STATE OF NEW JERSEY
SCHOOLS DEVELOPMENT AUTHORITY

Section 1

Contract Management

Overview and System Requirements

ORACLE Primavera

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I. USER MANUAL SECTION OVERVIEW

An overview of each section of the User Manual is as follows:

Section 1. Overview

This section includes system requirements, descriptions of the available Contract Management modules and help desk information.

Section 2. System Navigation

This section addresses system login procedures, information on the Control Center and Folders, log views and Java installation procedures.

Section 3. SDA Data

This section describes the SDA Data Screen which lists important summary information about each phase of a project's construction. This section is accessible by SDA Staff only.

Section 4. Issues

This section describes Issues, which are a way of electronically organizing project documents that will be referenced in the future. Issues can be created 'on the fly'(directly from the document to be linked) or directly from the Issues log.

Section 5. Transmittals

This section includes instructions for creating and printing a transmittal.

Section 6. Transmittals (Close Out)

This section describes the processes for capturing close out data for specific projects utilizing the Transmittals module.

Section 7. Request for Information (RFI)

This section includes instructions for entering a Request for Information (RFI) (NJSDA Form 655).

Section 8. Claims and Settlement

This section includes instructions for entering a Contractor Claim Notice (CCN) and Settlements.

Section 9. Non-Compliance Notices

This section describes Noncompliance Notices which notify the Contractor of deviations that can either be field or contract related. A Noncompliance Notice may result in either the corrective action being noted on the same document and the record being closed (if no further action is required), or the initiation of Change Management to track time/cost impact.

Section 10. Letters

This section will provide instruction on creating letters.

Section 11. Correspondence Sent and Received

This section will provide instruction on populating the Correspondence Sent and Correspondence Received logs.

Section 12. Meeting Minutes

This section includes information on Meeting Minutes, such as when a meeting took place, the purpose of meeting, who attended, what was discussed, what decisions were made, and the responsibility for follow-up.

Section 13. Permits/DCA Inspections

This section will describe how to capture permit and inspection information. It will enable users to monitor the status and expiration information for each permit or inspection notice entered in the system.

Section 14. Telephone Logs

This section will provide instruction on creating a telephone log.

Section 15. Safety

This section includes instructions for creating, modifying and printing an Injury/Illness Report (OSHA form 301) and Safety Violations.

Section 16. Project Cost Report Module

This section includes detailed instructions on navigation through the report, modifying the layout and descriptions of the columns used in the report.

Section 17. Budgeting

This section describes the SDA Budgeting Process which includes the three phases (Planning Budget, Preliminary Budget, and Final Eligible Cost (FEC) Budget), and reforecasting of budget information.

Section 18. Contracts Committed

This section will displays contract information automatically populated from SIMS and will be used to track the commitment of funds at the project level.

Section 19. Payment Requisition

This section will be used to track all payments against committed contracts and displays a detailed schedule of values by line item, the percent complete of the work performed, approved change orders, the amount paid to date, the amount due this period, and the balance to complete. (NJSDA Form 803).

Section 20. Drawing Sets

This module will be used to track the physical location (regional office, cubby/rack) and attributes (size, phase/progress, date) of the drawings. Drawing reviewers can use the Ball-in-Court to indicate that they have borrowed the drawings for review.

Section 21. Drawings

This section describes the processes for logging, archiving and distributing Drawings, and the creation of transmittals for Drawings.

Section 22. Submittal Packages and Submittals

This section includes instructions for creating, reviewing, updating and distributing submittals.

Section 23. Daily Construction Reports

This section includes instructions for creating and approving daily construction reports.

Section 24. Insurance

This section includes instructions for creating and storing insurance policy information for all project participants.

Section 25. Punch list

This section includes instructions for creating, modifying and approving punch lists.

Section 26. Change Management for CMD Use Only

This section includes instructions for the Contract Management Division to update information in the Change Management module.

Section 27. Contract Change Request / Authority (CCR/A)

This section includes instructions for creating a Contract Change Request/Authority document (CCR/A) (NJSDA Form 500) in Change Management.

Section 28. Contractor Proposal (CP)

This section includes instructions for creating a Contractor Proposal document (CP) in Change Management.

Section 29. Authority Agent Recommendation (AAR)

This section includes instructions for creating an Authority Agent Recommendation document (AAR) (NJSDA Form 501 in Change Management.

Section 30. Change Order (CO)

This section includes instructions for creating a Change Order document (CO) (NJSDA Form 503) in Change Management.

Section 31. Construction Change Directive (CCD)

This section includes instructions for creating a Construction Change Directive document (CCD).

Section 32. Reports

This section provides instructions on running custom reports related to Change Management, Payment Requisitions and other Contract Management module information.

Section 33. Accessing DB02 and WFP Safety Reports

This section will describe the process for accessing DB02 and WFP Safety Reports in Contract Management.

Section 34. Appendices and Glossary

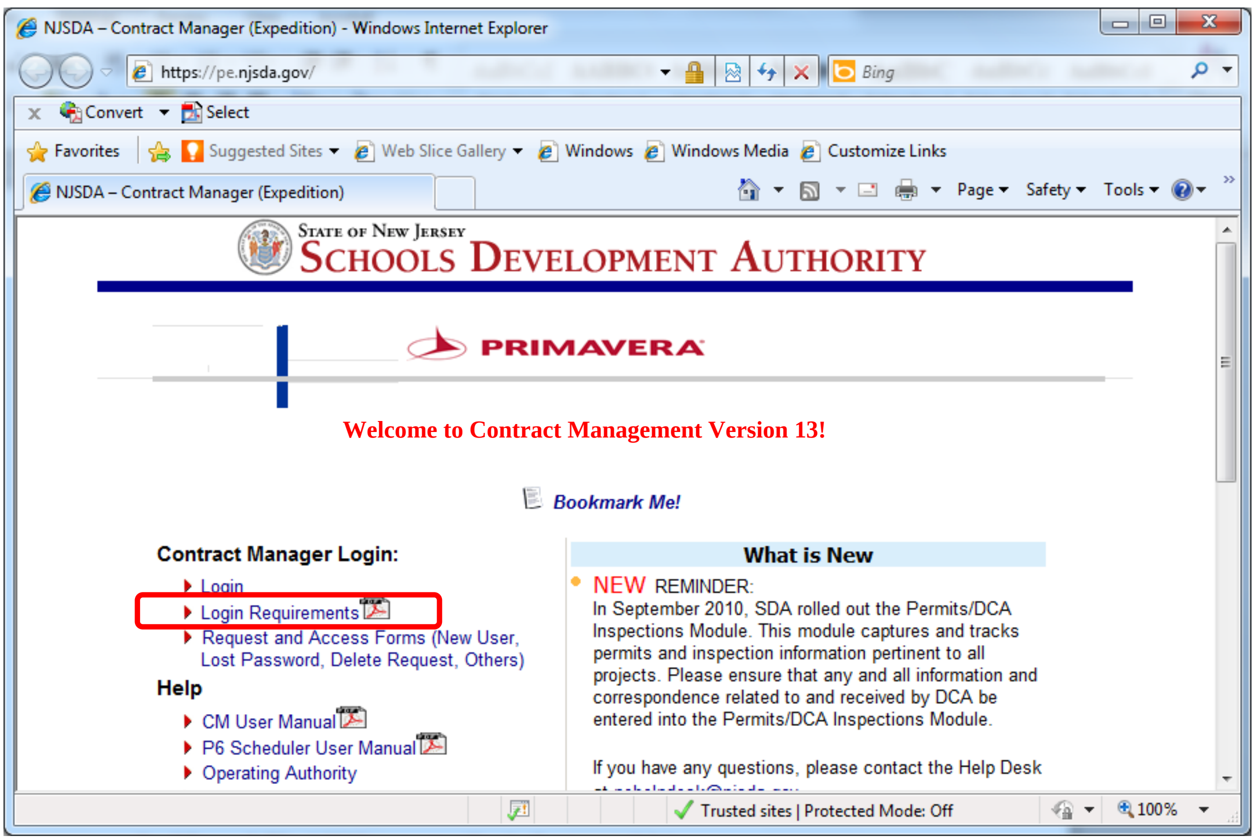
Includes procedures for accessing Contract Manger, Cost Codes and Log View layouts.

II. CLIENT MACHINE REQUIREMENTS

On the client machines, Contract Management runs entirely through a web browser interface. The majority of pages are HTML with JavaScript code in them. There are a few applets that require the Java JRE. There is an optional ActiveX control for higher quality printing of reports and forms. The latest updates to these requirements are located on the Contract Management Splash Page (https://pe.njsda.gov) as shown below:

A. Operating Systems, Microsoft Office and Browsers

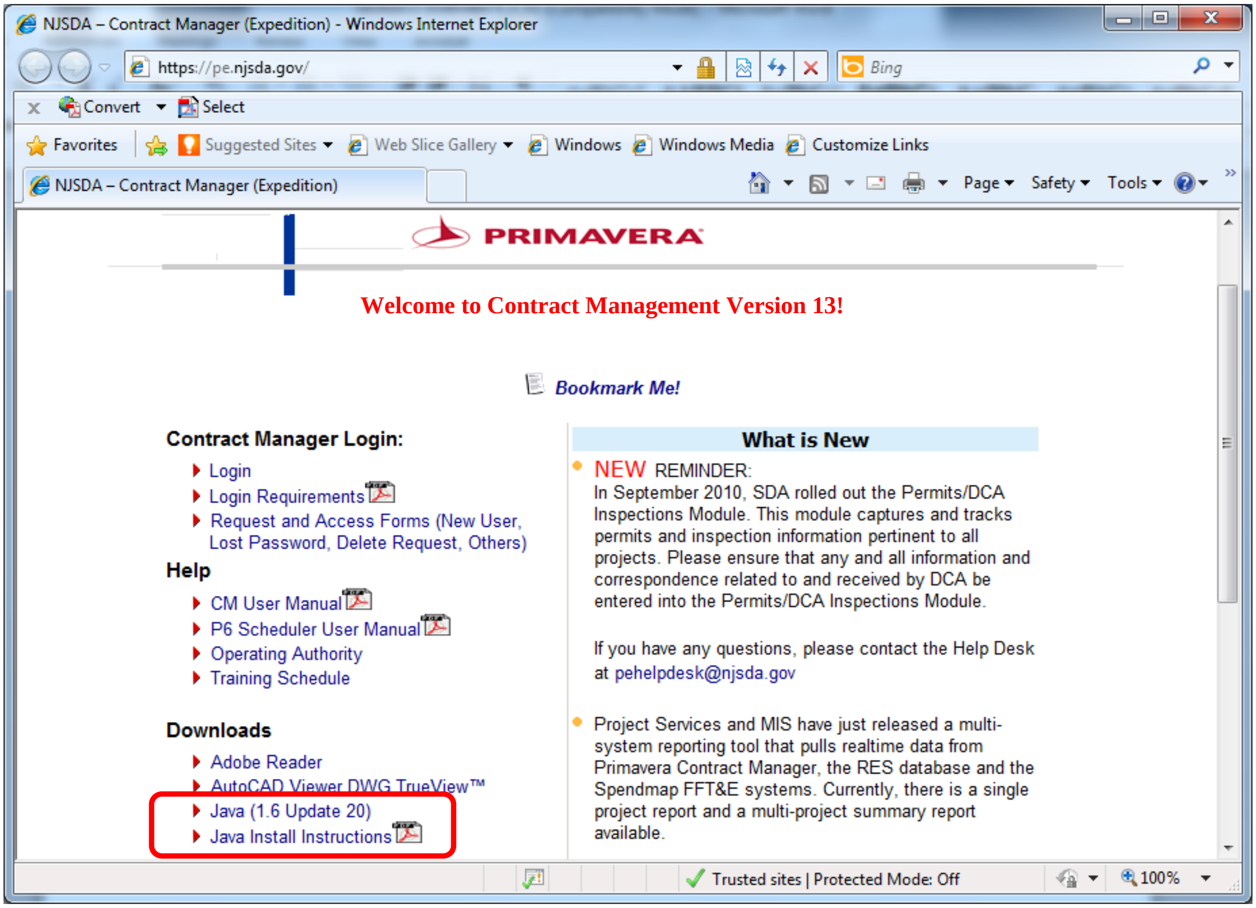
- Open the Contract Management Splash Page (https://pe.njsda.gov)
- Click the **Login Requirements link** under the Contract Management Login section
- An Adobe PDF file will display with the login requirements for operating systems and browsers



B. Java

- Open the Contract Management Splash Page (https://pe.njsda.gov)
- Click the **Java Install Instructions link** under the Downloads section
- An Adobe PDF file will display with the Java installation instructions

Note: The latest version of Java will be available for downloading from the splash page.



III. DESCRIPTION OF CONTRACT MANAGEMENT MODULES

Modules	***Description Feature Functionality***
Contract Management Control Center – The Primavera user configurable activity center is a customizable role-based dashboard providing the information needed to manage construction projects in a single window. The activity window is the default user interface upon logging into Contract Management.	
Personal Workspace	Personal User Dashboard providing a view of and access to short cuts necessary to manage Alerts, Reports, Modules and Features built into Primavera Contract Management.
Project Information – Provides the ability to review project schedules, companies, vendors and issues related to any specific project.	
Schedule	Contract Management can be linked to a Primavera Project Schedule (P6). This module shows the activities from the project.
Contact Information	A listing of the companies on the project. Information such as contacts at the company and addresses.
Issues	Allows user to create a “virtual file folder” in which to track links to documents regarding a certain topic. For example, documents tied to a known problem, which may lead to a claim.
Communications – Provides the ability to create and manage project correspondence, telephone conversations, meeting minutes, notices and safety situations related to any specific project.	
Transmittals	Transmittals are memos or cover letters that accompany project documents or items, such as submittals or materials. Use transmittals to accompany items to indicate what, when, and why they were forwarded; communicate efficiently with vendors and contractors; create a permanent record of the action taken regarding an issue; trace an item if it is lost, misplaced, or misdirected; and track the status of items that are the responsibility of others. This module is also used to capture close out data for specific projects.
Request for Information	A document that asks for information or clarification on some aspect of the project. Contract Management includes an automatic email notification for RFI participants.
Notices	Claims are tracked in the Notices module and are processed through the Office of Chief Counsel. Notices allow you to track costs and document details, and if they meet internal approval, can be used to launch Change Management and track costs in the Project Cost Report.
Non-Compliance Notices	Use Notices and Non-Compliance Notices to inform project participants of the latest project developments or deviations from the contract requirements.
Letters/Doc. Templates	Use this document window to create and keep a record of letters. Once created, you can type the body of the letter and other information in Microsoft Word. Letter templates can be created at the global level for use in all projects, or they can be project specific. Contract Management supports Microsoft Windows 2000 or greater.
Correspondence Sent Log	Use this document window to track documents that you sent to other contacts, including the subject, status, associated costs, and other remarks.

Modules	*Description Feature Functionality*
Correspondence Received Log	Use this document window to record details about a document that you receive, including the source, subject, status, associated costs, and other remarks.
Meeting Minutes	Contract Management automates the task of listing a meeting's business items; it even starts off with last week's agenda so you don't overlook any open items. As items are resolved, Contract Management crosses them off the list.
Permits/DCA Inspections	This module will capture information for Permits and DCA Inspection items. It will allow the user to monitor the status of these documents, and track any applicable expiration information.
Telephone Logs	Contract Management provides a Telephone Log to record the date, content, and parties involved in each call.
Safety	Contract Management's Safety module enables you to track safety violations and accidents. It satisfies OSHA's 300, 300a and 301 reporting requirements.
Contract Information – Provides the ability to create and manage project budgets and contracts related to any project. Contract information includes the ability to adjust contracts via change management life cycle or trends as well as create and approve payment requisitions.	
Project Cost Report	The Project Cost Report window provides a central location for analyzing budgeted, committed, and actual project costs. From this window, you can review cost items.
Contracts – Budgeted	The Budgeted Contracts log window displays a one-line summary of each budget line item.
Contracts – Committed	The Committed Contracts log window displays a one-line summary of each committed contract.
Purchase Orders	The Purchase Orders log window contains information for each purchase order in the project. Contract Management helps you organize and manage lump sum and unit price POs. Once you set up a PO in Contract Management, you can generate related submittals or requisitions, track changes, and monitor charges. SDA is currently not using this module.
Trends	Trends are used to develop preliminary project budgets.
Payment Requisitions	Requisitions are based on a contract established in Contract Management for the project and parallel AIA certification for payment format (G702/G703 forms). Contract Management uses lump sum line items from the contract to automatically create the requisition schedule of values.
Procurement/Bids	Contract Management procurement enables you to enter and track information for procurement items and the related scope items that make up the procurement item. The module allows you to track bids from contractors on materials that you require, or for a job you need done. Once the item is open for bid, you can track who is bidding, how much they bid for each procurement item and its individual components, and then award the procurement item to a contract or purchase order for the winning bidder. SDA is currently not using this module.

Modules	***Description Feature Functionality***
Logs – Provides the ability to manage and organize project documentation and associated communications related to any specific project. Logs are frequently used to create end user ad hoc reporting requirements.	
Drawing Sets	Drawings are usually contained in sets for easier distribution and record keeping. Use the Drawing Sets log window to create a new set of drawings documents or add to an existing set. You can also print a report or a form. This can be used to group drawings for submittal to DOE for approvals and to group drawings by design phase.
Drawings	Use the Drawings log window to track drawings associated with the project. You can use the drawings module to track and attach new drawing documents, review drawing history via drawing revisions, and log, track, and update drawing information as they are created, received, and sent to and from project participants.
Submittal Packages	Organizing submittal items into packages enables you to review them at a summary or a detailed level. The Submittal Packages log window displays a one-line summary for each submittal package.
Submittals	Submittals are used to track reviews and approvals of drawings, samples and documents. With Contract Management, you always know where submittals are in the review process and who has responsibility for them. The submittal information includes who holds the submittal, how long they have held it, and whether it is overdue. Because submittals are seldom approved the first time around, the ball-in-court helps you track the submittals through every review cycle. You can also track multiple reviewers for each submittal review cycle.
Materials	The Materials Delivery log window enables you to record the date and quantity of deliveries. Contract Management calculates the value of delivered materials and the remaining balance so you always know the current delivery status. You can select and update daily reports using the information in this window. SDA is currently not using this module.
Daily Construction Reports	Use this document window to enter the history of project events and progress, including a description of physical conditions, a summary of the work accomplished at the job site, lists of resources used and delivered, a log of visitors to the site, and a report of any problems encountered that day. These details are important when you need to explain delays or justify costs, and can be used to defend against litigation.
Insurance	The Insurance module tracks individual insurance policies used to cover employees, automobiles, property, equipment, and so forth. SDA is currently not using this module.
Punch Lists	A punch list is a list of items that must be completed before a project can finish. Items can include repairing damages that occurred during construction, or reporting missing equipment. Each item in this list can represent either a single item or a collection of punch list items.

Modules	***Description Feature Functionality***
Change Order Management – Provides one location where you enter all necessary contract, contractor, and costing information about a change. At any stage of the process, you can see the current status of the change, including estimates, costs, documents, and responsibilities of all parties.	
Change Management	Contract Management's Change Management module provides a central location where you can monitor and control the change process to quickly ascertain the affect of changes on your projects' budgeted, committed, and actual costs. A Change Management document encompasses all of the change documents required during the change process, including documents sent to customers and subcontractors.
Final Change Documents (Log)	The Final Change Documents log window lists every change document. Change documents specify a redirection of plans, or introduce new items to the project. Changes also show approved increases or decreases in costs and contract allowances. Change Orders are created in Change Management.
Proposals	Proposal documents solicit a priced offer to perform a particular activity, or outline how much a specific change will cost and how long it will take. From this window, you can look at details of proposal documents, or open a proposal document to edit it. Proposal documents are created as part of the Change Management cycle.

IV. AUTO-NUMBERING OF NEW DOCUMENTS

When working in Contract Management, new documents are automatically assigned unique document numbers as they are created. Each time a new document is created, the new document's number is auto-incremented by Contract Management as "<last document number> +1".

For example, the first time that an RFI is created for a project, the number automatically assigned to the RFI will be 00001. The next RFI created will be assigned a number of 00002, the next will be assigned a number of 00003, and so on.

This numbering scheme is consistent across all Contract Management document types with the exception of Committed Contracts (which will be numbered in accordance with their numbers in SIMS) and Change Orders (which can be processed out of sequence if necessary). If it is necessary to alter a Change Order document number, remember that this field can only contain numbers – no alpha or special characters are permitted.

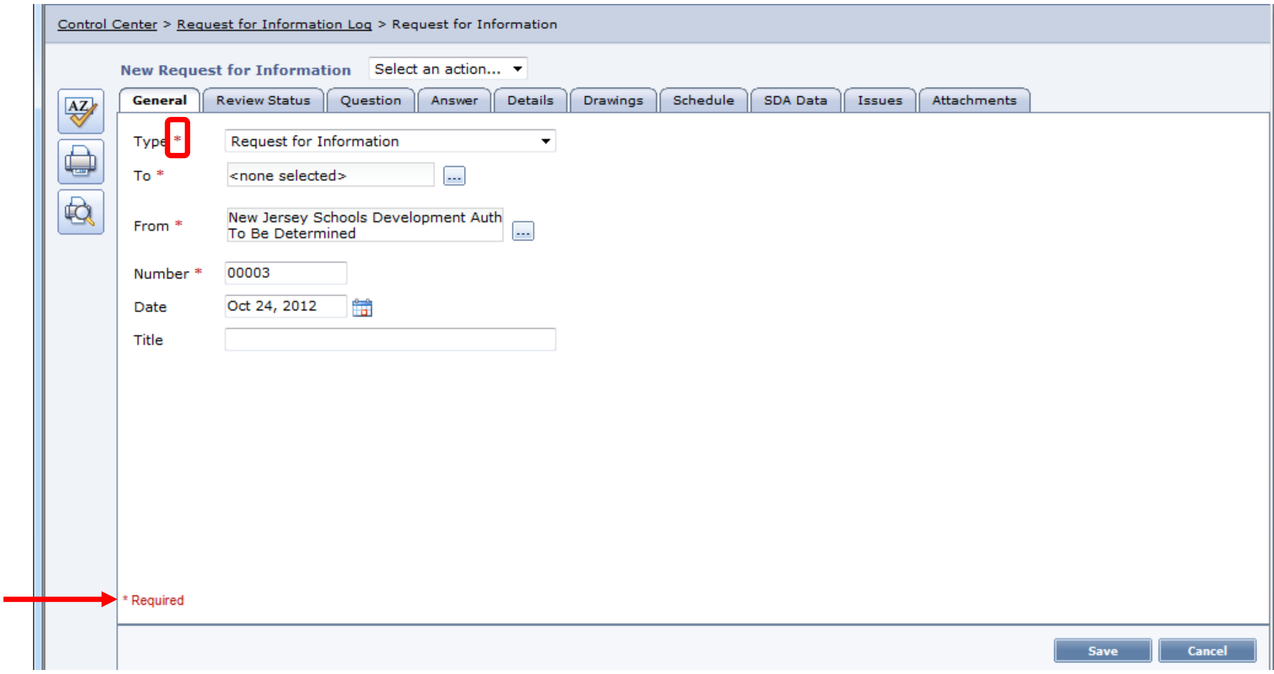
When viewing any of the document logs, you should see documents numbered beginning with 00001, with this number increasing by one (00002, 00003, 00004, etc.) with each new document created.

It is important to accept the automatically generated numbers for documents as they are created, with the exception of Change Orders as previously noted. The auto-incremented numbering system establishes a standard numbering scheme which requires no maintenance on the part of users, and also provides an easy way to establish the order in which documents were created.

V. REQUIRED FIELDS

Fields displayed in Contract Management with a red asterisk (*) are required fields. These fields must be completed before the document can be saved.

In the example below, an RFI's required fields are displayed. Notice that there is a key at the bottom of each screen that contains required fields.



If the required fields are not completed before attempting to save the document, Contract Management will highlight the missed field (as shown below), and will prompt the user to enter a value and save the document again.

A. Fields Common to all Contract Management Documents

1. **Ball-in-Court (BIC):** Used to determine the company and contact responsible for acting on an item. The contact set as the BIC for a document will see this document appear in their Actions list on the Control Panel when they log on to Contract Management. By default, the BIC is set to the contact which originally appears in the **To** field of a document.

2. **Priority:** May be set to High, Normal or Low (default is Normal). The priority for a document determines the manner in which the document will appear in the **Ball-In-Court** contact's Actions list on the Control Center.

3. **Status**: Indicates the status of the document being created. Newly created documents will have a status of **New Item** by default. This default should be accepted when creating documents. There are many statuses which are available for selection.

4. **Issues:** Once an issue is created in the Issues module, it can be linked to any document within that project. Additionally, issues can be created within a document. This allows users to cross-reference issues within a project.

5. **Attachments**: Allows for documents of any type (i.e., Word Documents, Excel Spreadsheets, PDF Files, DWG Files) to be attached to a Contract Management document. Other users can view the attached document, and can attach additional documents, but cannot replace the existing document. Attachments have no limitation on file size. If you need to add attachments after a document has been approved and saved, you must contact the SDA Project Manager for that particular project.

VI. VERSION DOCUMENT – NEW TO VERSION 13

VERSION DOCUMENT OVERVIEW

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

VII. CONTRACT MANAGEMENT HELP DESK INFORMATION

SDA has an e-mail address and telephone line to support end-users who have questions regarding Contract Management.

Telephone Number: (609) 943-4500
E-Mail Address: pehelpdesk@njsda.gov