



STATE OF NEW JERSEY

SCHOOLS DEVELOPMENT AUTHORITY

Section 10

Letters

ORACLE Primavera

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I. LETTERS

A. Overview

Contract Management utilizes Microsoft Word (version 2000 or greater) to create letters. After setting the date, To, From and Subject, then selecting a template (as described below), Contract Management automatically launches Microsoft Word and populates the document with information from Contract Management. All letters are saved back to the Contract Management database.

Available letter templates include:

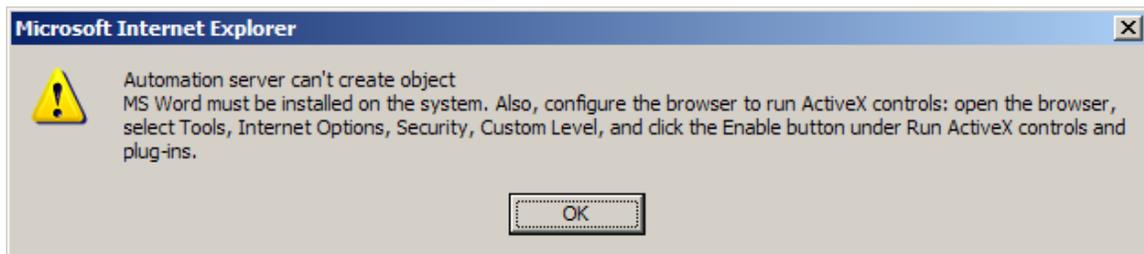
Name	Description	Level
NJSDA standard	Standard NJSDA letterhead format	Group
Blank Template (No logo)	Standard letter format with no logo	Group

Additional templates can be created if necessary. Please contact the SDA Primavera Help Desk at pehelpdesk@njsda.gov.

B. Internet Explorer Settings

It is recommended that you check the Internet Explorer settings described below before creating letters. This will help avoid any possible errors when attempting to open Microsoft Word during the letter creation process.

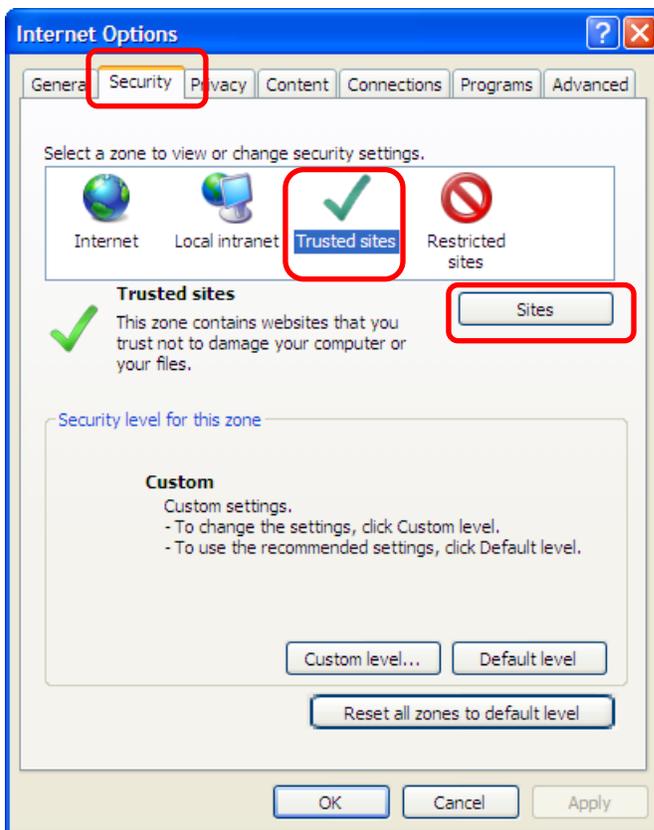
1. If you try to generate a letter and receive the following error message, you must add the URL <http://pe.njsda.gov> to **Trusted Sites Zone (bookmarks)**.



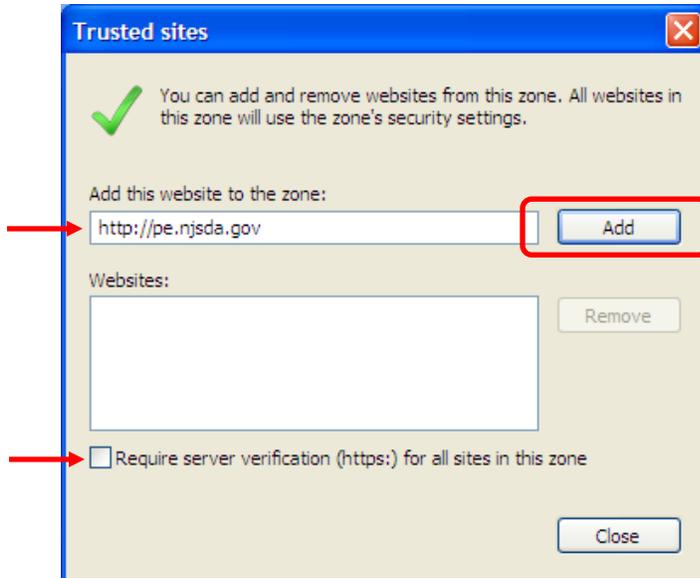
2. With Internet Explorer open, go to **Tools -> Internet Options** from the toolbar at the top of the screen.



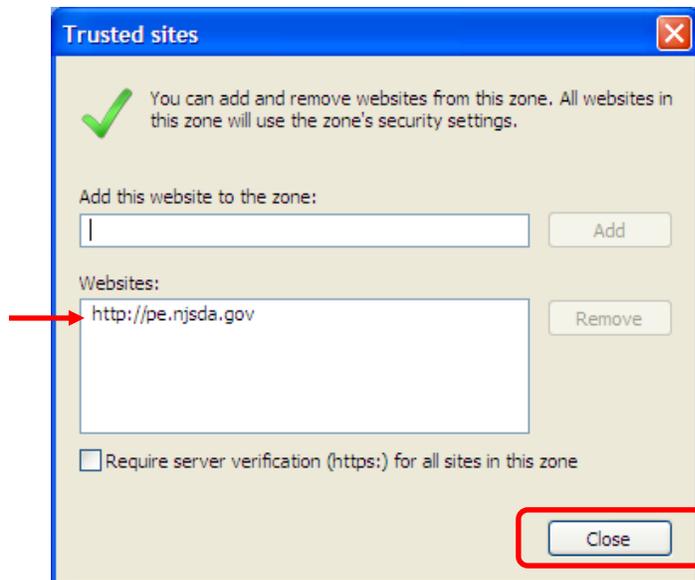
3. On the **Internet Options** dialog box, click the **Security** tab, then select the **Trusted Sites** icon (green check mark). Click the **Sites** button.



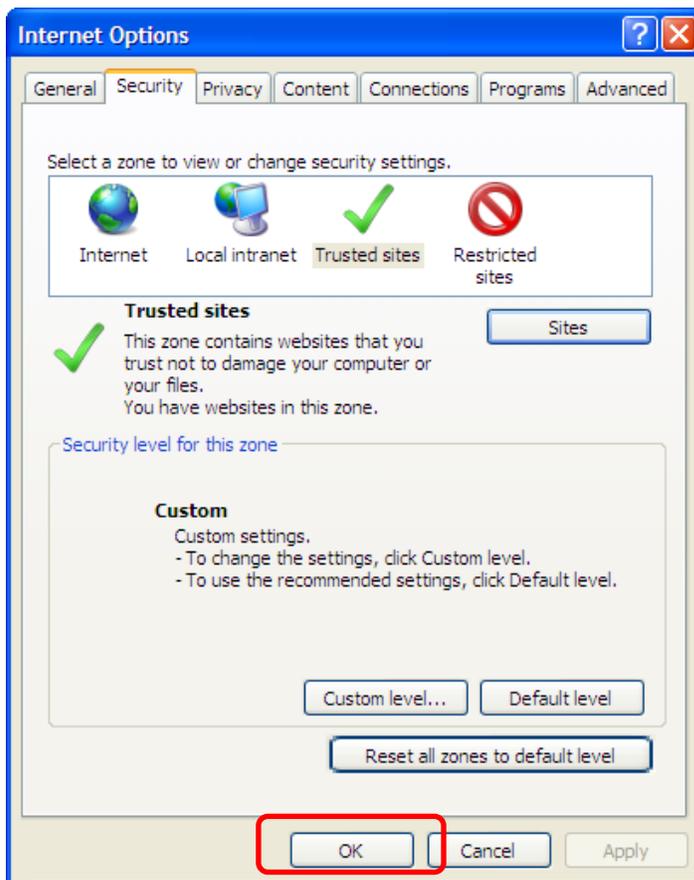
4. On the **Trusted sites** dialog box, uncheck the **Require server verification (https) for all sites in this zone** checkbox at the bottom of the screen. The Contract Management URL will be displayed in the option box for **Add this website to the zone**. Click the **Add** button to add Contract Management to your trusted sites.



5. The Contract Management URL will be moved under the **Websites** box. When completed, click the **Close** button.



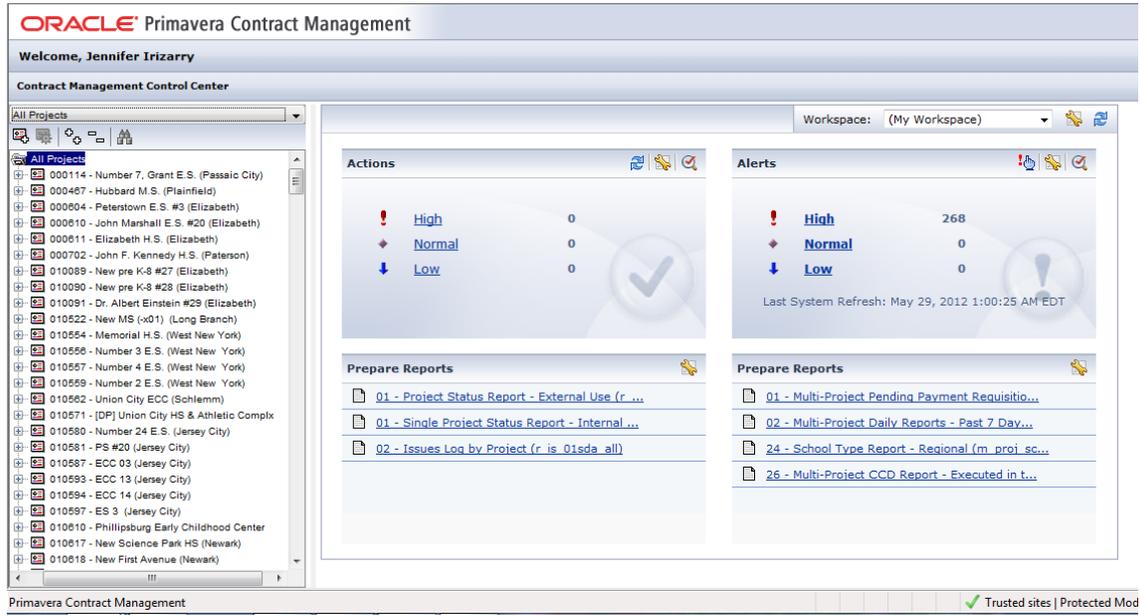
6. Click the **OK** button to accept the changes on the Internet Options screen. You will need to close and re-open your browser in order for the changes to take affect.



7. If you still experience problems using Microsoft Word within Contract Management, contact the SDA Primavera Helpdesk (pehelpdesk@njsda.gov) to assist in troubleshooting your Internet Explorer settings.

II. CREATING LETTERS

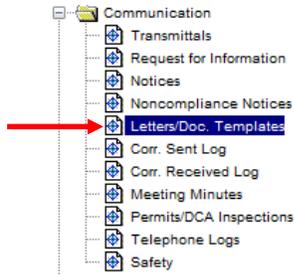
1. Once logged into Primavera, the **Contract Management Control Screen** displays (as shown).



2. Select your desired project.



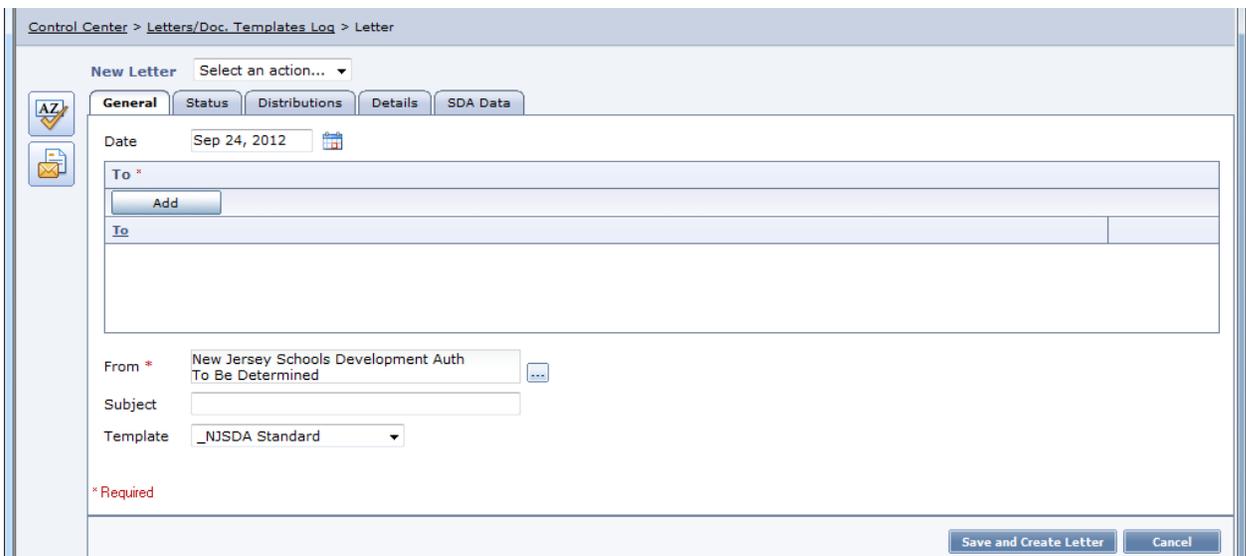
3. Open the **Communication** folder (a list of modules displays) and select the **Letters/Doc. Templates** module.



- The **Letters/Doc Templates** log view displays. Click the **Add Document** button to begin the letter creation.



- A blank Letter displays. The Letter document is divided into several sections:



A. General Tab

New Letter Select an action...
AZ
General Status Distributions Details SDA Data
Date Sep 24, 2012
To *
Add
To
From * New Jersey Schools Development Auth To Be Determined
Subject
Template _NJSDA Standard
* Required

- **Date** – Click the calendar icon to enter the date of the letter.
- **To** – Click the **Add** button to select the desired parties from the contact list. Selecting more than one company will create multiple letters (each listed individually on the Letter Log). You may add as name names in the To field as is required. This is a required field.
- **From** – Click the **select button** next to the field to choose the desired name from the contact list
- **Subject** – Enter a subject or brief description (36 character limit)
- **Template** – Select a template from the drop down list. Available options include NJSDA Standard template or a Blank template with no logo.

Additional templates can be created if necessary. Please contact the Primavera System Administrator via the SDA PE Help Desk email address (pehelpdesk@njsda.gov).

An example of a completed section is shown.

New Letter Select an action...
AZ
General Status Distributions Details SDA Data
Date Sep 24, 2012
To *
Add
To
William Costello (Epic Management, Inc.) remove
From * New Jersey Schools Development Auth Aaron Goss
Subject Report Submissions
Template _NJSDA Standard
* Required

B. Status Tab

The screenshot shows the 'New Letter' form with the 'Status' tab selected. The form has a breadcrumb trail: 'Control Center > Letters/Doc. Templates Log > Letter'. Below the breadcrumb, there is a 'New Letter' section with a 'Select an action...' dropdown. The 'Status' tab is highlighted with a red box. The form contains three fields: 'Ball in Court' with a dropdown menu showing '<none selected>' and a '...' select button; 'Priority' with a dropdown menu set to 'Normal'; and 'Status' with a dropdown menu set to 'New Item'. At the bottom right, there are two buttons: 'Save and Create Letter' and 'Cancel'.

- **Ball in Court** – click the **select button** next to the field to choose the name from the contact list
- **Priority** – Defaults to **Normal**, but can be changed to **High** or **Low** if desired
- **Status** - Default is **New Item**

C. Distributions Tab

The screenshot shows the 'New Letter' form with the 'Distributions' tab selected. The breadcrumb trail is 'Control Center > Letters/Doc. Templates Log > Letter'. Below the breadcrumb, there is a 'New Letter' section with a 'Select an action...' dropdown. The 'Distributions' tab is highlighted with a red box. The form contains an 'Add' button, which is also highlighted with a red box. Below the 'Add' button, there is a 'To' field with a table structure for adding recipients.

Click the **Add** button to select a Company/Contact to distribute a copy of the letter. Choose the desired contact by clicking the **select** link to the left of the name. Click **Save** when completed. Contract Management will include the company and contact on the CC section of the letter.

D. Details Tab

The screenshot shows the 'New Letter' form with the 'Details' tab selected. The form contains the following fields:

Field	Value
Time	10:50
Due Date	Oct 8, 2012
Responded Date	
Contract	<none selected>
Reference	
Enclosures	

Buttons at the bottom: Save and Create Letter, Cancel.

- **Time** – Contract Management displays the current system time, edit as necessary
- **Due date** – Automatically calculates 14 days from letter date. This can be changed as necessary by clicking the calendar icon next to the field.
- **Responded date** – When a response to this letter is received, enter the response date by clicking the calendar icon next to the field.
- **Contract** – Select a contract to reference by clicking the select button.
- **Reference** – Add additional references (optional) (80 character limit).
- **Enclosures** – Add any enclosure information (36 character limit).

An example of a completed **Distributions** section is shown.

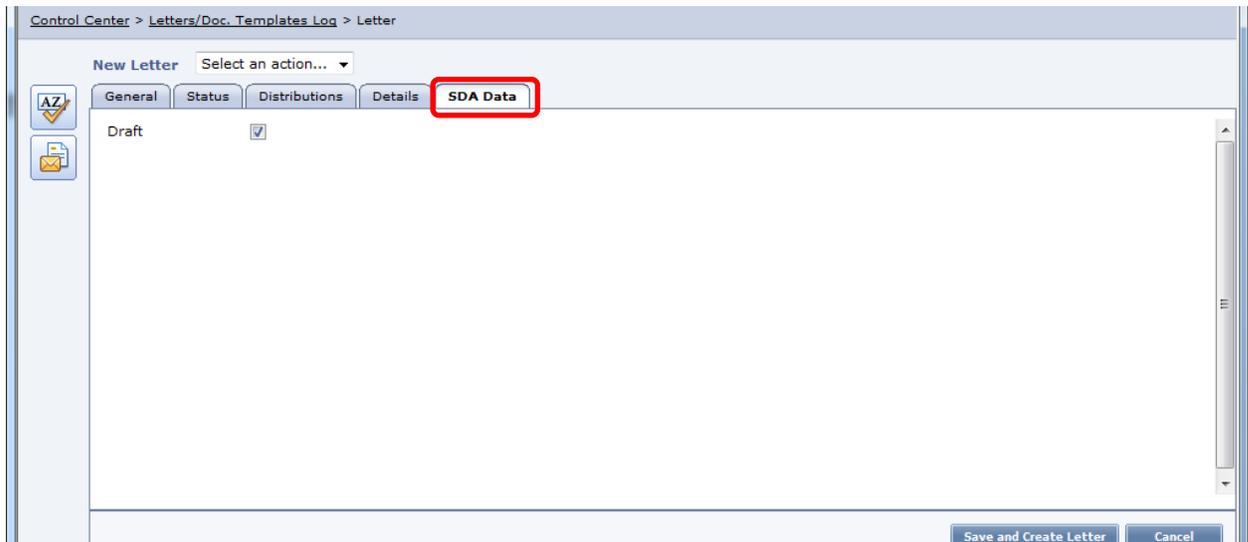
The screenshot shows the 'New Letter' form with the 'Distributions' tab selected. The form contains the following fields:

Field	Value
Time	10:50
Due Date	Oct 8, 2012
Responded Date	
Contract	Construction (NT-0032-C02)
Reference	
Enclosures	Report A

Buttons at the bottom: Save and Create Letter, Cancel.

E. SDA Data Tab

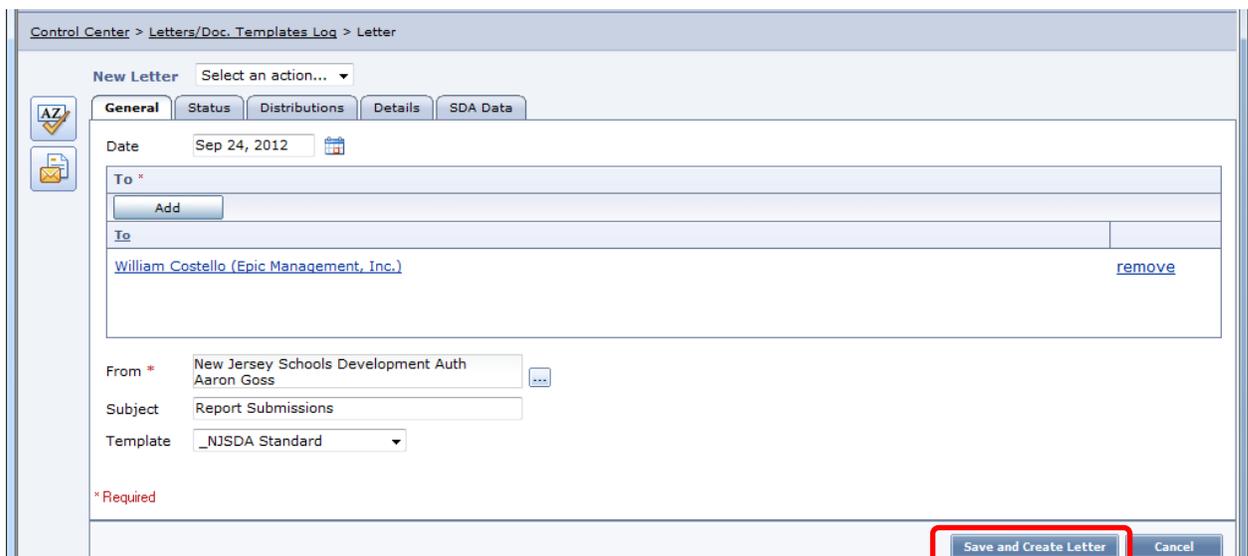
All letters should be in **Draft** status until the final letter with signatures is signed, scanned, and attached to the Contract Management letter. Check the **Draft** check box to indicate a draft.



The screenshot shows the 'New Letter' form in a web application. The breadcrumb trail is 'Control Center > Letters/Doc. Templates Log > Letter'. The form has a 'New Letter' header with a 'Select an action...' dropdown. Below the header are five tabs: 'General', 'Status', 'Distributions', 'Details', and 'SDA Data'. The 'SDA Data' tab is highlighted with a red box. In the 'Draft' section, there is a checked checkbox. At the bottom right, there are two buttons: 'Save and Create Letter' and 'Cancel'.

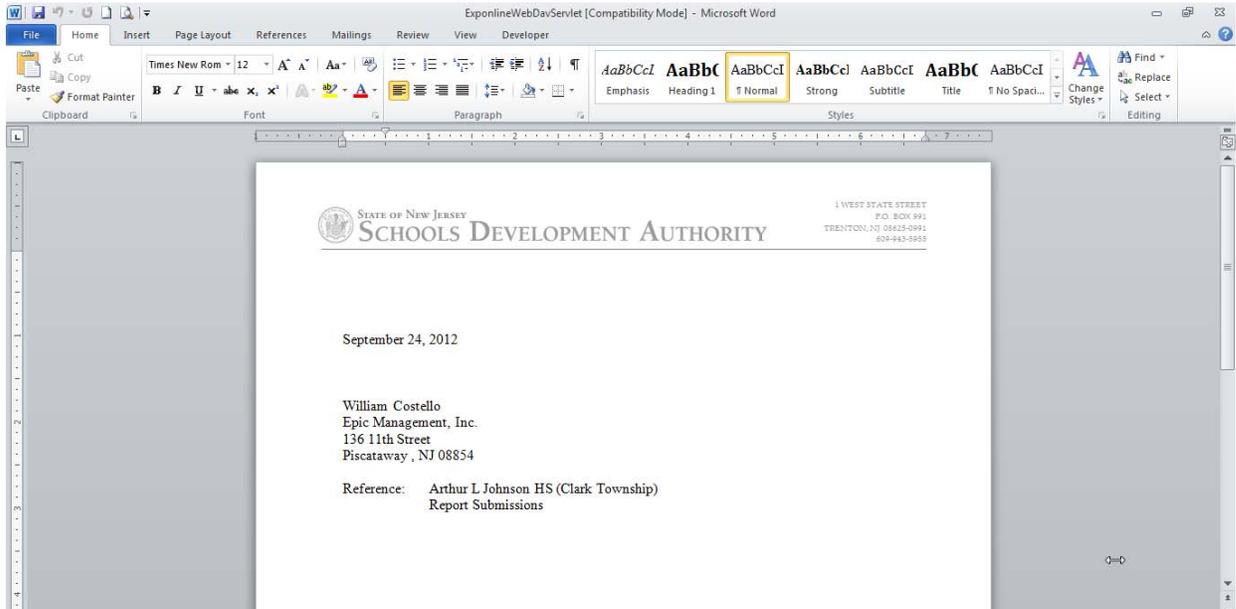
F. Generating the Letter

1. When all options are entered, click the **Save and Create Letter** button at the bottom of the screen to launch Microsoft Word and enter the body of the letter.

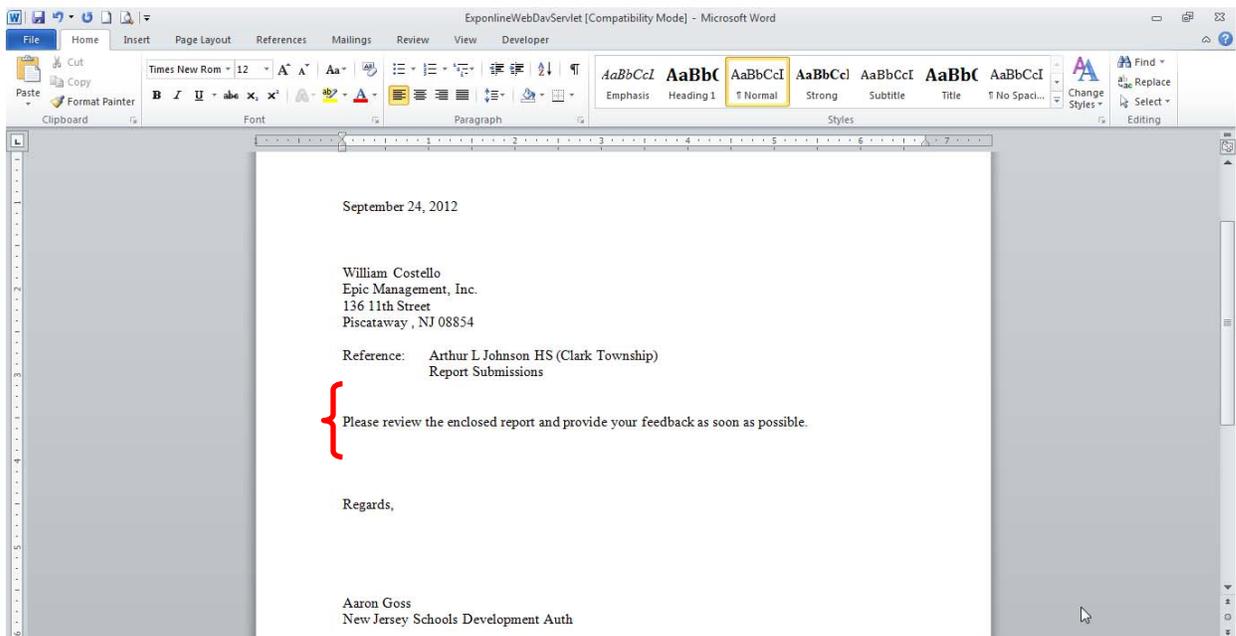


The screenshot shows the 'New Letter' form with the 'General' tab selected. The breadcrumb trail is 'Control Center > Letters/Doc. Templates Log > Letter'. The form has a 'New Letter' header with a 'Select an action...' dropdown. Below the header are five tabs: 'General', 'Status', 'Distributions', 'Details', and 'SDA Data'. The 'General' tab is selected. The form contains the following fields: 'Date' (Sep 24, 2012), 'To *' (with an 'Add' button), 'To' (with a 'remove' link), 'From *' (New Jersey Schools Development Auth, Aaron Goss), 'Subject' (Report Submissions), and 'Template' (_NJSDA Standard). At the bottom right, there are two buttons: 'Save and Create Letter' and 'Cancel'. The 'Save and Create Letter' button is highlighted with a red box.

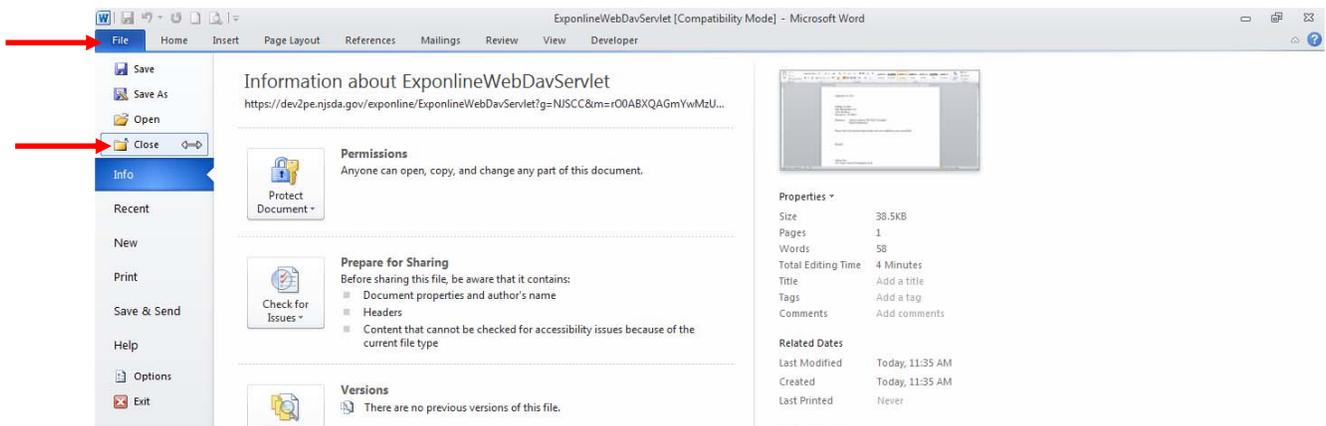
- If you receive an error message, follow the steps as outlined on page 3 of this manual to check your Internet settings. If Microsoft Word still does not open, contact the SDA Primavera Helpdesk (pehelpdesk@njsda.gov) to assist in troubleshooting your Internet Explorer settings.
- If no errors are encountered, the letter will open in Microsoft Word. Contract Management fills in the addresses and project information defined in the selected letter template. All other completed selections will be displayed as well. Note: the example shown uses Word version 2010.



- To complete the letter, type in your desired information in the body of the letter. Do not change any populated information. A completed example is shown.



- To close Microsoft Word and save the letter in Contract Management, choose **File -> Close** from the ribbon.



- Select the **Yes** button on the dialog box to save the letter.



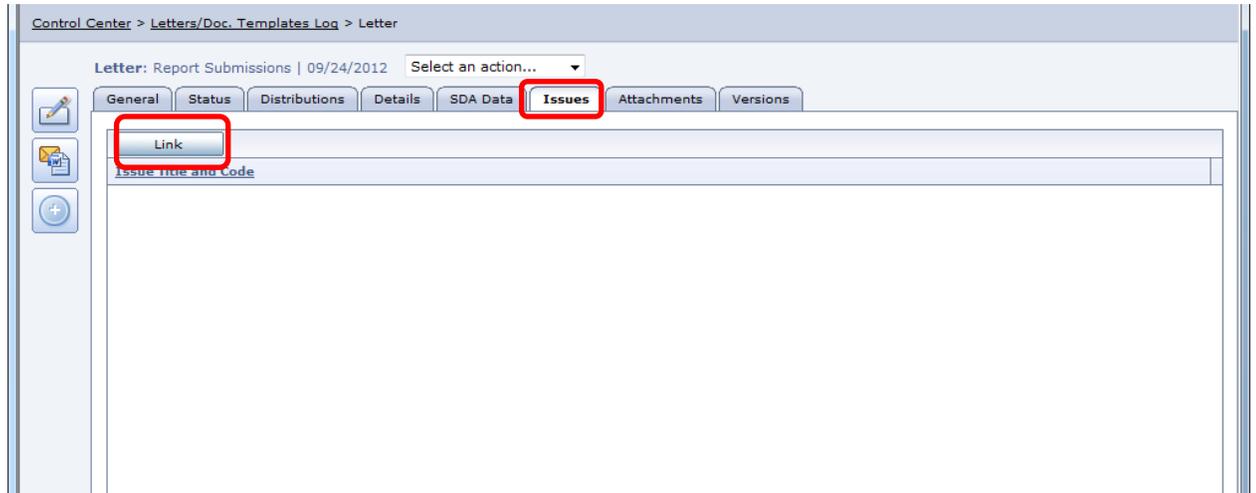
- Return to Contract Management. The next time you open the letter in Contract Management it will reflect your changes.



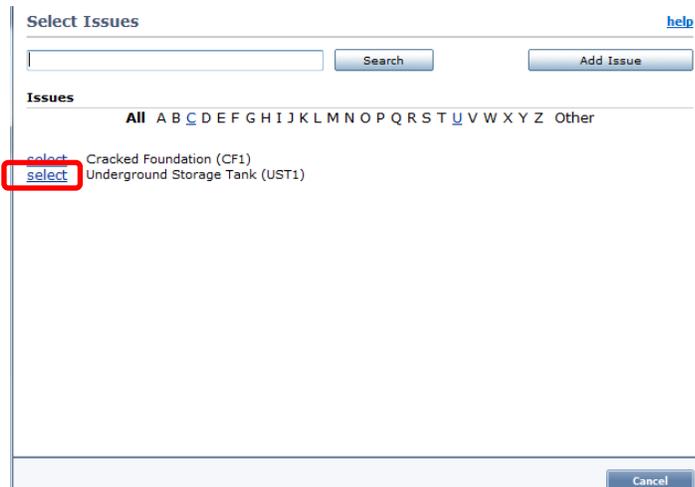
Additionally, two tabs (Issues and Attachments) now display on the document and can be populated.

G. Issues Tab

If this Letter relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button.



The **Select Issues dialog box** displays. Locate your desired issue and click the **select** link to the left of the issue title to link it to the letter. Once you click the select link, you will return to the letter.



An example of a completed section is shown:

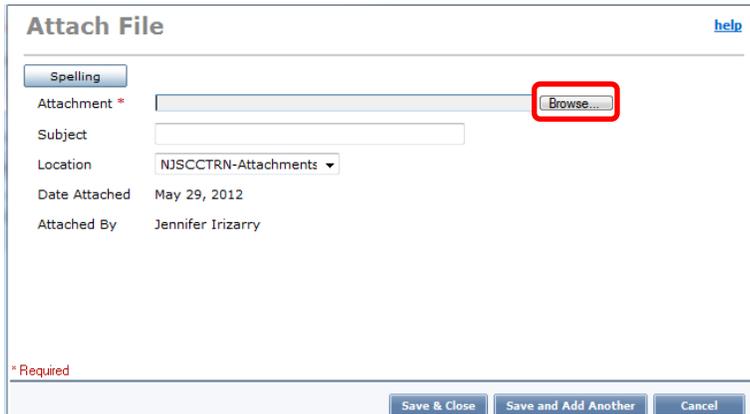


H. Attachments Tab

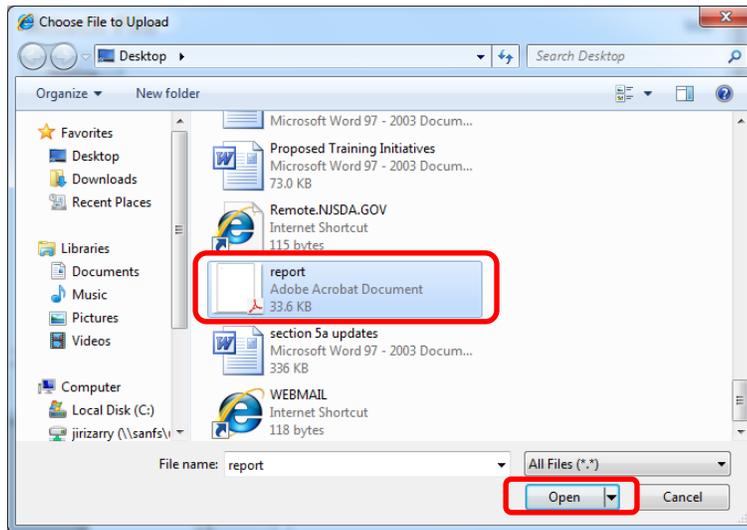
To attach supporting documentation, click the **Attach File** button.



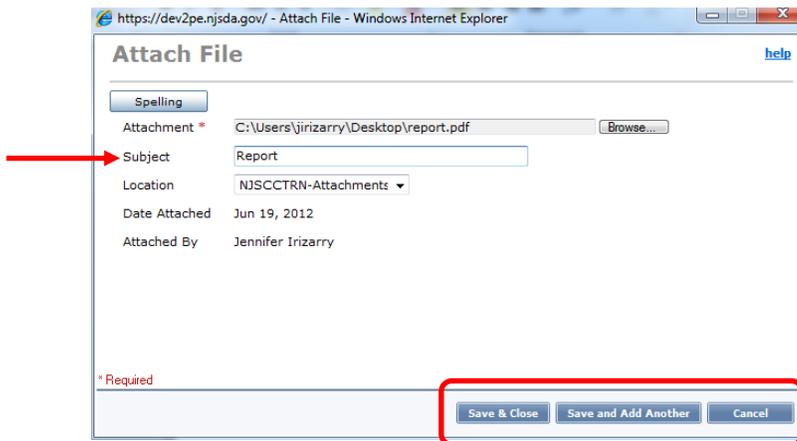
Click the **Browse** button to navigate to the document you wish to attach.



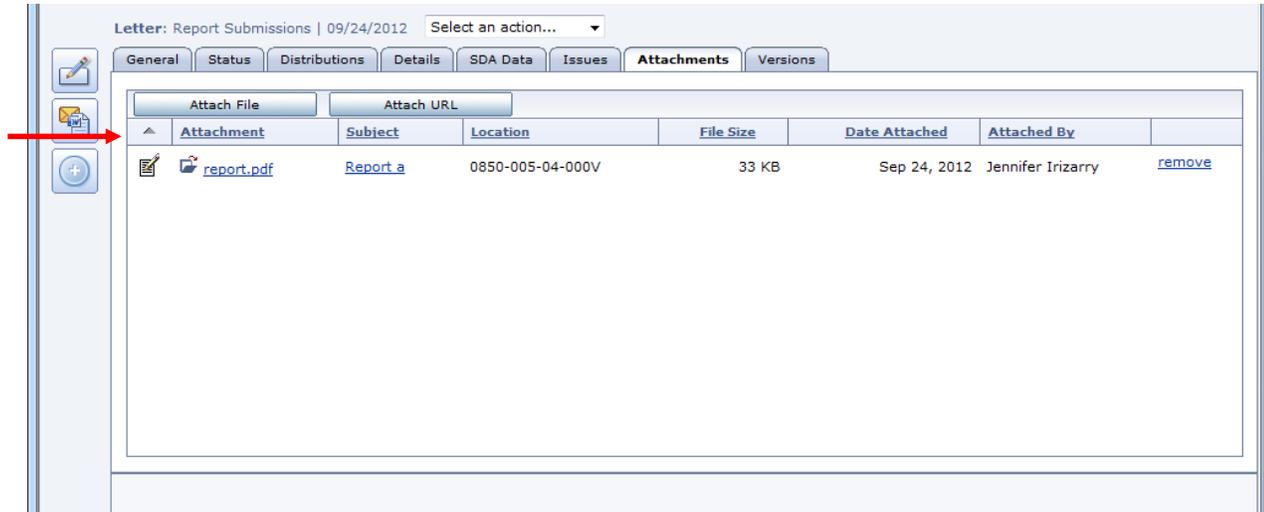
The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



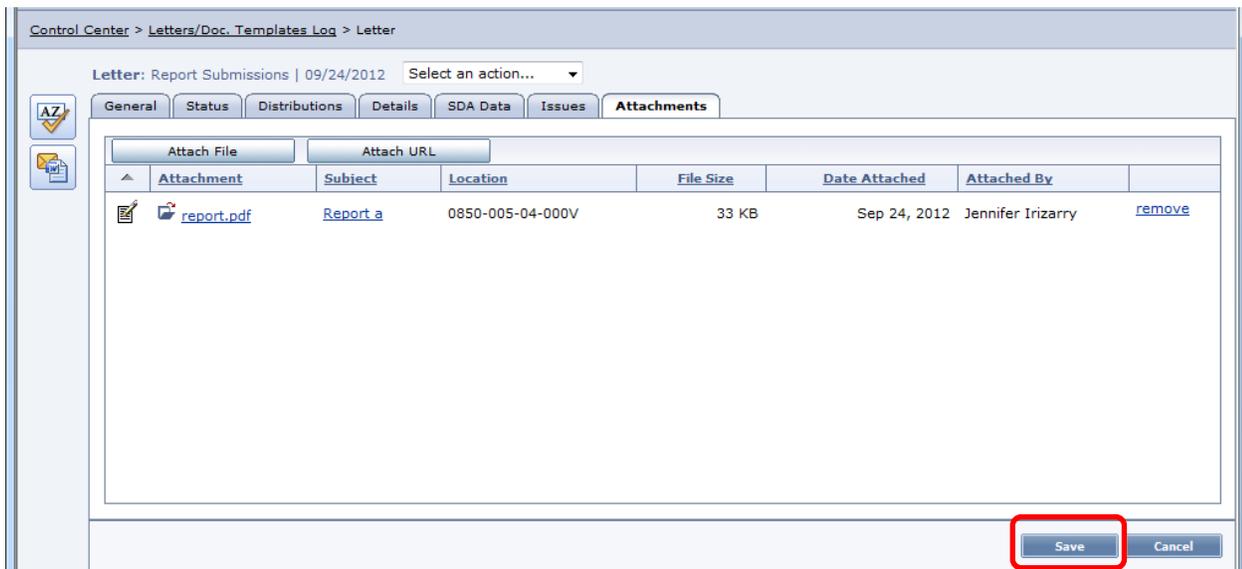
Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



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



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



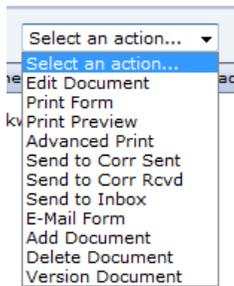
III. Version Document

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.

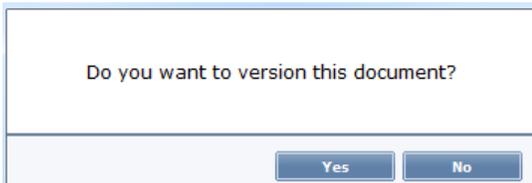
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

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.

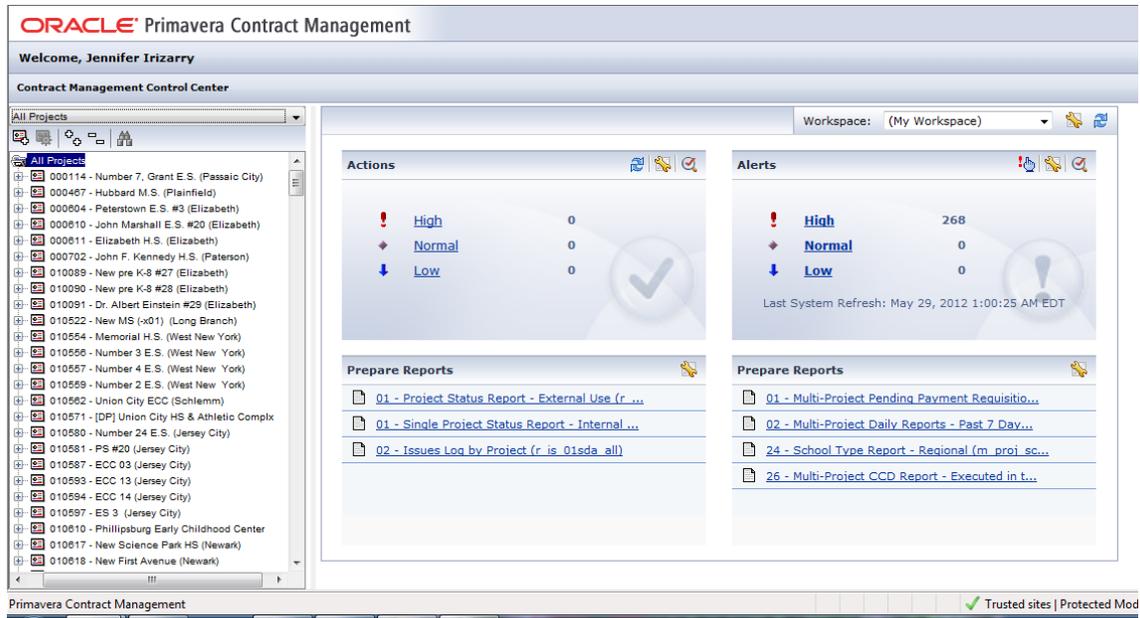


3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version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

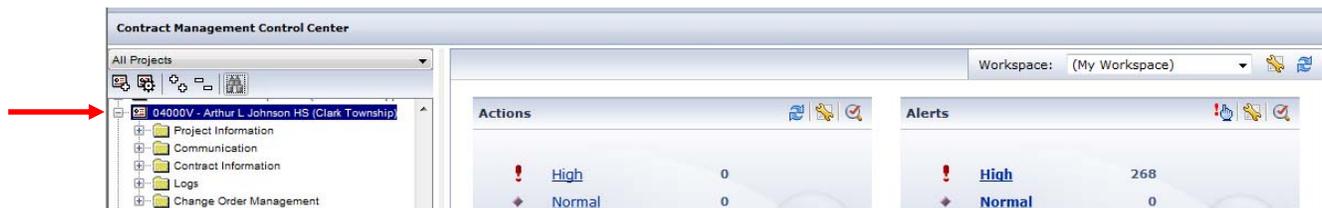


IV. VIEWING AND MODIFYING LETTERS IN MICROSOFT WORD FROM CONTRACT MANAGEMENT

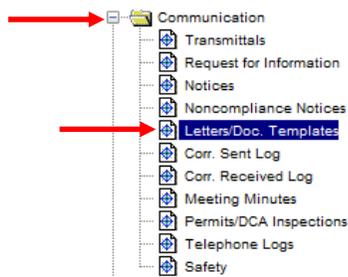
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



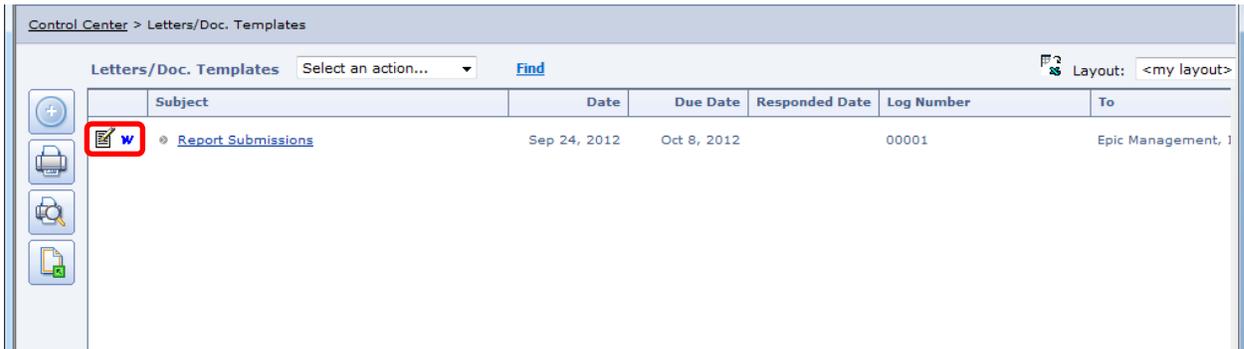
2. Select your desired project.



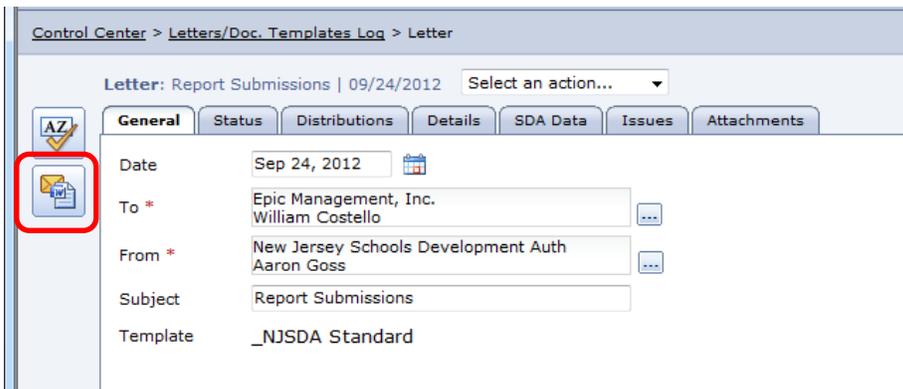
3. Open the **Communication** folder (a list of modules displays) and click the **Letters/Doc. Templates** module.



- When the **Letters/Doc. Templates log view** displays, locate your desired letter and click the **blue W** to the left of the letter to launch the letter in Word or click the **edit icon** to open the Contract Management Letter document.



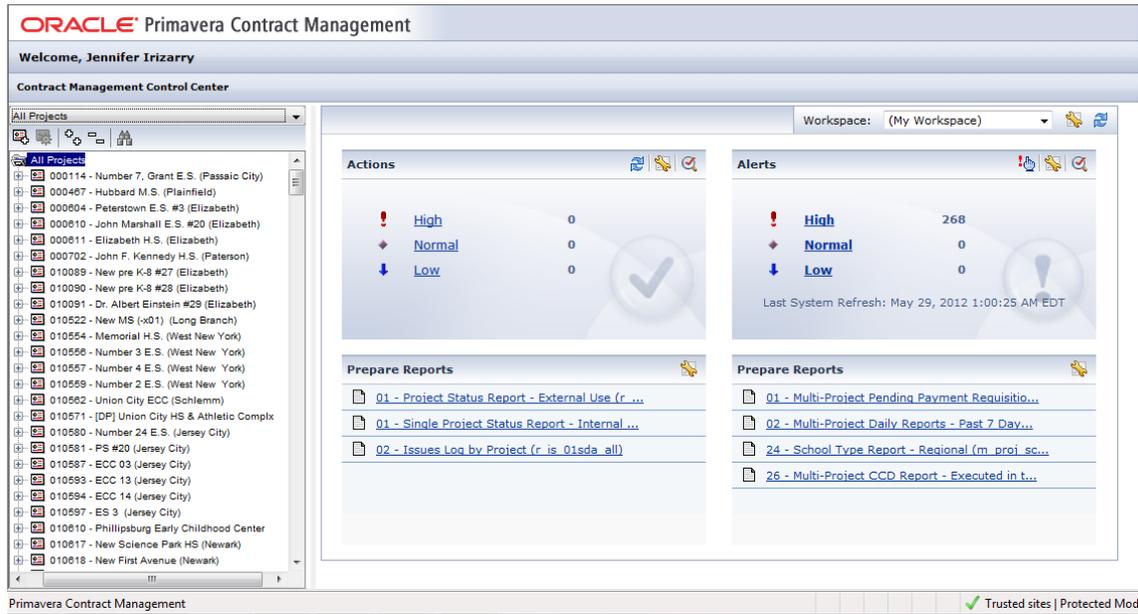
- If you clicked the edit icon, when the Letter document displays, click the **Word icon** on the left side of the screen to launch Microsoft Word.



- If you receive an error message, follow the steps as outlined on page 3 of this manual to check your Internet settings. If Microsoft Word still does not open, contact the SDA Primavera Helpdesk (pehelpdesk@njsda.gov) to assist in troubleshooting your Internet Explorer settings.
- If no errors are encountered, the document will open in Microsoft Word. Make any desired modifications to the text as needed, and save the letter when completed.

V. E-MAIL A LETTER

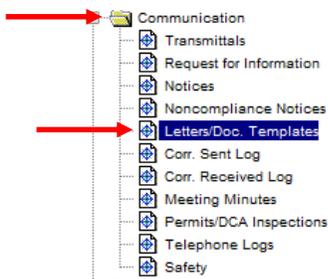
1. Once logged into Primavera, the **Contract Management Control Screen** displays (as shown).



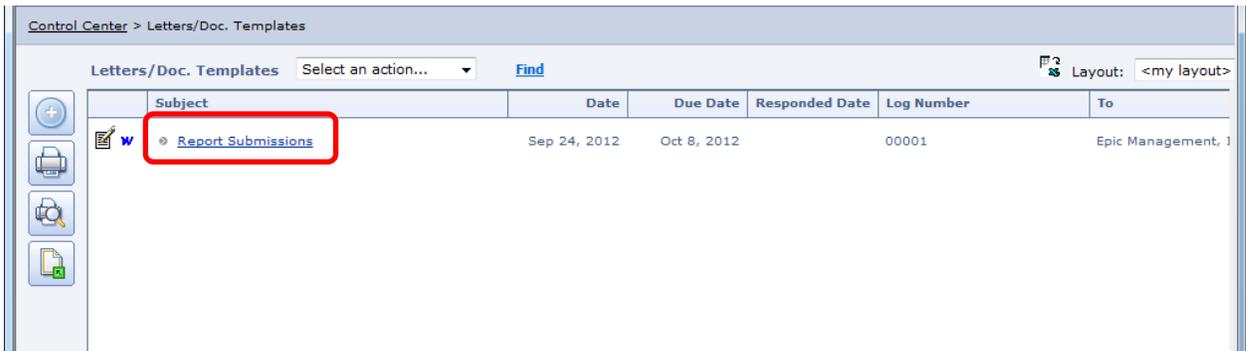
2. Select your desired project.



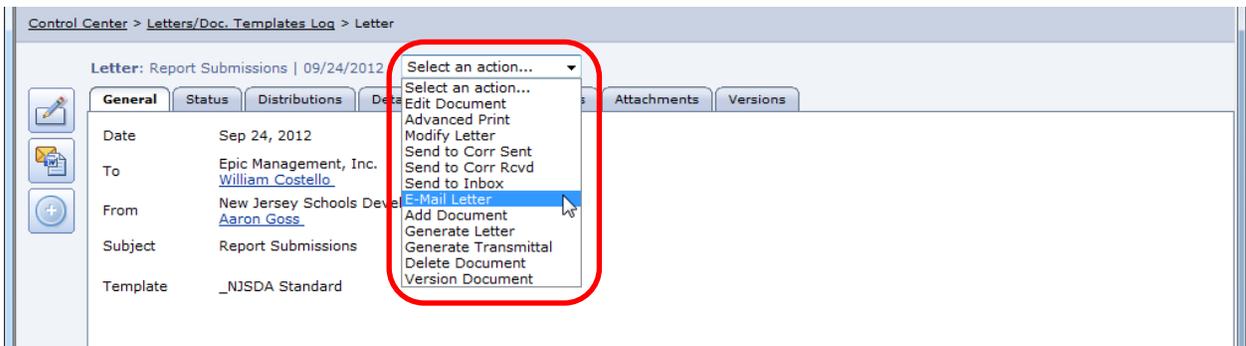
3. Open the **Communication** folder (a list of modules displays) and click the **Letters/Doc. Templates** module.



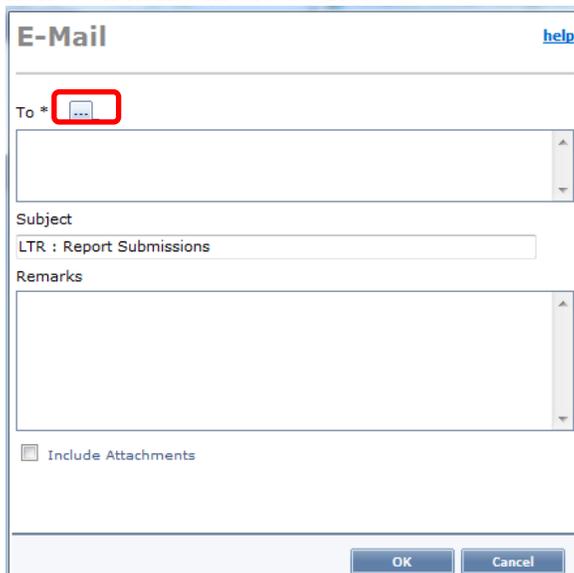
- The **Letters/Doc Templates** log view will display. Locate your desired letter and click on the title (blue link) to open it.



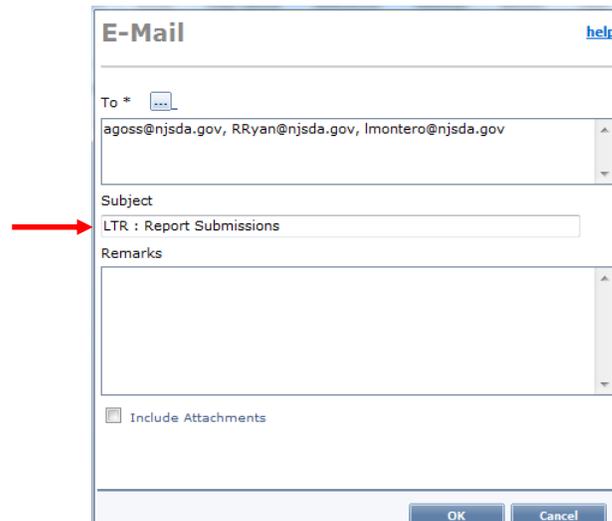
- With the letter open, choose **E-Mail Letter** from the **Select an Action** drop-down list on the top of the screen.



- The **E-mail dialog box** displays. Click the select button to choose names from the contact list to e-mail this letter to. Please note that the sender of the e-mail should always include their own name in the To field.



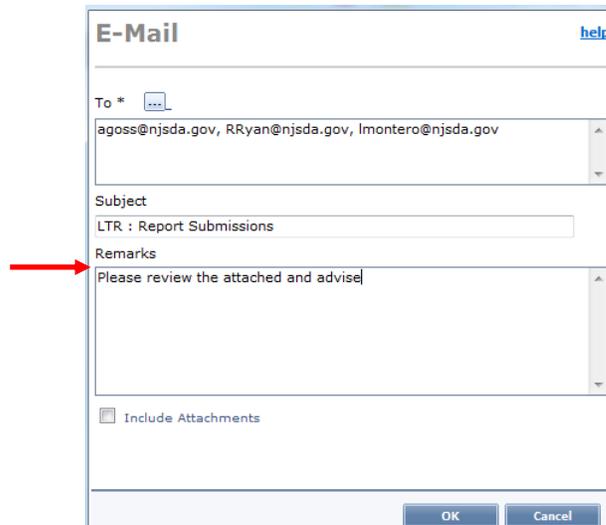
- The **Subject** field will display a descriptive title based on the Subject you entered in the letter. If desired, delete the default and enter a new subject.



The screenshot shows the 'E-Mail' dialog box with the following fields:

- To ***: agoss@njsda.gov, RRyan@njsda.gov, lmontero@njsda.gov
- Subject**: LTR : Report Submissions (indicated by a red arrow)
- Remarks**: (empty text area)
- Include Attachments
- Buttons: OK, Cancel

- Information and/or instructions for the recipient should be entered in the **Remarks** section. Any text entered in the Remarks field will be included in the body of the email.



The screenshot shows the 'E-Mail' dialog box with the following fields:

- To ***: agoss@njsda.gov, RRyan@njsda.gov, lmontero@njsda.gov
- Subject**: LTR : Report Submissions
- Remarks**: Please review the attached and advise (indicated by a red arrow)
- Include Attachments
- Buttons: OK, Cancel

- If there are attachments which also need to be forwarded, click the **Include Attachments** box.

Include Attachments

- When all entries are completed, click **OK** to send the e-mail. Please note that E-mails sent from Contract Management automatically creates an entry in the Correspondence Sent log.

