

Contract Management – CM13

Getting Started with CM13 for General Contractors



ORACLE Primavera Contract Management

Course Outline

- ◇ **Getting Started with Primavera CM13**
- ◇ **What's New in CM13**
- ◇ **The Contract Manager Control Center**
- ◇ **The Workspace**
 - **Layouts | Widgets**
- ◇ **The Project View**
 - **Folders | Logs | Documents**
- ◇ **Forms and Reports**
 - **Print | Save-As | E-mail**

Course Outline

- ◇ **Creating Requests for Information (RFI's)**
- ◇ **Using Attachments**
- ◇ **Viewing Inspection Reports**
- ◇ **Using the Update This Period (UTP) Interface**
(Quick Reference Guide Attached)

Contract Management CM13

CM13 is a multi-user, multi-project, web-based application that helps you track:

- ◇ Contracts
- ◇ Meeting Minutes
- ◇ RFI's
- ◇ Inspections
- ◇ Bulletins
- ◇ Payment Requisitions and
- ◇ Daily Reports
- ◇ many other aspects of a project


CM13 also provides you with:

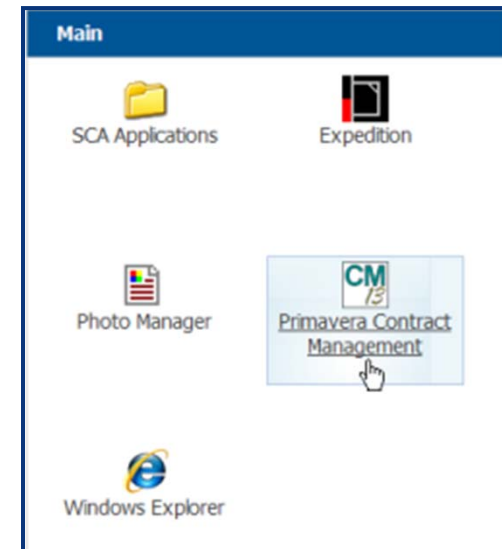
- ◇ A way to store, organize and track project information over the Internet
- ◇ The information you need, when you need it, via your Web browser

Getting Started with CM13

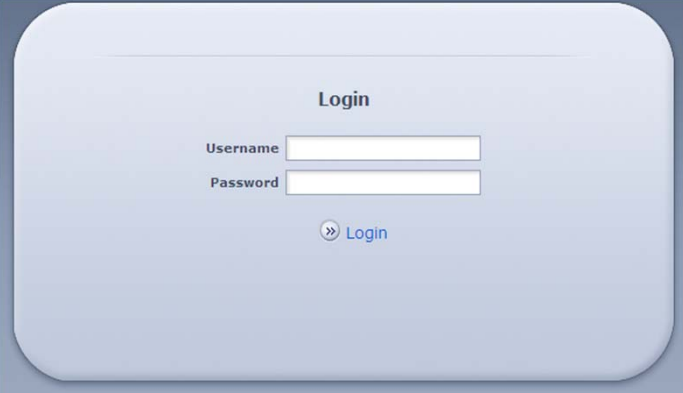
Getting Started with CM13

To log onto Primavera CM13, CITRIX will still be used

- ◇ **Step 1:** Click on **Primavera Contract Manager icon**  on the SCA application portal to access the Login Window



- ◇ **Step 2:** Enter your **Username** and **Password** in the appropriate fields
- ◇ **Step 3:** Click on **Login**



What's New in the CM13 Interface

CM13's New Interface

The screenshot displays the Oracle Primavera Contract Management interface. The top navigation bar includes the Oracle logo, the text "Primavera Contract Management", and user options: "Change Group", "Print", "Help", and "Logout". Below this, a welcome message reads "Welcome, JOSE JACOBS" and the date "August 9, 2010" is shown on the right.

The main interface is titled "Contract Management Control Center" and features a "Workspace: Contract Management" dropdown. On the left, a "All Projects" list contains numerous project entries, such as "HSBARM03 - Bard HS (@M097) Aud Reno" and "HSBERM01 - MURRY BERGTRAUM HIGH SCHOOL".

The central area is divided into several sections:

- Group Shortcuts:** Includes a link for "Expedition Helper (CM13)" and a "View All Shortcuts for this Group" link.
- Inbox:** A table showing notification counts for different priority levels:

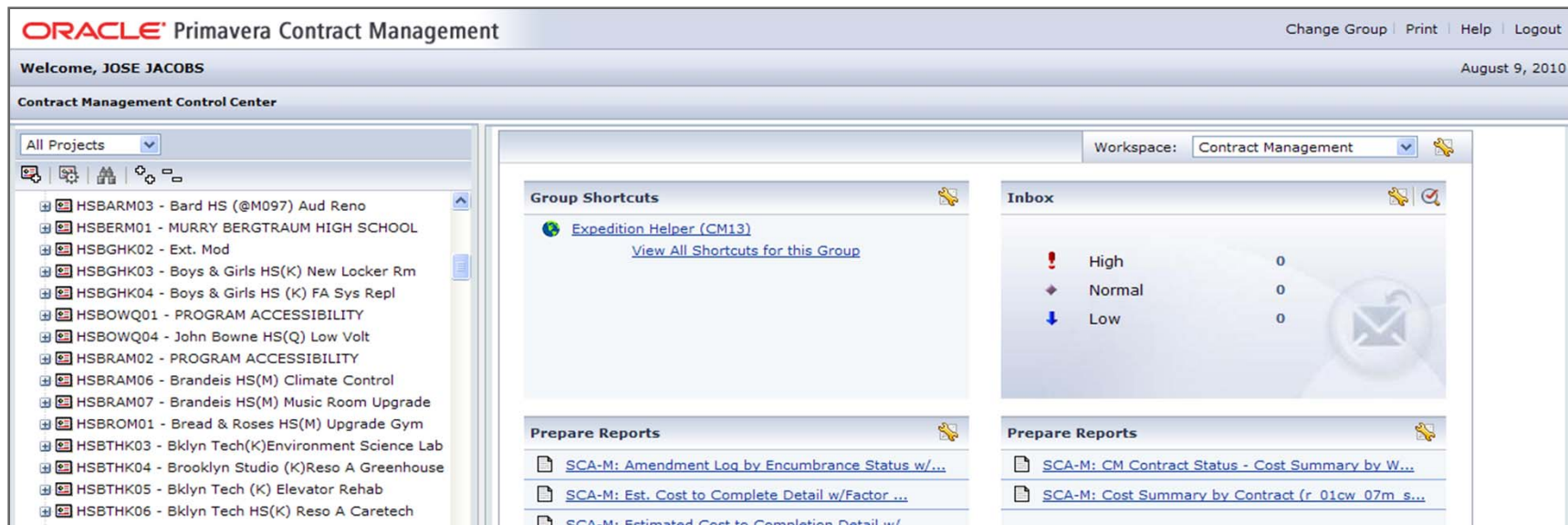
High	0
Normal	0
Low	0
- Prepare Reports:** Lists several report titles, including "SCA-M: Amendment Log by Encumbrance Status w/...", "SCA-M: Request for Funding (r_01cw_03_rff_m)", and "SCA-M: Estimated Cost to Completion Summary w/...".
- RFI, RFC, RFP (49):** A 3D bar chart showing counts for categories: CLO (blue, ~20), NEW (red, ~32), OLD (yellow, ~5), and RFP (red, ~5). A tooltip for the "NEW" bar indicates a value of 32.
- Actions:** A table showing counts for different priority levels:

High	0
Normal	0
Low	0

CM13's Windows Interface
No Major Changes

New Features in CM13?

There are several new features in the CM13 interface:



1. The **Web-based interface**

2. The Command menus are replaced with **Drop-down menus** and **Action Icons**

3. The Expedition Toolbar no longer exists. **CM13** Icons are now displayed throughout the page

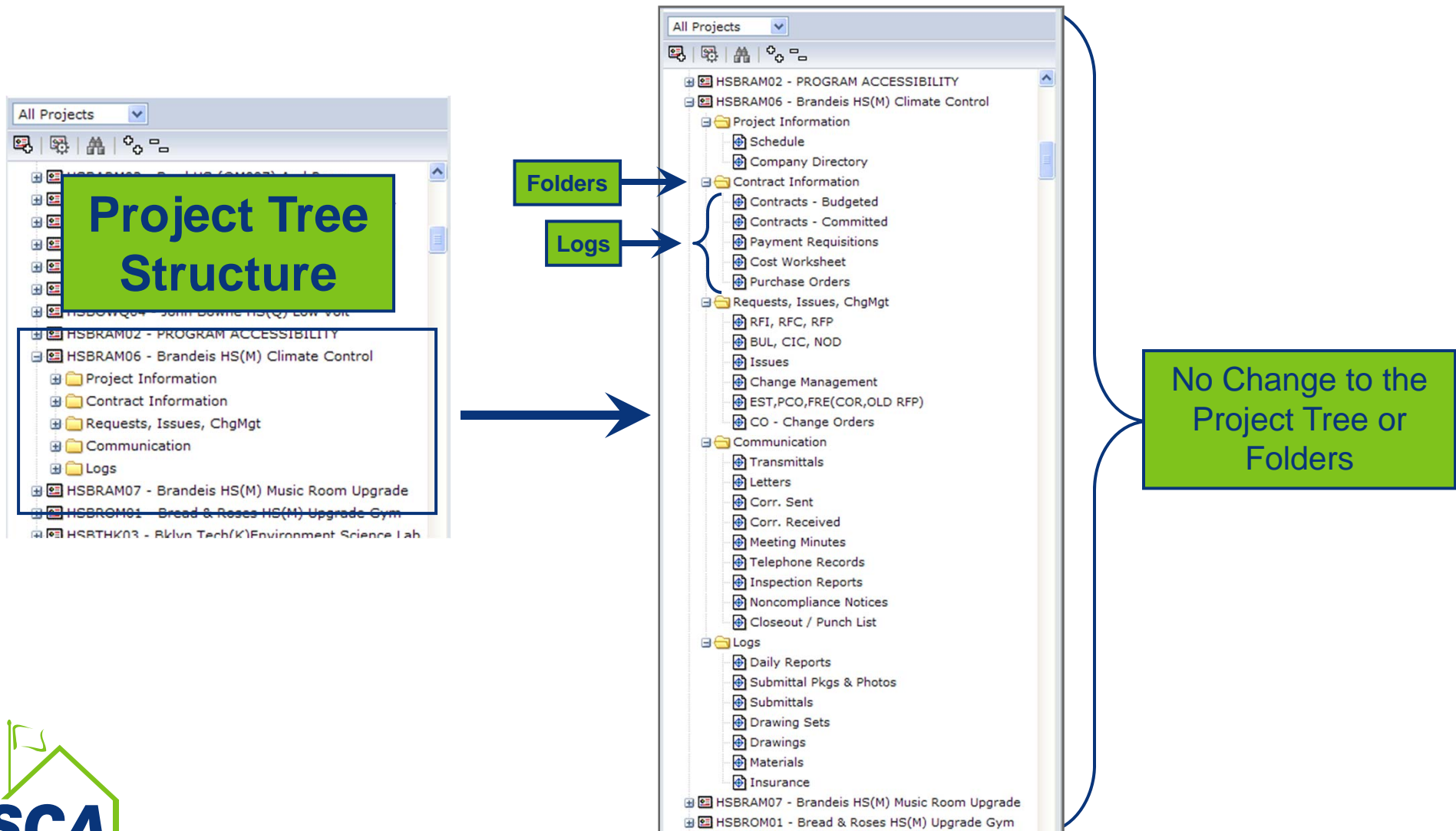
CM13's Control Center

No Change to the Project Tree | Workspace

The screenshot displays the Oracle Primavera Contract Management interface. The top navigation bar includes 'ORACLE Primavera Contract Management', 'Change Group', 'Print', 'Help', and 'Logout'. The user is identified as 'JOSE JACOBS' and the date is 'August 9, 2010'. The main area is titled 'Contract Management Control Center' and is split into two panes. The left pane, labeled 'Project Tree', shows a list of projects under 'All Projects'. The right pane, labeled 'Workspace', contains several functional areas: 'Group Shortcuts' with a link to 'Expedition Helper (CM13)'; 'Inbox' showing zero items for High, Normal, and Low priority; 'Prepare Reports' with links to various SCA-M reports; 'RFI, RFC, RFP (49)' with a 3D bar chart showing values for CLO, NEW (32), OLO, and NfO; and 'Actions' showing zero items for High, Normal, and Low priority.

Project Tree - Folders and Logs

Project Tree Structure - Folder and Log View



New Log View

Main Features:

- ◇ Command Menus are replaced with **Drop-down Menus**, **Action Buttons** and **Hyperlinks**
- ◇ Toolbars no longer exist
 - **Icons** are now displayed throughout the page

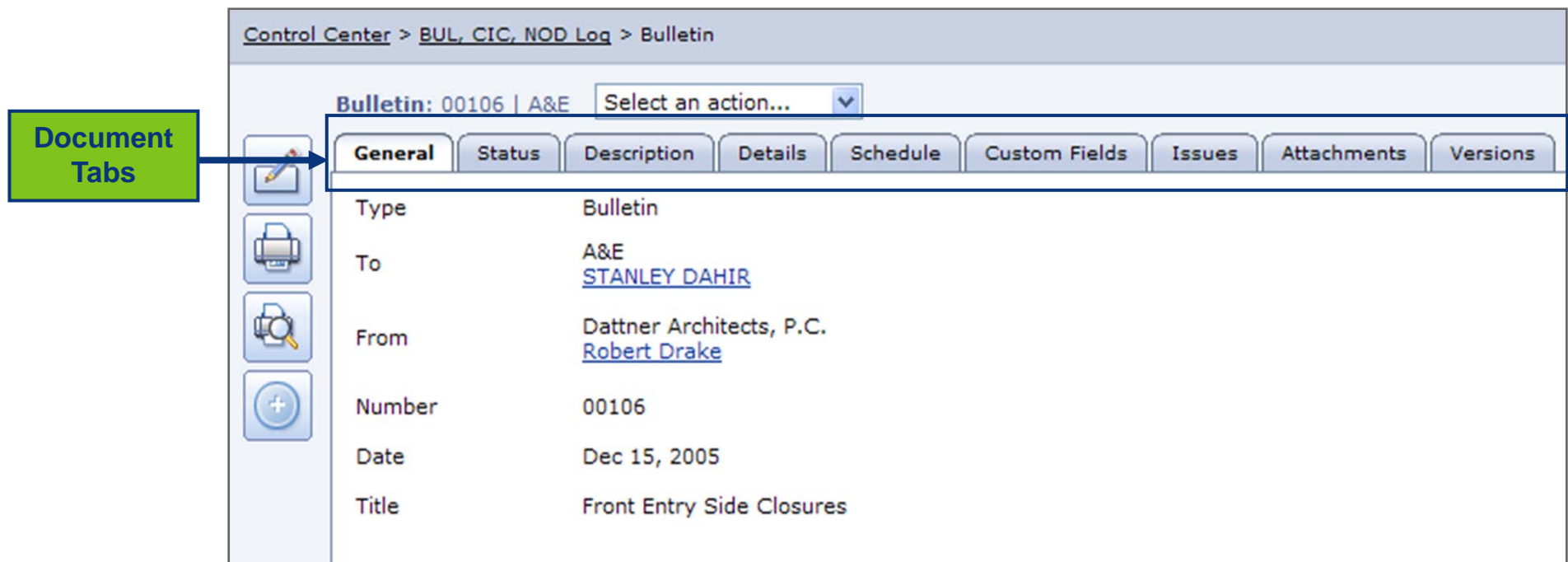
The screenshot shows the 'Control Center > BUL, CIC, NOD' interface. At the top, there is a breadcrumb 'BUL, CIC, NOD', a 'Select an action...' dropdown menu, and a 'Find' link. Below this is a table with columns: Title, Type, To, and To Contact. The table contains several rows of log entries, each with a document icon and a blue hyperlink in the Title column. On the left side, there is a vertical toolbar with three icons: a plus sign, a printer, and a magnifying glass. Three green callout boxes with arrows point to specific features: 'Action Buttons' points to the toolbar, 'Drop-down Menu' points to the 'Select an action...' dropdown, and 'Hyperlinks' points to the blue links in the 'Title' column.

Title	Type	To	To Contact
ADA Covenience Mirrors	Bulletin	A&E	STANLEY DAHIR
Exit Sign Chqs & Coord f	Bulletin	A&E	STANLEY DAHIR
Front Entry Side Closures	Bulletin	A&E	STANLEY DAHIR
Gas Piping Booster	Bulletin	A&E	STANLEY DAHIR
Room 102 Attendance Office ReDesign	Bulletin	P M - Queens	GEORGE BLUTNER
Floor Vents Auditorium	Bulletin	P M - Queens	GEORGE BLUTNER
Machinist Area in basement	Bulletin	P M - Queens	GEORGE BLUTNER

New Document Window

Within the document window there are various sections that are separated by Tabs.

- ◇ Click on the **Tab** to view a corresponding section of the Document



The screenshot shows a web application interface for a document window. The breadcrumb path is "Control Center > BUL, CIC, NOD Log > Bulletin". The document title is "Bulletin: 00106 | A&E" with a dropdown menu for "Select an action...". A row of tabs is visible: "General", "Status", "Description", "Details", "Schedule", "Custom Fields", "Issues", "Attachments", and "Versions". The "General" tab is selected. Below the tabs, a table displays document details:

Type	Bulletin
To	A&E STANLEY DAHIR
From	Dattner Architects, P.C. Robert Drake
Number	00106
Date	Dec 15, 2005
Title	Front Entry Side Closures

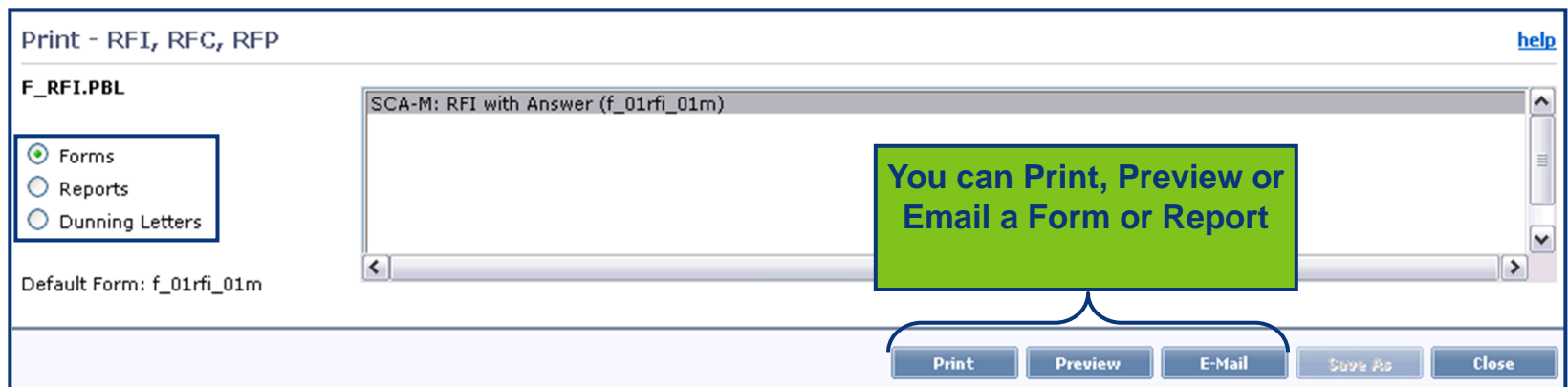
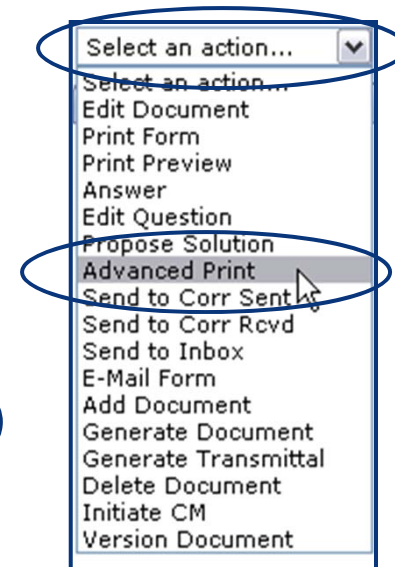
A green callout box labeled "Document Tabs" with an arrow points to the "General" tab.

Forms and Reports

Forms and Reports

To preview/print documents in CM13, you must do the following:

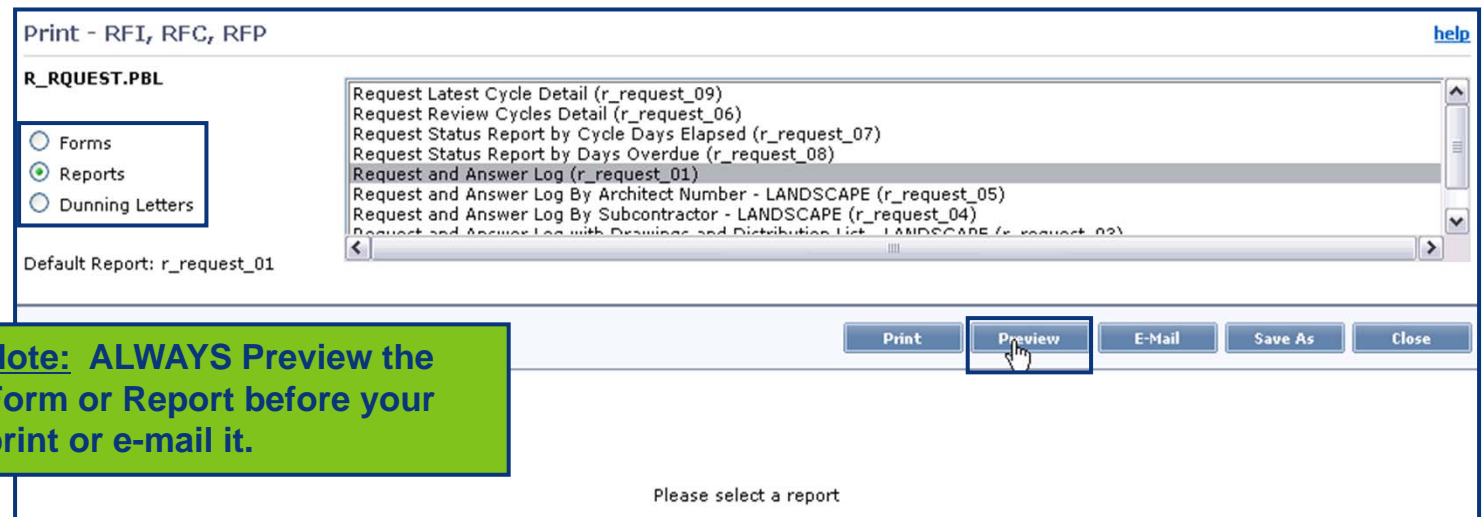
- ◆ **Step 1:** Go to the **Select an Action...** drop-down menu
- ◆ **Step 2:** Select the **Advanced Print** option
The dialog box will display the available forms and reports for previewing or printing (**see below**)



Forms and Reports (cont'd)

The Advanced Print dialog box, will display the available forms or reports.

- ◇ **Step 3:** Click on the **radio button** for Forms or Reports
- ◇ **Step 4:** **Highlight** the desired Form or Report
- ◇ **Step 5:** Click on the **Preview button**
 - note the other available action buttons (*Print, E-Mail, Save As and Close*)



Forms and Reports (cont'd)

A Sample RFI Form in Preview

Primavera Contract Management - Windows Internet Explorer provided by NYCSCA

Print - RFI, RFC, RFP [help](#)

F_RFI.PBL

SCA: RFI with Answer (f_01rfi_01)

Forms
 Reports
 Dunning Letters

Default Form: f_01rfi_01

Print Preview E-Mail Save As Close

1 / 1 57.6% Find

Page 1 of 1
REQUEST FOR INFORMATION
RFI 00095
03/02/04

NYC Department of Education **SCA** School Construction Authority
30-30 Thomson Avenue
Long Island City, NY 11101-3045

PROJECT: HSQUEQ01 - New Addition & Miscellaneous Work in Existing Building
TITLE: Track Lighting over Demo Tables **CONTRACT NO:** C000009044
TO: Attn: Robert Drake **REQUIRED:** 03/09/04
Dattner Architects, P.C.
QVTHS Site
47-28 37th Street- 2G
Long Island City, NY 11101
Phone: 718-706-0575 Fax: 718-706-1070

REQUEST:
Architectural Drawing A-582 for service Demo classrooms 202 and 204 indicates Track Lighting over the demo table.
There does not appear to be any track lighting on the light fixture schedule (E-100 D) or the electrical plans (E-109B, E-121B) for these rooms.
Is track lighting required?

Creating Requests for Information (RFIs)

Request for Information (RFI)

RFIs are used to enter requests for information or to answer questions.

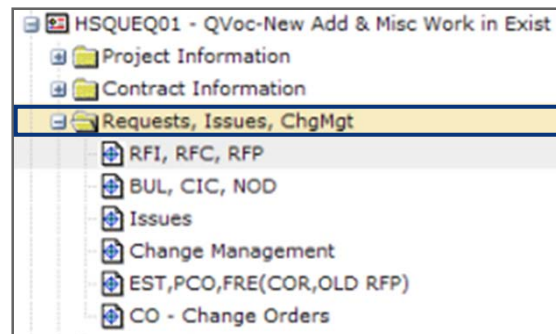
The RFI Document window is categorized into different tabs. These tabs can be used to:

- ◇ Record, requests and answer details
- ◇ Provide additional information or clarification on some aspect of the project, such as:
 - procedures
 - equipment
 - materials

Request for Information (cont'd)

To create an RFI in CM13, you must to do the following:

- ◇ **Step 1:** Under your Project in the Control Center, click on the **plus sign (+)** next to **Request, Issues, ChgMgt** Folder
- ◇ **Step 2:** Click on the **RFI, RFC, RFP** hyperlink to open the log



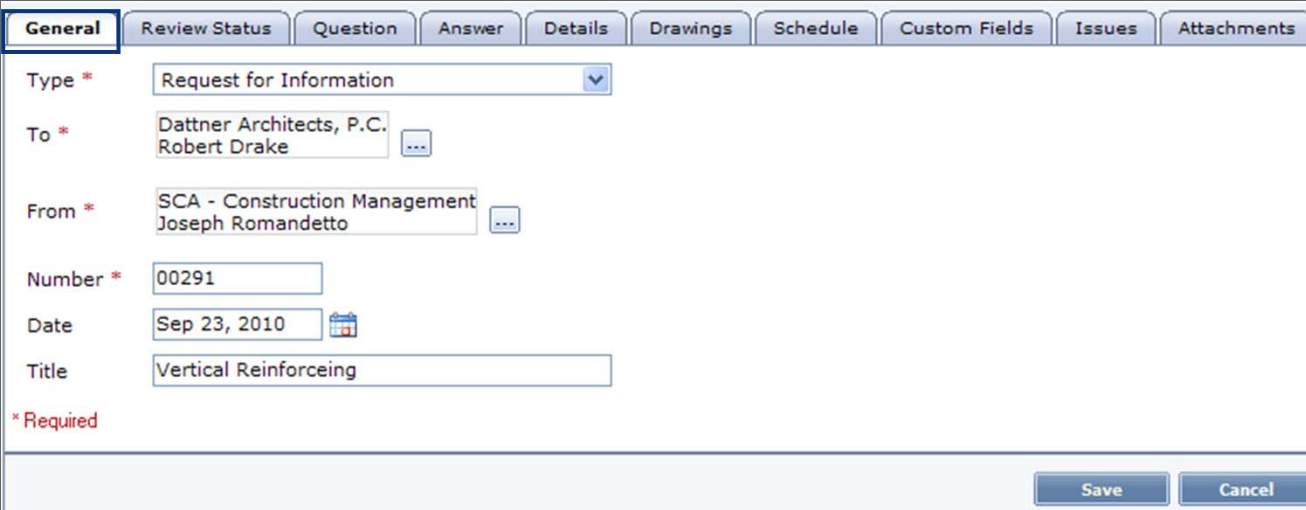
- ◇ **Step 3:** In the **RFI, RFC, RFP** log, Click on the **Add Document** icon  to open the RFI Document window



Request for Information (cont'd)

The RFI Document window displays various document tabs:

- ◇ **Step 4:** Click on the **General** tab



The screenshot shows a software window titled "General" with several tabs: "General", "Review Status", "Question", "Answer", "Details", "Drawings", "Schedule", "Custom Fields", "Issues", and "Attachments". The "General" tab is active. The form contains the following fields:

- Type *: Request for Information (dropdown menu)
- To *: Dattner Architects, P.C. Robert Drake (with a browse icon)
- From *: SCA - Construction Management Joseph Romandetto (with a browse icon)
- Number *: 00291
- Date: Sep 23, 2010 (with a calendar icon)
- Title: Vertical Reinforceing

At the bottom right, there are "Save" and "Cancel" buttons. A red asterisk indicates that the fields marked with an asterisk are required.

- **Key Fields:** Type | To | From | Title
 - **Type:** Select the **Request for Information** option from the drop-down menu
 - **To:** Use the Browse icon to select **Architect**
 - **From:** Select the appropriate **Project Officer** or **General Contractor**
 - **Title:** Enter the **Name** or **Title of Request**

Request for Information (cont'd)

- ◆ **Step 5:** Click on the **Question** tab

The screenshot shows the 'Question' tab of an RFI form. The tabs at the top are: General, Review Status, Question (selected), Answer, Details, Drawings, Schedule, Custom Fields, Issues, and Attachments. The form contains the following fields and sections:

- Work Impact: [Dropdown menu]
- Reason for Request for Information: [Dropdown menu]
- Question: A text area containing the following text:

1. Five Star is requesting that the electric closets be aligned to allow the riser conduits to hit their respective panels:
---a. First, is it acceptable to offset riser conduit and are there any restrictions in offsetting the conduit?
---b. Second, if it is not acceptable can the closets, or the panels, be aligned?


Enclosed is Five Star's question and sketch, dated 1/15/04 respectively.
Please advise if this is acceptable.
- Question Signed By: [Text field] Joseph Romandetto
- Date: [Text field] [Calendar icon]
- Required Date: [Text field] Sep 30, 2010 [Calendar icon]
- Question Distribution: A section with 'Add' and 'Copy Distribution to Answer' buttons, and a table with columns: Distributed To, Contact, Date, Remarks.
- Buttons: Save, Cancel

- **Key Fields:** Question | Question Signed By | Date
 - **Question:** Use this section to write a **detailed request**
 - **Question Signed By:** The **name of the requester** should be displayed
 - **Date:** The **Calendar icon** must be used when selecting the date of the RFI to ensure the proper date formatting

Request for Information (cont'd)

- ◇ **Step 6:** Click on the **Details** tab
 - **Key Field:** Contract
 - In this section, use the Browse icon to **select the appropriate contract**

The screenshot shows a software interface with several tabs: General, Review Status, Question, Answer, Details (selected), Drawings, Schedule, Contract Summary, and Cust. The 'Details' tab is active. The 'Contract' field is highlighted with a blue box and contains 'Contractors Contract (C000009044)'. The 'Reference' field contains 'Vertical Reinforcing. (00094, Mar 2, 2004)'. The 'Subcontractor Name' field contains '<none selected>'. The 'Save' button is highlighted with a blue box at the bottom right.

- ◇ **Step 7:** Click on the **Save Button** at the bottom of the page.
 - Your page will refresh in **Read Only mode**. To enter additional information or make corrections click on the **Edit document icon** .

Request for Information (cont'd)

To print or print preview an RFI, you must:

- ◇ **Step 1:** In the RFI, go to the **Select an Action...** drop-down menu

- ◇ **Step 2:** Select **Advanced Print**

- The dialog box will display the available forms and reports for previewing or printing

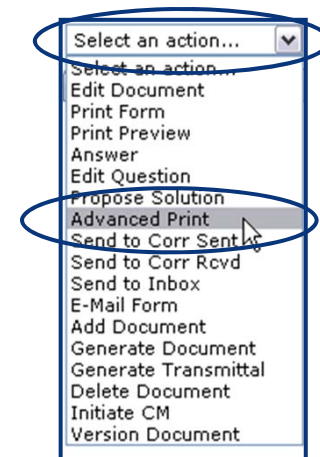
- ◇ **Step 3:** Click on **Forms radio button**

- ◇ **Step 4:** **Highlight** the desired Form

- ◇ **Step 5:** Single-click on the **Preview button**



- The RFI form is displayed as a PDF

- ◇ **Step 6:** Click the **close** button to return to the RFI, RFC, RFP Log



Request for Information (cont'd)

Sample of an RFI created in CM13

			30-30 Thomson Avenue Long Island City, NY 11101-3045	Page 1 of 1 REQUEST FOR INFORMATION RFI 00094 03/02/04
<hr/>				
PROJECT: HSQUEQ01 - New Addition & Miscellaneous Work in Existing Building				
TITLE:	Vertical Reinforcing.	CONTRACT NO:	C000009044	
TO:	Attn: Robert Drake Dattner Architects, P.C. QVTHS Site 47-28 37th Street- 2G Long Island City, NY 11101 Phone: 718-706-0575 Fax: 718-706-1070	REQUIRED:	03/09/04	
<hr/>				
REQUEST:				
Please confirm as per our meeting on Thursday 02-26-04 with John Sanchez and Susan Bacas that the vertical reinforcing for interior cmu will be #4 rebar at 10'-0" O.C. Max with additional #4 rebar at openings, ends of wall and at corners as shown on Dwg. S-603 plan interior section. A. See attached highlighting sketches.				
Requested By: John Sanchez		Date: 03/03/04		
Turner Construction Company				
<hr/>				
ANSWER:				
The above is correct with one clarification; the bars around the windows and doors are per S-603; Interiors are #4. Susan C. Bacas, Ysrael A. Seinuk, P.C.				
Bob Drake, Field Representative Richard Dattner & Partners Architects P.C.				
Answered By: Robert Drake		Date: 03/04/04		
Dattner Architects, P.C.				
<hr/>				
05-21-08 f_rf_pbvrf_01rf_01				

Using Attachments

Using Attachments

Attaching a File

- ◆ **Step 1:** To attach a file, click on the **Attachments** tab in the document window.



- **Note:** you can attach file's, URL's or both
- ◆ **Step 2:** Click on the **Attach File button** located in the upper left-hand corner of the Attachments section



- This will take you to a separate dialog box which will allow you to attach your file, or files, to the document
- **Note:** you no longer have to upload a document from the S: drive

Using Attachments (cont'd)

Attaching a File

- ◇ **Step 3:** In **Attachment Field**: click on the **Browse** button to select the file to attach.
- ◇ **Step 4:** Enter the **Subject**
- ◇ **Step 5:** Depending on the number of attachments, click on **Save & Close** or **Save and Add Another**

Attach File [help](#)

Spelling

Attachment * PS020X LV Electrical 07-31-07_files\formimageviewer.jpg

Subject LV Electrical - 07-31-07_files

Address Attachments

Date Attached Apr 6, 2010

Attached By PHARAH JEAN-PHILIPPE

* Required

Using Attachments (cont'd)

Viewing Attachments

- ◇ **Step 1:** To view an attachment, click on the **Attachments** tab in the document window.
- ◇ **Step 2:** **Click on the hyperlink of the file** you wish to view
 - The file will open up in a read-only mode for viewing.



Attachment	Subject	File Size	Date Attached	Attached By	
 PS20(X) RFI #11.pdf	PS020X - RFI #11		Oct 5, 2009	SUE MALDONADO	remove
 PS020X;llw#44219- Dwq-A101.pdf			Oct 5, 2009	ROBERT ORTIZ	remove
 PS020X;llw#44219- Dwq-A201.pdf			Oct 5, 2009	ROBERT ORTIZ	remove

Using Attachments (cont'd)

Removing Attachments

- ◇ **Step 1:** To remove an attachment, click on the **Remove** hyperlink at the extreme right side of the page.

Request for Information: PP011 | Bovis Lend Lease, LMB, Inc.

General Review Status Question Answer Details Drawings Schedule Contract Summary Custom Fields Issues **Attachments** Versions

Attach File Attach URL

Attachment	Subject	File Size	Date Attached	Attached By	
 PS20(X) RFI #11.pdf	PS020X - RFI #11		Oct 5, 2009	SUE MALDONADO	remove
 PS020X;llw#44219- Dwq-A101.pdf			Oct 5, 2009	ROBERT ORTIZ	remove
 PS020X;llw#44219- Dwq-A201.pdf			Oct 5, 2009	ROBERT ORTIZ	remove

Viewing Inspection Reports

Viewing Inspection Reports

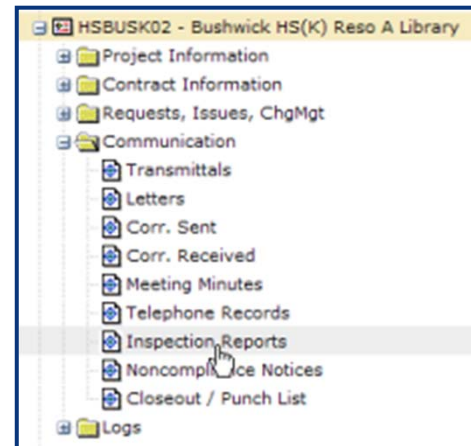
Things to know about Safety, CID and BCC Inspections

- ◇ **Inspection Reports** information recorded in Contract Manager (CM13) consists of data imported from the **SCA Inspection Forms Automation (IFA)** system.
- ◇ IFA automates the process of form submissions by inspectors for Environmental & Regulatory Compliance (ERC) forms.
- ◇ The resulting inspector observations are then inserted into each Contract Manager project for review by the Project Officer.

Viewing Inspection Reports (cont'd)

To view an Inspection Report, you must to do the following:

◇ **Step 1:** Under your Project in the Control Center, click on the **plus sign (+)** next to **Communications Folder**



◇ **Step 2:** Click on the **Inspection Reports** hyperlink to open the log

◇ **Step 3:** In the **Inspection Reports** window, click on the **View Document** icon to open the Document window

	Inspection Type	Inspector	Description	FID Job Number
	◆ PLUMBING	BERNARD COSSEAN	HSBUSK 042286 ROOM CONVERSIONS	0262- -05
	◆ ROOFING	STEVE RUSCIO	HSBUSK 042286 ROOM CONVERSIONS	0262- -05
	◆ WINDOW	JAMES CASALE	HSBUSK 044257 INTERIOR RENOVATION OF EXISTING SPACES "06"	1246- -05
	◆ WINDOW	JAMES CASALE	HSBUSK 042286 ROOM CONVERSIONS	0262- -05

Viewing Inspection Reports (cont'd)

The document window is broken down by various key tabs
(General, Status, Notepad Items, Custom Fields & Attachments)

Notepad: HSBUSK 042286 ROOM CONVERSIONS | 00002 Select an action... ▼

General Status Notepad Items Details Custom Fields Issues Attachments Versions

Notepad: HSBUSK 042286 ROOM CONVERSIONS | 00002 Select an action... ▼

General Status Notepad Items Details Custom Fields Issues Attachments Versions

Ball in Court

Notepad: HSBUSK 042286 ROOM CONVERSIONS | 00002 Select an action... ▼

Notepad Items Details Custom Fields Issues Attachments Versions

Item No.	Status	Ball in Court	BIC Contact	Closed	Received	Notes
00001	Closed					
00002	Closed					
00003	Closed					

Notepad: HSBUSK 042286 ROOM CONVERSIONS | 00002 Select an action... ▼

General Status Notepad Items Details Custom Fields Issues Attachments Versions

Inspector STEVE RUSCIO

FID Job Number

Notepad: HSBUSK 042286 ROOM CONVERSIONS | 00002 Select an action... ▼

General Status Notepad Items Details Custom Fields Issues Attachments Versions

Attachment

- <https://ifa.nycsca.org/inspectionformswEB/formviewer.aspx?borough=K&schoolcode=HSBUSK&pro>
- <https://ifa.nycsca.org/inspectionformswEB/formviewer.aspx?borough=K&schoolcode=HSBUSK&pro>
- <https://ifa.nycsca.org/inspectionformswEB/formviewer.aspx?borough=K&schoolcode=HSBUSK&pro>
- <https://ifa.nycsca.org/inspectionformswEB/formviewer.aspx?borough=K&schoolcode=HSBUSK&pro>

Attachment Tab: To view the inspection, click on the view icon next to the hyperlink.

Viewing Inspection Reports (cont'd)

The inspections are stored on the IFA web server.

- ◇ **Step 1:** Enter your **SCA User name** and **Password**
- ◇ **Step 2:** Click on the **OK** button



Fid Roofing QA-QC Inspection Report	
Open Observations	
Project Information	
Project Name: <u>HSBUSK02</u>	Type of Project: <u>MNTR</u>
Inspector Name: <u>STEVE RUSCIO</u>	Project Officer: <u>Agranovich, Alexander</u>
Contractor: <u>TDX/Becom, JV</u>	Sub Contractor: _____
FID Job Number: <u>0262- -05</u>	
LLW: <u>042286</u>	Contract Number: <u>C000008240</u>
Facility Information	
Facility Code: <u>HSBUSK</u>	Facility Name: <u>HS BUSHWICK</u>
Street Address: <u>400 Irving Avenue</u>	Borough: <u>K</u> Block: <u>3365</u> Lot: <u>98</u>
Inspection Information	
Inspection Start: <u>9/27/2006 10:06 AM</u>	Inspection Stage: <u>Final</u>
Conditions: <u>Not Applicable</u>	Temperature In Fahrenheit: _____
Prerequisites	
Weather Protection Provided	_____
QC Submittal Plans	<u>No</u>

Using the Update This Period (UTP) Program

*(Refer to the UTP Quick Reference Guide on our
Public Website)*

Using the Update This Period (UTP) Program


The UTP program was developed to allow General Contractors to update pay amounts in the current-period payment and submit them electronically to the Project Officer in CM13.

Accessing UTP using CITRIX:

- ◇ **Step 1:** Log into **CITRIX**
- ◇ **Step 2:** In **Applications**, click on **UTP** icon to launch program
- ◇ **Step 3:** Enter **Username** and **Password**
- ◇ **Step 4:** Click on **Login**
- ◇ **Step 5:** Once the **Project List** screen is displayed, click on the **(+) plus icon** to expand the **All Projects** folder

Using the Update This Period (UTP) Program (cont'd)

Updating the UTP:

- ◇ **Step 1:** Select the **Project** to be updated by clicking on the **(+)** icon
- ◇ **Step 2:** Click on the **Payment** hyperlink to view the payment to be updated
- ◇ **Step 3:** Click on the **Payment** Icon  to view the **Schedule of Values**
- ◇ **Step 4:** Click the **Edit** button on the lower left hand side of the page to enable the **This Period** and **% Complete G/C** column
- ◇ **Step 5:** The GC can update the Pay-item by entering the Value in the **This Period** or **% Complete G/C** column

Using the Update This Period (UTP) Program (cont'd)

Updating the UTP:

- ◇ **Step 6:** Once the pay-items are updated, click on the **Save** button on the lower right hand side of the screen
- ◇ **Step 7:** Click **Yes** to save the changes
 - **Note:** Clicking on **Save** allows for additional changes to be entered to the Schedule of Value prior to final submission
- ◇ **Step 8:** Click on the **Submit** button to finalize the Schedule of Value
 - **Note:** Once submitted, the Schedule of Value is locked; the action of updating the Schedule of Value is complete and an e-mail is sent to the Project Officer

Additional Support

Help with your Password

- ◇ Contact the SCA Service Desk at **718.472.8871**

Assistance with a CM13

- ◇ Simon Chow | schow@nycsca.org | 718.752.5602
- ◇ Robert Erenburg | rerenburg@nycsca.org | 718.752.5417
- ◇ Sue Norton-Williams | snorton-williams@nycsca.org | 718.472.8407

Additional Training

- ◇ Jose Jacobs
 - ◇ Pharah Jean-Philippe
- } scaitraining@nycsca.org