State of New Jersey
Schools Development Authority

Section 4

Issues

Oracle Primavera

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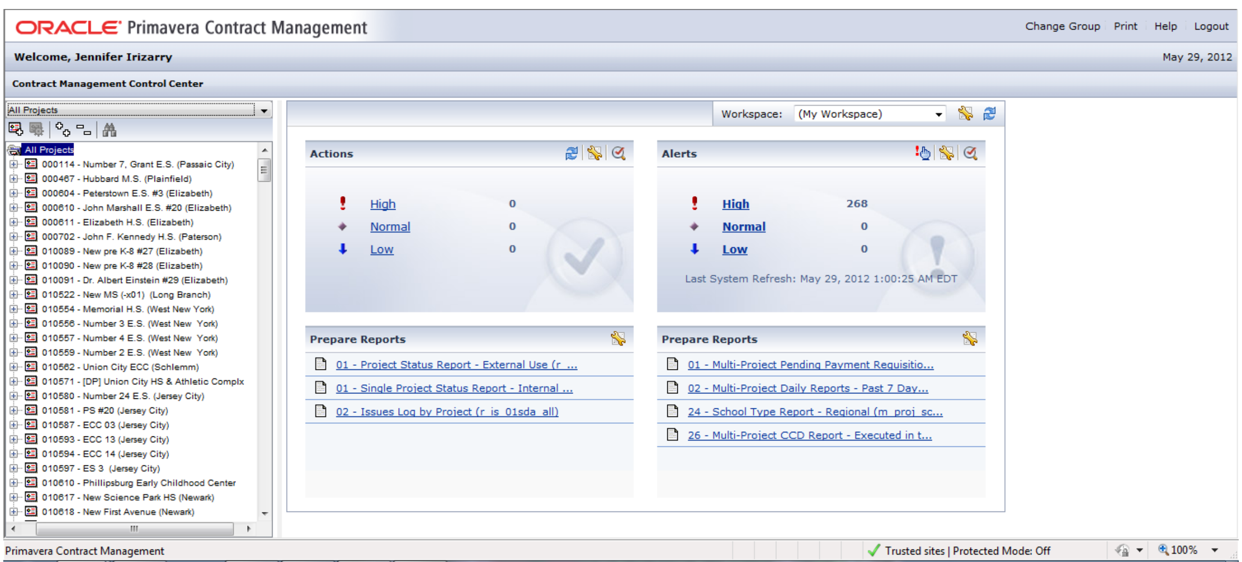
I. Issues Overview

Issues can encompass a wide range of project concerns, such as problems that must be resolved before a job is completed, or conditions that can lead to the creation of a Change Management document. Organizing project information using Issues enables you to quickly review each problem that may affect the project schedule or costs at completion.

Issues are created from the Issues Log. This manual describes how to create new Issues from the Issues Log. Issues can be linked to any document within a specific project and can also be created directly from a document. Instructions for performing these steps will be discussed in detail within the applicable Contract Management document.

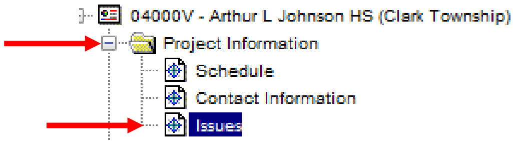
II. Create an Issue from the Issues Log

1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



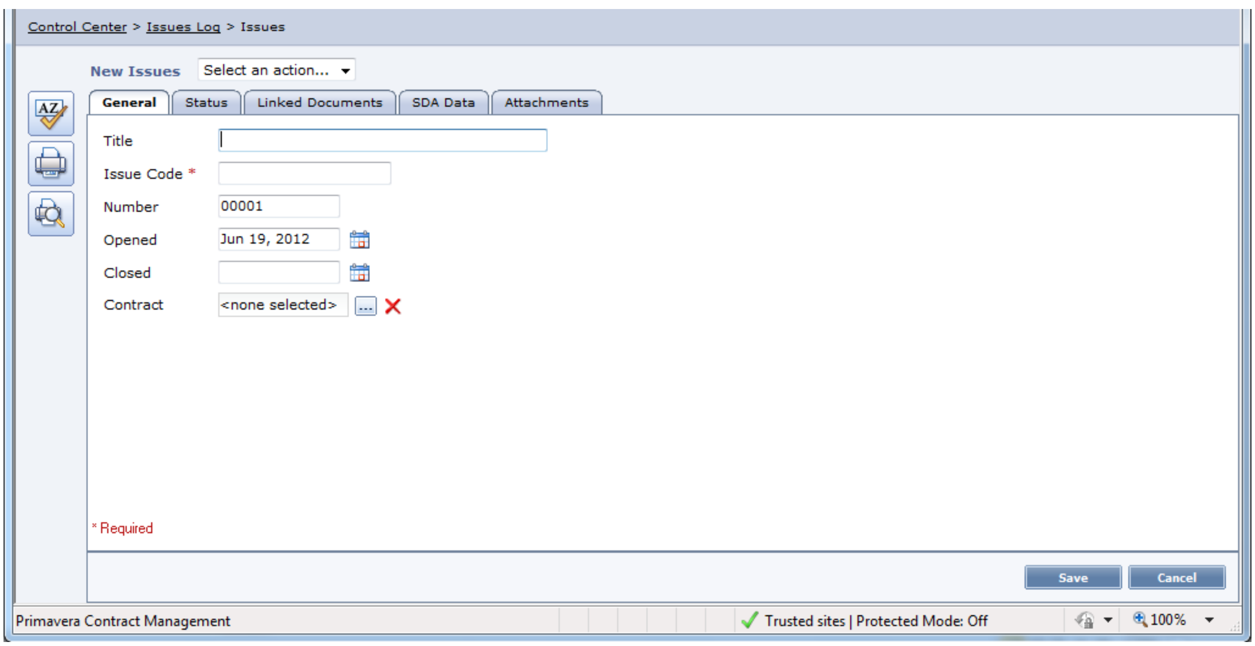
2. Select your desired project.

3. Open the **Project Information** folder (a list of modules will display) and click the **Issues** module.



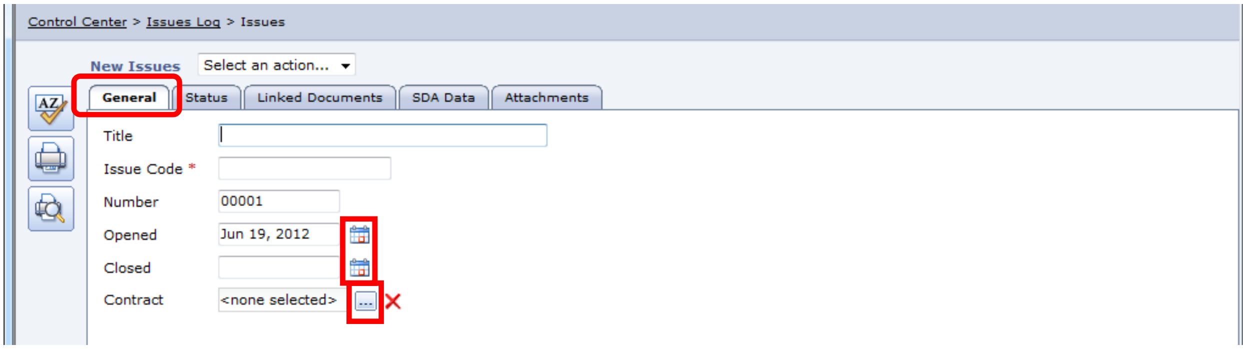
4. The **Issues log view** displays. Click the **Add Document** button to create a new Issue.

5. A blank Issue document displays.



The Issues document is divided into several sections:

A. General Tab

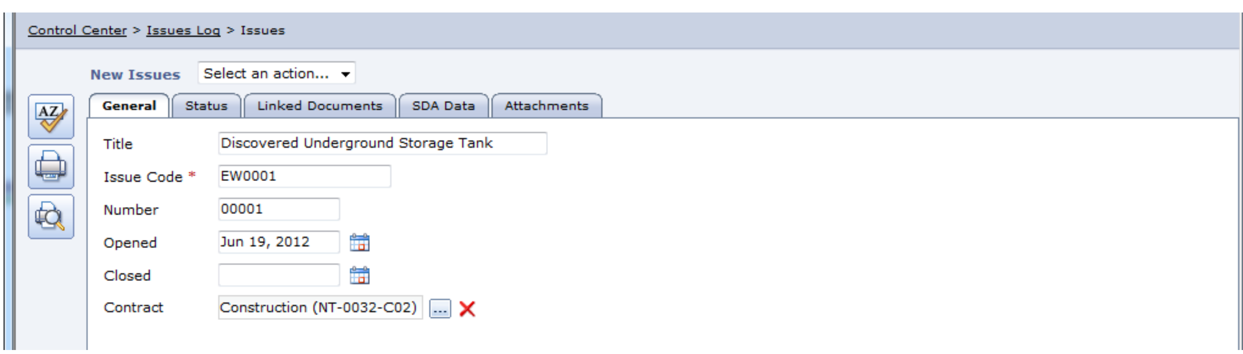


- **Title –** Enter a title for the Issue (49 character field).
- **Issue Code** – Enter a unique identifier for the Issue (6 character field). This is a required field. This information will be displayed in the Issue Name column in the log view and will help organize the Issues entered in this module. For example, Issues added by the CM could be prefaced with CM (ie-CM0001); Issues referencing the East wing in a building could be prefaced with EW (ie-EW0001).

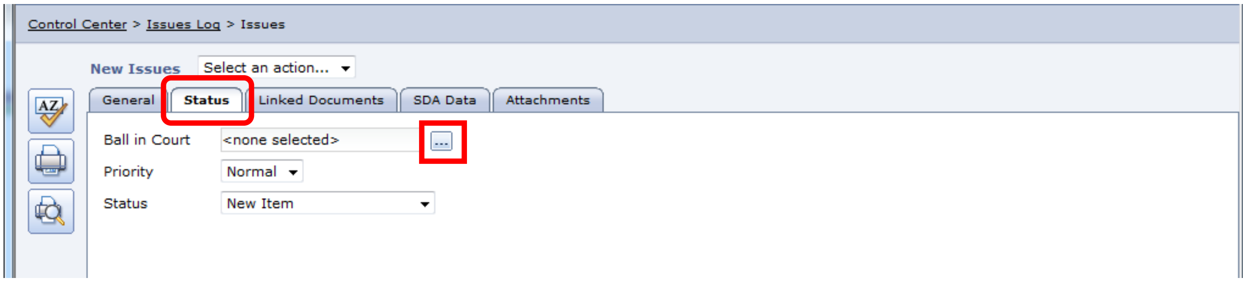
  Note: It is recommended that each project team should define and agree upon a standard coding format for their documented Issues.

- **Number –** Contract Management automatically assigns the next sequential number to a document. Do not edit this field.
- **Opened –** Defaults to the current date. Click the **calendar icon** to change this field as necessary.
- **Closed –** When the Issue is eventually closed, click the **calendar icon** to enter the date that the issue was closed.
- **Contract –** Click the **select** button to choose a contract.

An example of a completed section is shown:

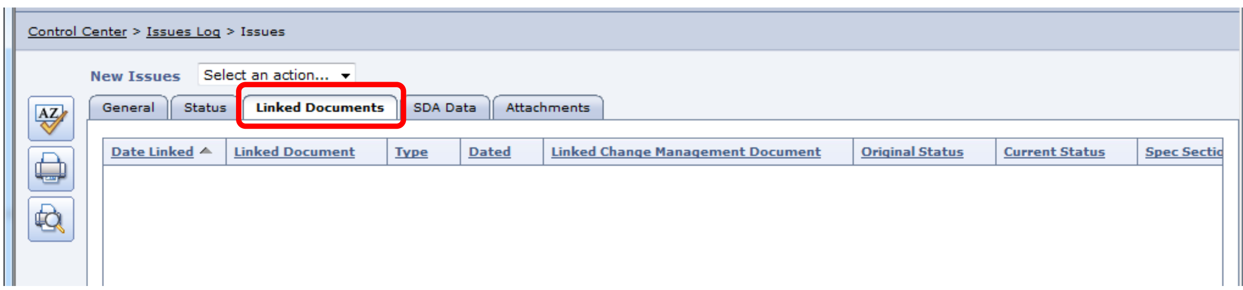


B. Status Tab



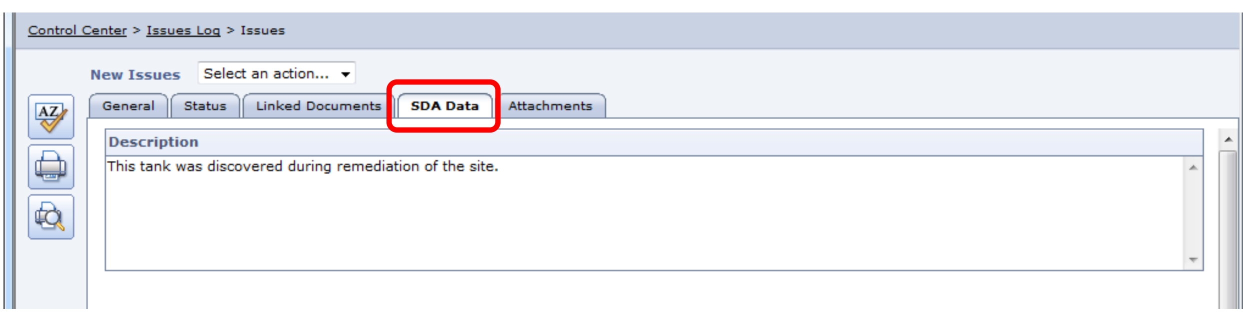
- **Ball in Court –** If desired, a responsible party can be set for this document by clicking the **select** button to the right of the field.
- **Priority – Normal** is the default, can be changed to **High** or **Low** as necessary.
- **Status – New Item** is the default. Use the pull down list to choose another option as needed. For example, when the Issue is complete, the Status should be changed to **Closed**.

C. Linked Documents Tab



- If this Issue is linked to other documents within this project, the documents will be listed in this section. Information cannot be manually entered in this section.

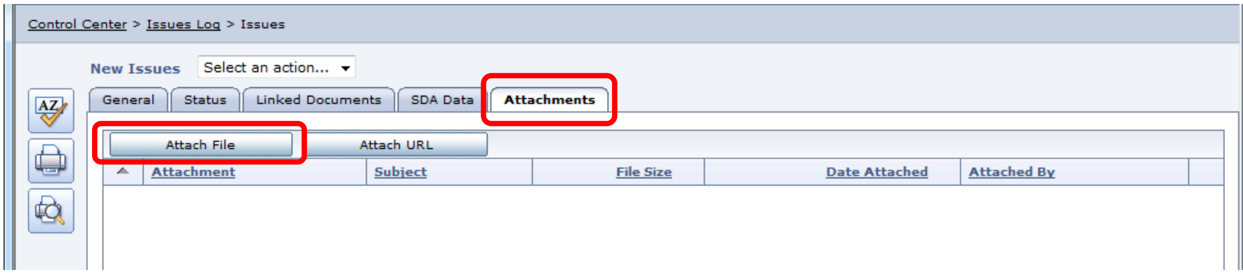
D. SDA Data Tab



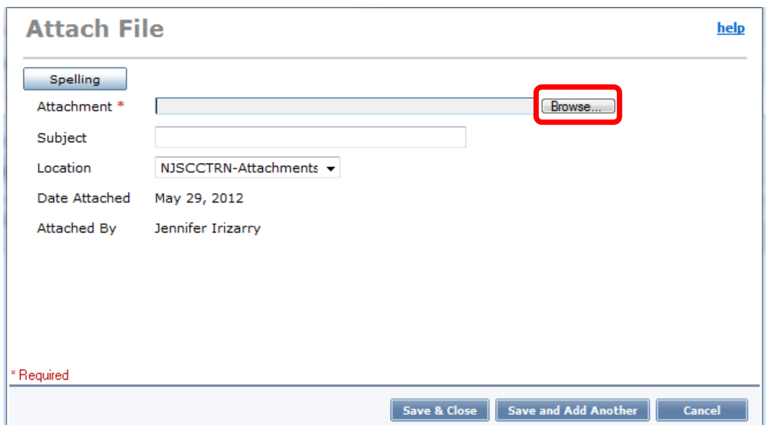
- **Description –** Enter any applicable details about the issue in this field (4000 characters).

E. Attachments Tab

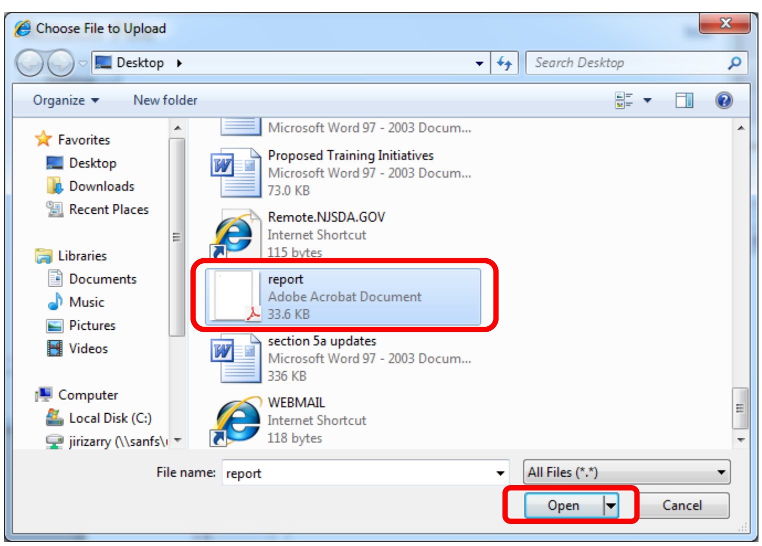
- To attach supporting documentation, click the **Attach File** button.



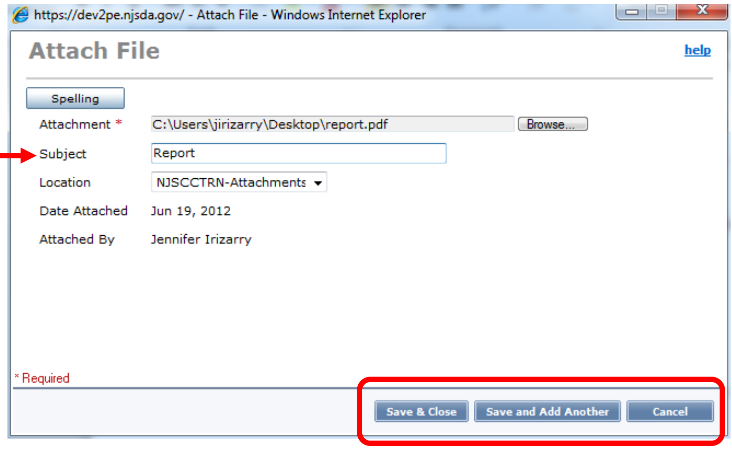
- Click the **Browse** button to navigate to the document you wish to attach.



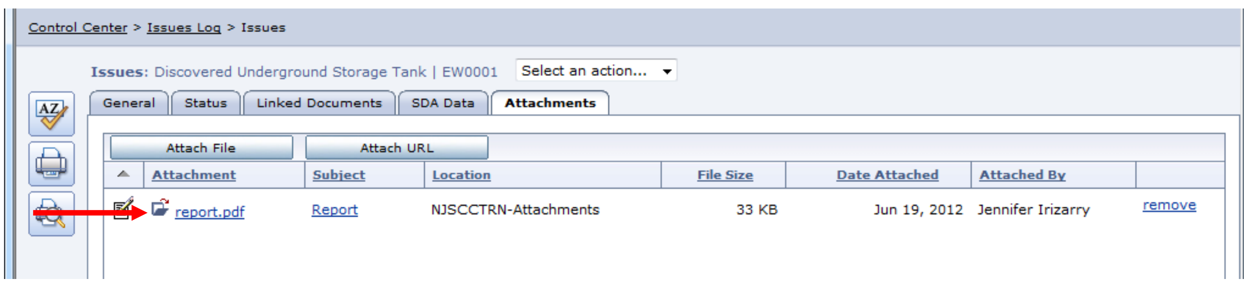
- The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



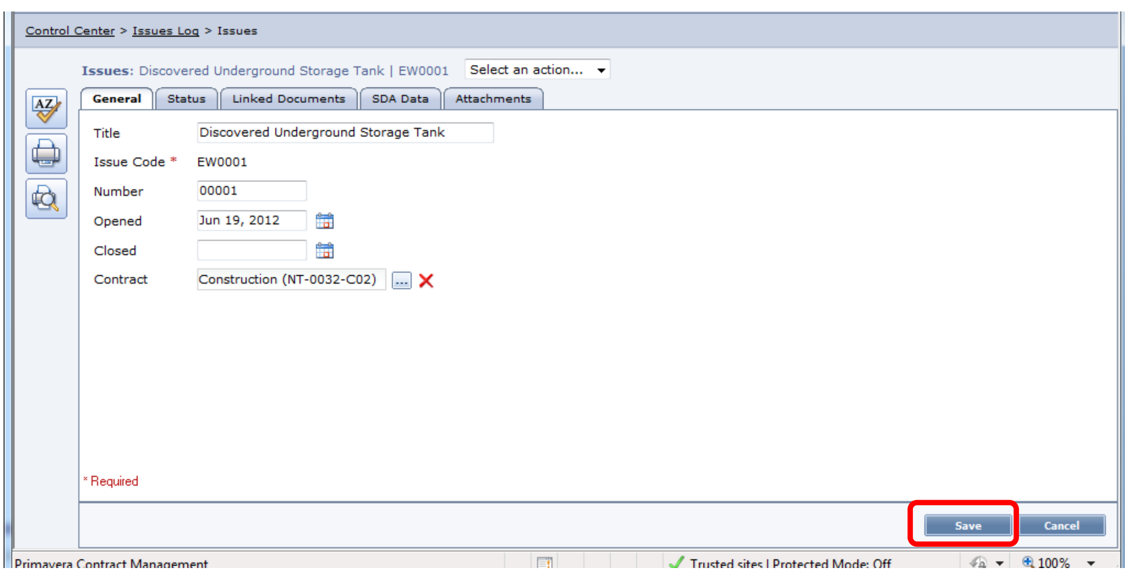
- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



- The attached file displays in the **Attachments** section.



When all fields are completed, click the **Save** button at the bottom of the document window.



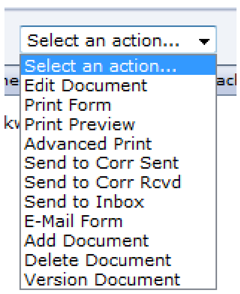
III. Version Document

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.

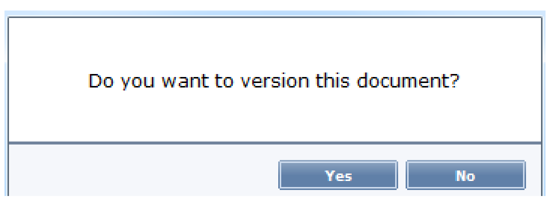
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

A. Create a Document Version

1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.

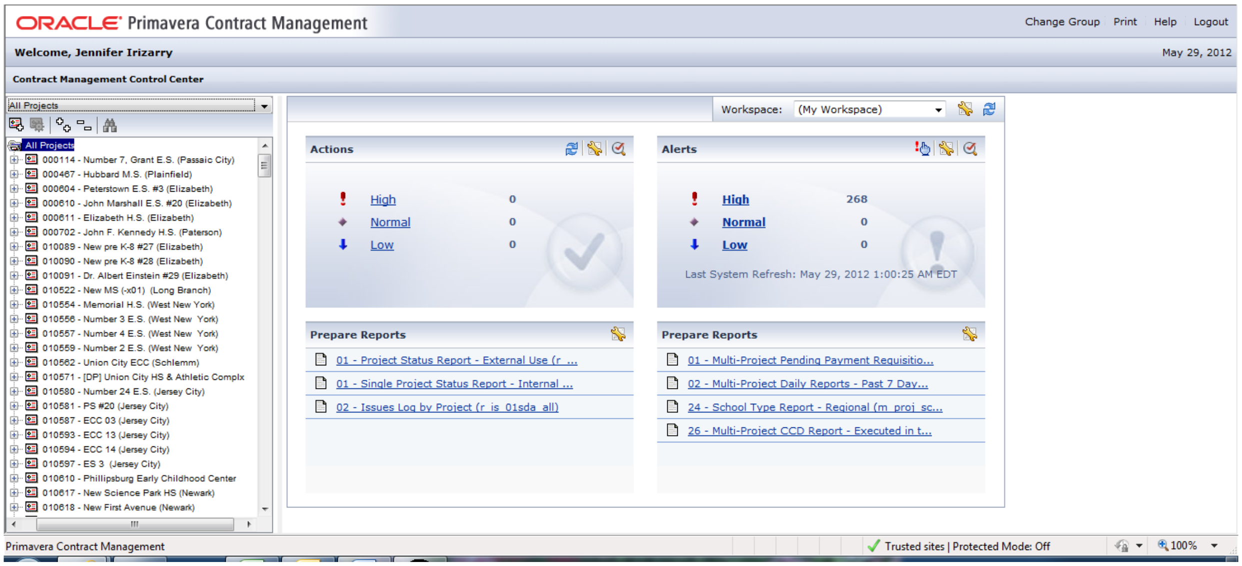


3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.

IV. Printing Issue Information

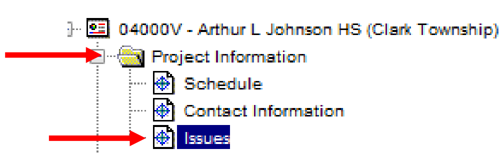
A. To print Issue information

1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).

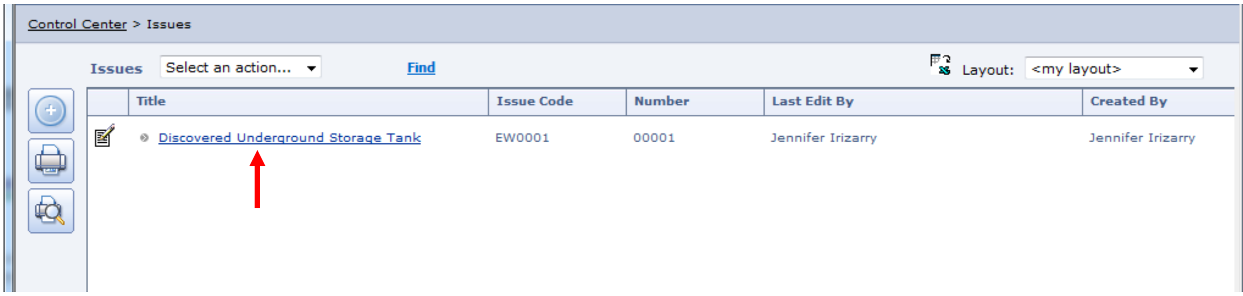


2. Select your desired project.

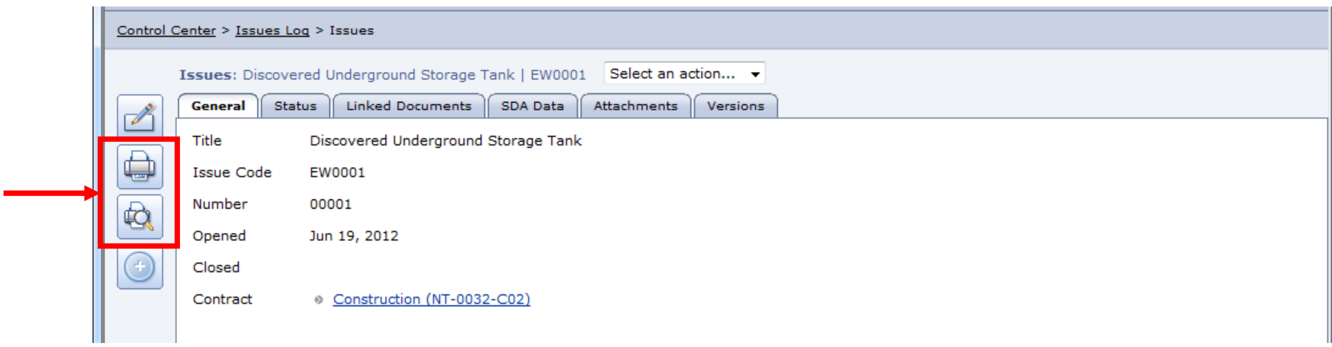
3. Open the **Project Information** folder (a list of modules will display) and click the **Issues** module.



4. The **Issues log view** displays. Click a **blue title link** to open an Issue.

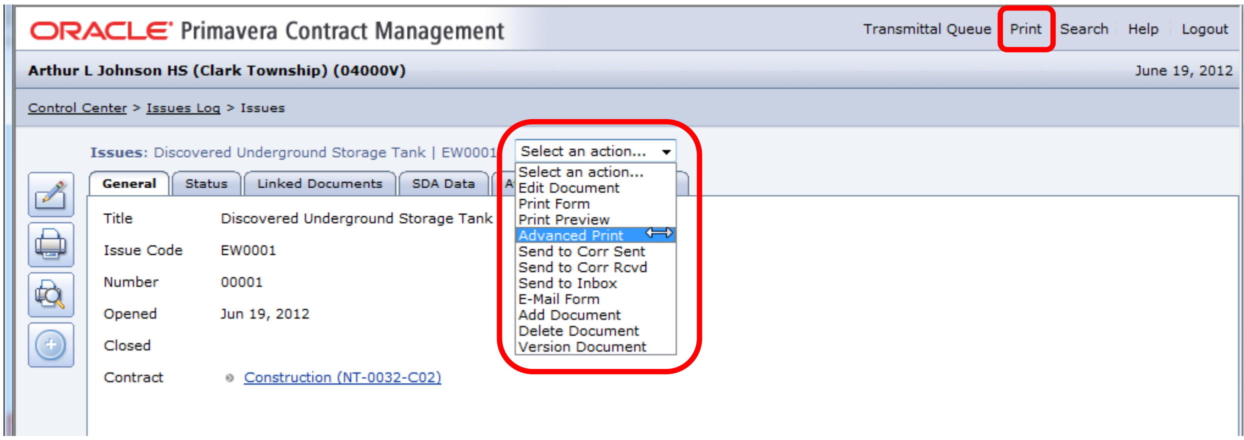


5. The **Issue** document displays. Click the **Print Form** button on the left side of the screen to send the output directly to a printer or to create an Adobe PDF. Click the **Print Preview** button to see the document before sending it to a printer or creating an Adobe PDF.

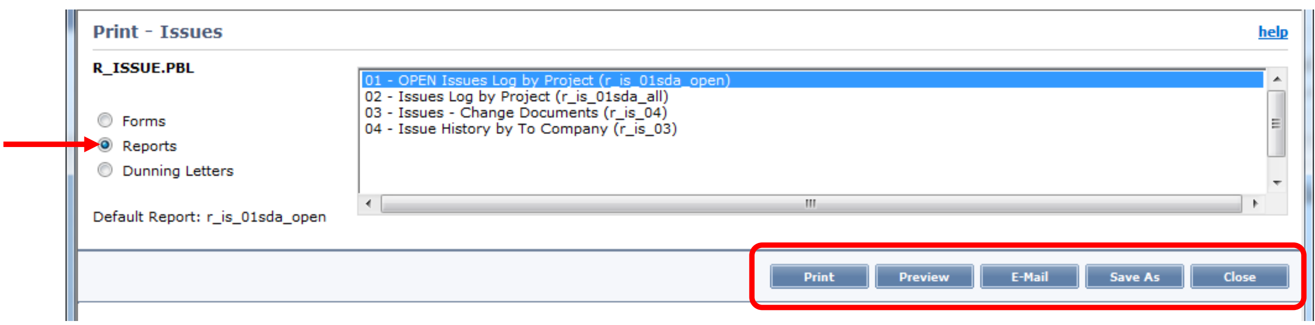


B. Advanced Reports

1. With the Issue document open, click the drop down box on the **Select an action** menu on the top of the screen and select the **Advanced Print** option. You can also select the **Print link** on the upper right side of the screen.



2. The **Print – Issues** window displays. Click the **Reports** radio button to display the list of reports.



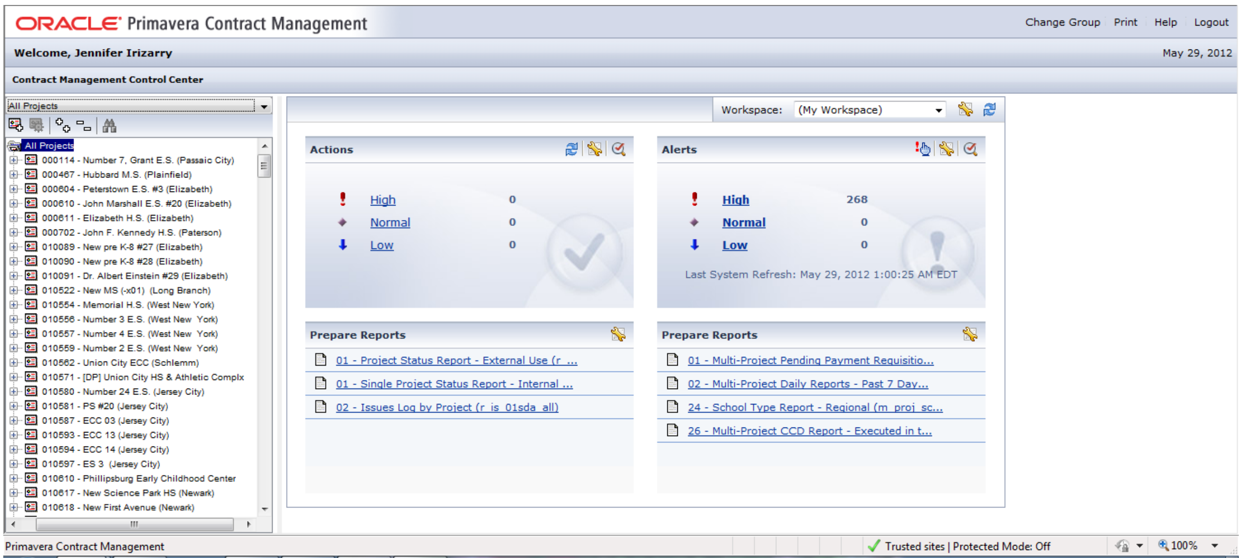
Choose the desired report from the report window, then click one of the following buttons.

- Click **Print** to get a printed output.
- Click **Preview** to see your output displayed in the window.
- Click **E-Mail** to electronically send the output to another user.
- Click **Save As** to save the output to your local computer or other desired location.
- Click **Close** when finished to return to the document.

V. Closing an Issue

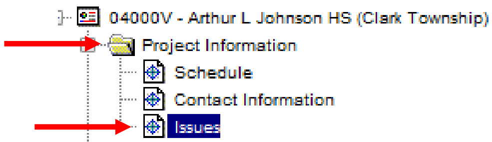
Once an Issue has been completed, it can be closed or cancelled.

1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).

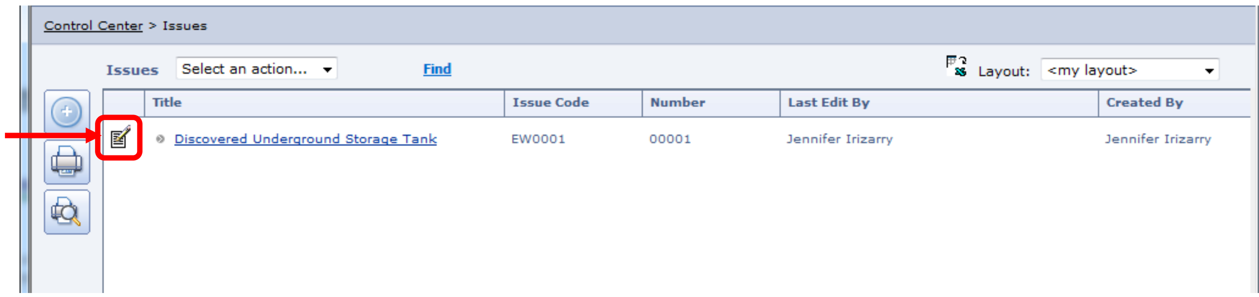


2. Select your desired project.

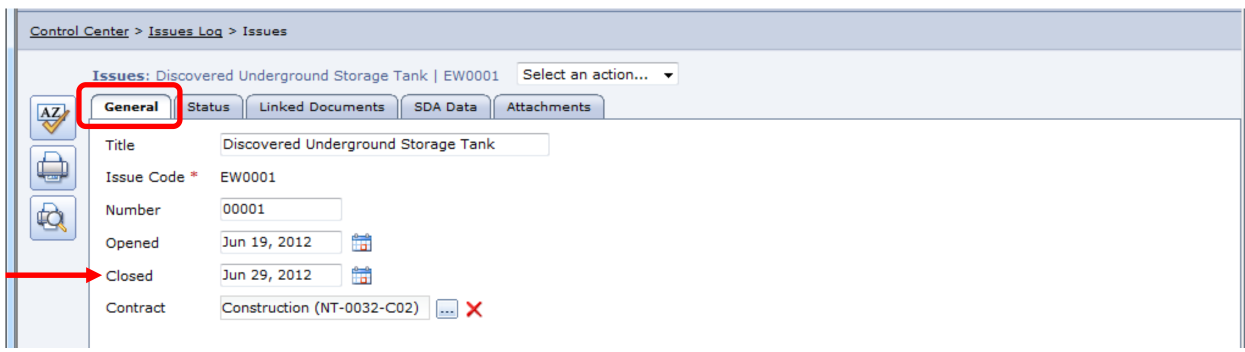
3. Open the **Project Information** folder (a list of modules will display) and select **Issues**.



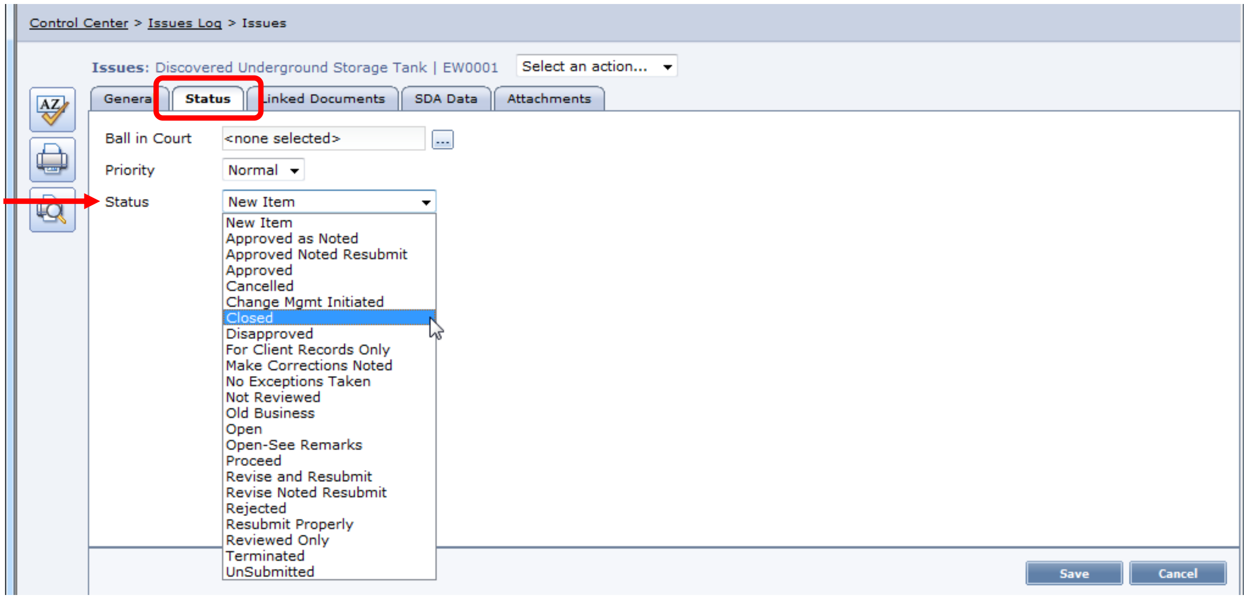
4. The **Issues Log View** displays. Click the **edit icon** to the left of the Issue name that will be closed.



5. The Issue document displays. To close the Issue, enter the date the Issue was completed in the **Closed** field on the **General** tab.



6. Click the **Status** tab. Click the pull down list on the **Status** field to change the status of the document to **Closed** or **Cancelled**. In the example shown, Closed was selected.



7. Once the status has been selected, click the **Save** button to save your changes.