
		A. J. Rose Carpets		
		A&P Woodworking, Inc.		
		A Maintenance Supply Co., Inc.		
Nº Closed		A C & R Supply Co Inc		
% Closed		A & M Associates Ltd		
Closed Lines		3M Company		
Total Lines		2020 Engineering LLC	Testing Testing	
	\bigcirc	2020 Engineering LLC		
То	()	Company	Contact	
From)		-	

8. Enter the name of the GC or Subcontractor in the **Responsible Contractor** field, who will be in charge of the work from this **Submittal Set**.

Note: As most Sub contractors will not be users or contacts in projects@BU, this is a manual entry field.

9. Click the "Save" button at the top of the page.

		Ð	120ASH De	emonstration Project - 21 - 💌	B	+-	Ŵ		> s	UBMIT
¢	Þ		MAIN		SPECIFIC	ATIONS				NOTES
	Proje	ct*	(***)	00556 - 120ASH Demonstration P	roje 💌			From	•••	Construction Testing Company - Con 💌
	Set #	*	\bigcirc	001				Total Lines	[0
	Desc	ription		Demonstration Submittal Set				Closed Lines	[0
	Statu	us / Revisio	n	Draft 🔹	1			% Closed	[0%
	Date				6					
	CSI C	Code			-					
	Resp	onsible Co	ntractor							
	Trans	smittals			0					

Completed Submittal Set Header with "Save" button indicated.

10. The **Closed Lines** list is the number of "Approved" line items compared to the total of lines on the **Submittal Set**.

Total Lines	0
Closed Lines	0
% Closed	0%



Adding Items to the Submittal Set

11. In the toolbar of the **Details** table click the **Add Items** button. In the <u>Details</u> tab, click the "Add Items" button, and the **Items** dialog opens.

Drag a column header and drop it here to group by that column											
🖉 Edit 🕂	Add 🗌 A	dd Items 🛛 🔗	Submittal Items	前 Delete	📿 Refresh	🐐 Generate Transmitta	al 🔛 Layouts				
CSI CODE	ATTACHMEN	SUBMITTAL ITEM #									
				-		-					
No records to disp	olay.										
	PAGE SIZE	20 🔻									

"Add Items" button indicated.

ITEMS	
MOBILE/BROWSE	SCANTYPE Choose File No file chosen Barcode Settings
h 🗋 🗁 Items Catalog	Phase • Company • Location • Type • Cost Code • Period •
	IEM DESCRIPTION PHAGE COST CODE THYE
Ite	ems Catalog

12. Expanding the **Items Catalog** folder shows the general categories that Items are broken into by the type of *Costs* they represent, either Construction, Owner Controlled or Contingency.

	lte	ms Catalog
•		01 Construction
•		02 Owner Controlled Costs
•		03 Contingency

13. Expanding, for example, the **01 Construction** folder by clicking the arrow next to it, shows the three phases that Cost Codes are separated into.

Note: For single-phase Projects, pick the "Phase 1" folder.

4 🗆 🗀 Ite	ems Catalog
4 🗆 🗀	01 Construction
•	Phase 01
	Phase 02
	Phase 03

14. The next set of sub-folders that contain all the Owner Controlled Cost Groups, including Design Fees, FF&E, Security, and Insurance.

Items Catalog	
▲ □ 01 Construction	
Phase 01	
▶ 🗀 00 Procurement and Contracting Re	qu
Climate Control Con	
► 🗀 02 Existing Conditions	
▶ 🗀 03 Concrete	
▶ 🗀 04 Masonry	
► □ 05 Metals	
▶ 🗀 06 Wood, Plastics, and Composites	
Image:	1

15. Expanding, for example, the sub-folder 50 Design Fees shows the Design-related cost centers.

L L Items Catalog
I Construction
4 🗋 🗋 Phase 01
I CONTRACTION OF Procurement and Contracting Requirement
O1 General Requirements
D C Existing Conditions
- D3 Concrete
030000 - Concrete
O30100 - Maintenance of Concrete
O 31000 - Concrete Forming and Accessor
032000 - Concrete Reinforcing
Expanding the 06 Concrete Folder

16. Click the appropriate cost item(s) and drag them from the Catalog on the left to the table on the right.

	ITEMS		
		OWSE O SCAN/TYPE Choose File No file chosen Barcode Sett	ings
		Phase Location Cost Code Edit Delete Press Edit Delete CostCole Notered Delete CostCole CostC	• • •
Drag th		ements	
	Theme Catalog Origination	Place Company Location Type Cest Code Period Period Period Period	COST COD
	orzen - Allowarcea orzen - Allowarcea orzen - Contrigency Allowarcea orzen - testing and inspecting Allowarcea orzen - testing and inspecting Allowarcea orzen - Analysia orzen - Analysia The Cost codes no	1 010 01 01 N PAGE SUZE 0 01	-010000-01-01

- 17. Click the *"Save and Exit"* button in the Items dialog box.
- 18. The Items dialog closes and the new items appear in the Details table on the Submittal Set. Note: If the line(s) you are adding to the Submittal Set do not correspond to Cost Codes, click the "+ Add" button, manually enter a Description and then click the "Save" button.

Completing lines on the Submittal Set and attaching Documents

19. Open the lines for editing.

Drag a column hea	ader and droj	p it here to group l	by that column				
🖊 Edit 🕂	Add 🗌 A	Add Items 🔗	Submittal Items 🛛 前	Delete	📿 Refresh	🐐 Generate Transmitta	l 🔠 Layouts
CSI CODE ATTACHME		SUBMITTAL ITEM #					
				÷		-	
	<u>(O)</u>	<u>001</u>	030000 - Concrete		1		
	<u>(O)</u>	002	050000 - Metals		1		
	<u>(O)</u>	003	090000 - Finishes		1		
{ ◀ 1 ▶ ▶	PAGE SIZE	20 🔻					

Items selected for editing and "Edit" button indicated.

- 20. If there is a specific status for these submittal items, select it from the Status column.
- 21. Select the task in the Schedule that these items are tied to in the **Task** column. This will also auto-populate both the **Start** and **Finish**.
- 22. The Lead Time field is not used.
- 23. In the **Sent** and **Return Due** dates enter the date that the **Submittal Set** was sent to the receiver and when it is due.
- 24. The **Due Date** auto-populates with the date the **Task** is scheduled to be completed, but can be modified by the submitter.
- 25. Enter any specific Notes that you wish to have on these lines in the **Note** column.
- 26. Click the "Update Records" button.

🖺 Update Reco	rds 🛞 🔿	Cancel										
		SUBMITTAL ITEM #										SUB OVER
÷				-		÷					 	
	(0)	001	030000 - Concrete	1	No Action	-	700 - Constru 🔻	09-26-2021	09-26-2021	0		
	(0)	002	050000 - Metals	1	No Action	-	700 - Constru 💌	09-26-2021	09-26-2021	0		
	(0)	003	090000 - Finishes	1	No Action	-	700 - Constru 🔻	09-26-2021	09-26-2021	0		

"Update Records" button indicated.

- 27. To attach documents to the **Submittal Set** lines, follow these steps.
 - i. Click the grey document link, and the "View Attachments" window will open.

Drag a column he	eader a	nd droj	p it here to group l	by that column				
🖋 Edit 🛛 🕂	- Add		\dd Items 🛛 🔗	Submittal Items	前 Delete	C Refresh	🖩 Generate Transmitta	l 🔛 Layouts
	ATTA	CHMEN	SUBMITTAL ITEM #	DESCRI		REV.	STATUS	TASK
-		-			÷			-
		<u>.(0)</u>	001	030000 - Concre	ete	1		
		<u>.(Q)</u>	002	050000 - Metals		1		
		<u>(0)</u>	<u>003</u>	090000 - Finishe	es	1		
<								
	PAGE	SIZE	20 🔻					
Attachmer	nts lir	nk in	dicated					
VIEW ATTACHMENTS								

VIEW ATTA	CHMENTS							
	DROP FILES HERE OR CLICK TO (ADD	SELECTED				_	
Drag a colur	ATTACH FROM DOCUMENT MA	NAGER						
1 Delete	Save Layout Load Defau	ult Layout						
	LINKED LINE	DESCRIPTION	FILE	SIZE REVISION/VERS	TYPE DATE	NOTES	ID ATTAC	CHED BY
					T	T		—
No records t	to display.							

- View Attachments window
- i. You have two options from here.
- ii. Drag and Drop
 - a. Locate the file on your computer.

b. Click-and-drag the file to the "Drop Files Here to Upload" green box. **Note:** You will know you have dragged correctly when your cursor turns into an expanded version of the file icon.



- iii. Attach from Document Manager
 - c. Click the "Attach from Document Manager" button
 - d. In the window that opens navigate to your file and click "Open"
 - e. Once a file has been uploaded to projects@BU it will appear in the list above the green upload box.
- iv. Click on the "Save & Exit" button on the toolbar at the top of the page to save the record.
- 28. Click on the "Save" button on the toolbar at the top of the page to save the record.
- *29.* Click the **Submit** button at the top of the record.

()	<u>(Portfol</u>	<u>lio)</u> > Engineering Forms > SUBMIT1	AL SETS	5 > 001 -	Demor	nstration Submi	ttal Set	
123	Ð	120ASH Demonstration Project - 21 - 💌		++	Ŵ	- 6 - 1		

30. Click the **Save and Exit** button to submit the Request to Workflow.

SUBMIT - 001 - Demonstration RFI			
Comments			
Additional CC			
DROP FILES HERE OR CLICK TO AD	D		

SUBMIT window with Save and Exit button indicated.

Transmittals

Transmittals in projects@BU allow you to package groups of documents or records from projects@BU into a single record to be sent to members of the Project team. Transmittals can also be used to track the movement of physical files sent to and from those working on the project.

Creating a Transmittal Package

1. Navigate to Engineering Forms > Transmittals.

٢P	Meb	<u> </u>	ontrols
Ť	PLANNING		CUSTOM FORMS
۵	ENGINEERING FOR		
\$	COST MANAGEMENT	Submittal Sets Meeting Minutes	
₽	SCHEDULING	Drawing Lists Drawing Sets	
	ASSET MANAGEME	Punch Lists	
~	WORKFLOW	Transmittals Correspondence	
۲	PORTFOLIO	Document Manager	
	E	ngineering Forms > Tra	nsmittals

2. In the top of the list that appears click the "+" to button. **Note:** If this is the first **Transmittal** record you have generated or have access to then this step will not be necessary, you will be brought directly to the record view.

wiii 110	in not be necessary, you win be brought uncerty to the record view.												
(<u>Po</u>	(Portfolio) > Engineering Forms > TRANSMITTALS												
Drag a colum	Drag a column header and drop it here to group by that column												
ē	Programs *All* Projects *All*												
PROJECT N													
	Ŧ				Ē								

Transmittal toolbar with "+ Add" button at the top.

- 3. In the **Project*** dropdown search for the name of your Project.
- 4. Select the current **Phase** of the Project.
- 5. The **Transmittal #** is populated automatically by the system and should be left at the system generated value.
- 6. Enter in an appropriate **Description** of the Correspondence.
- 7. In the **To** drop-down select the Project Team member you wish to send the Correspondence to.
- 8. If the Transmittal is a physical document and being sent to a physical location, enter it into the **Address** box.

Note: If there is an address for the Company of the selected contact in the system it will autopopulate into this field.

9. In the **From** drop-down select your name.

То	(***)	testing comp	-]
Address	\bigcirc	Company	_	Contact
Address		Architecture Testing Company		Architecture Update Tes
		Construction Testing Company		Construction Update Tes
From	•••	Construction Testing Company		OPM Update Test
Category				
Shipped Date				
Shipped Time				
Via				
Tracking #		4		→
Quantity		▼ Contact 1-3	out	of 3
Quantity			0]

To/From drop-down and Address Box open showing options.

- 10. The **Category** field will be populated after the system has been used for a period of time.
- 11. If the **Transmittal** is being sent physically, the right-hand column holds multiple pieces of information. Enter the **Shipped Date**, **Shipped Time**, **Via** (shipping method), **Tracking Number**, and **Quantity**
- 12. In the **Due Date** enter the date the transmittal needs to arrive.
- 13. Click the "Save" button at the top of the page.

٠.	MAIN	SPECIFICATIONS	NOTES
Pro Pha Tra Des Sta Dat Ref To	oject* ase scription atus / Revision te ference	00556 - 120ASH Demonstration Proje	REMARKS For Your Use For Your Information For Your Records For Your Approval
Add Fro Cat Shi Via Tra Qui	dress om tegory ipped Date ipped Time t toking # antity e Date	123 Builder Ave Boston, MA 02481 Boston University - Jonathan Smith ▼ ▼ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	

Completed Transmittal Header

Adding Records to the Transmittal Package

Once the header of the **Transmittal** record has been created you can either add items to the list directly, if they are physical items, or you can add any completed record from the *Engineering Forms* section of projects@BU to the transmittal.

Dedit 🖉	- Add	🔗 Add Link	Delete	C Refresh	III L	ayouts			
	ATTACHME		DESCRIPTI	ON RE				TI' SOURCE L	LINE #
				-	1	-	-	=	-
No record	s to display.								
€ € 1	PAGE	SIZE 20 -							

Transmittal List

Adding projects@BU Records to the Transmittal

14. In the "Items" section of the Details table, click the "Add Link" button on the top of the **Transmittal** list.

/ Edit	+ Add	🔗 Add Link	🗊 Delete 🛛 🕄 F	tefresh	I Layouts						
IMF LINE #	ATTACHME		DESCRIPTION					SOURCE LINE #			
	-		-		=		-	-			
No records t	o display.										
[4] ◀ 1 ▶	K I → N PAGE SIZE 20 →										



15. The "Link Records" window opens.

LINK RECORDS				s _ o x
T 120ASH Demonstration Project - 21	RECORD TYPE			DESCRIPTION
Safety Forms	No records to display.			
* 🗅 RFI				
Doline Submittals				
Submittal Sets				
Meeting Minutes				
Drawing Lists				
Drawing Sets				
Daily Reports				
D Punch Lists				
C Action Items				
Correspondence	1			

- Link Records window
- 16. Click the arrow button her next to the folder containing the projects@BU records you wish to add to the Transmittal.

 T 120ASH Demonstration Project - 21
🗅 Safety Forms
RFI
🗅 Online Submittals
🖌 🗋 Submittal Sets
001 - Demonstration Submittal Set
Meeting Minutes
Drawing Lists
Drawing Sets
Daily Reports
D Punch Lists
C Action Items
Correspondence

- "Add Link" window with folders shown, and arrows indicated
- 17. Drag the name of the item from the folder list on the left-hand side of the window.



Moving records from the folder list, to the Transmittal list.

18. Click the "Save and Exit" button at the top-left of the window.



Transmittal window with the "Save and Close" window.

Note: Once you have added a projects@BU record to the **Transmittal** list, a link to that **Transmittal** now appears in the linked Documents list.

/	Edit	+ Add	🔗 Add Link	🗎 Delete 🛛 📿 Ref	resh	I Layouts				
	LINE #	ATTACHME								
		-			-		-	-		
S	1	<u>(Q)</u>		Demonstration Subm	1		Submittal Sets	1		
K < 1 ► M PAGE SIZE 20 ▼										

Transmittals box on Submittal Sets.

Adding Documents to the Transmittal

19. In the "Items" section of the Details table, click the "+ Add" button on the top of the **Transmittal** list.

🖋 Edit 🕂 Add 🔗 Add Link		🔗 Add Link	前 Delete 🛛 📿 Ref	resh	E Layouts				
ім	F LINE #	ATTACHME							SOURCE LINE #
					-			-	
5) 1	<u>(0)</u>		Demonstration Submi	1		Submittal Sets	1	
k	1	PAGE	SIZE 20 🔻						

Transmittal list with "+ Add" button indicated.

- 20. Enter the name of the document in the **Description** field.
- 21. Click the **"Save"** button.
- 22. Click the grey document link, and the "View Attachments" window will open.

/ Edit	- Add	🔗 Add Link	前 Delete 🛛 📿 Ref	resh	I Layouts			
IMF LIN #	E ATTACHME	SET #						OURCE LINE #
								-
8	1 <u>(Q)</u>		Demonstration Subm	1		Submittal Sets	1	
. € .€ 1	PAGE	SIZE 20 🔻						

Attachments link indicated

VIEW ATTA	ACH	IMENTS											• ×
	1	(*)											
		DROP FILES HERE OR CLICK TO A	DD	SELECTED —									
Drad a colu	A	ITTACH FROM DOCUMENT MAN	IAGER										
fil Delete		Save Lavout Load Defaul	t Lavout										
0		LINKED LINE	DESCRIPTION	FILI	E	SIZE	REVISION/VERS	TYPE	DATE	NOTES	ID	ATTACHED BY	
		÷			=	=		-	-	-		÷	
No records t	to d	isplay.											
10	€ 1	PAGE SIZE 20 V											

View Attachments window

- 23. You have two options from here.
 - i. Drag and Drop
 - a. Locate the file on your computer.
 - b. Click-and-drag the file to the "Drop Files Here to Upload" green box. **Note:** You will know you have dragged correctly when your cursor turns into an expanded version of the file icon.

DROF FILLS FILLE ON CLICK TO ADD
ATTACH FROM DOCUMENT MANAGER

- ii. Attach from Document Manager
 - a. Click the "Attach from Document Manager" button
 - b. In the window that opens navigate to your file and click "Open"
 - c. Once a file has been uploaded to projects@BU it will appear in the list above the green upload box.
- iii. Click on the "Save & Exit" button on the toolbar at the top of the page to save the record.
- 24. After you have entered the transmittal information, locate the <u>Remarks</u> section on the <u>Details table</u>.

Note: You may need to scroll to the right of the page to find this section.

x	REMARKS		
	For Your Use		
	For Your Information		
	For Your Records		
	For Your Approval		

Remarks section indicated.

25. In the <u>Remarks</u> section, you will find several checkboxes that help inform the recipient of your transmittal of the reason for you sending it to them, these options are:

- 1. For your Use
- 2. For your information
- 3. For your records
- 4. For your Approval
- 26. Click the checkbox next to the <u>Remarks</u> type you wish to tag this Transmittal with, and click the "Save" button.
- 27. Click the "Notifications" button to send an Email to the recipient of the Transmittal that the record has been completed.

Correspondence

The Correspondence record holds correspondence between members of the Project Team. This correspondence is preferred instead of mail since it keeps all records in a central location and is accessible to both members of the Project Team as well as others in PDC.

Note: Email is still used for communication with those people outside of projects@BU, as Correspondence, can only be shared with users in the system that have access to the record type.

Creating a Correspondence Record

1. Navigate to Engineering Forms > Correspondence.

P	M/eb	<u>.</u>	Controls
*		RFIs	CUSTOM FORMS
1	FLANNING	Online Submittals	Monthly Project Update
٦	ENGINEERING FOR	Submittal Items	Permit Summary
\$	COST MANAGEMENT	Submittal Sets Meeting Minutes	
=-	SCHEDULING	Drawing Lists	
Ħ	ASSET MANAGEME	Punch Lists	
✓	WORKFLOW	Transmittals Correspondence	
	PORTFOLIO	Document Manager	

Engineering Forms > Correspondence

2. In the top of the list that appears click the "+" \square button.

Note: If this is the first **Correspondence** record you have generated or have access to then this step will not be necessary, you will be brought directly to the record view.

(<u>)</u>	() (Portfolio) > Engineering Forms > CORRESPONDENCE								
Drag a colur	mn header ar	nd drop it here to g	group by that colur	nn					
Programs *All* Projects *All* + Image: Compared by the second by the secon									
				DESCRIPTION	STATUS				
demon	-		-		=				
120ASH Der	monstration	00556	001	Design Question	Draft	3) Design -	Boston University - Jonat		
4									
(∢])	K ◀ 1 ► M PAGE SIZE 20 •								

Correspondence toolbar with "+ Add" button at the top.

- 3. In the **Project*** dropdown search for the name of your Project.
- 4. Select the current **Phase** of the Project.
- 5. Enter an appropriate **Description** of the Correspondence.
- 6. In the **To** drop-down select name of the Project Team member the Correspondence is being sent to.
- 7. In the **From** drop-down select your name.

То	smith		•	
From	Comp	any		Contact
	ABC	Construction Test		John Smith
Category	Bosto	on University		John Smith-Test
Priority	Bosto	on University		Jonathan Smith
Transmittals	Bosto	on University		John Smith
Hunomittato	Bosto	on University		Darlene A Santos-Smith
	Smit	n&Sons Machine Inc		
	Smit	nGroupJJR, Inc		
		 Contact 	t 1-7 out	: of 7

To/From drop-down open showing how the Companies and Contacts are displayed.

- 8. The Category drop down is not in use yet.
- 9. In the **Priority** drop-down select the priority level of this correspondence.
- 10. Click the "Save" button in the header at the top of the page.

Project*	00556 - 120ASH Demonstration Proje	•
Phase	3) Design -	•
Correspondence #*	001	
Description	Construction Update	
Status / Revision	Draft 🔹	0
Date		<u></u>
То	Boston University - Jonathan Smith	•
From	••• Construction Testing Company - Constru	•
Category		•
Priority	1- High	•
Transmittals	••	0

Correspondence header completed and Save button indicated.

11. In the <u>Details table</u> write out the text of the Correspondence you wish to send. **Note:** This correspondence field has full editing functionality allowing you to create a formatted correspondence just as you would with any email application.

MAIN	SPECIFICATIONS NOT
Project*	00556 - 120ASH Demonstration Proj€ ▼
Phase	3) Design -
Correspondence #*	001
Description	Design Question
Status / Revision	Draft 0
Date	
To	Boston University - Jonathan Smith
From	Construction Testing Company - Constru
Category	
Priority	1- High
Transmittals	0
0	
"Work Sans"	- 12px - B I U S Ξ Ξ Ξ Α·
Good Afternoon;	
This is an example of a	orrespondence record in projects@BU (PMWeb).
Thank you	
Johnsthan Smith	

- 12. Click the "Save" button at the top of the record.
- 13. Click the "Notifications" icon in the toolbar at the top of the window.

Notifications icon indicated

14. In the window that opens, select who you are sending the Transmittal to by clicking the ellipsis next to "To" and searching for their name.

NOTIFICATION	`		
From	Jonathan Smith		Use System Add
то			
cc 💮)		
всс			
Manual CC			
Subject	PMWeb Notification: Correspondence 001 - 120ASH	Demonstration Project - 21 - Design Questio	on
Status	•	Due Date	10-15-2021 🗂 12:00 PM
Notification type		Reminder	
Reference		Completed	
Include Link		Completed	d Date
BBE wat be D			a [m]
V Times New Rom			
Corresponde	nce #001		
Document sent for REV	IEW		
Notification:			

To field and Ellipsis indicated

15. Click the Send Icon recipient(s).

Punch Lists

Punch lists are groups of items that are created towards the end of a construction project. They are managed by both the Project Manager and the General Contractor as a way of ensuring that all tasks, both large and small, which need to be completed prior to project closure, are documented and assigned.

projects@BU allows for multiple Punch Lists per project. They can be grouped together, using Reporting, into a master Punch List, which is maintained by either the Project Manager or the OPM.

Creating a Punch List Record Header

1.	Navigate to Eng	ineering Forms >	Punch Lists	
	<	PM∕∕eb	0	Controls
	*	PLANNING	RFIs Online Submittals	CUSTOM FORMS Monthly Project Update
		ENGINEERING FOR	Submittal Items	Permit Summary
	\$	COST MANAGEMENT	Submittal Sets Meeting Minutes	
	=	SCHEDULING	Drawing Lists Drawing Sets	
	U	ASSET MANAGEME	Punch Lists	
	~	WORKFLOW	Transmittals Correspondence	
			Document Manager	

Engineering Forms > Punch Lists

2. In the top of the list that appears click the "+" +" button.

Note: If this is the first **Punch List** record that you have created or have access then this step is not necessary, and you will be automatically brought to the new record view.

() (Portfolio) > Engineering Forms > PUNCH LISTS								
Drag a colum	nn header ar	nd drop it here to g	group by that colur	nn				
D Programs *All* • <t< td=""><td></td></t<>								
PROJECT								
	-	-	-					
120ASH - Te	sting Projec	00557	001	Testing Punch List	Draft			
4								
€ € 1 ▶	A A A A A A A A A A A A A A A A A A A							

Punch List with "+ Add" button highlighted.

- 3. In the **Project** field, select the name of your project.
- 4. Select the **Phase** of the Project this Punch List is for.
- 5. The **Punch List #** is automatically populated by the system and should be left at the system generated value.
- 6. In the **Description** field, name your Punch List something both you and the Project Team will recognize.
- 7. In the **From** box, select your name in the list, and in the **To** box select the name, if applicable, of the project team member you are sending this Punch List to.

From)	construction test	-
То		Company	Contact
CSI Code	0	ABC Construction Test	John Smith
Category		ABC Construction Test Construction Testing Company	John Doe-Test Construction Update Test
Priority		Construction Testing Company	OPM Update Test
Reference			
Transmittals			
		▼Contact 1-	4 out of 4
Fr	om/To	Contact 1-	4 out of 4 ct List shown.

- 2. If this Punch List pertains to a specific **CSI Code** select it from the dropdown.
- 3. **Category** is not being used at this time.
- 4. Select the appropriate Priority level (Low, Medium, or High) from the **Priority** drop-down.
- 5. Click the "Save" button at the top of the record.

Project*		00556 - 120ASH Demonstration Proje	•
Phase		2) Planning -	•
Punch List #*		001	
Description		Demonstration Punch List	
Status / Revision		Draft 🔹	0
Date		09-17-2021	<u></u>
From	•••	Construction Testing Company - Constru	•
То	•••	Boston University - Jonathan Smith	•
CSI Code		062000 - Finish Carpentry	•
Category			•
Priority		1- High	•
Reference			
Transmittals			0

Completed header with "Save" button highlighted.

Entering Individual Punch List lines.

Punch Lists records have a separate selection of <u>Locations</u> than the rest of the Project, to add a building and room to the Punch List, follow these steps.

1. Right-Click in the Locations section of the Details table, and click "Add Location"

Add Location	

Add Location Right-Click menu, with Locations area shown.

- 2. Type in the name of the Building where the work is being performed, for example "120 Ashford"
- 3. Right Click on the Location Name you created in Step 2, to open the location menu, and click "Add Sub Location"

Delete	Add Sub-Location	
Detete	Delete	
Rename	Rename	

Right Click menu with "Add Sub Location" highlighted.

4. Type in the room where you need to add **Punch List** items, for example "Room 205"

Lo	cati	ons			
1		12	20 Ashford Str First Floor	Add Sub-Location	
			Second Flo	Delete	
				Rename	

Room added to Punch List Location List

- Repeat steps 4-5 for each room in the Project you have Punch List tasks for. *Note:* You can have as many levels in your list as you would like to manage the Punch List by. These are created as "Groups" in the *Punch List* line items and can be organized as such. *Note 2:* Once a Location has been added to a single Punch List for a Project it will then be available to all Punch Lists for that Project.
- 6. Drag the location for the first punch list line from the Left-Hand Location list, to the Punch List items on the Right-Hand Side.

Locations		Drag a column header and drop it here to group by that column								
First Floor		/ Edit + /	Add 🗸 C	lose Selected Lines	前 Dele	ete 🦪 Refresh	X Export	To Excel	🗂 Paste Fro	am Excel eee
Second Floor										
Room 208					Ŧ		Ŧ		Ŧ	
Room 204 Room 218		 NO records to disc 	Re Re	om 208						

*Dragging a location from the list to the Punch List items.*Highlight the line you created and click the "Edit" button.



Edit button indicated.

- 8. In the **Description** field enter the punch list task.
- 9. The Trade drop down is not being used yet.
- 10. In the **Assigned To** drop-down select the Project Team member who is in charge of this task. **Note:** This selection is made up of users or contacts in projects@BU. If the assigned person is not a contact, then the name in this field should be the General Contractor.



Assigned To drop-down opened.

11. In the **Issued Date** field select the date the issue was discovered.



- *13.* In the **Received From** field select the name of the person who discovered the **Punch List** issue.
- 14. Enter the **Due Date** into the field.
- 15. Click the "Update Records" button at the top left of the list.

Drag a column header and drop it here to group by that column									
Update Records 🛞 Cancel									
ITEM #	ATTACHMEN	DESCRIPTION	LOCATION						
1	(0)		120 Ashford Street/Second Flo						
•									

Update records button.

16. Repeat steps 13 – 22 for each additional line in the **Punch List**.

Note: The system keeps track of both the current date, and the *Due Date* of the tasks.

Note: The **Punch List** item list, can be sorted just like any other list in projects@BU. This list can also be grouped by the various locations that were created in step 12.

Completing Punch List Lines

Once a **Punch List** line has been completed, navigate back to the list it was created on to close the line in the list.

17. Select the line that was completed and click the "Edit" button in the toolbar

Drag a column header and drop it here to group by that column										
📝 Edit 🕂 Add 🗸 Close Selected Lines 🍿 Delete 🍃 Refresh 🛛 Export To 1										
ITEM #	ATTACHME	DESCRIPTION	LOCATION							
1	<u>.(Q)</u>		120 Ashford Street							
•	• • • • • • • • • • • • • • • • • • •									

Line selected, "Edit" button highlighted.

- 18. Scroll to the far right of the list. In the **Completed** field enter in the date the task was completed.
- If there is an additional cost associated with the completion of this line, that you would like to track, enter it into the **Cost** field, and then select the name of the contact it was **Charged To** from the drop-down list.

Drag a colum	Drag a column header and drop it here to group by that column										
💾 Update Records 🛛 🛞 Cancel											
ED FROM							PM NOTES				
	<u> </u>		<u> </u>	\$0.00	_						
4											

Cost and Charged to fields.

- 20. If you are the BU Project Manager, click the **Closed** check box, once you are sure the task has been completed. If you are not the BU Project Manager, alert them that the task is done. The BU Project Manager will the verify completion, and click the check box, closing the line.
- 21. Click the "Update Records" button to save your changes to this line of the **Punch List**.