

CSI Code Management Training Guide

Date Created: 4/8/2022 Date Updated: 10/11/2022

Contents

About	3
Step-by-Step Instructions	3
Update CSI Codes Import Spreadsheet	3
Import CSI Codes	4
Manually Enter CSI Code	7
Manually Update CSI Code	10

About

The CSI Codes application serves as the list to pick Project CSI Codes from the Submittals and SOV Breakdown apps. While it is possible to manually add/update the Project's CSI Codes, the easiest method to populate the Project's CSI Codes is to import from a formatted Excel template that will be provided by SCA.

Step-by-Step Instructions

Update CSI Codes Import Spreadsheet

Role	Preceding Steps	Outcome
AE Plans Desk, CM Firm, CM	 CSI Codos aro known	 Excel Spreadsheet is ready to
Facilitator	 CSI Codes are known.	 import.

Steps

1. Open the Spreadsheet provide by SCA > Go to the CSI tab > Delete rows that are not needed and add new rows by entering the Code and Description.

Note. Do not change the headings or format. This will result in the spreadsheet being unusable for import.

🔊 AutoSave 💿 🕞 🖟 🔍 🗢 🛛 CSI-importPS037X.xlsx g	A ^R • Saved ▼	
File Home Insert Page Layout Formulas Data Re	eview View Developer Help Inquire Kofax PDF	
$ \begin{array}{ c c c c c c c c c c c c c c c c c c c$	= = ⇒ General ✓ = = = = Conditional Formatting Formatting = = = Conditional Formatting	I Format as Table Y
Undo Clipboard Fs Font Fs	Alignment Fi Number Fi	Styles
$[M6 \qquad \checkmark] : [\times \checkmark f_{X}]$		
🔺 А В С D Е	F	G
1 RowNumber RecordKey Code Parent Parent_ReferenceColu	mn Description	Notes
2 07270	FIRESTOPPING/SMOKE SEALS	
3 09900	PAINTING	
4 10505		
5 16010	GENERAL PROVISIONS FOR ELECTRICAL WORK	
7		
8	WIRING DEVICES	
9 16450	GROUNDING AND BONDING	
10 16727	DATA CABLING SYSTEM	
11 16728	FIBER OPTIC CABLING SYSTEM	
12 16776	IP BASED SOUND, INTERCOM - TEACHER ACTIVATED SECURITY SYSTEM	
13 16791	SELF CORRECTIVE CLOCK SYSTEM	
14		
15 3		
16		
17		
20		
20		
22		
A → Instructions CSI		E 🛛
Ready 🐻 🏌 Accessibility: Good to go		

Import CSI Codes

Role		Preceding Steps		Outcome
AE Plans Desk, CM Firm, CM Facilitator	\rightarrow	Excel Spreadsheet is updated and ready to import.	\rightarrow	CSI Codes are populated

Steps

1. Go to 'Project Finder' > Navigate to the desired Program > Select the desired Subproject

Project	- Finder	C000015851-MC0001 - Q262 Electrical Systems 🧳	External REQMT-CM1 SCA CM Firm 1	-	□ ×
	4	NEW			
Project	ct Finder	ALL PROJECTS MY PROJECTS RECENT PROJECTS Q			
Apps		SCA DEVQA > Requirements > Mentor > AECOM > AECOM - Q - DELTA MNTR C15636-C15851 SELECT			
O Second		Number Name			
≺ search		CO00015851-MC1003 Net Zero Test Subproject			
🖆 Tasks		→ C000015851-MC0001 Q262 Electrical Systems 3			
Messa	ages				
() Getting	g Started				
You last logged	l in Friday, January 21, 2022	at 10:00 AM Eastern Time (US & Canada)	1.9.31.65 - DEVWEEKLY	É ‡	🏂 kahua .

2. Go to 'Apps' > Select 'CSI Codes'

	Apps			C000015851-MC0001 - Q262 B	Electrical Systems 🥜		Thomas Everritt -		×
		←	Q Search	Visit the kStore to explore more than 50 pro	ject management apps that work the way you want them	to work.	Visit the kStore		
£:	Project Finder		Recent	Cost Management	Index Management	Othe	r Community		
	Apps		Security Statted	S Expenses	Document Types	1	Contacts		
0	6 b		Contacts	▲ Issues	O Locations	ð	File Manager		
~	Search		LUSERS	Issues		ڻ ب	Getting Started		
Ê	Tasks			Work Breakdown		88	Groups		
P	Messages		Administration	Bu Bulletin		L	Media Manager		
			Configuration	Ci Change in Conditions		6	Portfolio Manager		
ä	Users		LOG Dev Logs	Daily Reports		РМ	Pre-Construction Meeting Items		
1	Contacts		S Domain Settings	IF IFA			Project Directory		
	Getting Started		Installed Apps	AGS Meetings		Pr D	Properties Report Manager		
			Project Tasks	No Notice of Direction		sc	Submittal Closeout Master Log		
			Recycle Bin	RFIs					
			Share Manager	Submittals					
			Lisers	TC TCR					
+8	Add Person								
You la	st logged in Friday, Marcl	h 25, 2022 i	at 10:56 AM Eastern Time (US & Canada)				1.9.31.74 - DEVMAIN 🗭	攃 ki	ahua

3. Select 'More' > 'Import'

123	CSI Codes		C000	0015851-MC0001 ·	Q262 Electrical Sy	stems 🧪	Thomas Everriti	9 -	
		\leftarrow	CSI Codes	NEW REPORTS					
٥Ľ	Project Finder			CSI Code Descript	CREATE REPORT	0 Item(s)			
	Apps								
Q	Search				HISTORY				
Ê	Tasks								
P	Messages								
123	CSI Codes								
00	Users								
8	Contacts								
ብ	Getting Started								
+0	Add Person								
You la	st logged in Friday, March	1 25, 2022 a	nt 10:56 AM Eastern Time (US & Canada)	=			1.9.31.74 - DEVMAIN	ß	模

4. Select File > Click 'Open'



5. Click 'Ok'

123	CSI Codes		C00	0015851-MC0001 - Q262 Electrical Systems 🧳	Stellar	-		
		←	CSI Codes	NEW REPORTS MORE ~				
Ŀ	Project Finder			CSI Code Description				
	Apps			()				
Q	Search			Import X				
Ê	Tasks			Completed	1			
9	Messages			CSI-importQ262.xlsx				
123	CSI Codes							
Do Do	Users							
8	Contacts			Cancel Ok				
ባ	Getting Started							
+ <u>ಖ</u>	Add Person							
You la	ast logged in Friday, March	n 25, 2022 i	at 10:56 AM Eastern Time (US & Canada)		1.9.31.74 - DEVMAIN	ß	攃 ka	ah

6. Click 'OK' to finish

123	CSI Codes	C	00015851-MC0001 - Q262 Electrical Systems 🛛 🧪	Stellar – 🗆 X						
°11 Ⅲ ⊄	Project Finder Apps Search	 CSI Codes 07270 09900 10505 16010 16120 16130 	CSI Codes NEW REPORTS MORE ~ 07270 CSI Code Description 09900 07270 FIRESTOPPING/SMOKE SEALS 16010 09900 PAINTING 16120 10505 METAL LOCKERS							
Ê	Tasks Messages	16140 16450 16727 16728 16776	Import X 16010 Filename CSI-ImportQ262.xlsx 16120 Saved items: 12 16130 Total 12	, ,						
123	CSI Codes	16791	16140							
*	Users Contacts		16727 16728 16776 Cancel Ok							
ወ	Getting Started		16791 SELF CORRECTIVE CLOCK SYSTEM 12 Item(s)							
+	Add Person									
You la	st logged in Friday, March 2	i, 2022 at 10:56 AM Eastern Time (US & Canada)		1.9.31.74 - DEVMAIN 🛛 🛱 kahua						

Role		Preceding Steps		Outcome
AEoR	\rightarrow	CSI Codes are known.	\rightarrow	CSI Codes are entered
Steps				

Note. In the following images, the green check indicates the correct way to add a CSI Code. You should see CSI codes in the right panel. After we show you the correct way, we will show you the wrong way, indicated by a red x. You know you are headed the wrong direction when the right panel is blank. In case you continue to go the wrong way and accidentally add a CSI Code at the wrong level, we'll show you how to delete it.

1. Making sure there are no CSI Codes selected, click 'NEW'

123	CSI Codes		CO	00015851-N	1C0001 - Q262 Electrical Systems 🧳	Chomas Everriti) -		×
		←	- CSI Codes 1	NEW R	EPORTS MORE Y				
L	Project Finder		09900	CSI Code	Description				
Ľ,	riojeet maer		10505	07270	FIRESTOPPING/SMOKE SEALS				
	Apps		16010	09900	PAINTING				
			16120						
Q	Search		16130	10505	METAL LOCKERS				
			16140	16010	GENERAL PROVISIONS FOR ELECTRICAL WORK				
Ē	Tasks		16727	16120	WIRING SYSTEMS				
P	Messages		16728	16130	RACEWAYS, FITTINGS, SUPPORTING DEVICES, BOXES AND SSORIES				
			16776	16140	WIRING DEVICES				
123	CSI Codes			16450	GROUNDING AND BONDING				
Do	Users			16727	DATA CABLING SYSTEM				
<u>1</u> 81	Contacts			16728	FIBER OPTIC CABLING SYSTEM				
				16776	IP BASED SOUND, INTERCOM - TEACHER ACTIVATED SECURITY SYSTEM				
ባ	Getting Started			16791	SELF CORRECTIVE CLOCK SYSTEM				
					12 Item(s)				
+23	Add Person								
You la	st logged in Friday, March 2	25, 2022 :	at 10:56 AM Eastern Time (US & Canada)	-	≡ E 1.1	9.31.74 - DEVMAIN	æ	攃 ka	ahua

2. Enter the Code and the Description > Click 'Save'

123 (CSI Codes				C000015851-MC0001 - Q262 Electrical Systems 🧳			8	homas Ev tellar	verritt	_		×					
		←	→ CSI Codes	NEW R	EPORTS MORE 🗸													
L	Project Finder		07270	CSI Code	Description	New CSI Code					*	::	×					
	riejeotrinder		10505	10505	10505	10505	07270	FIRESTOPPING/SMOKE SEALS	Details Attachme	nts								
	Apps		16010	09900	PAINTING	✓ DETAILS												
Q	Search		16130	10505	METAL LOCKERS	Code	16145	1										
			16140	16010	GENERAL PROVISIONS FOR ELECOAL WORK	Description	LIGHTING CO	NTROL DEVICES	2									
Ê	Tasks		16450	16120	WIRING SYSTEMS	Notes												
P	Messages		16728	16130	RACEWAYS, W JUPPORTING DEVICES, BOXES AN													
			16776 16791	16140	WIRING DEVICES													
123 *	CSI Codes			16450	GROUNDING AND BONDING													
å	Users			16727	DATA CABLING SYSTEM		ITS											
19B	Contacts								16728	FIBER OPTIC CABLING SYSTEM								
þ	contacts			16776	IP BASED SOUND, INTERCOM - TEACHER ACTIVATED SEC	DOCUMENT	MARKUP?	CONTRIBUTOR	DATE	SIZE	PREVIEW	STATU	s					
ባ	Getting Started			16791	SELF CORRECTIVE CLOCK SYSTEM			No Files										
					12 Item(s)													
						3												
+23	Add Person					Save												
You la:	st logged in Friday, March	25, 2022	at 10:56 AM Eastern Time (US & Canada)				1.9.31.74 - DEV	/MAIN	e	£	攃 ka	hua					

The following images show the wrong way to add a CSI Code. Notice the Code 16140 is selected in this image and the right panel is blank. You are headed for trouble.

123 CSI Codes COO	0015851-MC0001 - Q262 Electrical Systems 🧪 📀 Thomas Everritt — 🗆 🗙
← → CSI Codes 07270	NEW REPORTS MORE V
Q: Project Finder 09900 10505 16010 16120 16120 Q: search 16145 Image: Contracts 16776 Image: Contacts 16791 Image: Contacts Image: Contacts Image: Contacts Image: Contacts	CSI Code Description O Item(s) This large open area is an indication you are headed for trouble!
+ 아 Add Person	二 『 同 193174-DEVMAIN 協 松 kabua

We tried to warn you but you continued to head for trouble.

123	CSI Codes		C000015851-MC0001 - Q262 Electrical Syst	tems 🖍 😢 Thomas Everritt – 🗆 🗙
	<	- CSI Codes	NEW REPORTS MORE ~	
f	Project Finder	09900	CSI Code Description	New CSI Code * 🖸 🗙
Ĵ		10505	0 Item(s)	Details Attachments
	Apps	16010		✓ DETAILS
		16120		
Q	Search	16130		Code 16141
		16140		Description ENTERING AT THE WRONG LEVEL
Ê	Tasks	16145		Notes
		16450		
	Messages	16727		
		16728		
123 *	CSI Codes	16776		
8	Users	16791		~ ATTACHMENTS
12	Contacts			UPLOAD ADD KAHUA DOC
				DOCUMENT MARKUP? CONTRIBUTOR DATE SIZE PREVIEW STATUS
U	Getting Started			No Files
+0	Add Person	_		Save
You la	st logged in Friday, March 25,	5, 2022 at 10:56 AM Eastern Tin	e (US & Canada) 🔳 🔳 🗉	1.9.31.74 - DEVMAIN 🖻 🎄 kahua

You may not realize this until later, but the Code you just entered is under Code 16140.

123	CSI Codes			C000015851-MC0001 - Q262 Electrical Syste	erns 🧪 🔁 Thomas Everritt – 🗆 🗙
		^ب	CSI Codes	NEW EDIT REPORTS MORE ~	EDIT HISTORY GOURL
Ŀ	Project Finder		09900	CSI Code Description	16141 ENTERING AT THE WRONG LEVEL C X Details Attachments
	Apps		16010	1 Item(s)	✓ DETAILS
Q	Search		16130		Code 16141 Description ENTERING AT THE WRONG LEVEL
Ê	Tasks		16145 16450		Notes
P	Messages		16470 16727	X	✓ ATTACHMENTS
123	CSI Codes		16728 16776		
0	Users		16791		DOCUMENT MARKUP? CONTRIBUTOR DATE SIZE PREVIEW STATUS No Files
<u>a</u>	Contacts				
ባ	Getting Started				
+ ු	Add Person				
You la	ist logged in Friday, March 25	5, 2022 at 10:	:56 AM Eastern Time (l	US & Canada) 📃 📃	1.9.31.74 - DEVMAIN 🗛 🕸 kahua

You now need to Delete the Code that was inserted at the wrong level. Select the parent record, 16140 > Select the child record, 16141 > Select 'MORE' > Click 'DELETE'

A CSI Codes 07270 NEW EDIT REPORTS MORE < 2	123	es
iiii Apps 10505 10505 16141 10505 16141 11100 EXPORT INPORT Inflat Inflation Inflation Inflation Inflation <th></th> <th> ⇒ CSI Codes 07270 09900 10505 16010 16120 16130 ■ 16140 ■ 16145 16450 16470 16727 16728 16776 16791 s Started </th>		 ⇒ CSI Codes 07270 09900 10505 16010 16120 16130 ■ 16140 ■ 16145 16450 16470 16727 16728 16776 16791 s Started

Manually Update CSI Code

Role	_	Preceding Steps		Outcome
AEoR	\rightarrow	CSI Codes are known.	\rightarrow	CSI Codes are entered

Steps

1. Select the desired CSI Code to update in the right-most panel (you will be able to see the CSI Code details appearing on the right side of the screen) > Select 'Edit'

123 CSI Codes	C000080209 - X087 Addition, Existing Reno 🧪 😌 Calvin Kwong — 🗆 🗙
<i>←</i>	
Project Finder Apps Q Search	01010 s1 code Description 01010 SUMMARY OF WORK C2 × 01015 01010 SUMMARY OF WORK Details Attachments * Details Attachment
Tasks Messages	01400 01300 SUBMITTALS 01500 01312 PROGRESS SCHEDULE
123 CSI Codes	01535 01400 QUALITY CONTROL 01550 TEMPORARY FACILITIES AND CONTROLS DOCUMENT MARKUP? CONTRIBUTOR DATE SIZE PREVIEW STATUS COMM
(¹) Getting Started	01600 01524 CONSTRUCTION WASTE MANAGEMENT No Files 01630 01535 SAFETY PROGRAM 01720 01550 INDOOR AIR QUALITY (IAQ) REQUIREMENTS 01600 MATERIAL AND EQUIPMENT
+암, Add Person You last logged in Friday, October 7, 2022	01900 01630 PRODUCT SUBSTITUTIONS 02070 01700 PROJECT CLOSEOUT 69 ltem(s) X35 AM Eastern Time (US & Canada) ■ ■ 19.35.91 - DEMO ♥ 🖾 \$k kahua

2. Edit the details of the CSI Code > Select 'Save'

Image: CSI Codes NEW EDIT REPORTS MORE \ CSI Code Project Finder 01010 CSI Code Description 01010 Otiono 01010 SUMMARY OF WORK 01010 Otiono 01010 SUMMARY OF WORK 01010 Otiono 01010 SUMMARY OF WORK 01010 Otiono 01000 PERMITS, FEES, AND CERTIFICATES OF OCCUPANCY Description 0100 Otiono 01000 PROJECT MEETINGS 01000 01000 SUBMITTALS Description Description <t< th=""><th>😫 Calvin Kwong — 🗆 🗙</th></t<>	😫 Calvin Kwong — 🗆 🗙
U Getting Started 01524 CONSTRUCTION WASTE MANAGEMENT V AT	Celvin Kvong – C ×
01700 01535 SAFETY PROGRAM 01720 01550 INDOOR AIR QUALITY (IAQ) REQUIREMENTS 01740 01600 MATERIAL AND EQUIPMENT 01900 01630 PRODUCT SUBSTITUTIONS 02070 01700 PROJUCT CLOSEOUT 69 Item(s)	TACHMENTS PLOAD ADD KAHUA DOC OCUMENT MARKUP? CONTRIBUTOR DATE SIZE PREVIEW STATUS CO No Files ave