STATE OF NEW JERSEY
SCHOOLS DEVELOPMENT AUTHORITY

Section 12

Meeting Minutes

Table of Contents

I. Meeting Minutes Overview

The Meeting Minutes log keeps track of information such as:

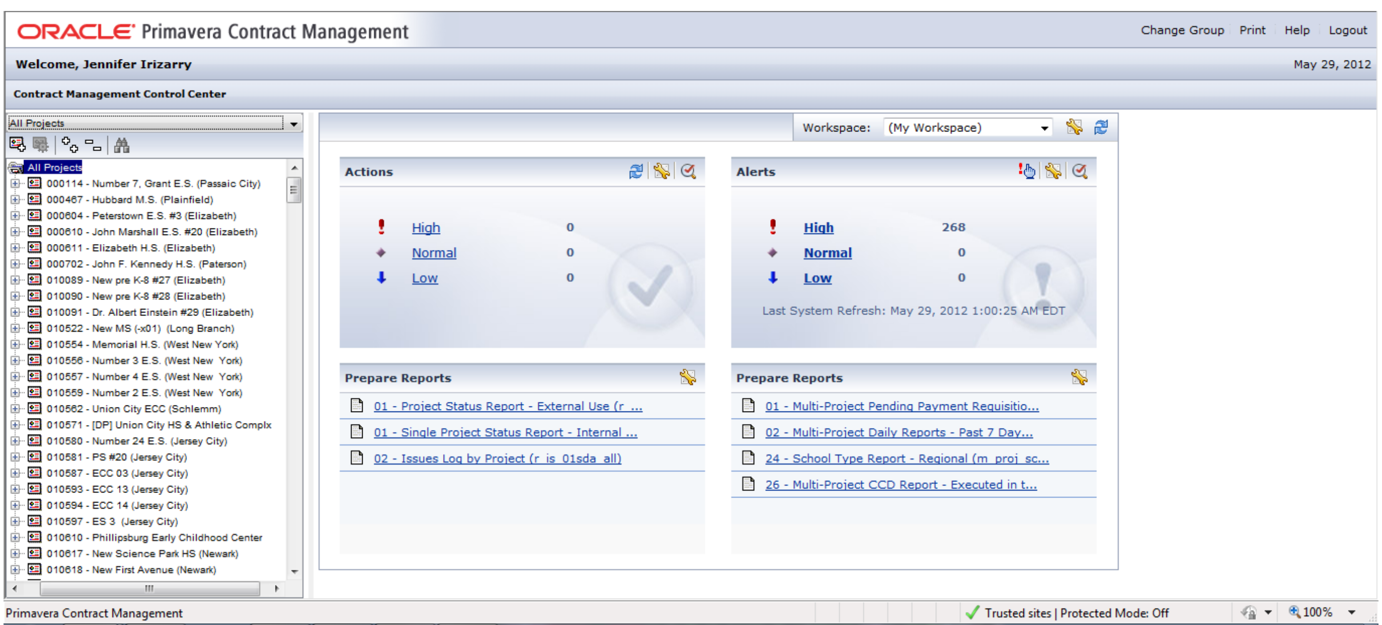
- When a meeting took place
- The purpose of the meeting
- Who attended
- What was discussed
- Decisions made
- Responsibility for follow-up

With Contract Management, you can create a new Meeting Minutes document or generate a Meeting Minutes document from an existing one using the ***Generate Document*** command. When you generate a new Meeting Minutes document from an existing one, Contract Management copies items from the original Meeting Minutes document to the new one (as long as the items are not closed).

II. Create a New Meeting Minutes Document

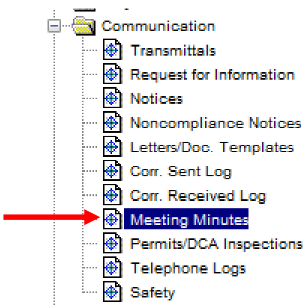
This procedure explains how to create a new Meeting Minutes document when previous Meeting Minutes do not exist.

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



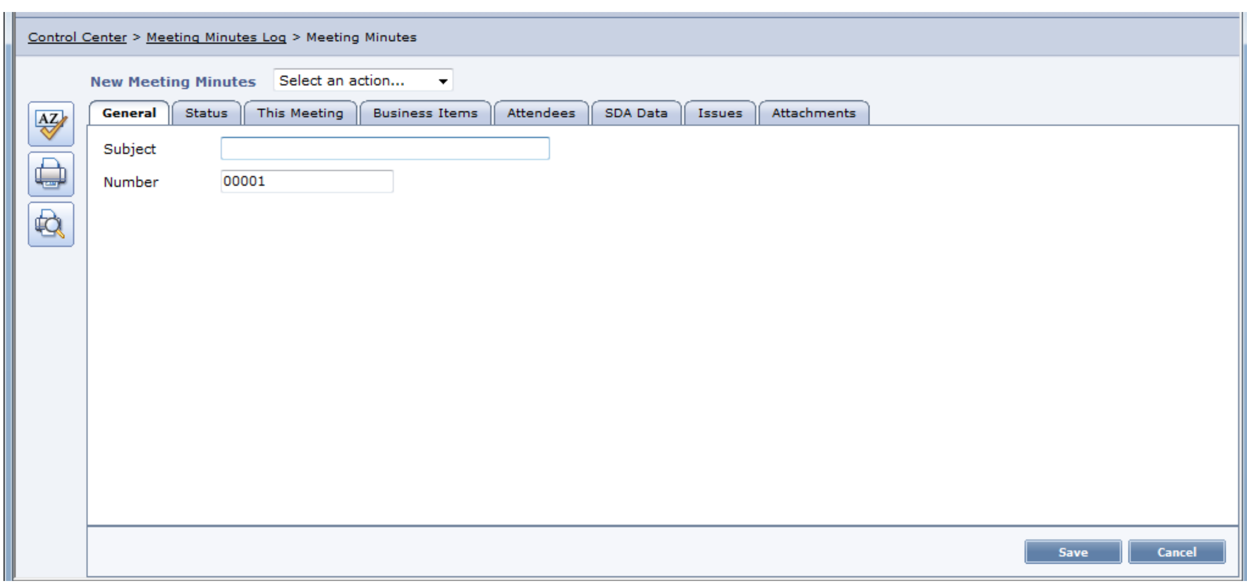
2. Select your desired project.

3. Open the **Communication** folder (a list of modules will display) and select **Meeting Minutes**.



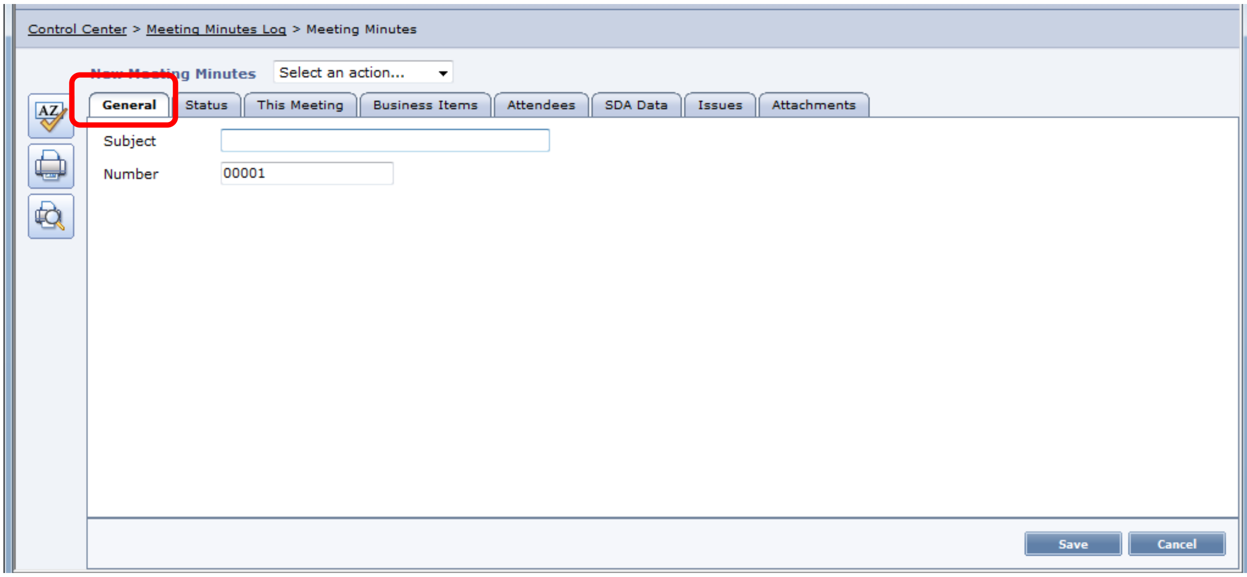
4. The Meeting Minutes **Log View** will display. Click the **Add Document** button.

5. A blank Meeting Minutes document displays.



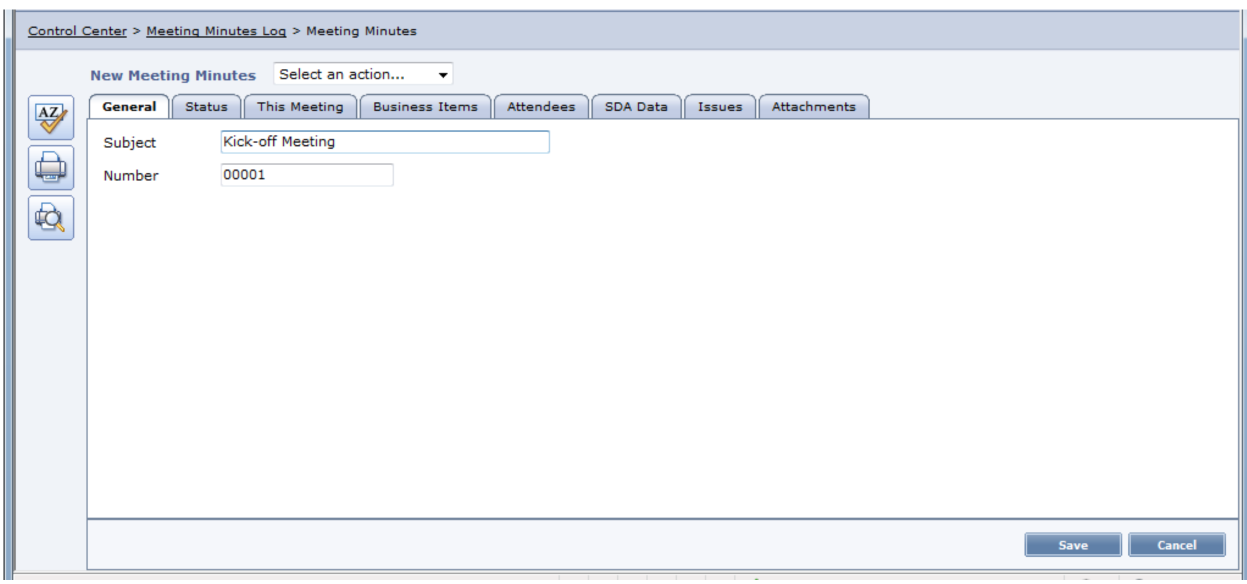
The Meeting Minutes screen is divided into several sections:

A. General Tab

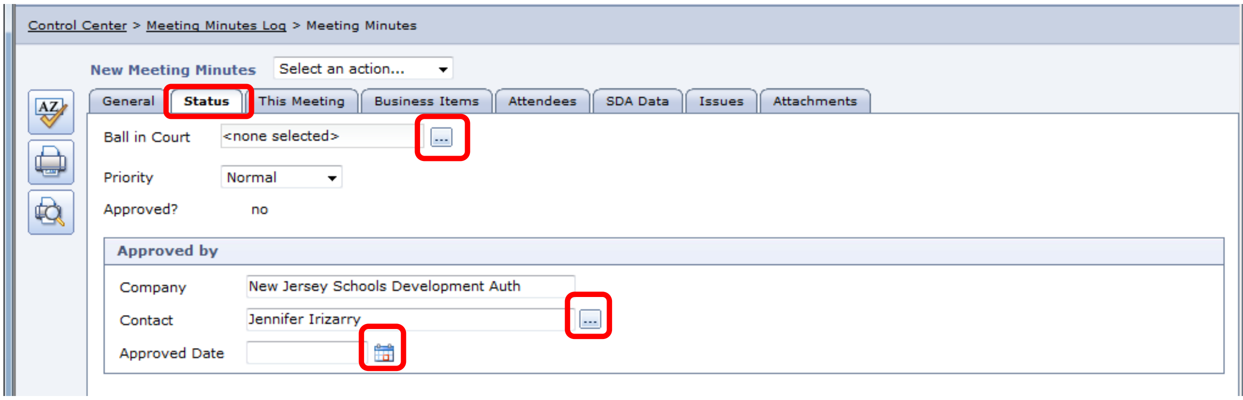


- **Subject –** Enter a brief title for the meeting (50 character field).
- **Number –** Contract Management automatically supplies the next sequential number, edit as necessary. If desired, you can add a prefix to the meeting number relating to the meeting type, for example, P001 for Progress Meeting.

An example of a complete section is shown:

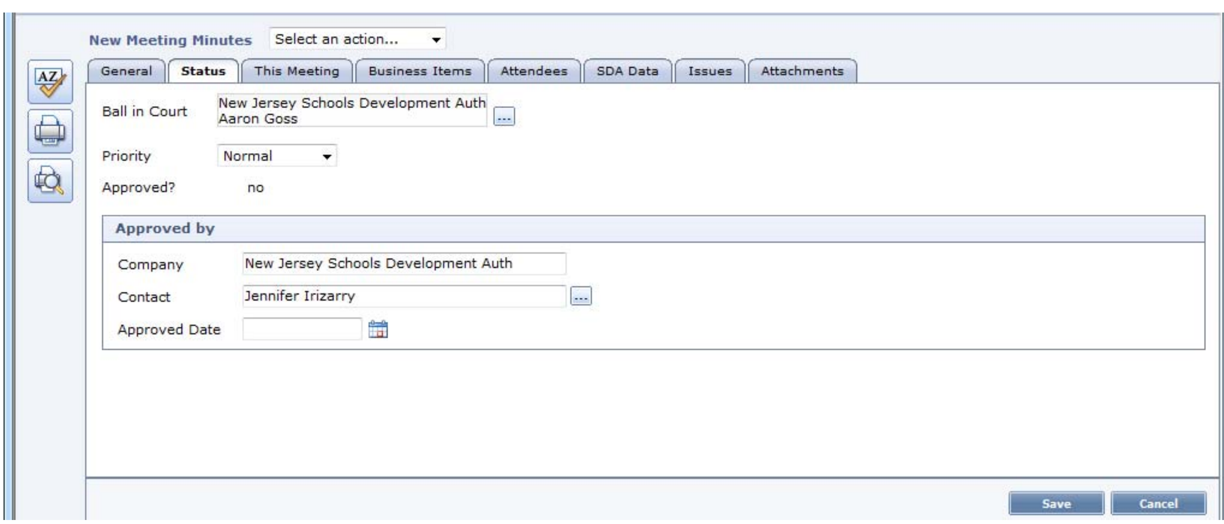


B. Status Tab

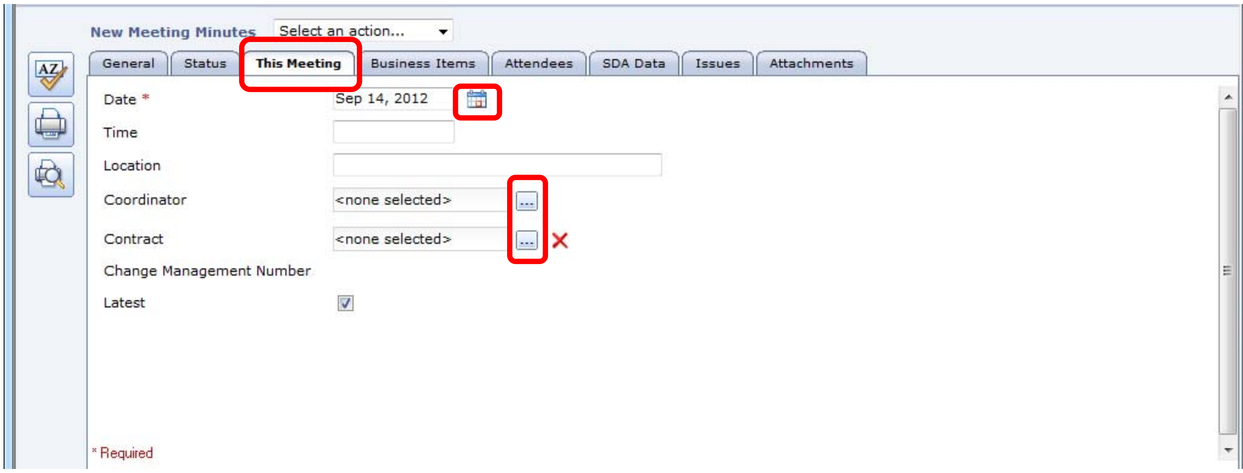


- **Ball in Court –** If desired, an overall responsible party for the meeting can be chosen by clicking the **select** button next to the field. You will also be able to choose a Ball in Court contact at the Business Item level.
- **Priority – Normal** is the default, but can be changed to **High** or **Low** as necessary.
- **Approved ? –** Once the document is finished, Meeting Minutes can be approved and saved (given the appropriate access rights) by selecting the approver, entering approval date and clicking the **Approve and Save** link. Once approved, a document cannot be edited unless you have the appropriate access rights.
- **Approved By –** Use the **select** button to choose the approver's name in the **Contact** field. The **Company** will automatically populate based on the name selected. Click the **calendar icon** to choose the **Approved Date**. By default, the Company and Contact name of the person creating the document will display in those fields.

An example of a completed section is shown. Note that the document has not yet been approved.



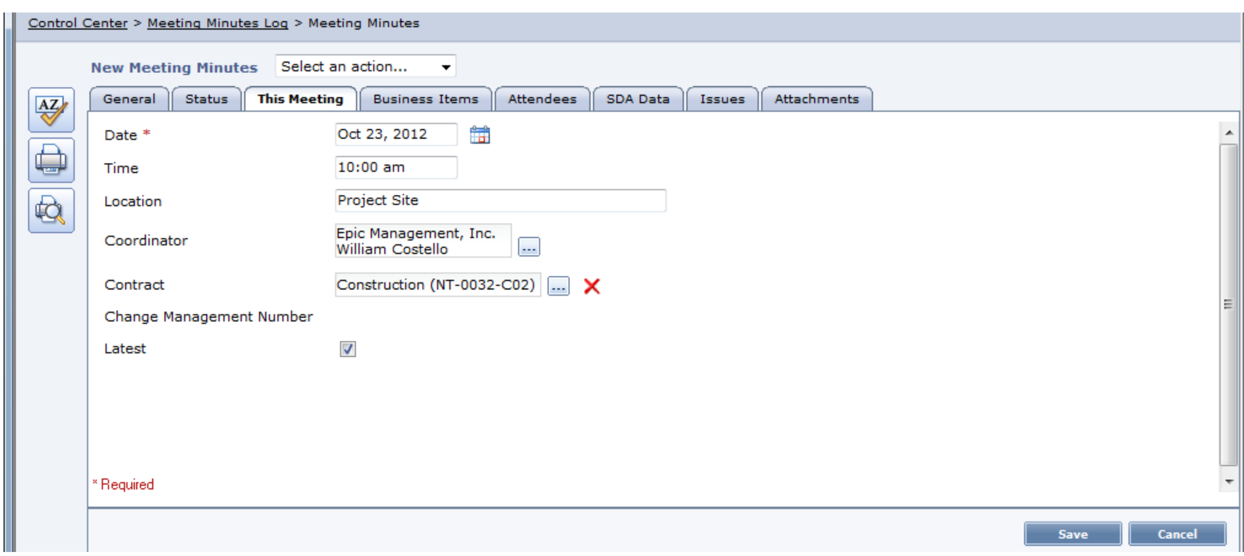
C. This Meeting Tab



- **Date –** The current date will display by default, but can be changed by clicking the **calendar icon** to choose a new date. This is a required field.
- **Time –** Enter the meeting time.
- **Location –** Enter the location for the meeting (example – jobsite) (22 character field).
- **Coordinator –** Select the coordinator for this meeting by clicking the **select** button to choose the name.

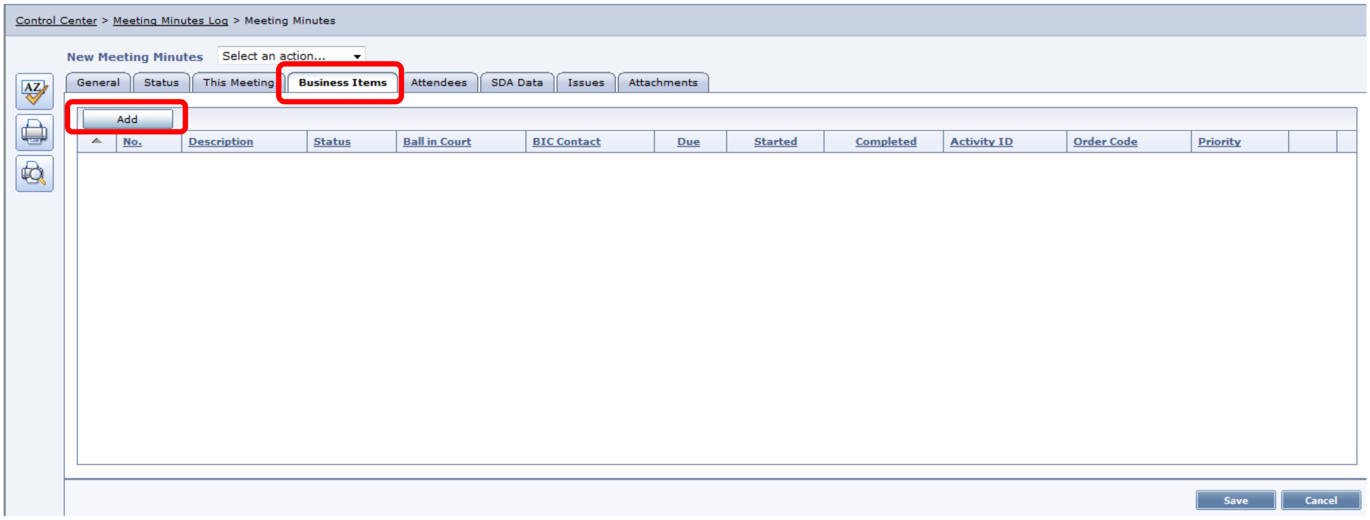
  NOTE: If the Ball in Court for the meeting is blank, the Coordinator name will be automatically used as the Ball in Court.
- **Contract –** Select a contract number reference using the **select** button.
- **Change Management Number –** If you initiate Change Management from this meeting, the number will be automatically indicated here.
- **Latest –** Automatically checked if this is the latest meeting.

An example of a completed section is shown.

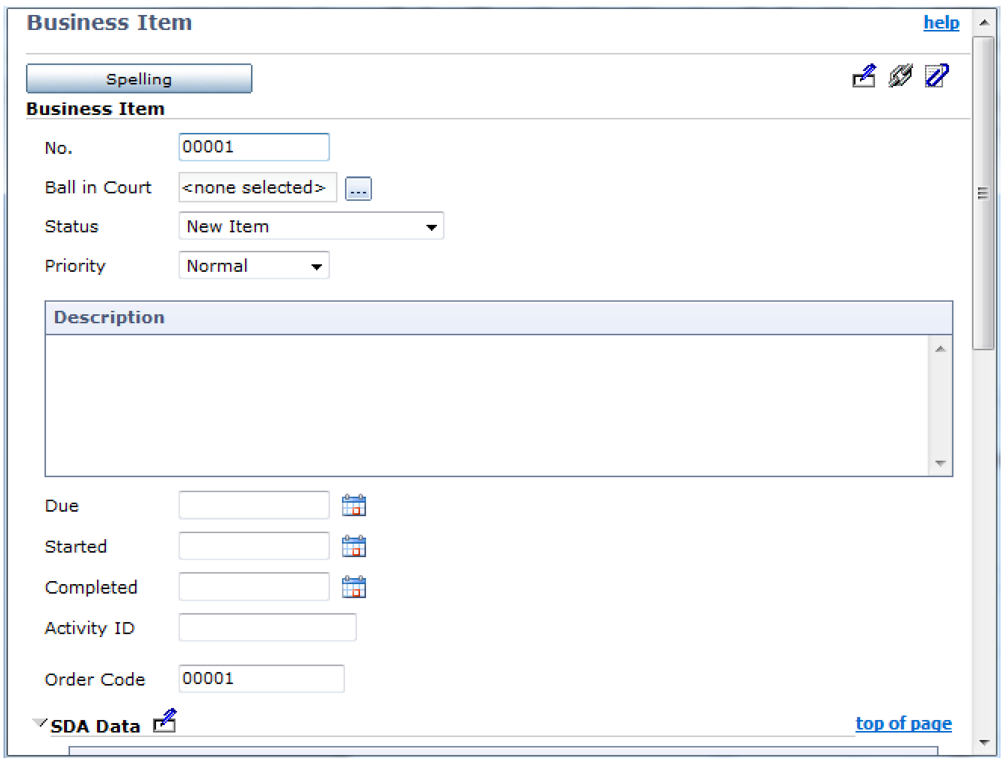


D. Business Items Tab

To add business items to this document, click the **Add** button.



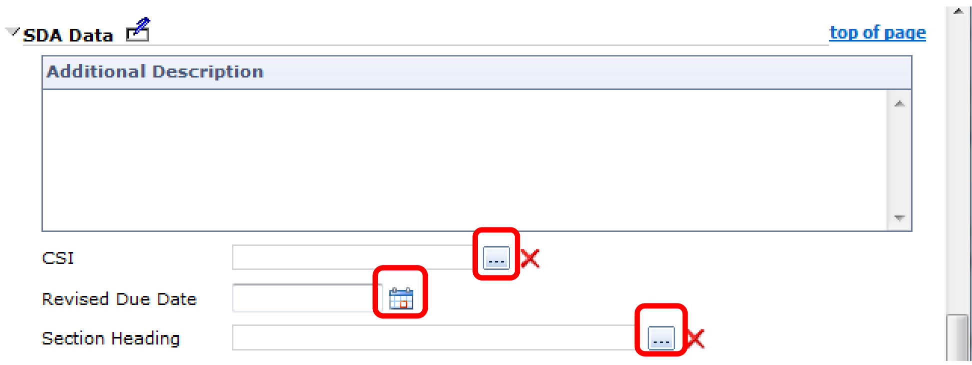
A blank Business Item displays. There are a number of sections in this Business Item:



- **No. -** Contract Management automatically sequentially numbers each item.
- **Ball in Court –** Select the responsible party for this item by clicking the **select** button. If they have a Contract Management account, this will appear in their Actions list in the Control Center.

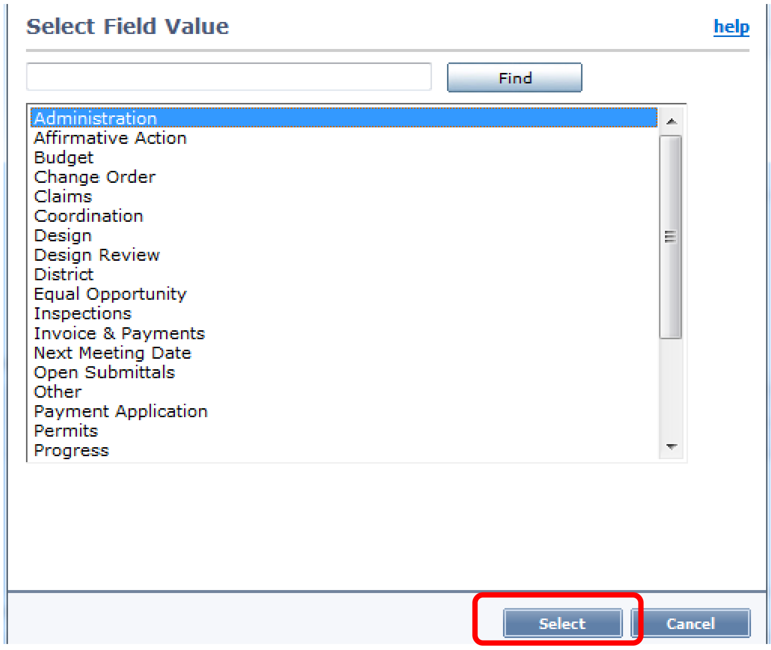
- **Status –** The default is **New Item**. Leave this default setting until the status of this Business Item changes.
- **Priority – Normal** is the default, but can be changed to **High** or **Low** as necessary.
- **Description –** Enter a description of the item including what was discussed and what decisions were made (4000 character field).
- **Due** – Click the **calendar icon** to enter the due date for this item.
- **Started –** Click the **calendar icon** to enter the date the item started.
- **Completed –** Click the **calendar icon** to enter the date item was completed.
- **Activity ID –** If applicable, enter the associated activity ID as listed in the project schedule.
- **Order Code –** Will be equivalent to the Business Item Number and completed automatically by Contract Management, do not enter a value in this field.

Scroll to the **SDA Data** section and complete the following, if applicable:



- **Additional Description –** Enter any additional information required for the description of the item including what was discussed and what decisions were made (4000 character field).
- **CSI** – Click the **select** button to reference a specification section.
- **Revised Due Date –** If the item has been carried over (Old Business) and the Due Date has changed from the original, click the **calendar icon** to choose a new date.

- **Section Heading –** Click the **select** button to choose a category for the Business Item from the list. Click once to highlight the desired value, then click the **Select** button at the bottom of the screen to return to the Business Item.

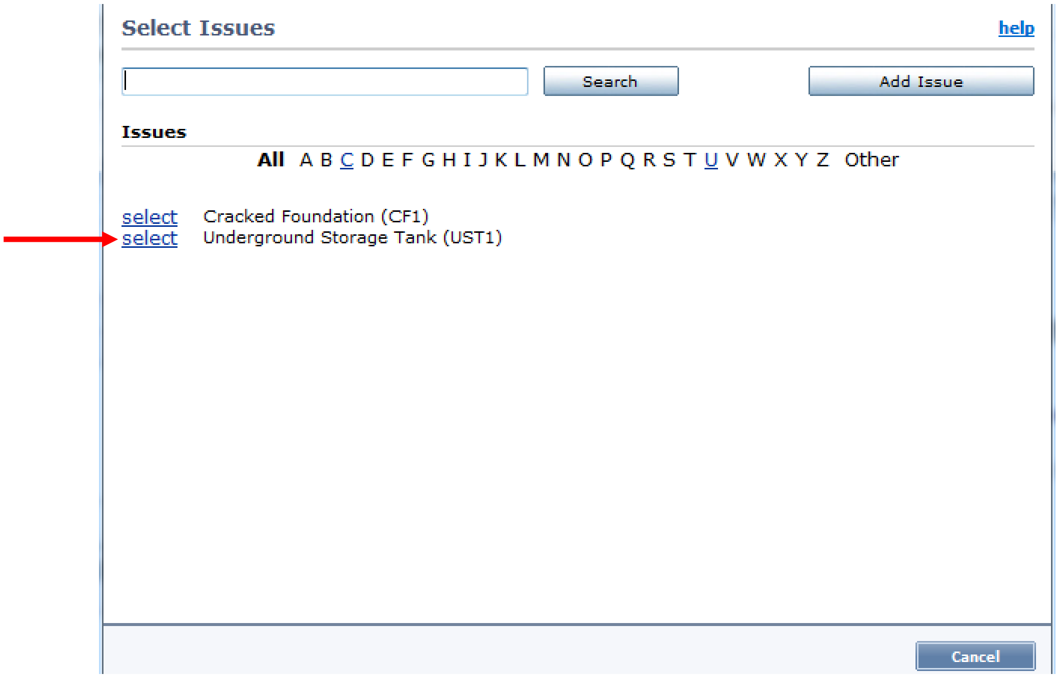


Scroll to the **Issues** section and complete the following, if applicable.

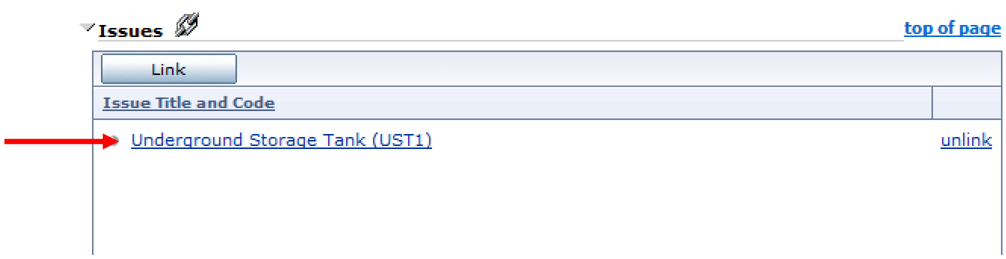
Note: Issues can also be linked at the Meeting Minutes document level in addition to the Business Item level.

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

- The **Select Issue** window will display. Choose the desired issue by clicking the **select** link to the left of the issue title.



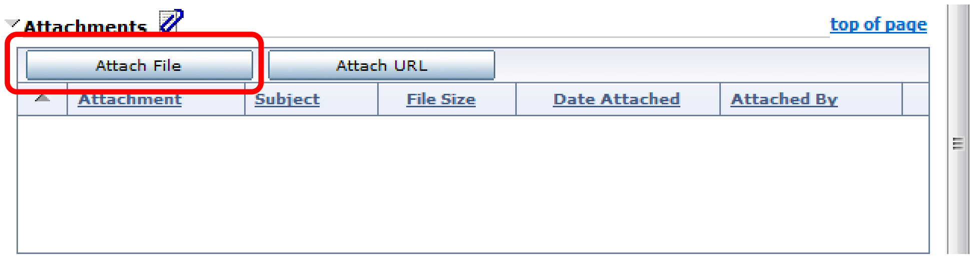
- The selected issue will display in the **Issues** section of the Business Item.



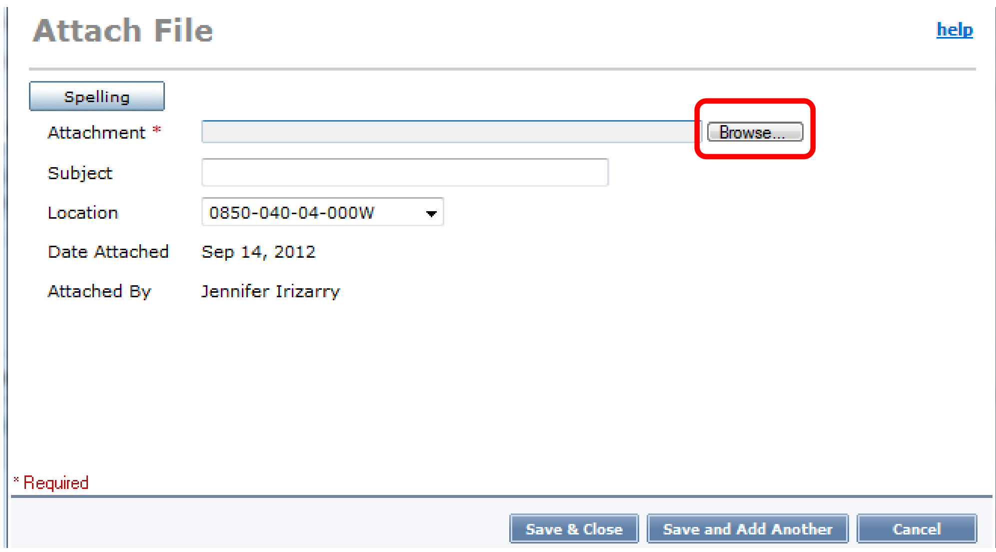
Scroll to the **Attachments** section and complete the following, if applicable.

Note: Attachments can also be linked at the Meeting Minutes document level in addition to the Business Item level.

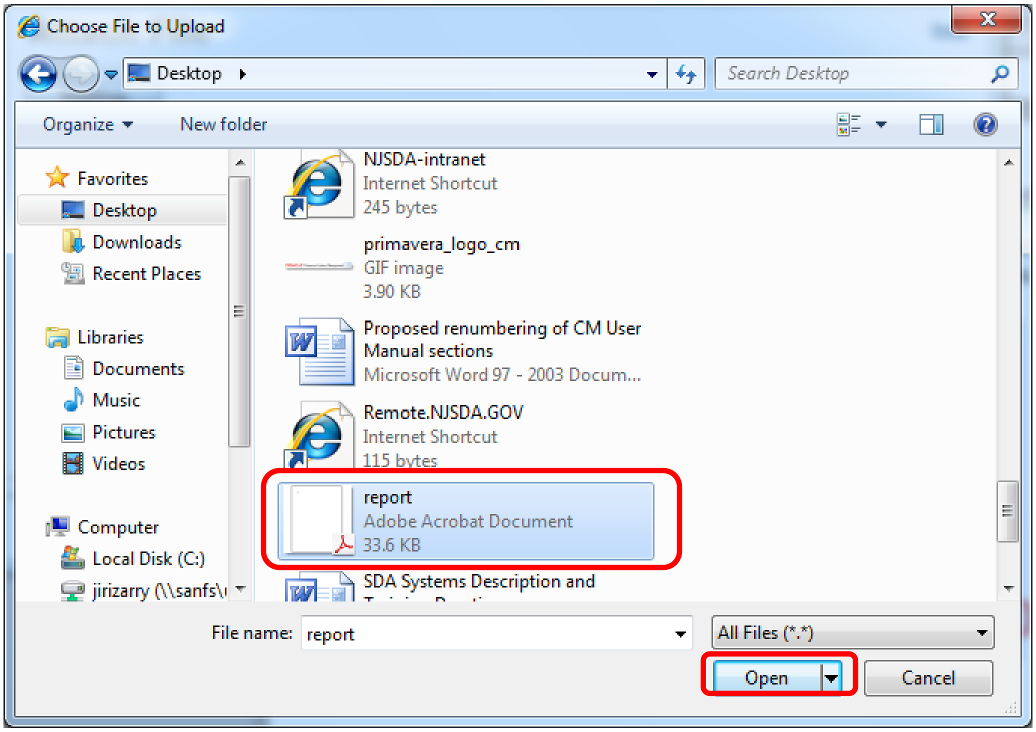
- To attach supporting documentation to this Business Item, scroll to the **Attachments** section and click the **Attach File** button.



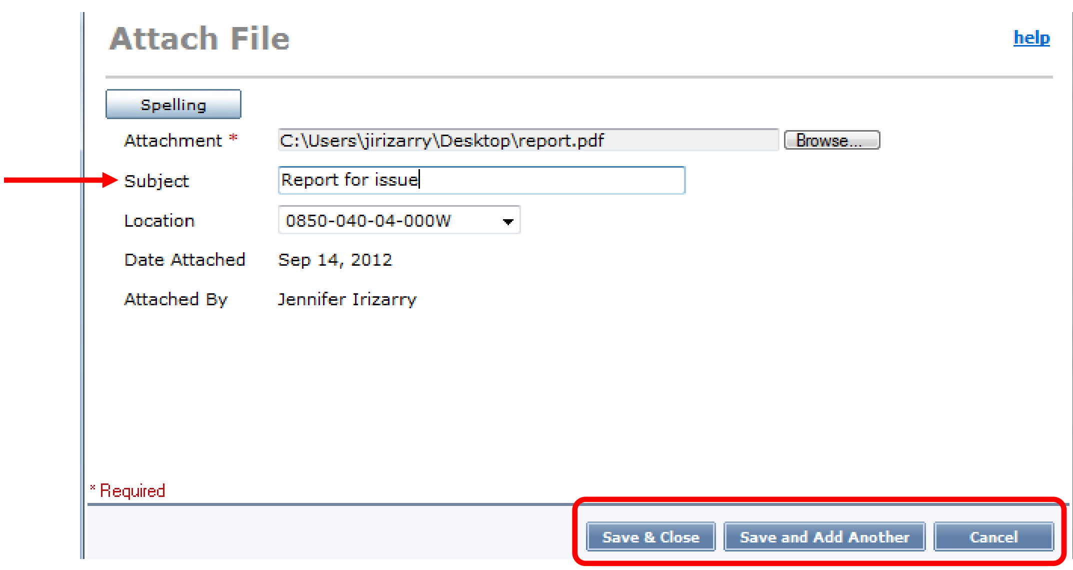
- Click the **Browse** button to navigate to the document you wish to attach.



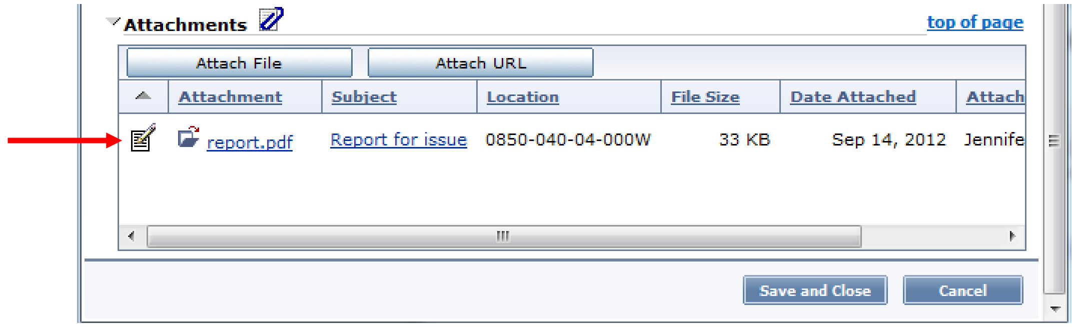
- The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



- 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.

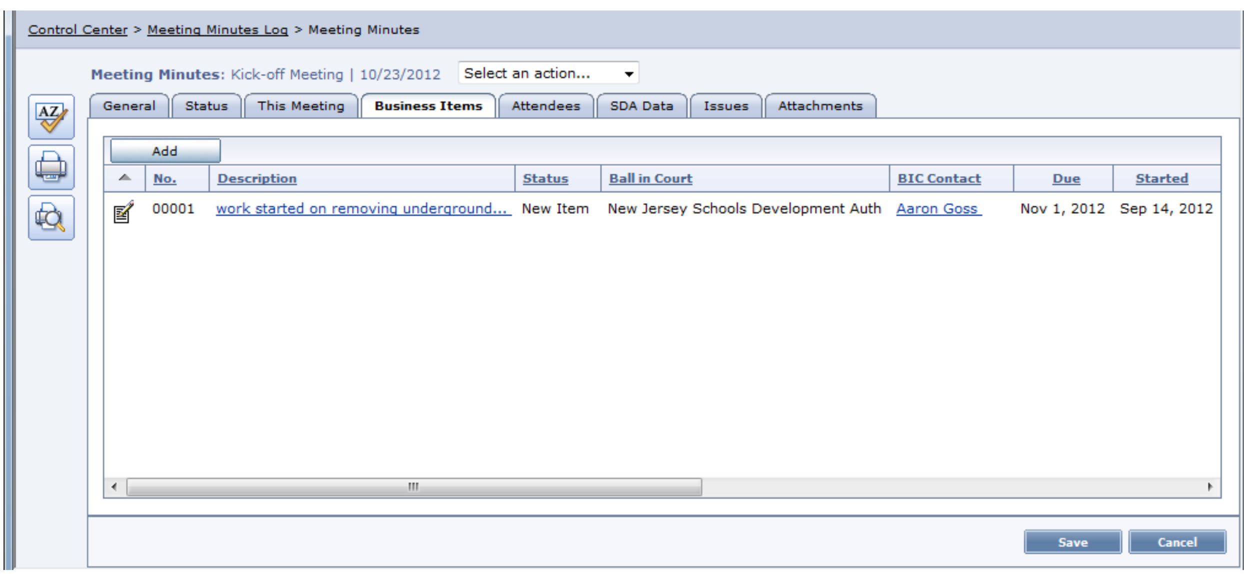


- The attached file will display in the **Attachments** section.



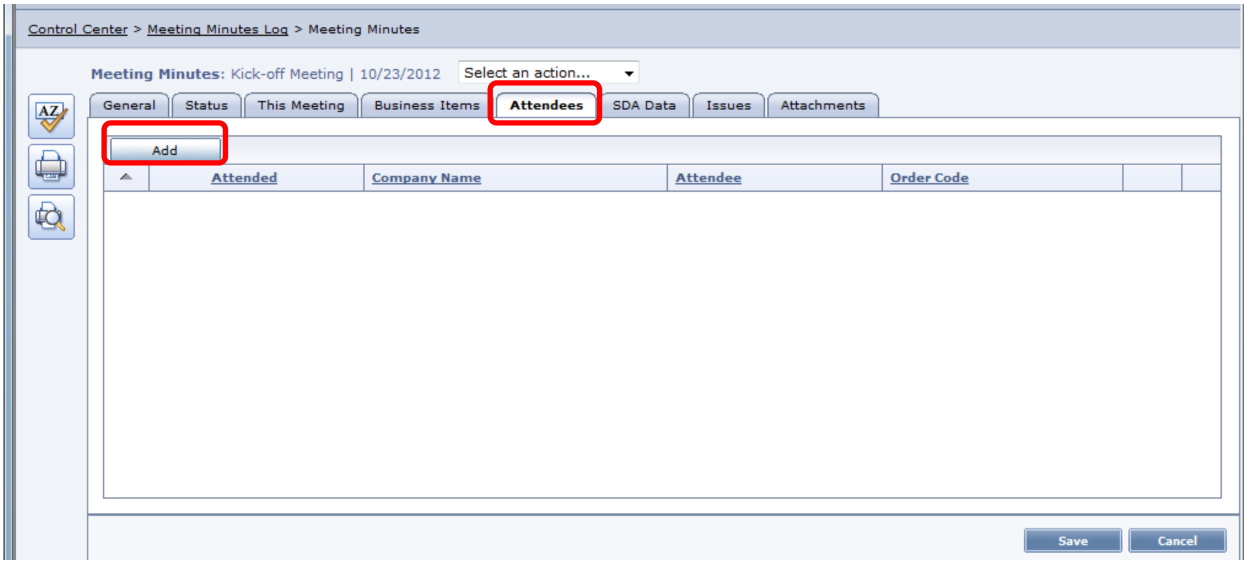
When all necessary Business Items have been entered, scroll to the bottom of the screen and click the **Save & Add Another** button to add another item or the **Save & Close** button to save changes and return to the Meeting Minutes document.

An example of a completed Business Item is shown:

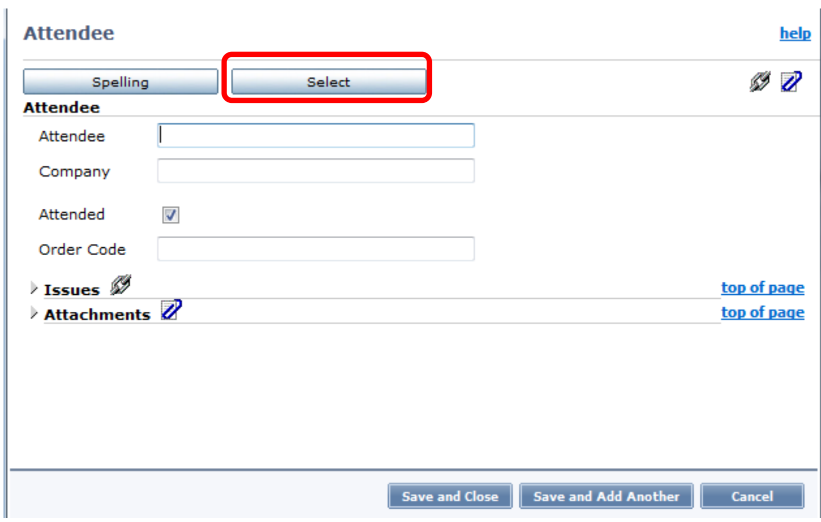


E. Attendees Tab

Click the **Attendees** tab and click the **Add** button to enter the names of those who attended the meeting.



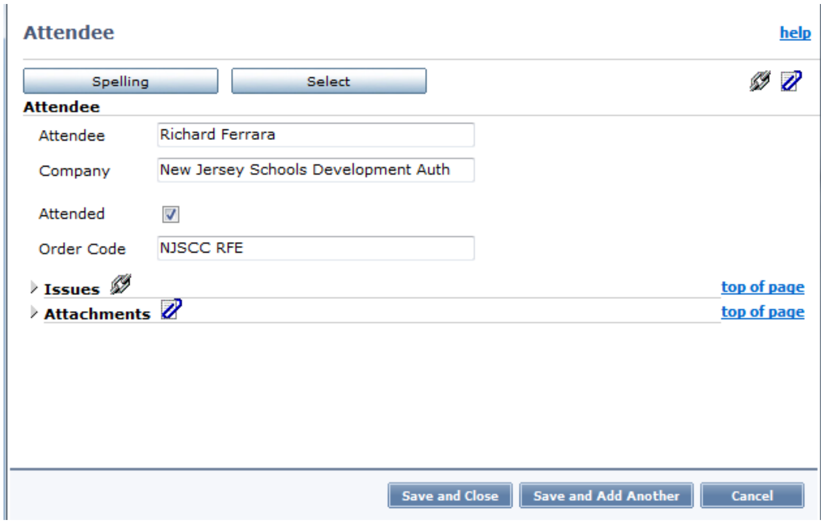
A blank Attendee screen will display.



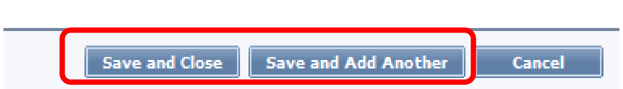
- To complete both the **Attendee** name and the **Company**, click the **select** button to choose the attendee's name from the contact list. If the attendee name does not appear in the contact list, manually enter the Attendee name and Company (Attendee is a 22 character field, Company is a 36 character field).

- The **Attended** checkbox is automatically checked. Uncheck if they did not attend.
- **Order Code** - Use this field to set the sort order of the attendee rows in the Attendees section of the Meeting Minutes document window. The field will display the company identification name or number, and the initials of the attendee.

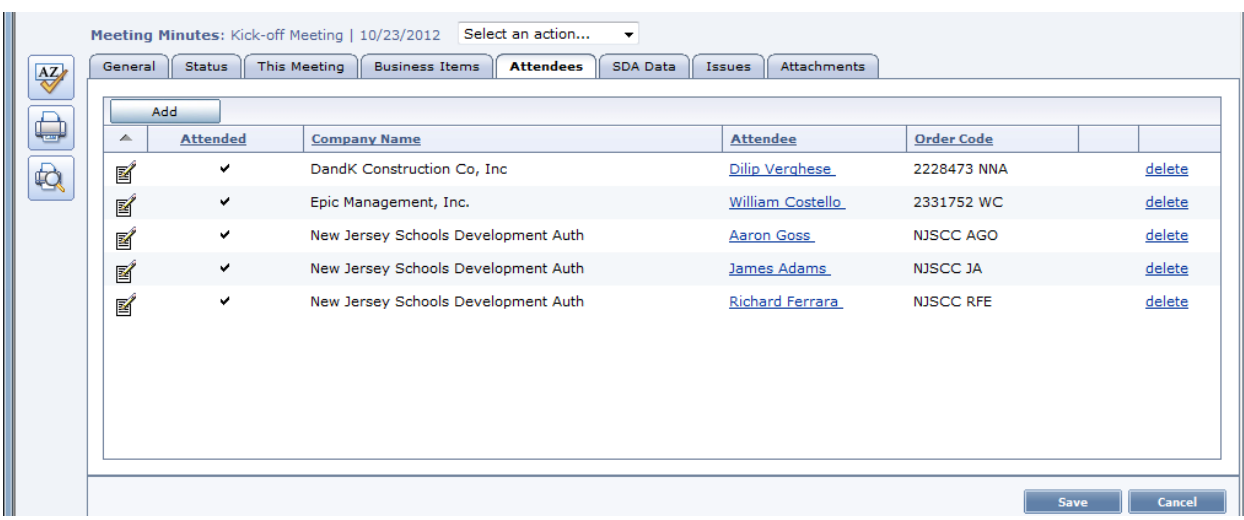
An example of a completed **Attendees** dialog box is shown:



To add more attendees, scroll to the bottom of the screen and click the **Save and Add Another** button. When all Attendees have been entered, click the **Save and Close** button to save changes and return to the Meeting Minutes document.

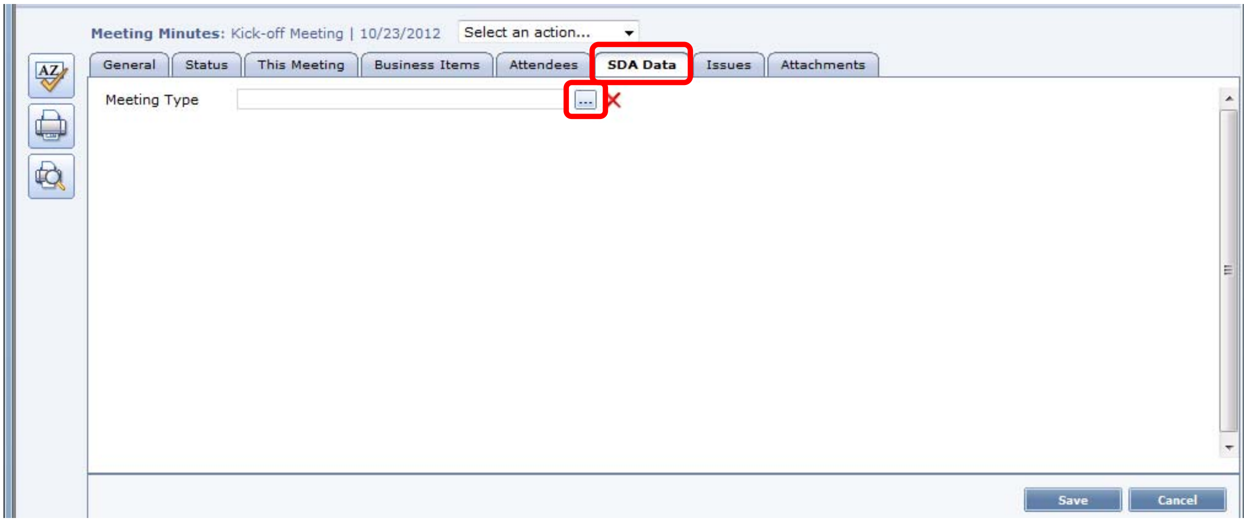


An example of a completed Attendees tab is shown.



F. SDA Data Tab

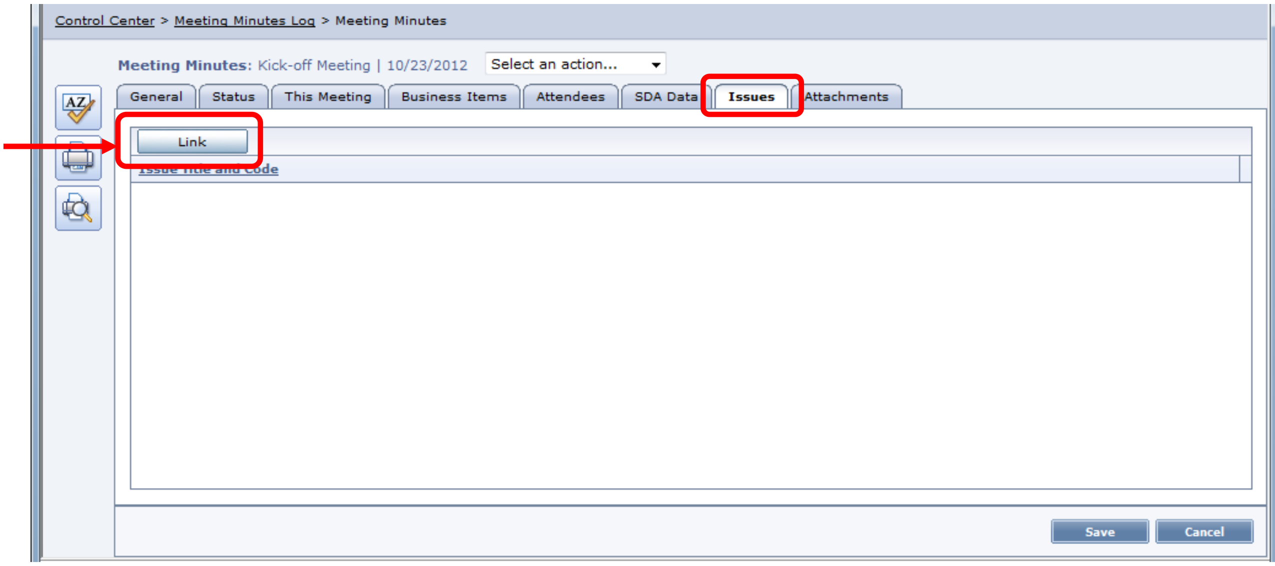
Click the **select button** to choose an applicable **Meeting Type** from the selection list.



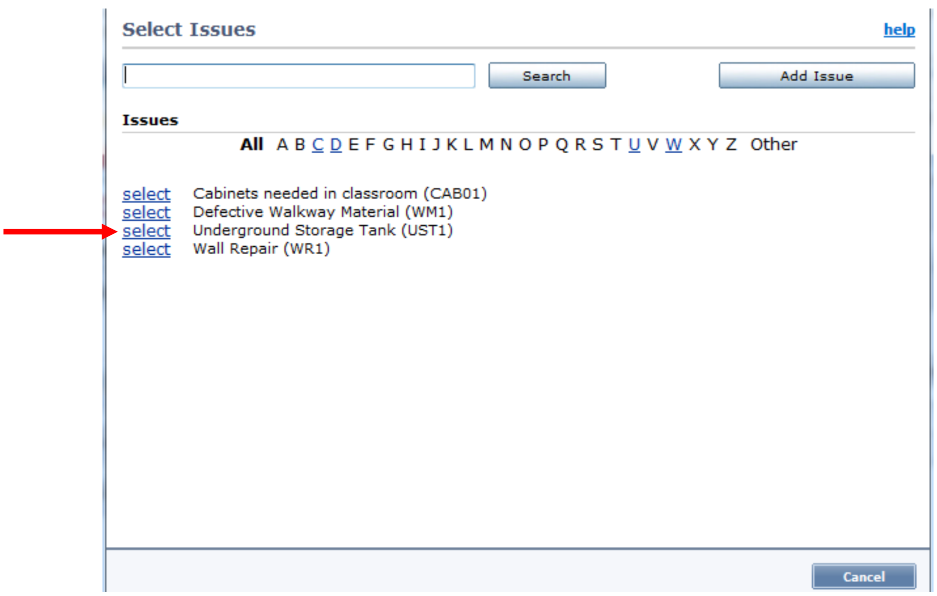
An example of a completed SDA Data tab is shown.

G. Issues Tab

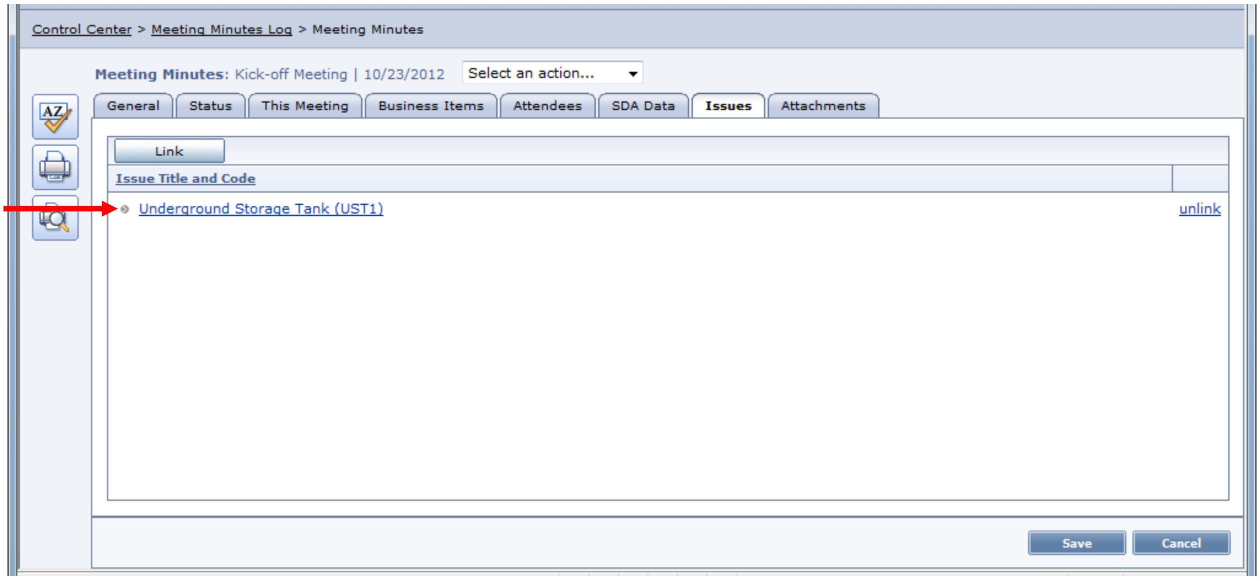
If this Meeting Minutes document relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button and choose the desired issue from the dialog box.
Note: Issues can also be linked at the Business Item level in addition to the document level.



- The **Select Issue** window displays. Choose the desired issue by clicking the **select** link to the left of the issue title.

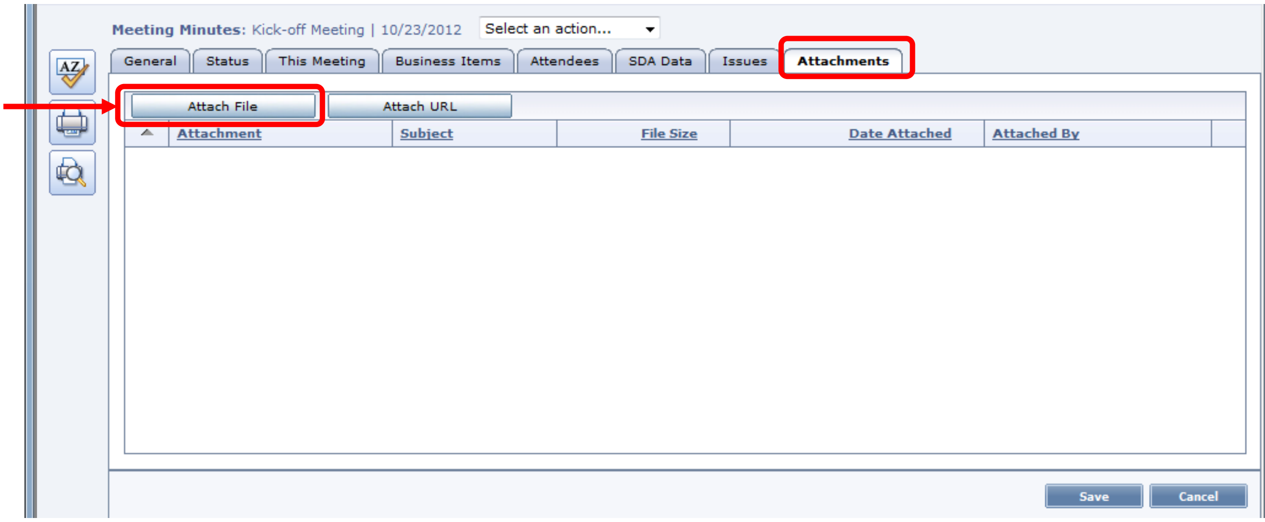


- The selected issue will display in the **Issues** tab.

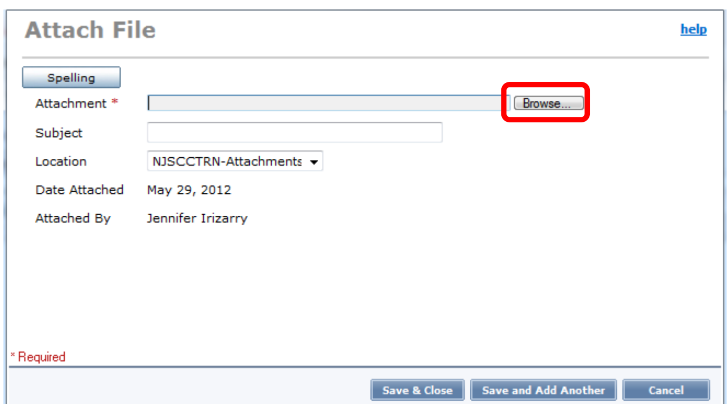


H. Attachments Tab

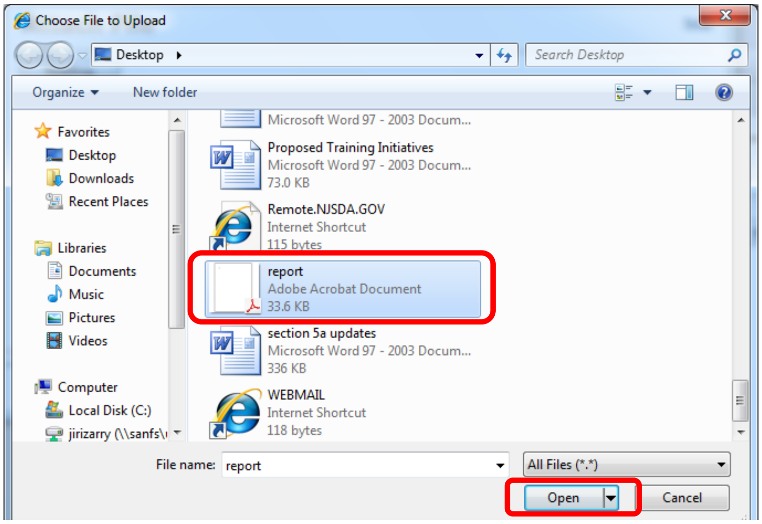
To attach supporting documentation to this Meeting Minutes document, scroll to the **Attachments** section and click the **Attach File** button.
Note: Attachments can also be linked at the Business Item level in addition to the document level.



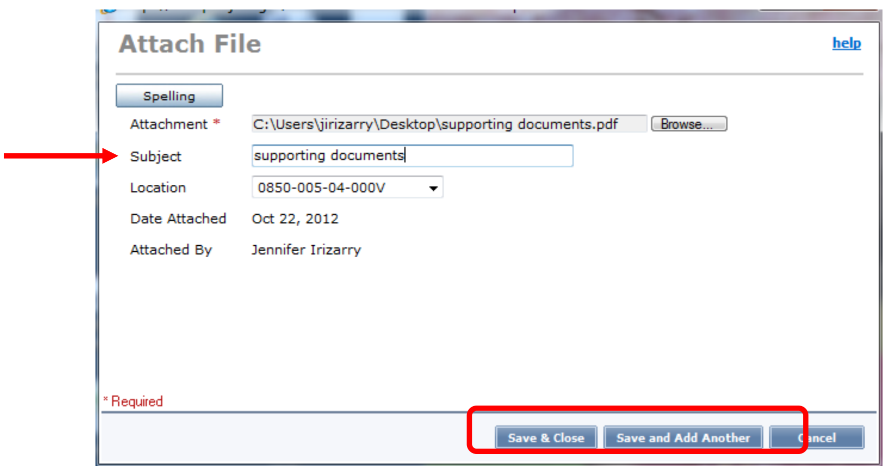
Click the **Browse** button to navigate to the document you wish to attach.



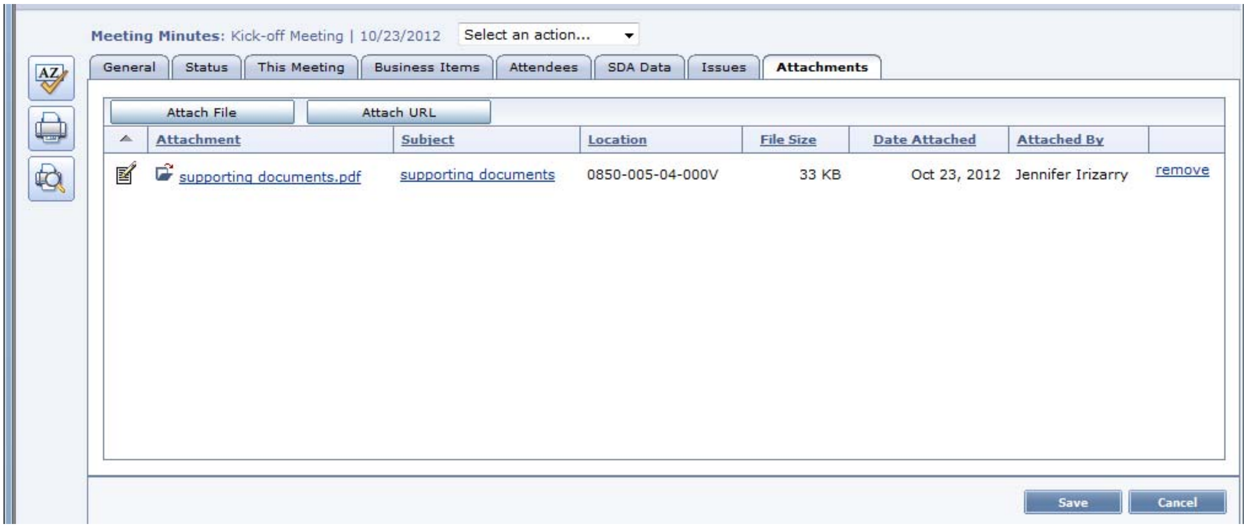
The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



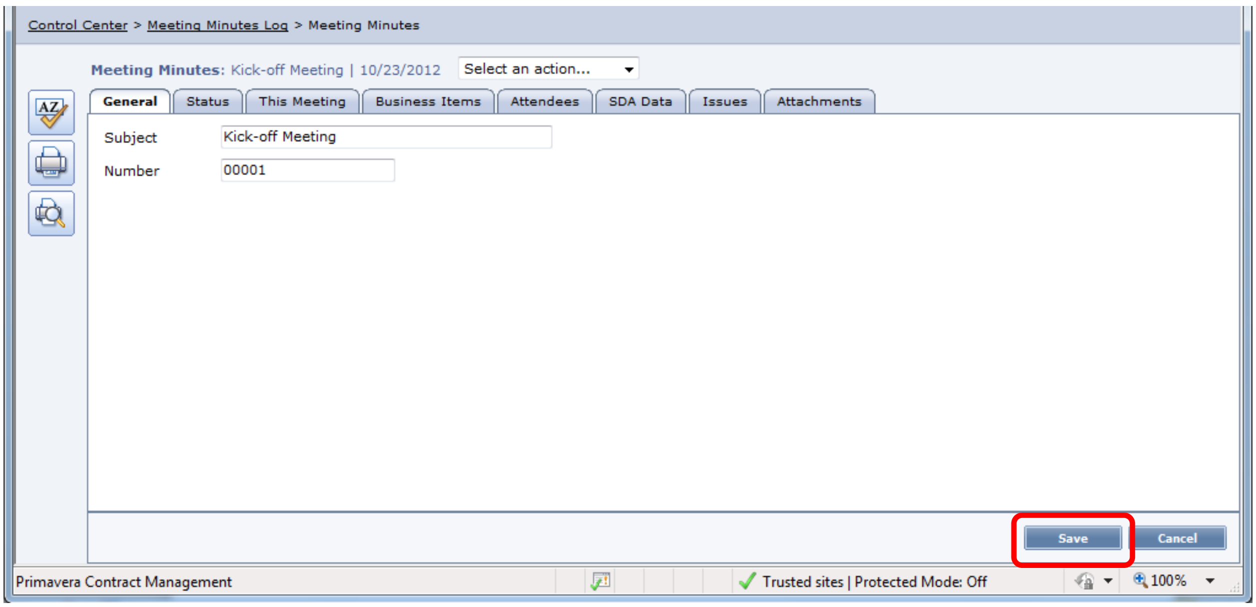
Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.



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



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



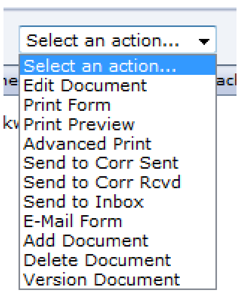
III. Version Document

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.

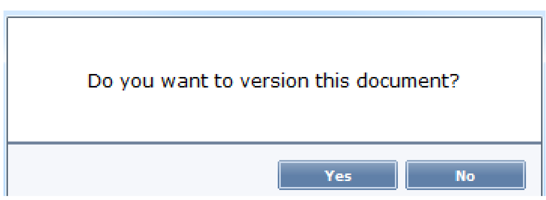
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

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. Distributing Copies of the Meeting Minutes Document

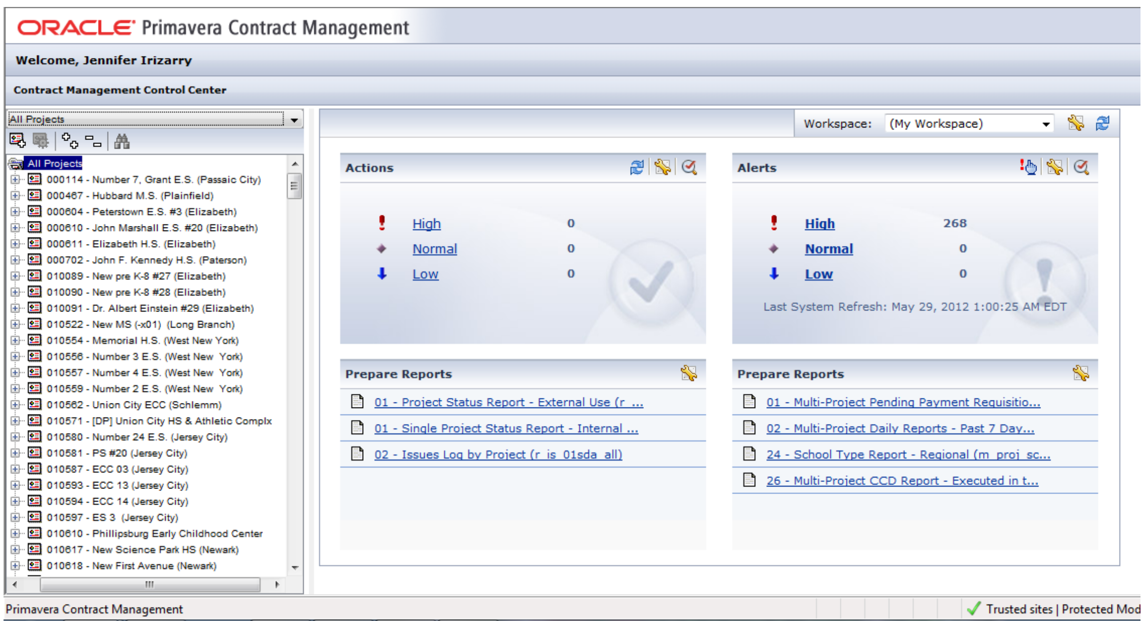
There are several methods used to distribute copies of the Meeting Minutes document, including:

- Generating and printing a Transmittal
- Printing the Meeting Minutes document
- E-mailing the Meeting Minutes document

A. Generate a Transmittal

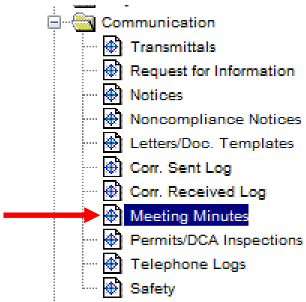
The **Generate Transmittal** command is used to create a Transmittal document from the Meeting Minutes once they are ready for distribution.

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

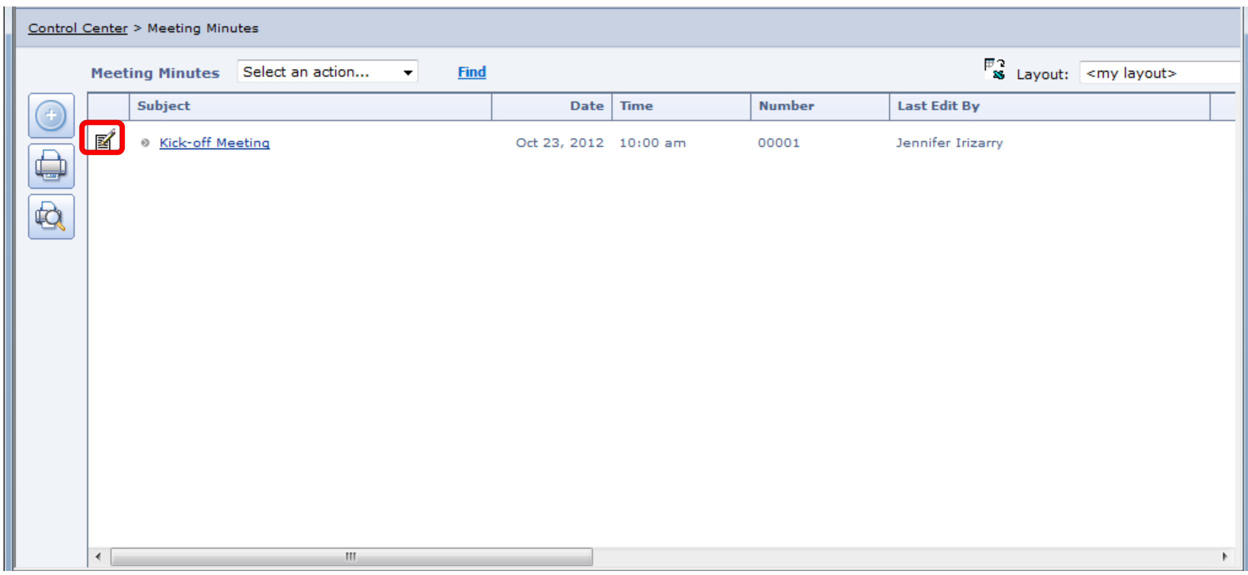


2. Select your desired project.

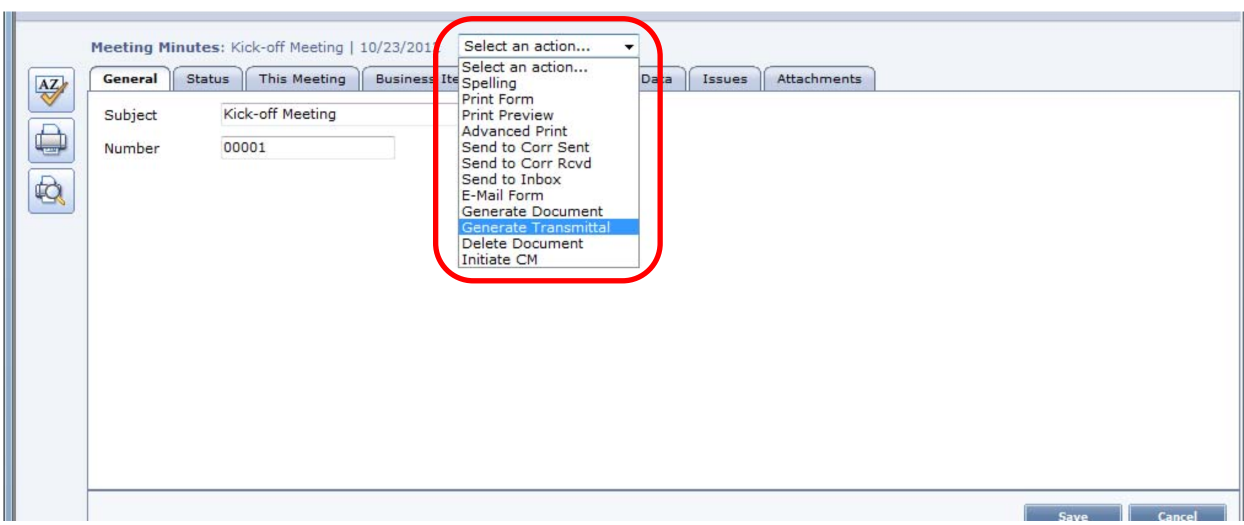
3. Open the **Communication** folder (a list of modules will display) and select **Meeting Minutes**.



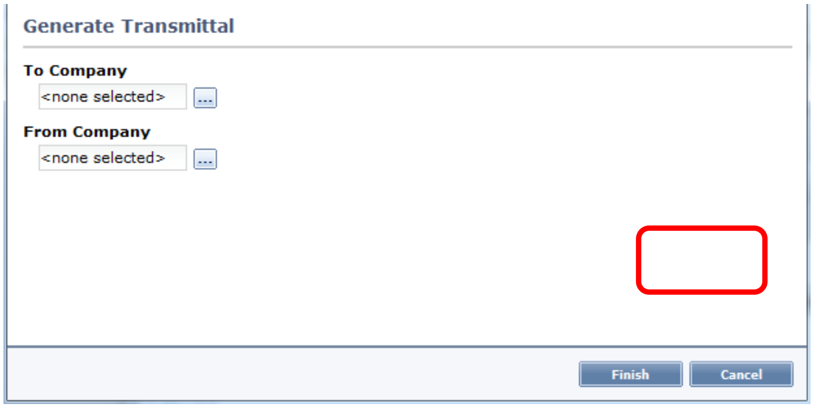
4. The Meeting Minutes **Log View** displays. Locate the desired Meeting Minutes document and click the **edit icon** to the left of the title.



5. The Meeting Minutes document displays. With the document open, choose **Generate Transmittal** from the **Select an action** menu on the top of the screen.

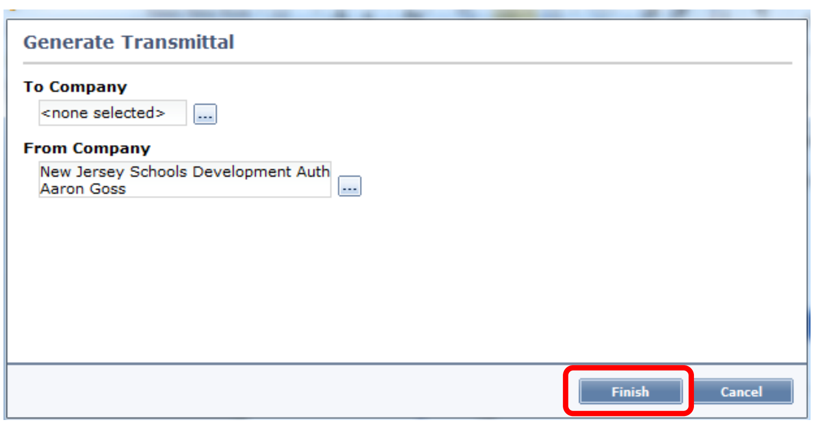


6. The Generate Transmittal dialog box displays.

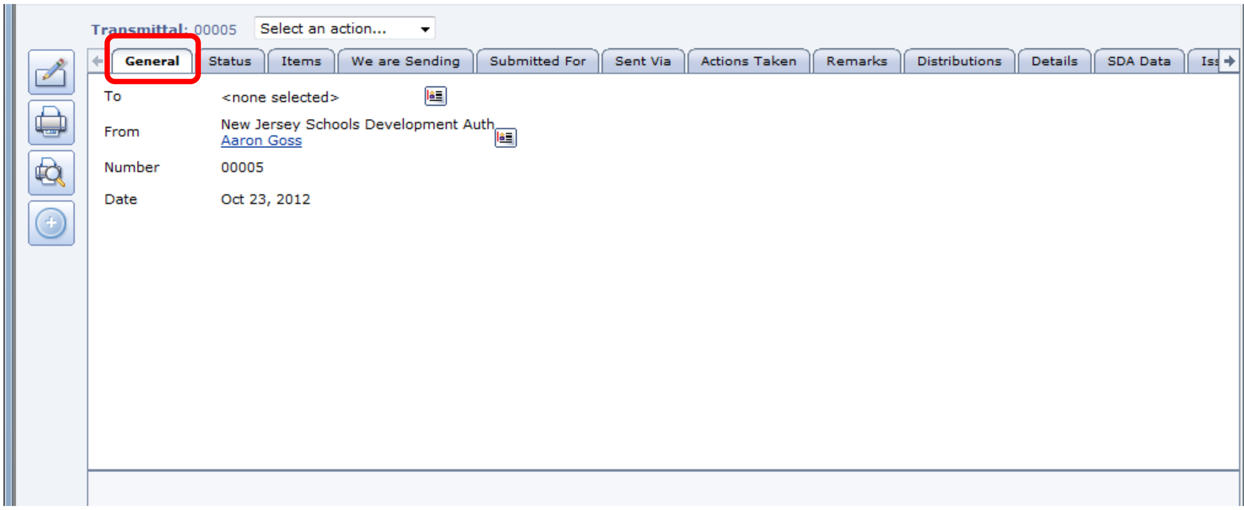


- **To –** Leave blank. The Distribution section will be created on the Transmittal document.
- **From** - Click the **select** button next to the field to choose the name of the person sending the Transmittal.

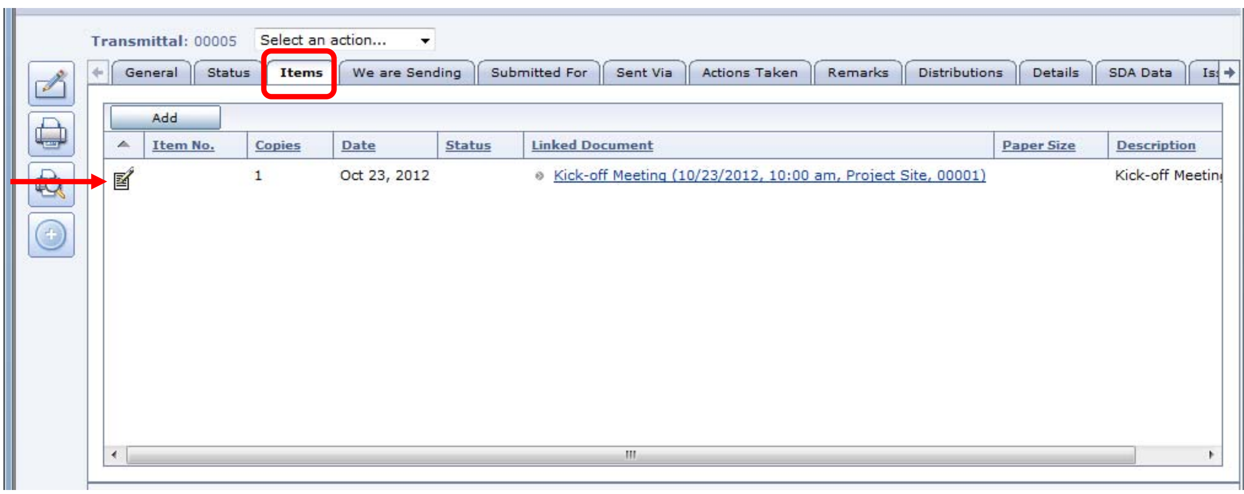
6. Click the **Finish** button when completed.



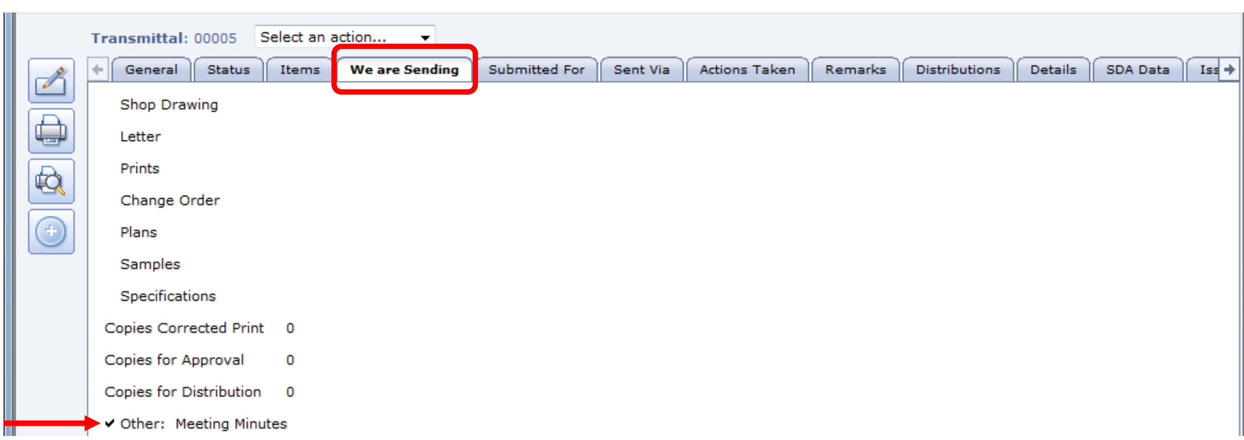
7. The Transmittal document displays. The General Tab lists the **From** name, the document **Number** and the **Date** the document was created



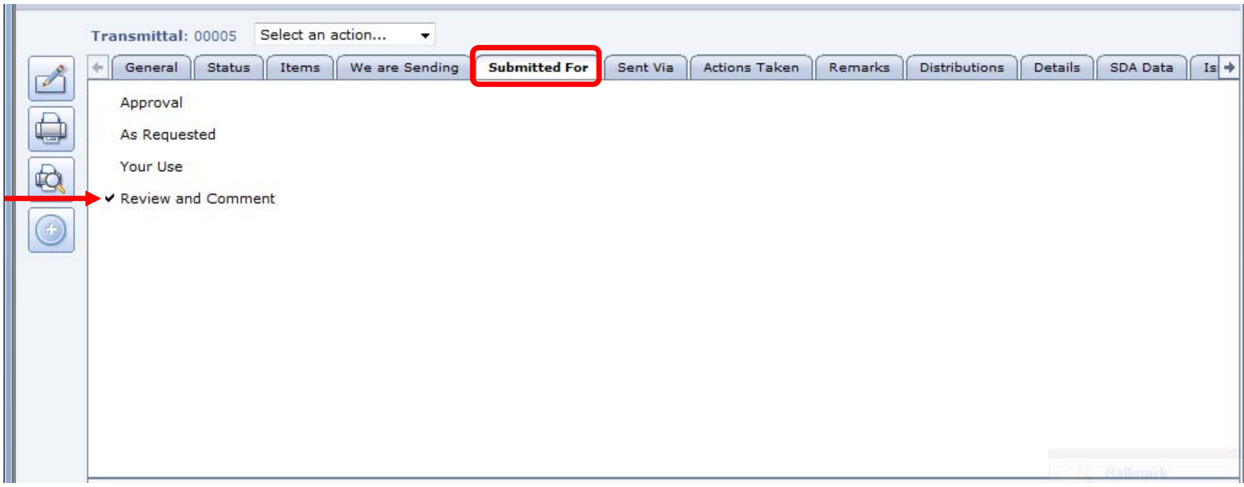
8. Click the **Items** tab to view the Meeting Minutes document which has been automatically linked to this Transmittal.



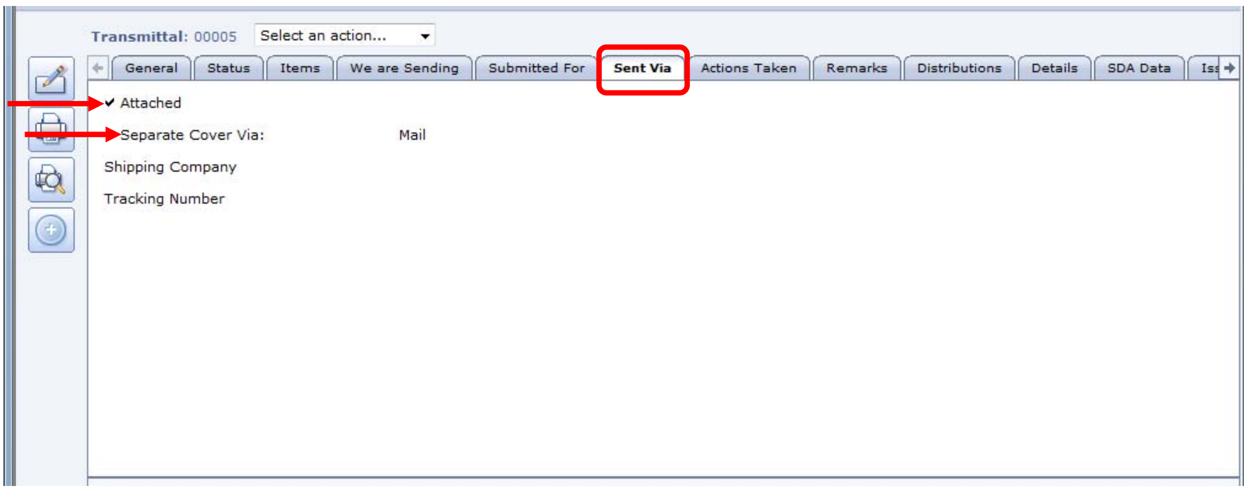
9. Click the **We Are Sending** tab to view that the **Other** field has been automatically populated.



10. Click the **Submitted For** tab to view that the **Review and Comment** field has been automatically populated.

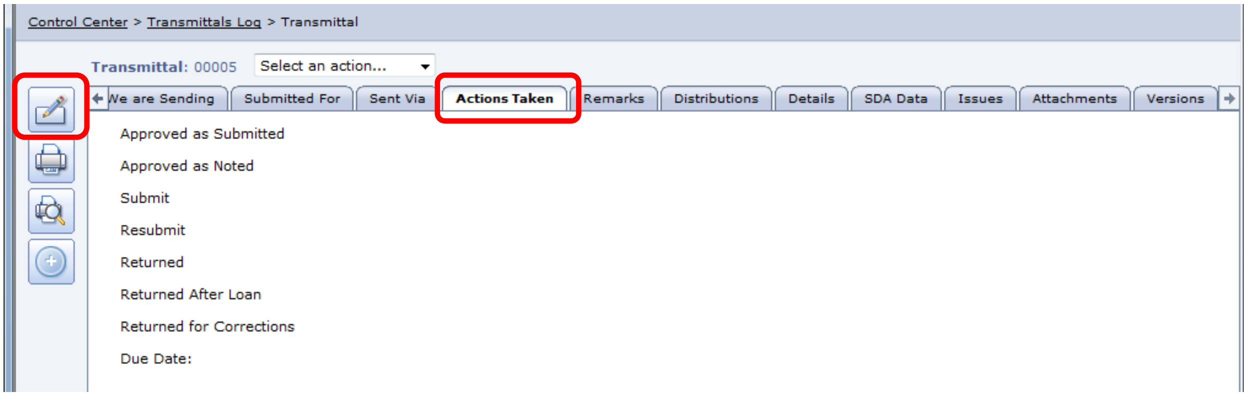


11. Click the **Sent Via** tab to view that the **Attached** and **Separate Cover Via** fields have been automatically populated.

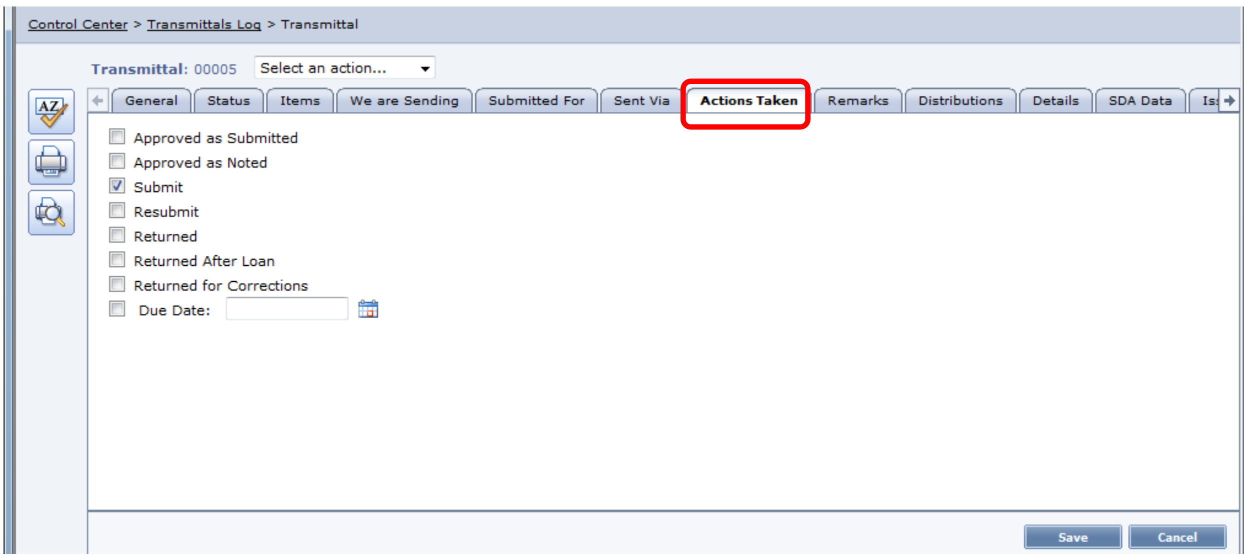


12. Click the **Details** tab to view that the **Reference** and **Signed** fields have been automatically populated.

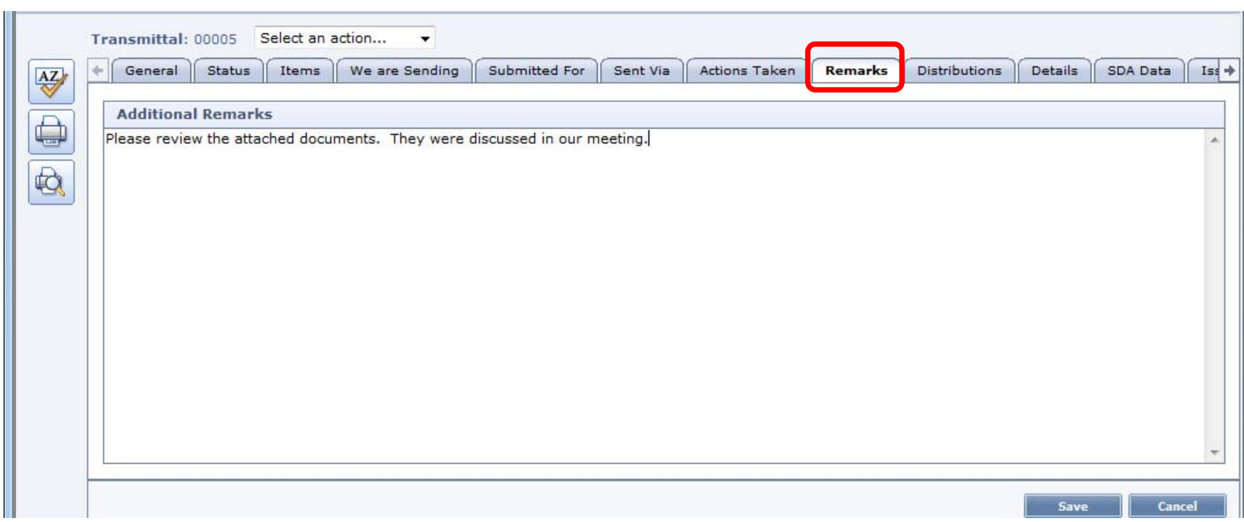
13. Click the **Edit document** icon on the left side of the screen and click the **Actions Taken** tab.



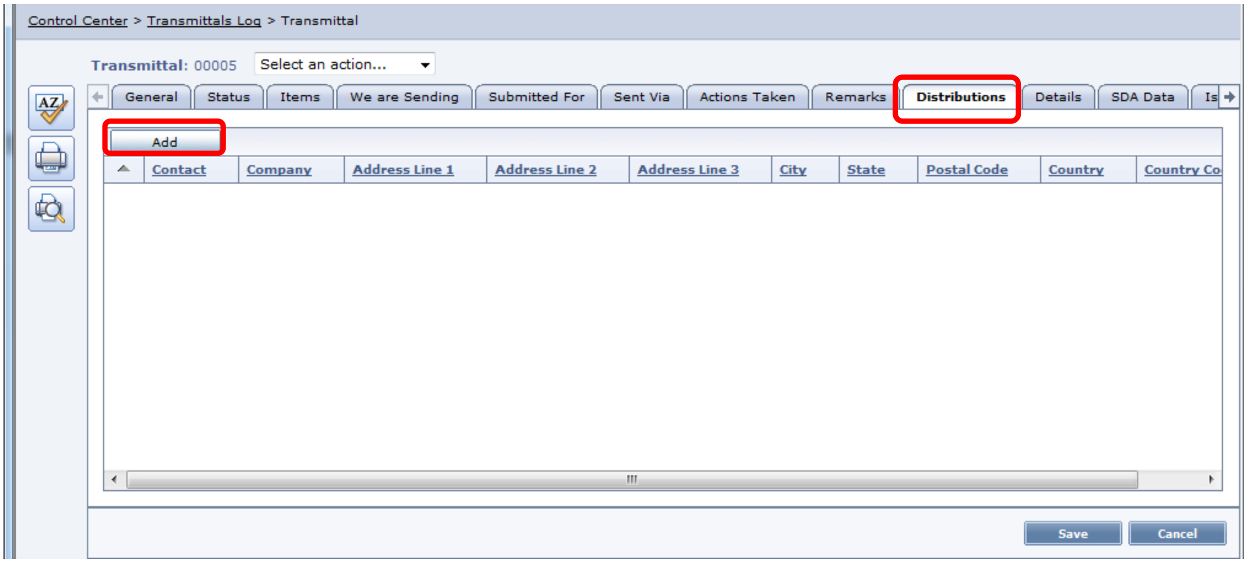
14. Click the appropriate checkbox(es) indicating what actions you are taking, or what actions the recipient must take regarding the attached contents.



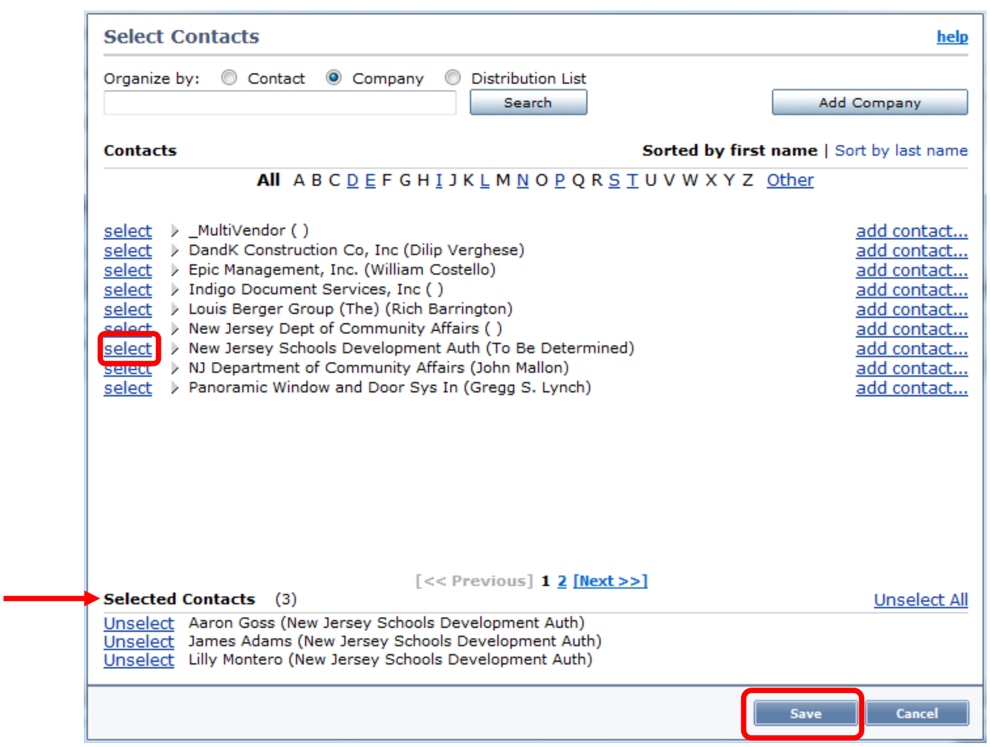
15. Click the **Remarks** tab and enter any applicable comments regarding the Transmittal.



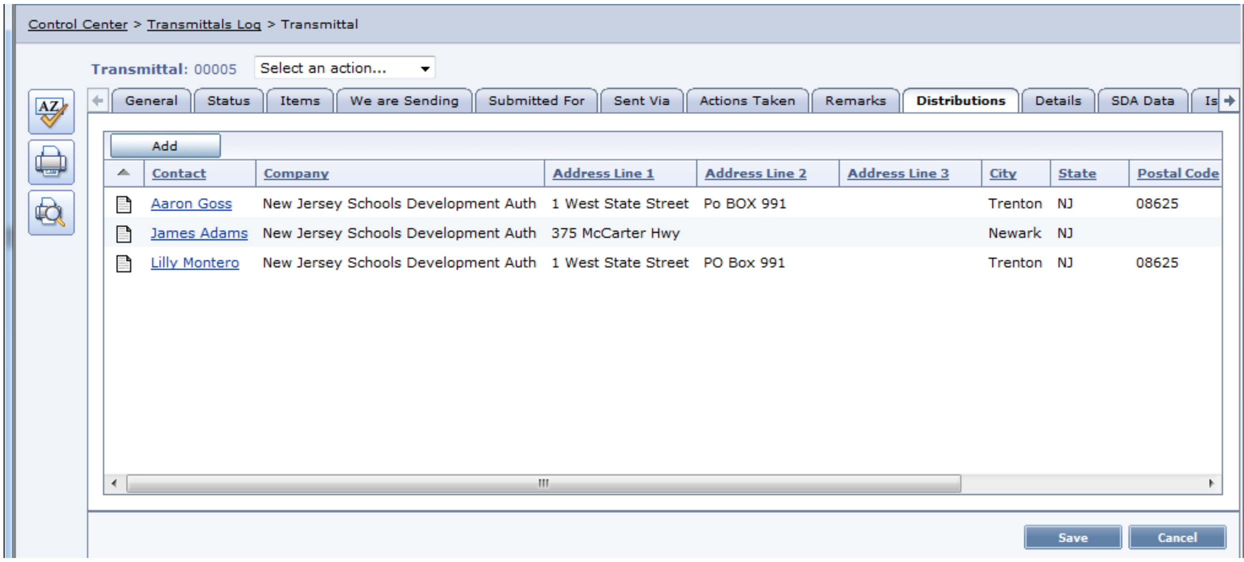
16. Click the **Distribution** tab. This section will be used to identify the contacts who will receive the document distribution. The contacts are not automatically notified, but a transmittal can be printed for each contact on the distribution list. Users may also receive the Meeting Minutes via Email (see page 29). Click the **Add** button.



17. The **Select Contacts** dialog box displays. Select the name (or names) from the list by clicking the **select** link to the left of the desired name. The names will be added at the bottom of the window in the **Selected Contacts** section. When completed, click the **Save** button to return to the Transmittal document.



18. The selected names will display in the Distributions tab.

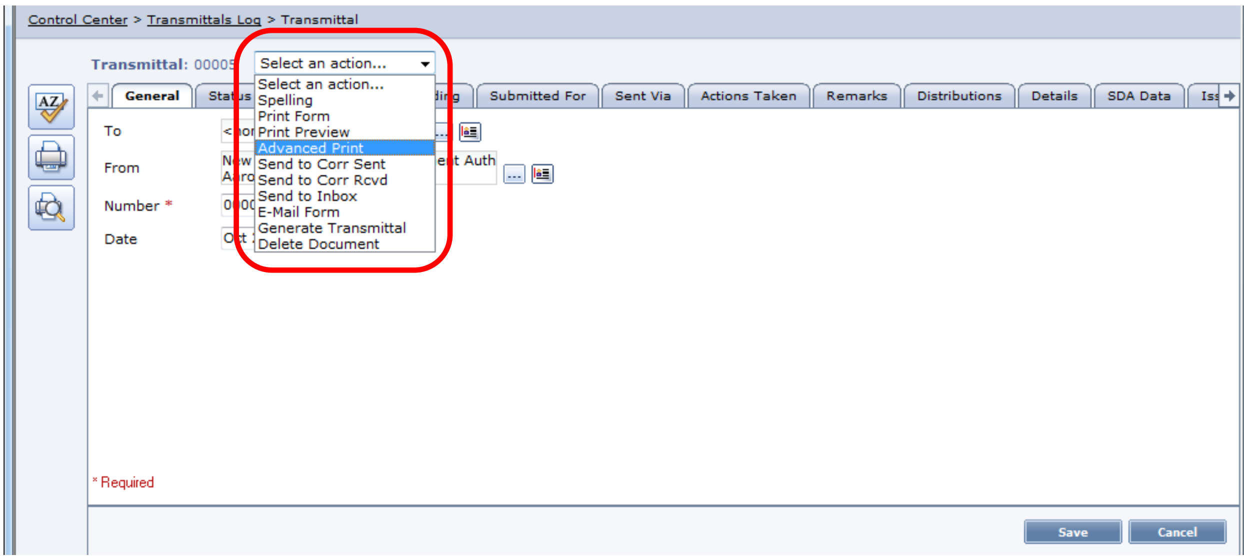


19. The next step will be to print the Transmittal.

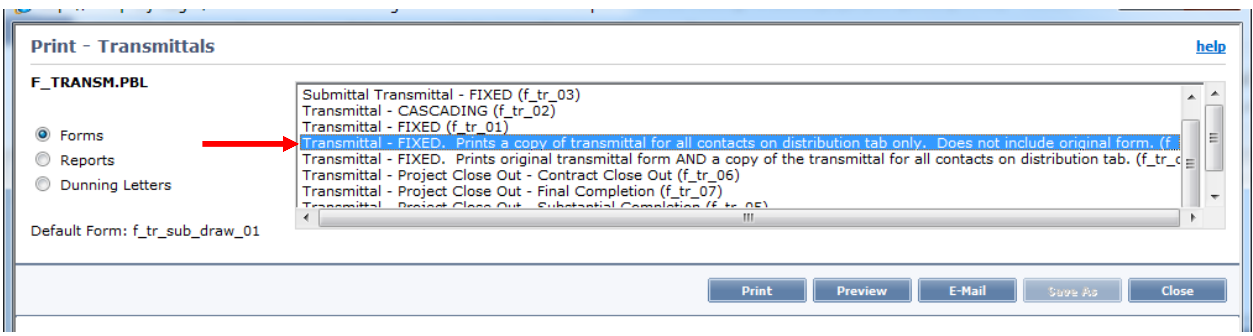
B. Print a Transmittal

To print the Transmittal and a copy for each recipient listed on the Distribution section:

1. With the transmittal document open, choose **Advanced Print** from the **Select an action** menu on the top of the screen.



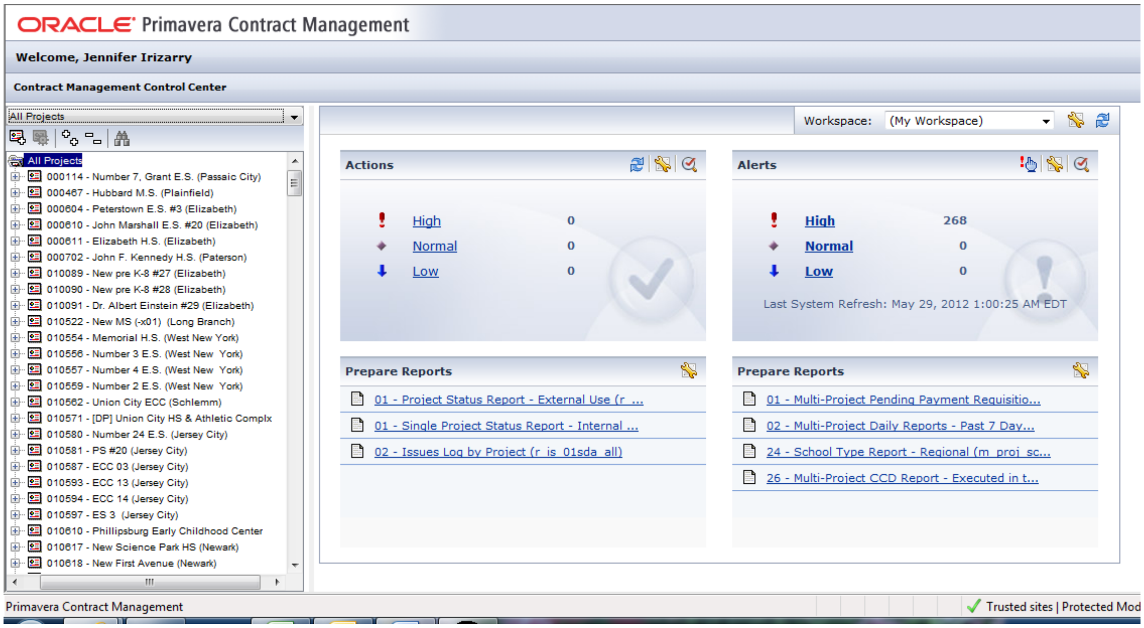
2. The **Print – Transmittals** dialog box displays. Select the form **Transmittal-FIXED Prints a copy of transmittal for all contacts on distribution tab only. Does not include original form.**



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

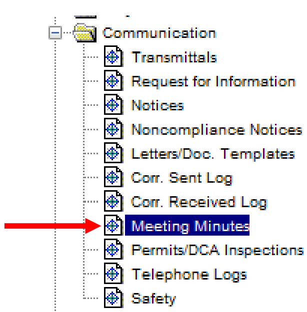
C. Print a Meeting Minutes Document Report

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

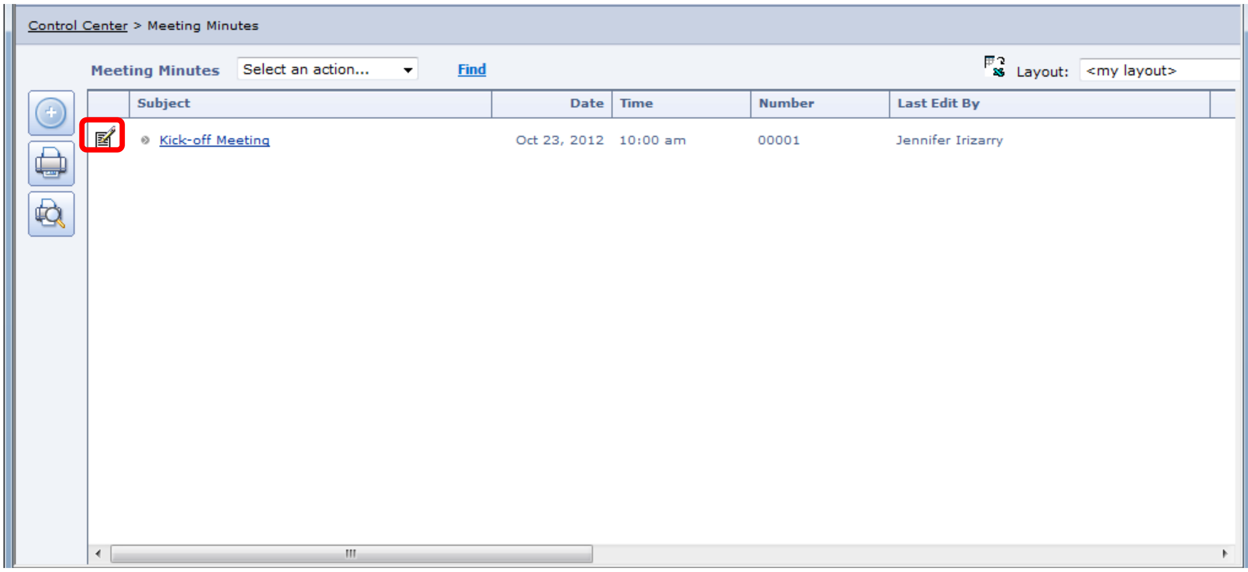


2. Select your desired project.

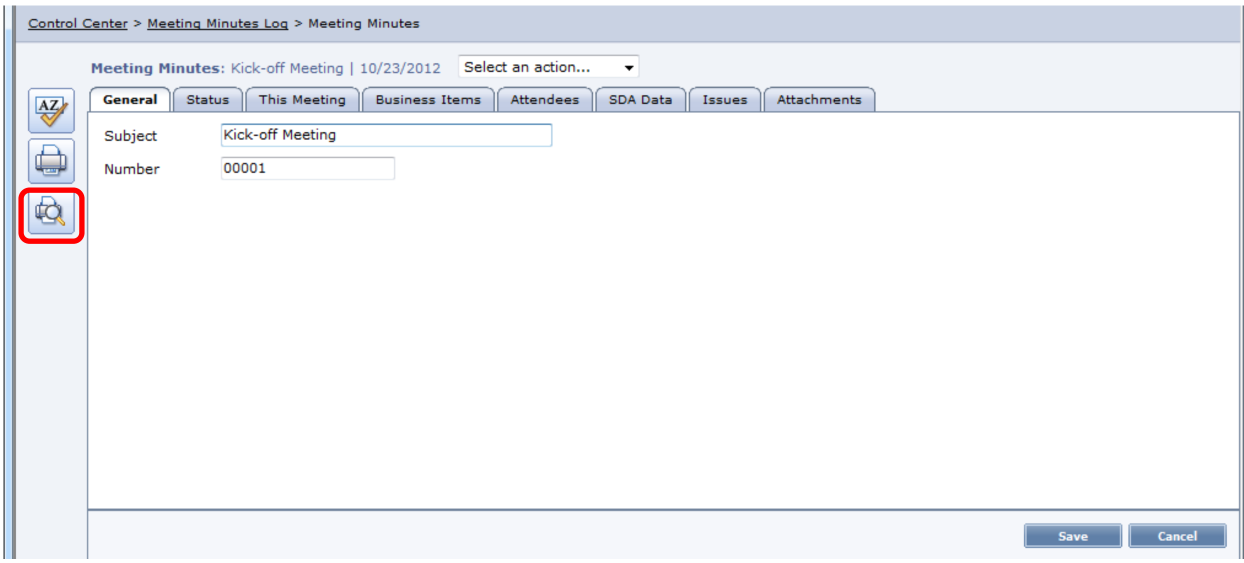
3. Open the **Communication** folder (a list of modules will display) and select **Meeting Minutes**.



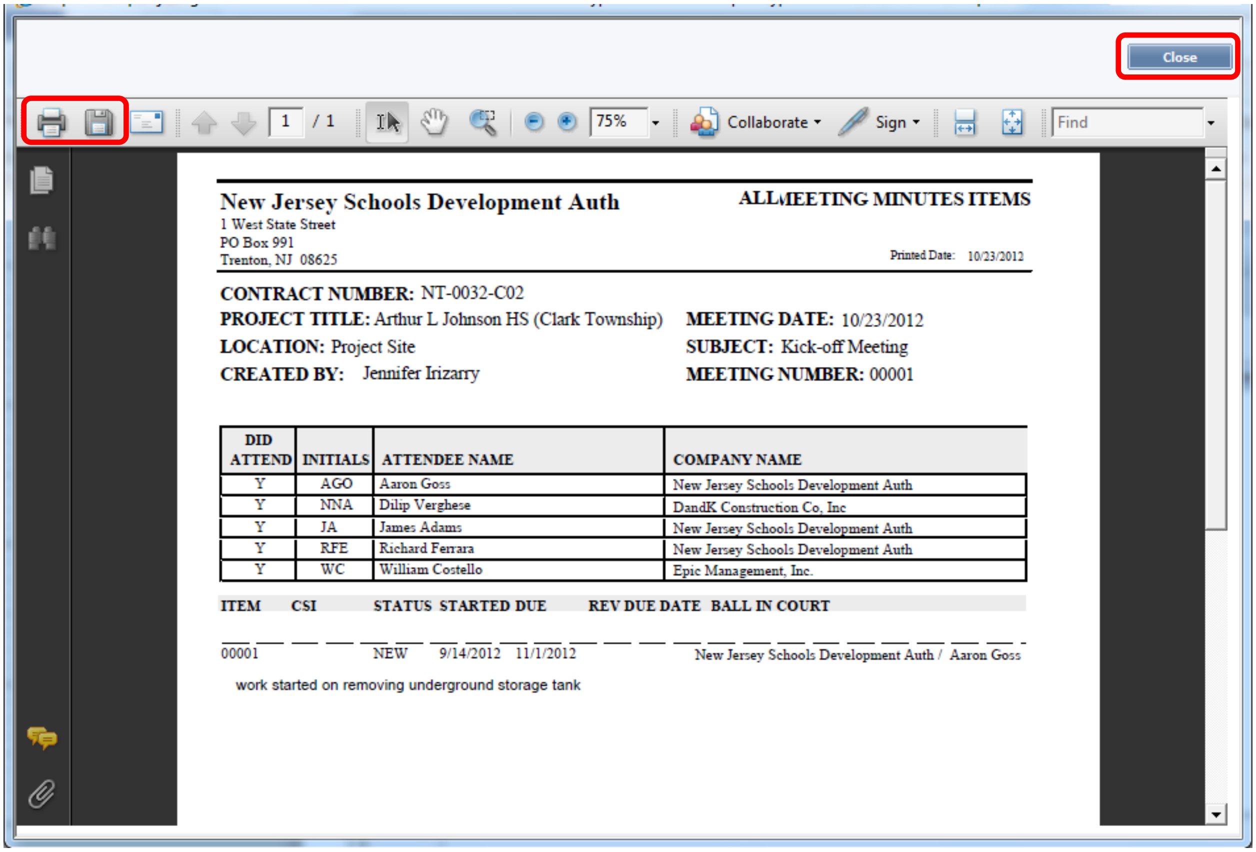
4. The Meeting Minutes **Log View** displays. Locate the desired Meeting Minutes document and click the **edit icon** to the left of the title.



5. With the Meeting Minutes document opened, click the **Print Preview** button on the left side of the screen.



6. The Meeting Minutes report displays (a sample is shown). Click the **Print** button on the upper left side of the page to print the document, or click the **Save a Copy** button to save the document to a desired local or network location. Click the **Close** button when finished.



New Jersey Schools Development Auth — **ALL MEETING MINUTES ITEMS**

1 West State Street
PO Box 991
Trenton, NJ 08625

Printed Date: 10/23/2012

CONTRACT NUMBER: NT-0032-C02
PROJECT TITLE: Arthur L Johnson HS (Clark Township)
LOCATION: Project Site
CREATED BY: Jennifer Irizarry
MEETING DATE: 10/23/2012
SUBJECT: Kick-off Meeting
MEETING NUMBER: 00001

DID ATTEND	INITIALS	ATTENDEE NAME	COMPANY NAME
Y	AGO	Aaron Goss	New Jersey Schools Development Auth
Y	NNA	Dilip Verghese	DandK Construction Co, Inc
Y	JA	James Adams	New Jersey Schools Development Auth
Y	RFE	Richard Ferrara	New Jersey Schools Development Auth
Y	WC	William Costello	Epic Management, Inc.

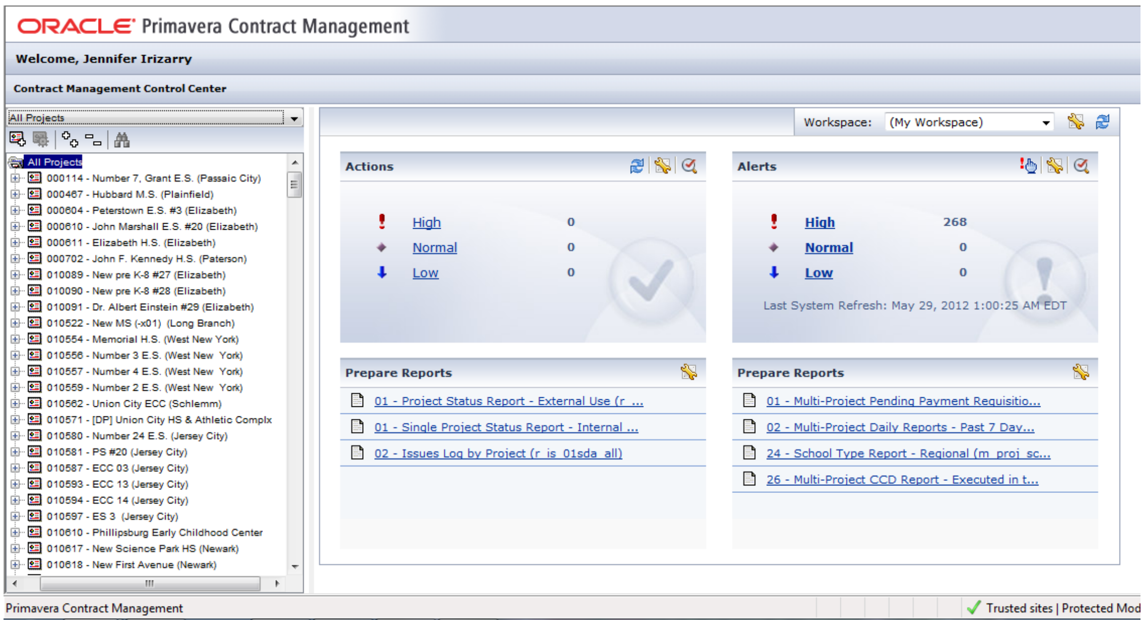
ITEM	CSI	STATUS	STARTED	DUE	REV DUE DATE	BALL IN COURT
00001		NEW	9/14/2012	11/1/2012		New Jersey Schools Development Auth / Aaron Goss

work started on removing underground storage tank

D. Email a Meeting Minutes Document

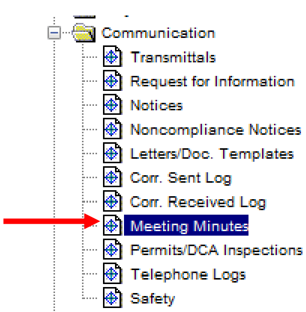
To email a Meeting Minutes document:

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

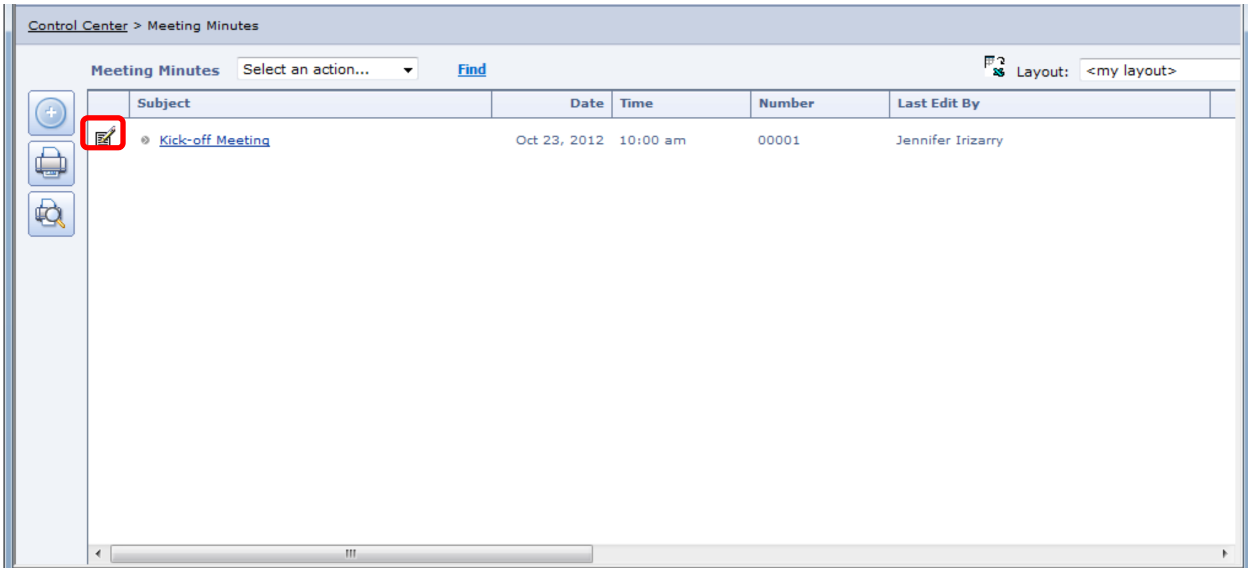


2. Select your desired project.

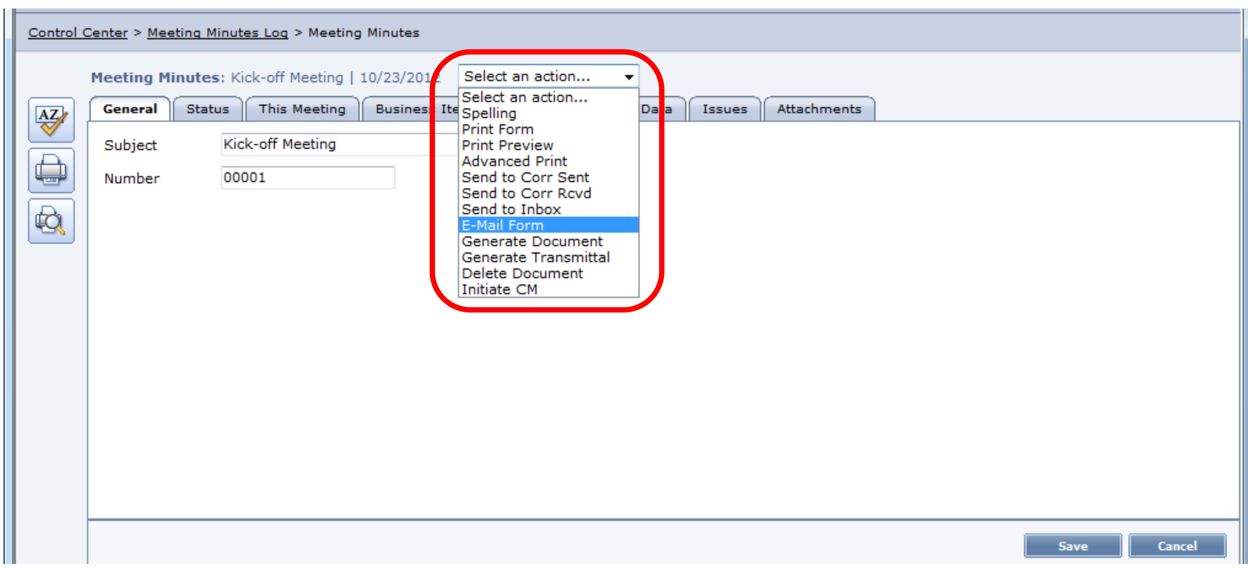
3. Open the **Communication** folder (a list of modules will display) and select **Meeting Minutes**.



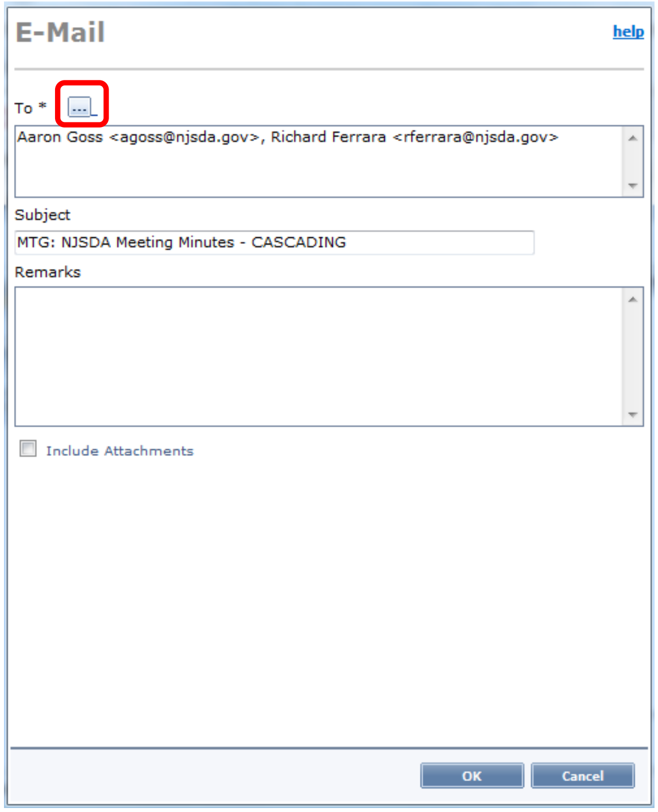
4. The Meeting Minutes **Log View** displays. Locate the desired Meeting Minutes document and click the **edit icon** to the left of the title.



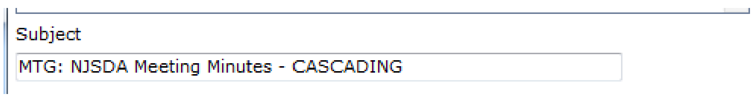
5. With the Meeting Minutes document open, choose the **Select an Action** drop-down list on the top of the screen and choose **E-Mail Form**.



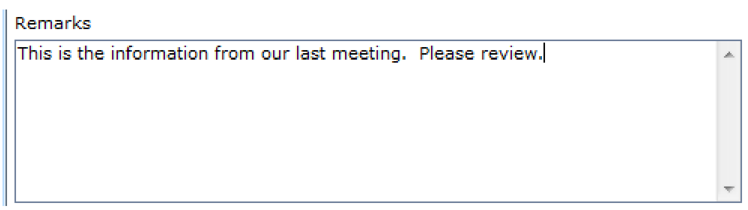
6. The **E-Mail dialog box** displays. Click the **select** button in the **To** box to choose the applicable names from the contact list. **Note:** If a Transmittal has already been created, the contacts chosen for the Transmittal will automatically display in the To box.



7. The default information in the **Subject** field can be changed as required.

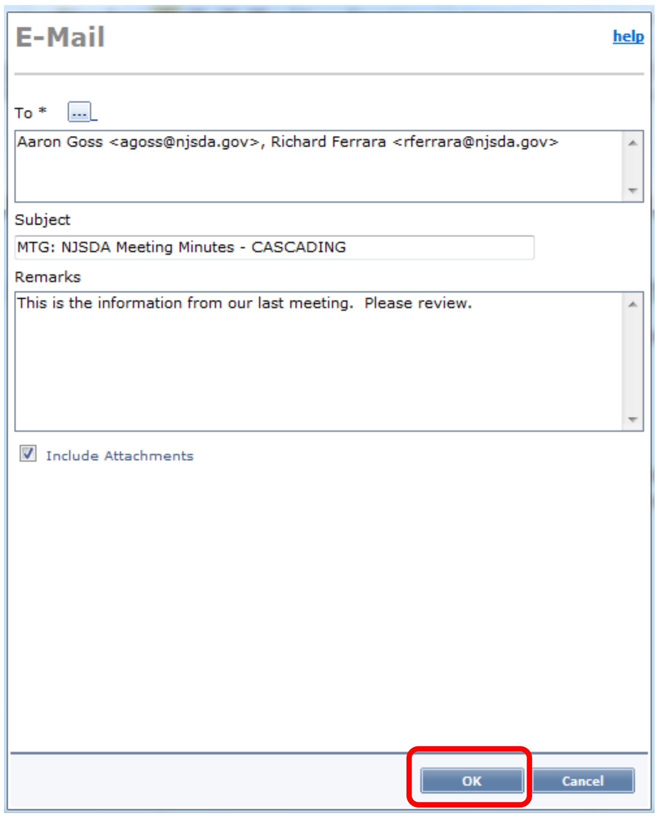


8. Enter any comments in the **Remarks** field. The information entered here will display in the body of the e-mail message.



9. If there are any attachments to be included with the e-mail, check the **Include Attachments** box at the bottom of the **E-mail** window.

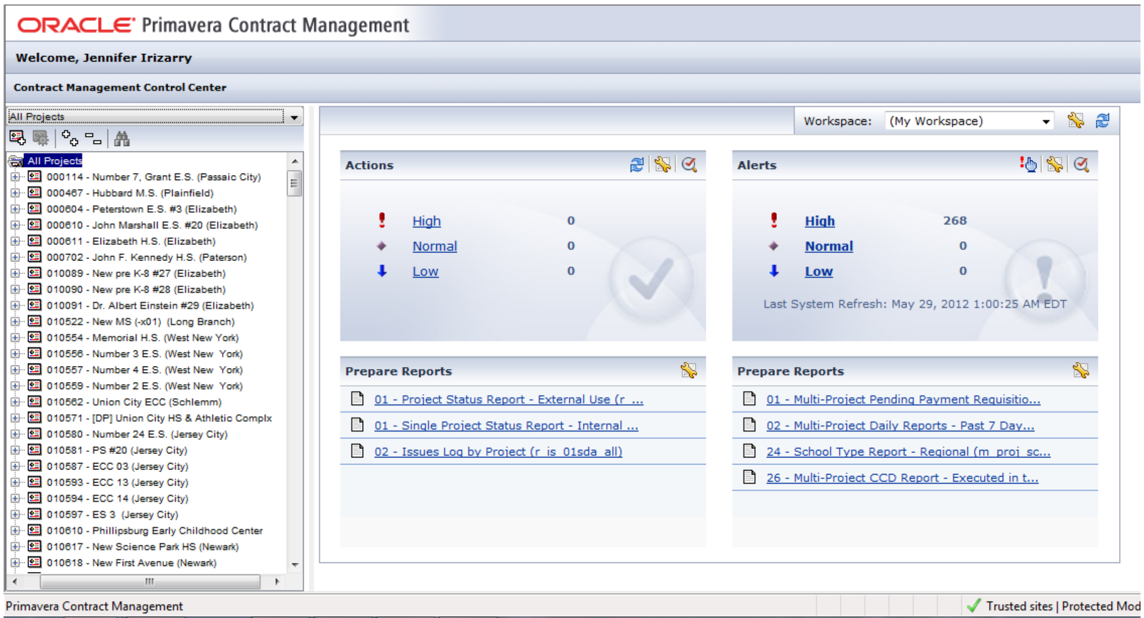
10. When all fields have been completed, click the **OK** button to send the e-mail.



V. Update the Status of a Business Item

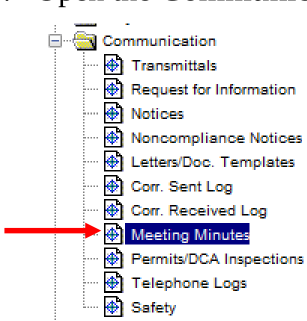
As Business Item tasks are updated or completed, their status should be changed.

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

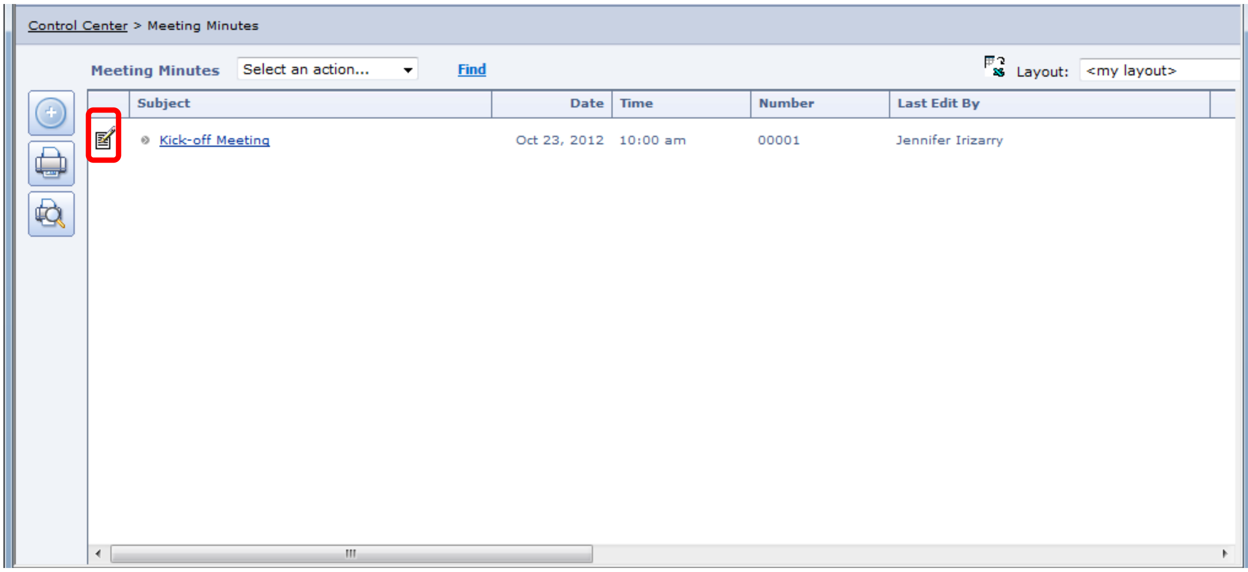


2. Select your desired project.

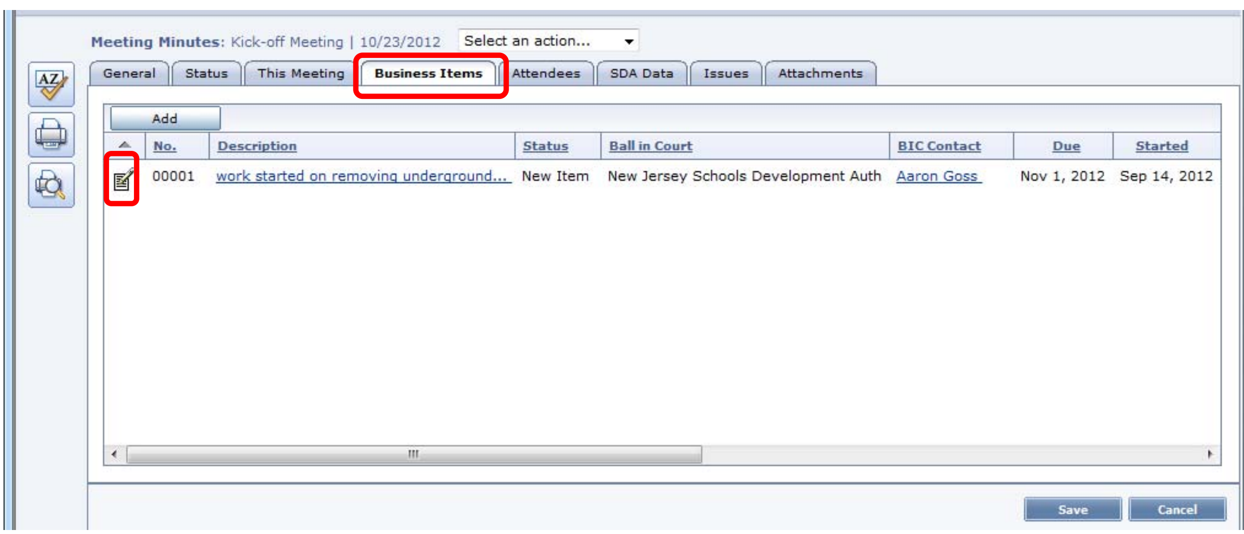
3. Open the **Communication** folder (a list of modules will display) and select **Meeting Minutes**.



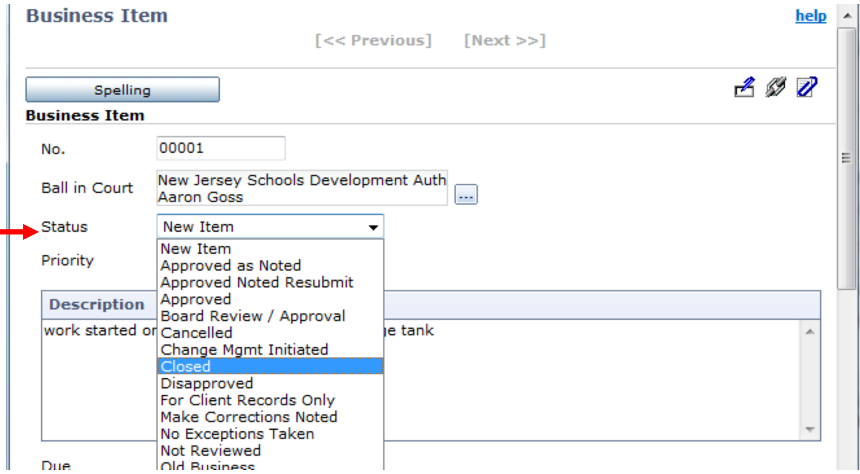
4. The Meeting Minutes **Log View** displays. Locate your desired Meeting Minutes document and click the **edit icon** to the left of the title to open it.



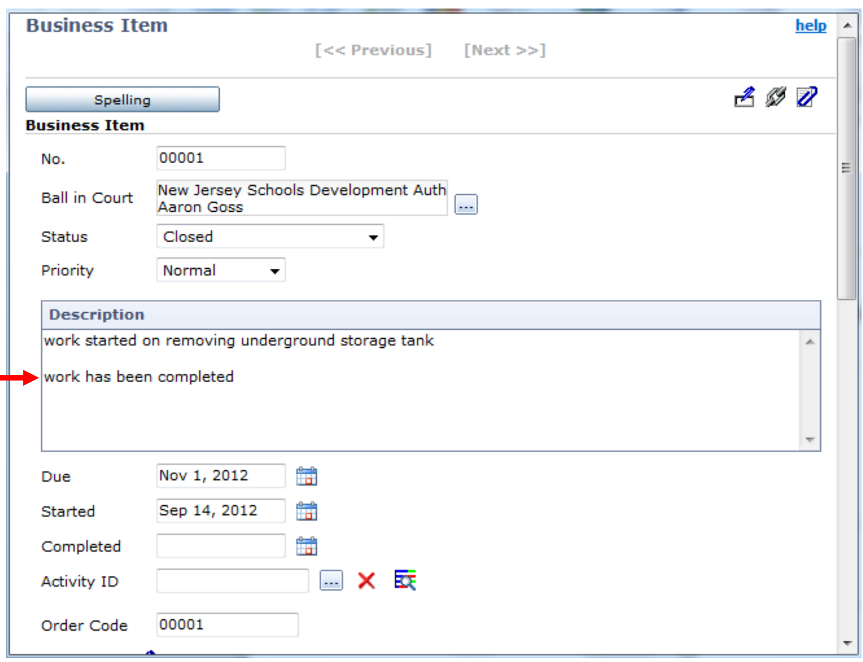
5. With the Meeting Minutes document open, click the **Business Items** tab. Locate the Business Item you wish to update and click the **edit icon** to the left of the title to open it.



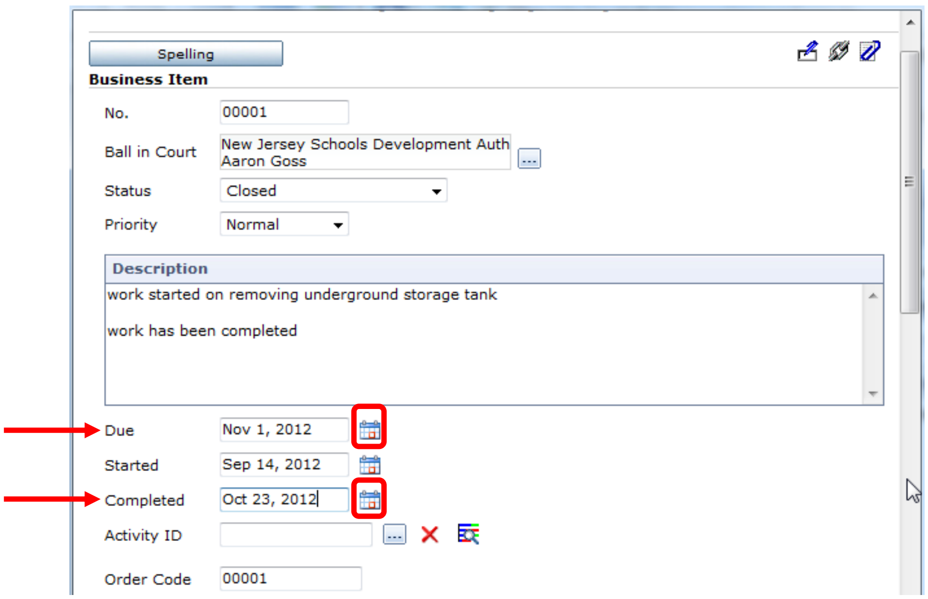
6. The **Business Item dialog box** displays. Click the drop down box on the **Status** field to choose the updated status for this item. In the example shown, Closed was selected.



7. Enter any applicable comments regarding the status change in the **Description** field.

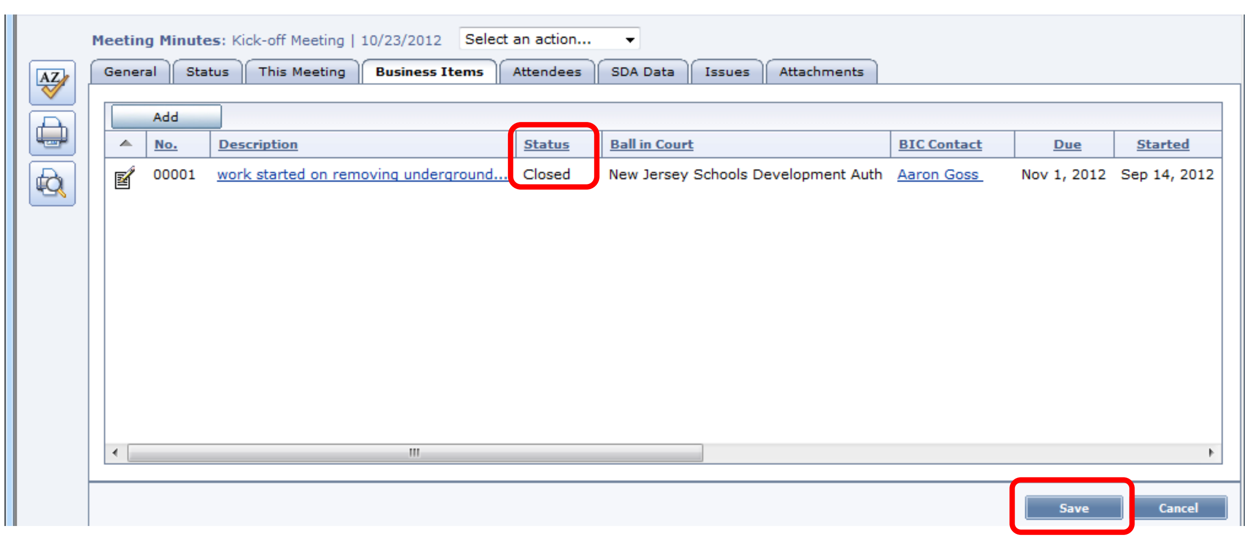


8. If the Business Item will remain open (due to a status of anything other than closed or cancelled) and the Due Date must be extended, update the **Due** date field by clicking the **calendar icon** to the right of this field. If the Business Item has been closed, a **Completed** date must be entered by clicking the **calendar icon** to the right of the field.



9. When all changes are completed, scroll to the bottom of the window. If there are more Business Items to edit, click the **Save and Edit Next** button, otherwise click the **Save and Close** button to return to the Meeting Minutes document screen.

10. The updated Status and Due completion dates for the Business Item will display in the Business Items section. In the example shown, the status of the Business Item now displays as **Closed**. Click the **Save** button at the bottom of the window to save your work.



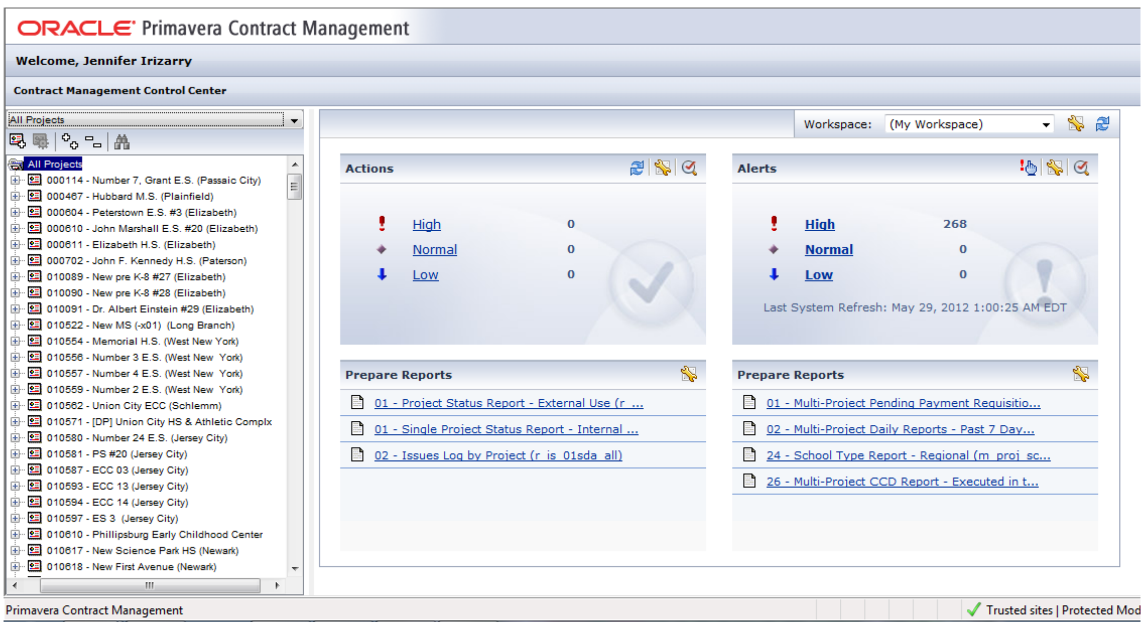
VI. Approve and Save a Meeting Minutes Document

Before a new Meeting Minutes document is created, it is recommended that the current Meeting Minutes document be approved and saved. While this is an *optional* function, approving and saving a document will ensure the integrity of all historical information that is entered on this document.

It is important to note that this function should only be selected right before you are ready to generate a new Meeting Minutes document. If the approve and save function is chosen at any point before you are ready to generate a new Meeting Minutes document, a user (such as an Architect or General Contractor) who would normally be able to edit their own Business Items will be locked out of the document.

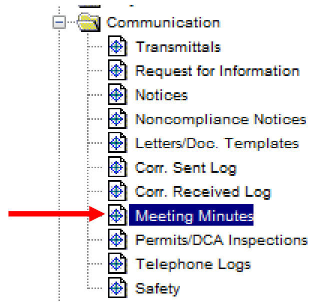
To approve and save a Meeting Minutes document:

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

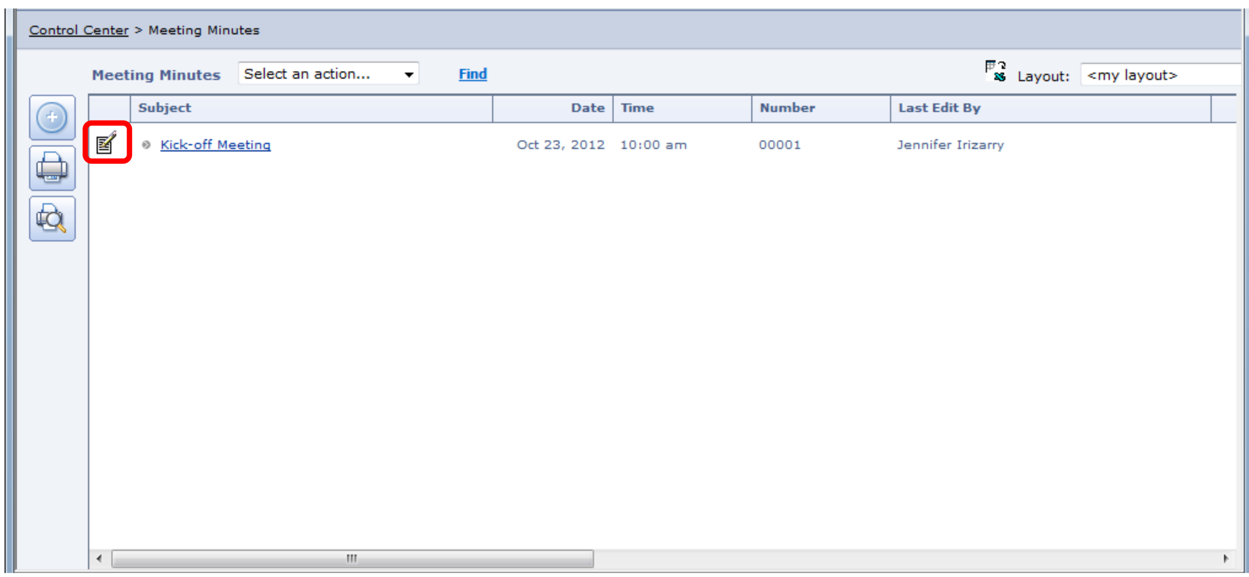


2. Select your desired project.

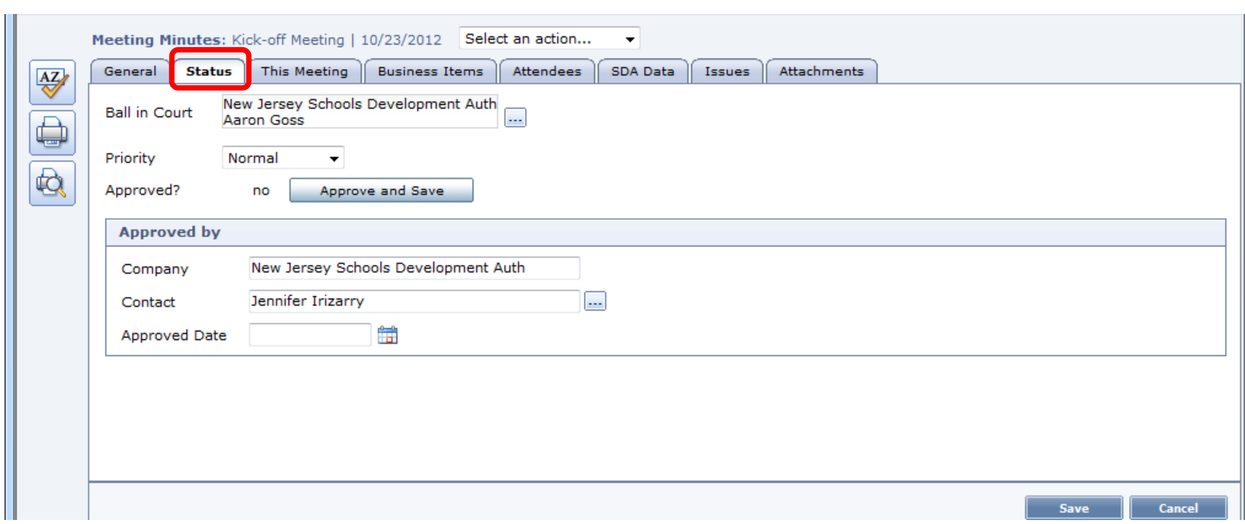
3. Open the **Communication** folder (a list of modules will display) and select **Meeting Minutes**.



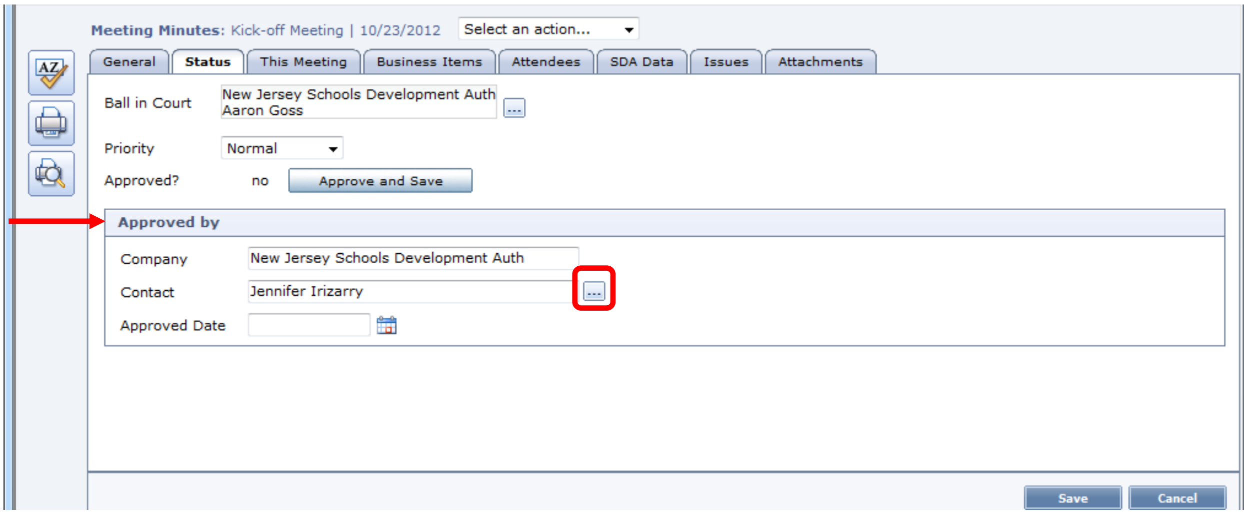
4. The Meeting Minutes **Log View** displays. Locate your desired Meeting Minutes document and click the **edit icon** to the left of the title to open it.



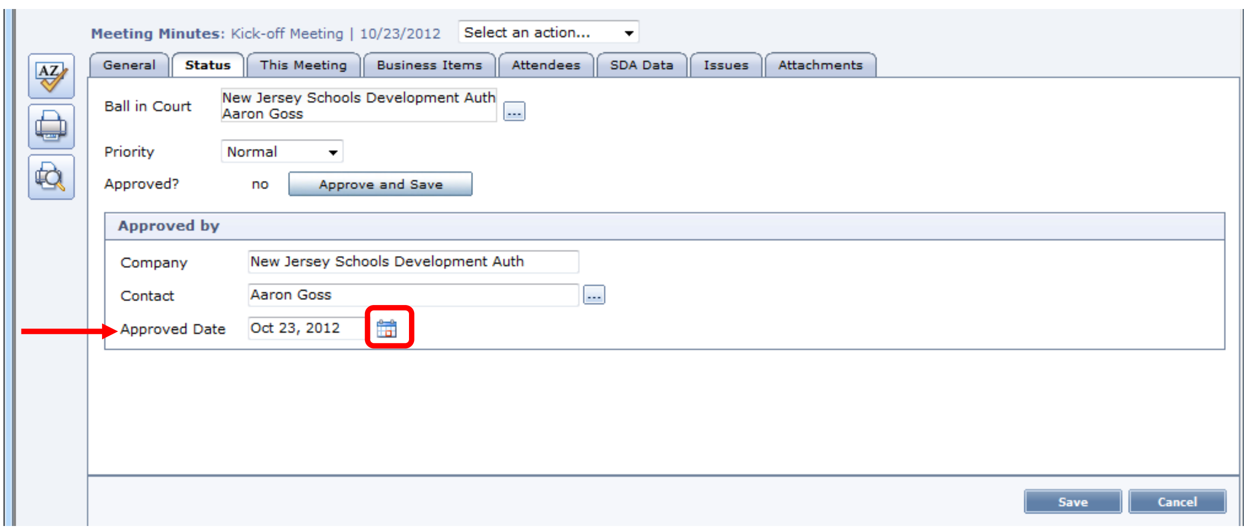
5. The Meeting Minutes document displays. Click the **Status** tab.



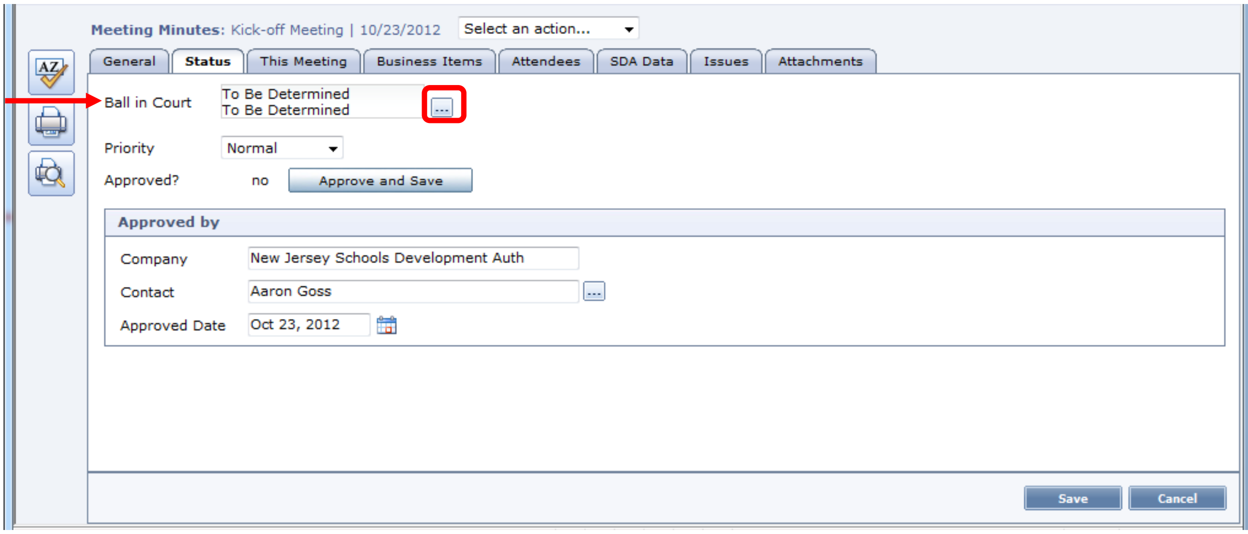
6. The **Approved by** information must be completed before the Approve and Save button can be clicked. The default information displayed in the Approved by section reflects the name of the person who created the document. This needs to be changed to the person who is approving the Meeting Minutes document. Click the **select** button next to the field to select the correct name from the contact list.



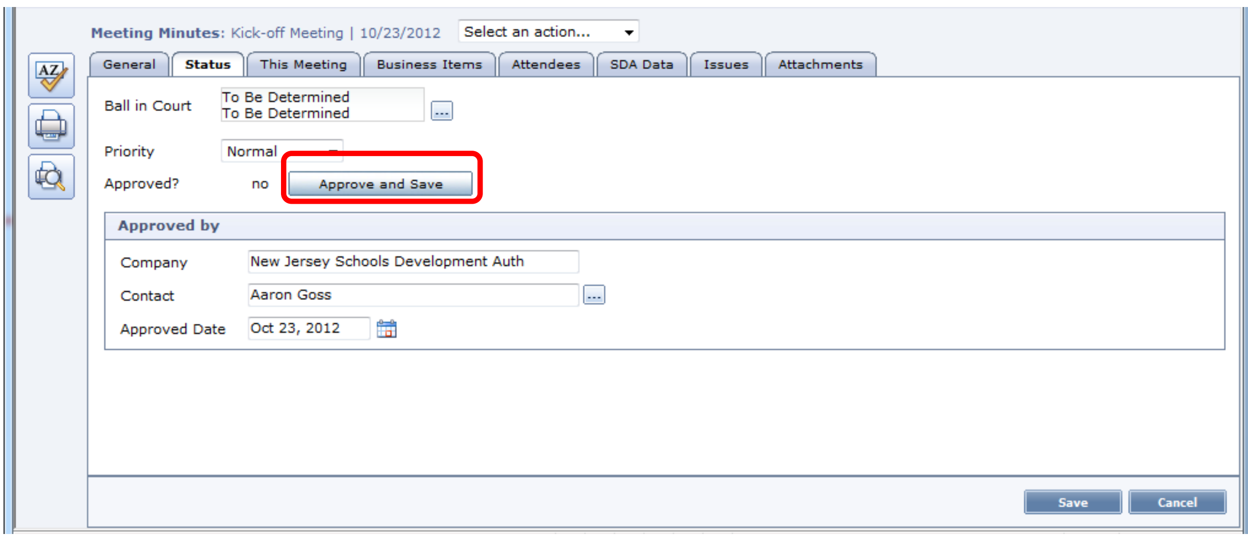
7. Click the **calendar icon** on the **Approved Date** field to select the date the document is approved.



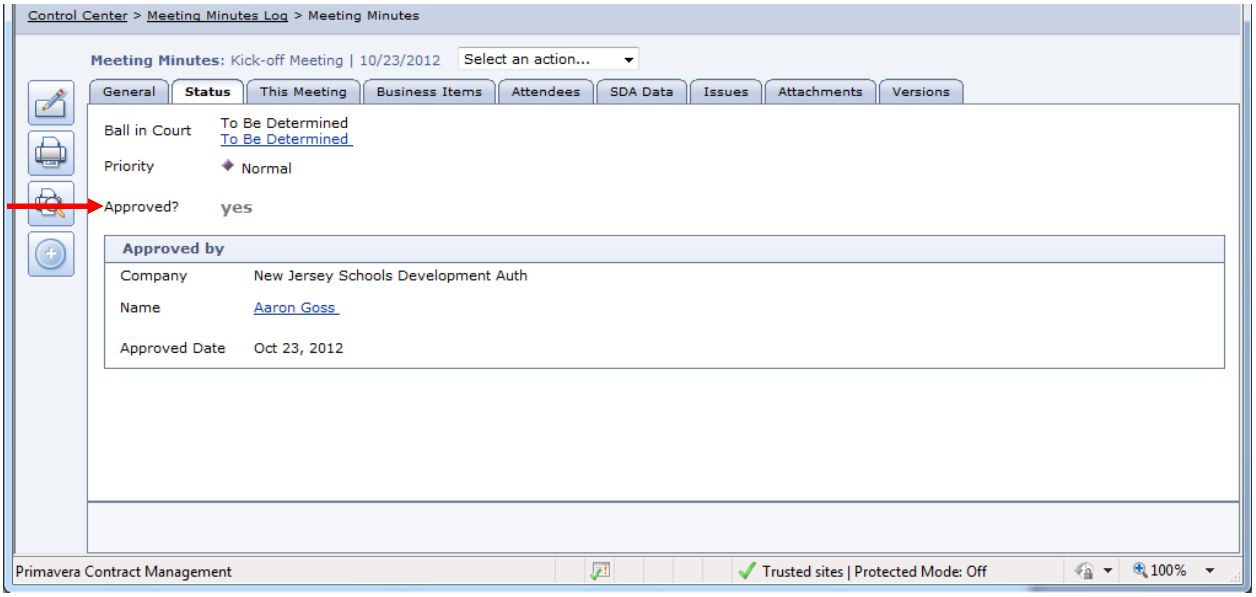
8. Click the **select** button next to the field to change the **Ball in Court** field to **To Be Determined**. This step will ensure that this document will not continue to display in a user's Action Item box on the Control Center.



9. When completed, click the **Approve and Save** button.



10. The **Approved?** field will change to **yes**. This means that the document cannot be changed unless you have the appropriate edit rights.



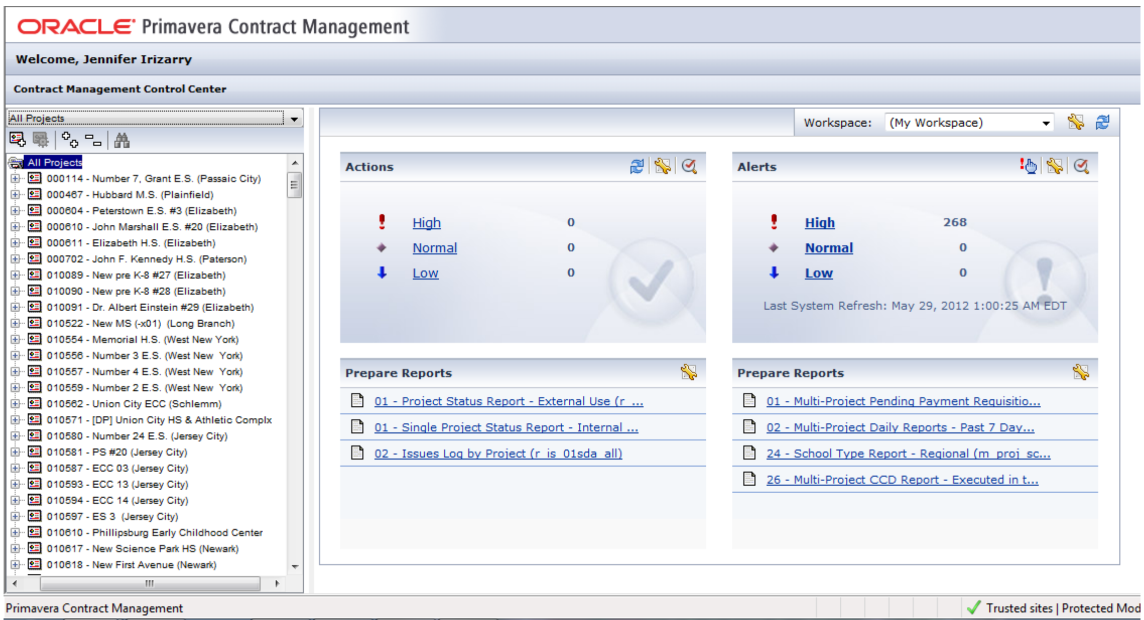
VII. Generate a Subsequent Meeting Minutes Document

This procedure outlines how to create a new Meeting Minutes document from a previous Meeting Minutes document. This will allow all information entered on the original document to be copied over into the new document.

It is recommended that the previous Meeting Minutes document be **Approved and Saved** before beginning this process.

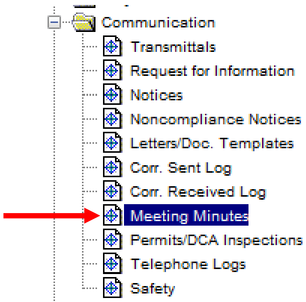
Note: Any Business Item with a status of **Closed** will not be copied over into the new document.

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

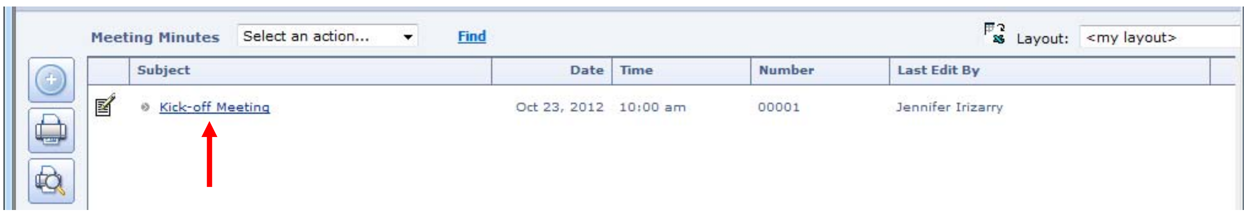


2. Select your desired project.

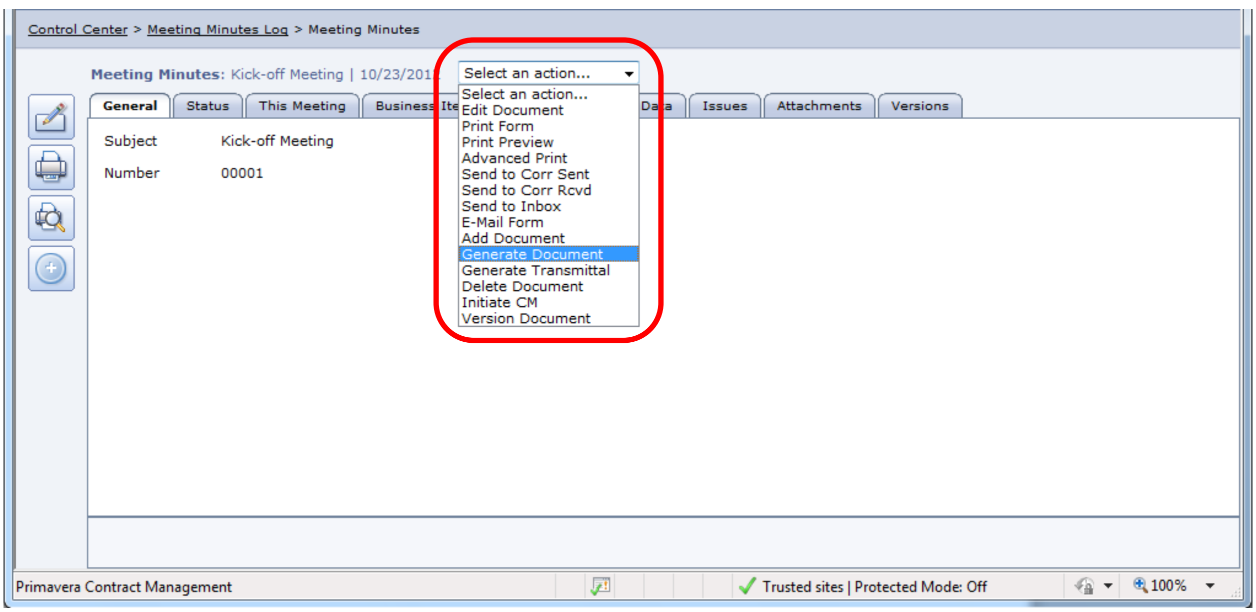
3. Open the **Communication** folder (a list of modules will display) and select **Meeting Minutes**.



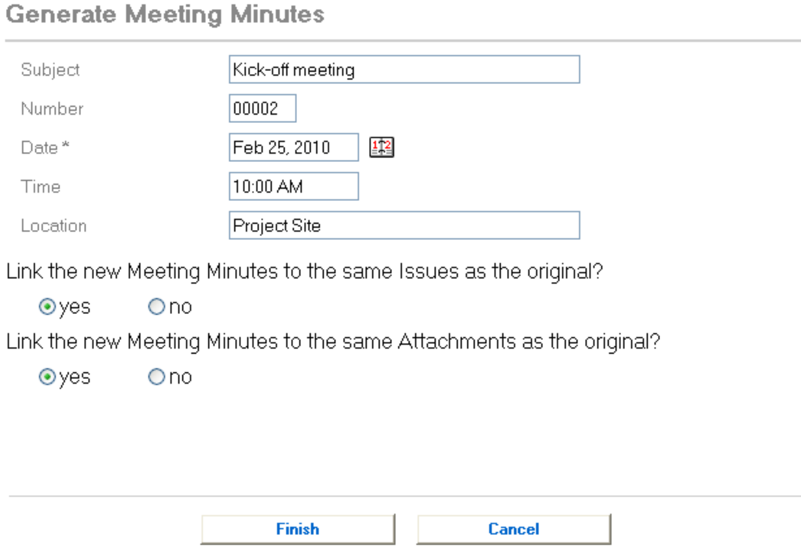
4. The Meeting Minutes **Log View** will display. Locate your desired Meeting Minutes document and click the **blue title link** to open it.



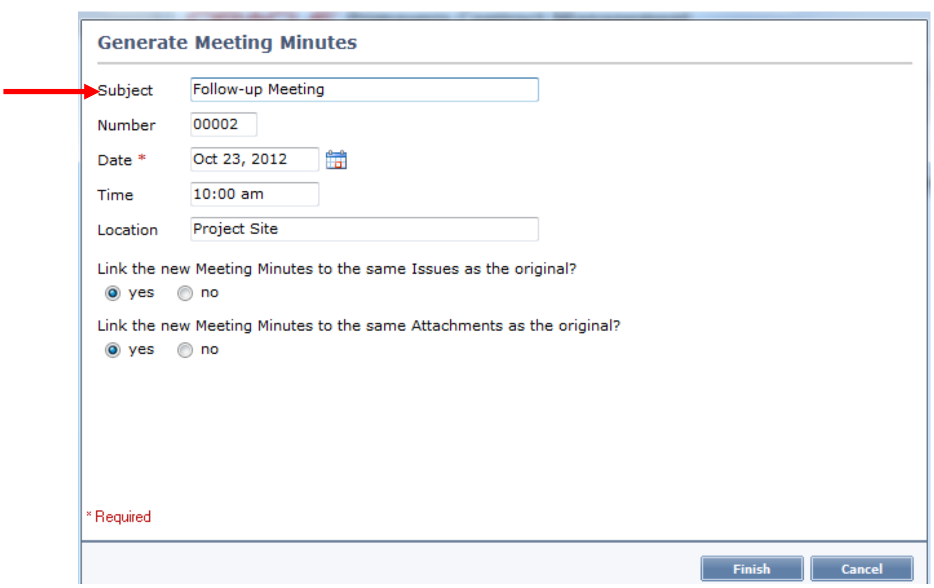
5. With the Meeting Minutes document open, click the drop down box on the **Select an action** menu on the top of the screen and choose **Generate Document**.



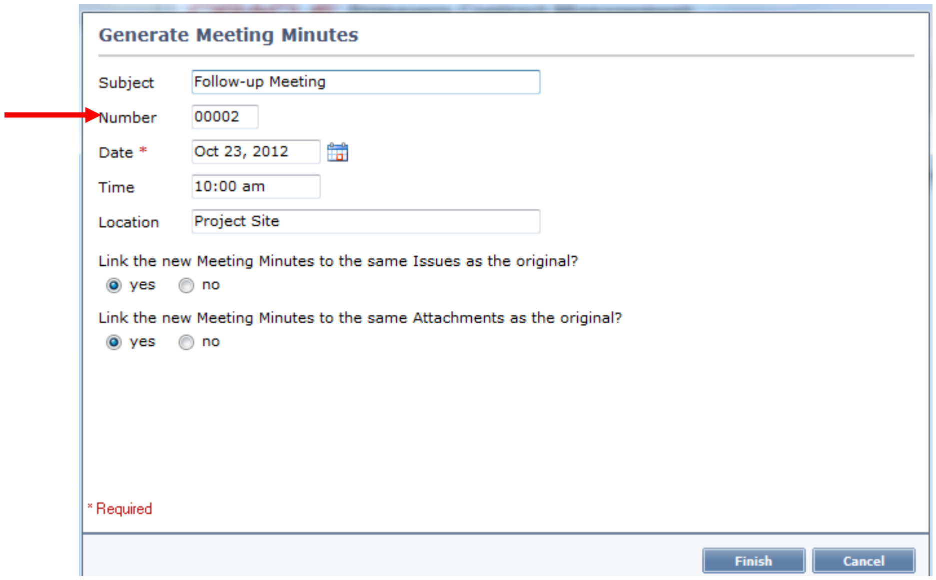
6. The **Generate Meeting Minutes** dialog box displays.



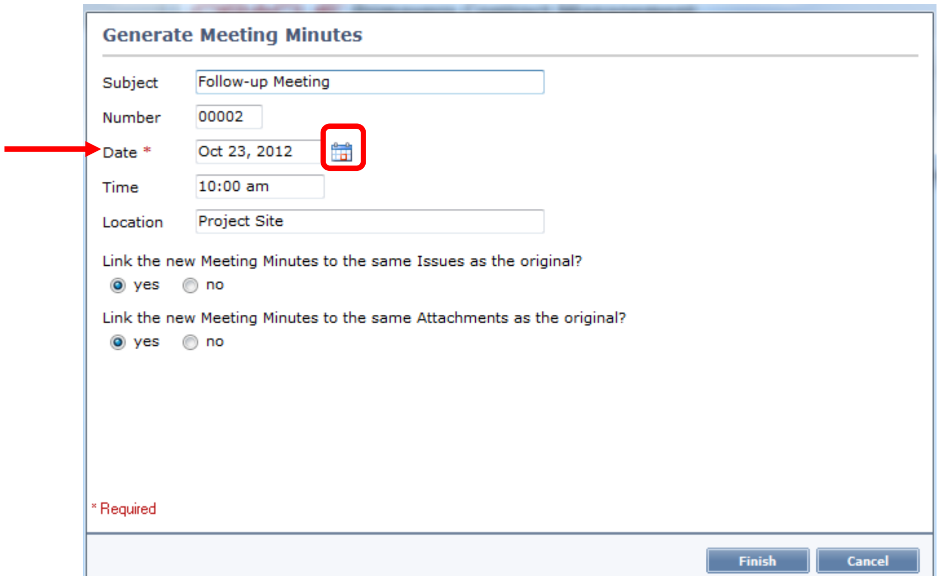
7. The **Subject** field will reflect the same title as the last meeting. If this is incorrect, edit the Subject to reflect the new information (50 character field). In the example shown, the Subject was changed.



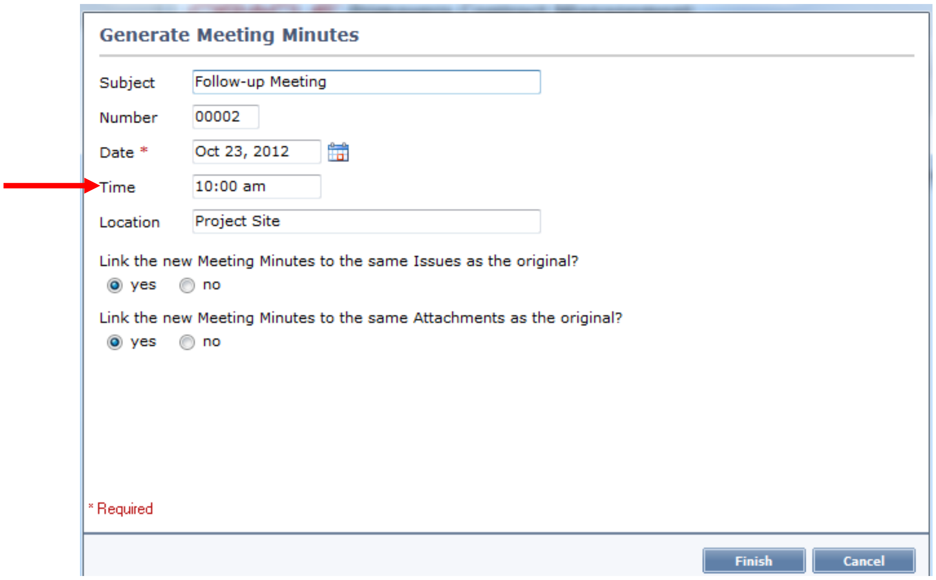
8. The **Number** field will automatically increment to the next available number. If this is incorrect, edit the Number field as needed. In the example shown, the Number was not changed.



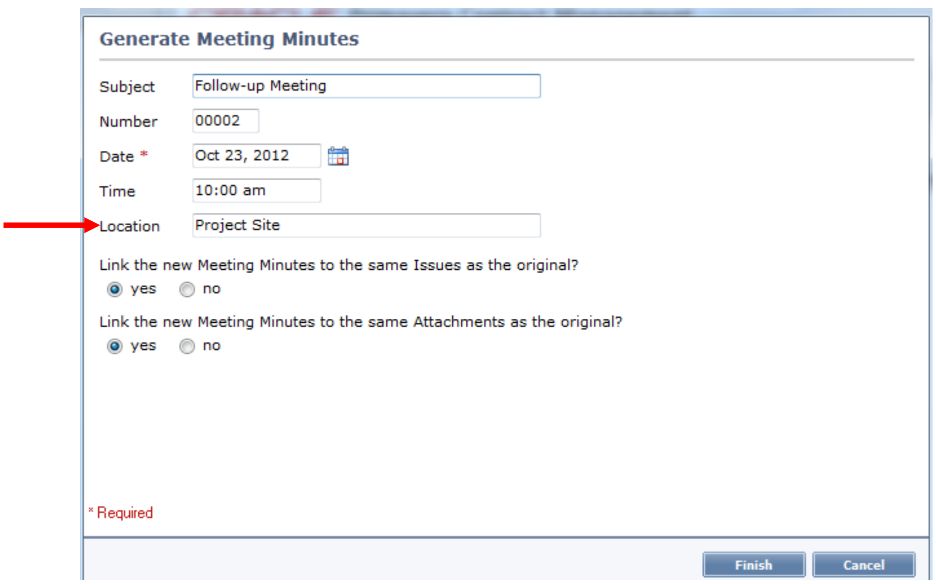
9. The **Date** field will display the current date. If this is incorrect, edit the Date field by clicking the **calendar icon** to the right of the field. This is a required field. In the example shown, the Date was not changed.



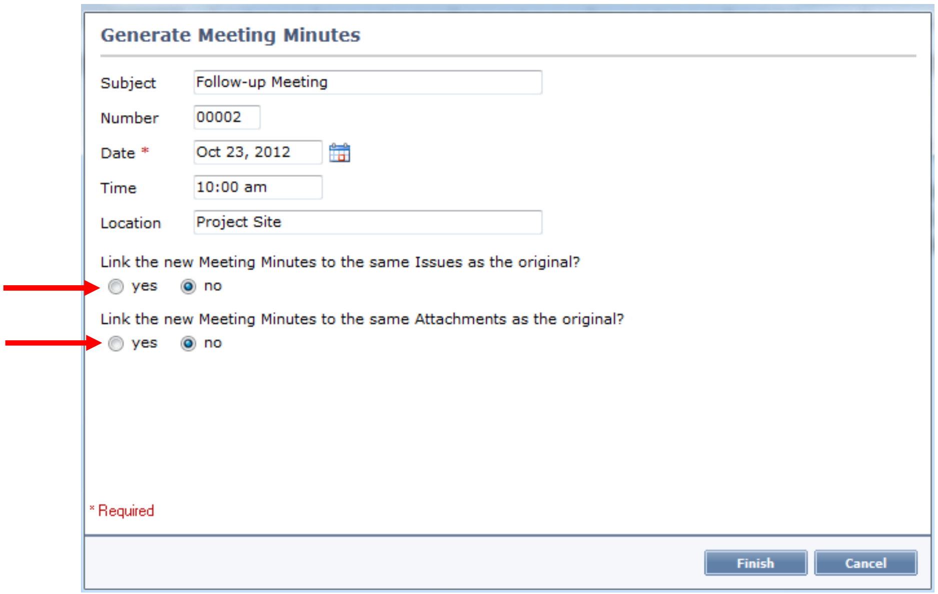
10. The **Time** field will reflect the same time as the previous meeting. If this is incorrect, edit the Time field as needed. In the example shown, the Time field was not changed.



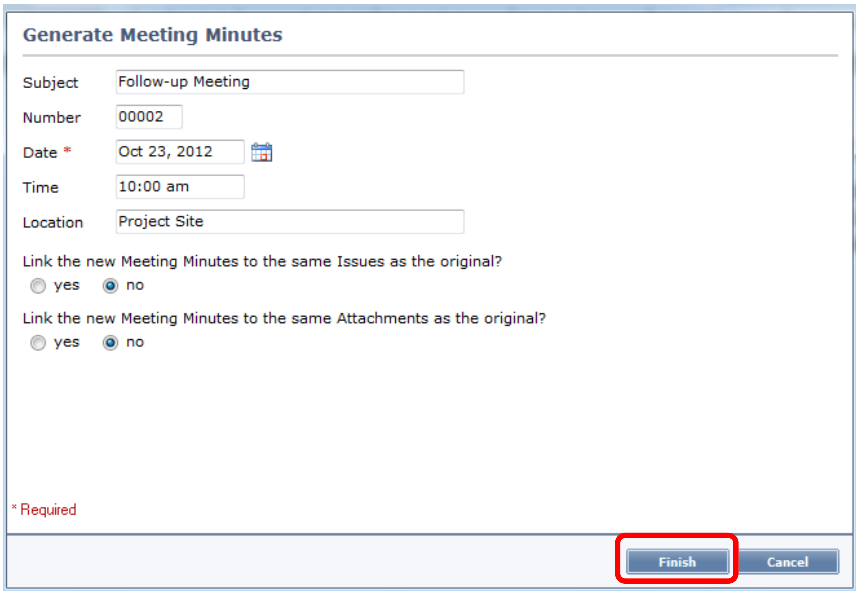
11. The **Location** field will reflect the same location as the previous meeting. If this is incorrect, edit the Location field as needed (22 character field). In the example show, the Location field was not changed.



12. The **Yes/No** options for the **Issues** and **Attachments** questions will default to **yes**. If the new meeting should be linked to the same Issues or Attachments as the original meeting, leave the default to yes, otherwise click the **no** option to change it. In the example shown, the no option was selected for both questions.

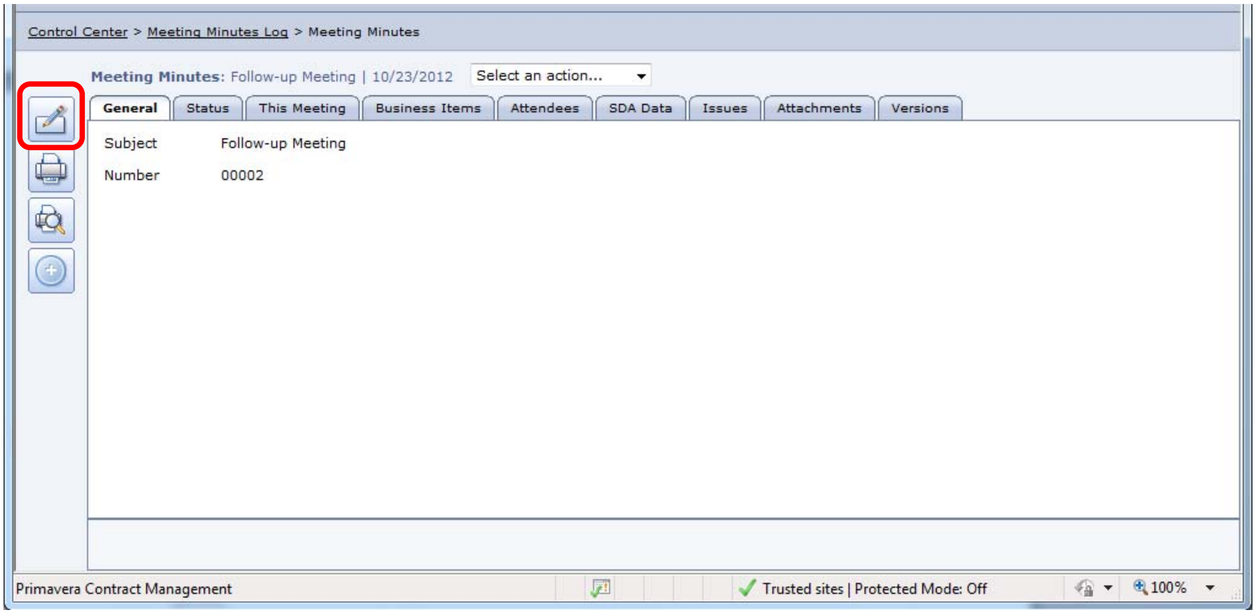


13. When all options have been selected, click the **Finish** button to generate the new Meeting Minutes document.



14. The new Meeting Minutes document displays. Notice that any Business Items that displayed a status of New Business in the previous Meeting Minutes document will now display a status of **Old Business**. Additionally, any Business Item with a status of Closed in the previous Meeting Minutes document will not be listed in the current document.

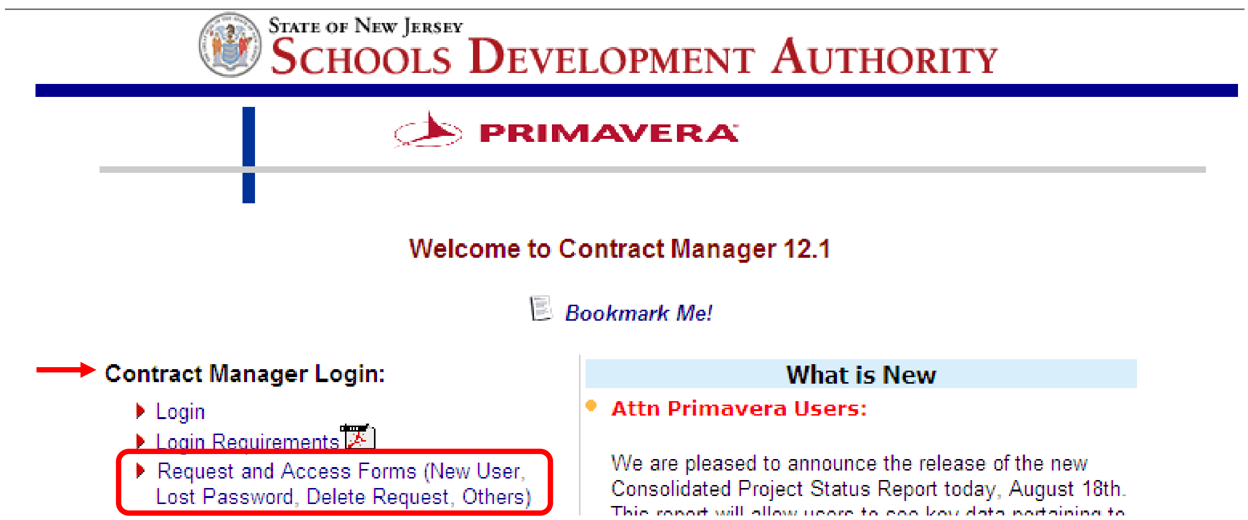
    Click the **Edit Document** button on the upper left hand side of the screen to edit the document following the previously described processes.



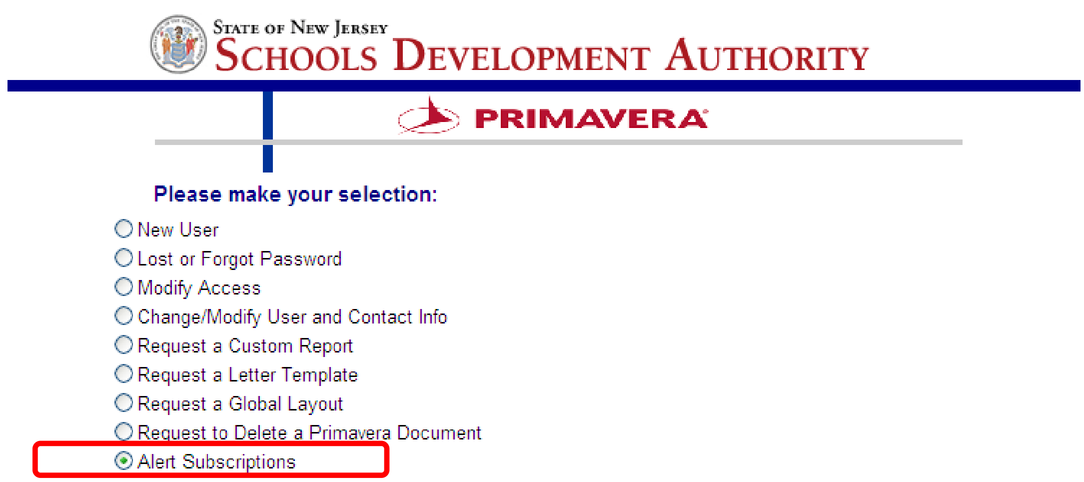
VIII. Meeting Minutes Alert Subscription

Alerts allow a user to receive a notification when a document is due or past due. The notification will display on the Control Center screen in the Alerts box. The Alerts box will provide a direct link to the applicable Contract Management document.

1. To subscribe to the Meeting Minutes alert, select the **Requests and Access Forms** link under the **Contract Management Login** section of the **Contract Management Splash Page**.

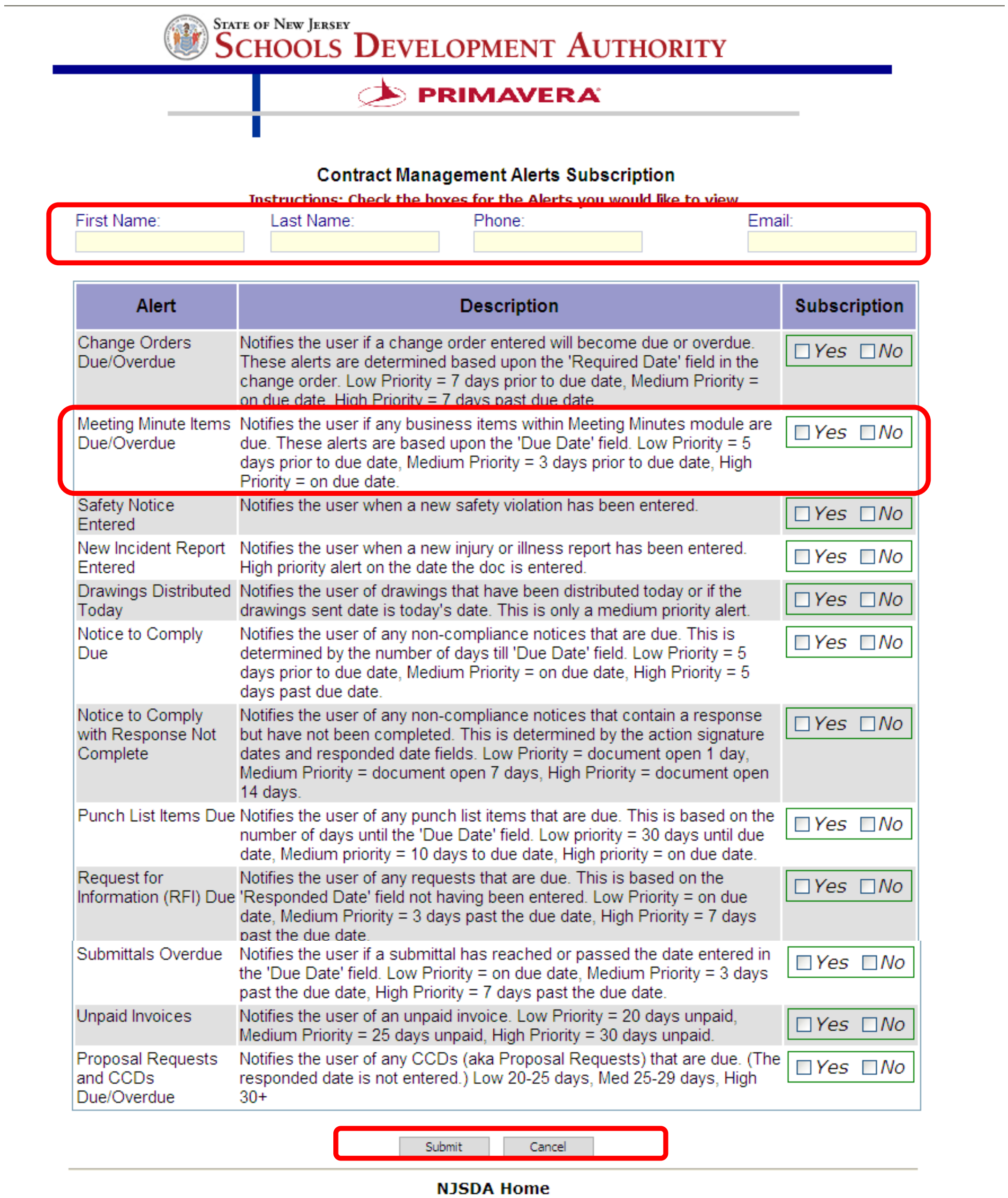


2. Select the **Alert Subscriptions** option.



3. The **Contract Management Alert Subscription** page will display. Complete the contact information at the top of the page. To subscribe to the Meeting Minutes alert, click the **Yes** box located to the right of the **Meeting Minute Items Due/Overdue** line item. Click the **No** box when you no longer wish to receive this alert.

4. Once this alert has been selected, click the **Submit** button at the bottom of the page. The Contract Management Systems Administrator will notify you via e-mail when your alert subscription has been processed.


STATE OF NEW JERSEY SCHOOLS DEVELOPMENT AUTHORITY

PRIMAVERA

Contract Management Alerts Subscription

Instructions: Check the boxes for the Alerts you would like to view

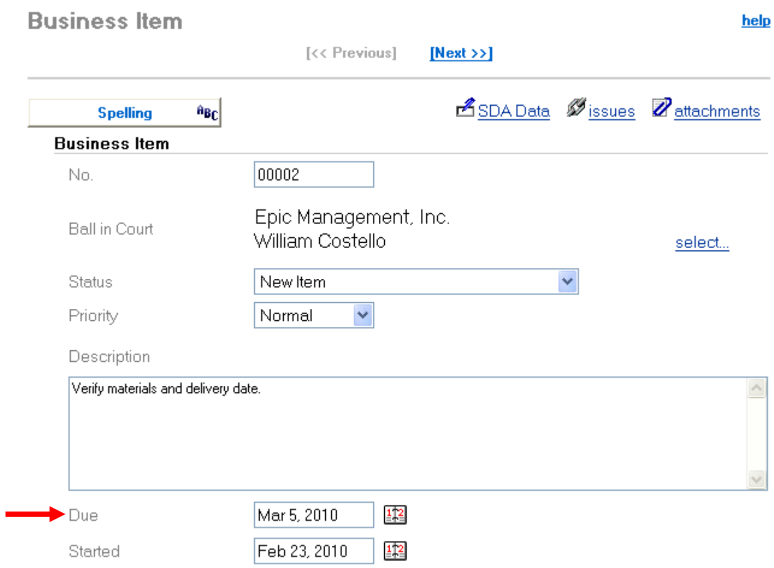
First Name: Last Name: Phone: Email:

Alert	Description	Subscription
Change Orders Due/Overdue	Notifies the user if a change order entered will become due or overdue. These alerts are determined based upon the 'Required Date' field in the change order. Low Priority = 7 days prior to due date, Medium Priority = on due date, High Priority = 7 days past due date.	☐ Yes ☐ No
Meeting Minute Items Due/Overdue	Notifies the user if any business items within Meeting Minutes module are due. These alerts are based upon the 'Due Date' field. Low Priority = 5 days prior to due date, Medium Priority = 3 days prior to due date, High Priority = on due date.	☐ Yes ☐ No
Safety Notice Entered	Notifies the user when a new safety violation has been entered.	☐ Yes ☐ No
New Incident Report Entered	Notifies the user when a new injury or illness report has been entered. High priority alert on the date the doc is entered.	☐ Yes ☐ No
Drawings Distributed Today	Notifies the user of drawings that have been distributed today or if the drawings sent date is today's date. This is only a medium priority alert.	☐ Yes ☐ No
Notice to Comply Due	Notifies the user of any non-compliance notices that are due. This is determined by the number of days till 'Due Date' field. Low Priority = 5 days prior to due date, Medium Priority = on due date, High Priority = 5 days past due date.	☐ Yes ☐ No
Notice to Comply with Response Not Complete	Notifies the user of any non-compliance notices that contain a response but have not been completed. This is determined by the action signature dates and responded date fields. Low Priority = document open 1 day, Medium Priority = document open 7 days, High Priority = document open 14 days.	☐ Yes ☐ No
Punch List Items Due	Notifies the user of any punch list items that are due. This is based on the number of days until the 'Due Date' field. Low priority = 30 days until due date, Medium priority = 10 days to due date, High priority = on due date.	☐ Yes ☐ No
Request for Information (RFI) Due	Notifies the user of any requests that are due. This is based on the 'Responded Date' field not having been entered. Low Priority = on due date, Medium Priority = 3 days past the due date, High Priority = 7 days past the due date.	☐ Yes ☐ No
Submittals Overdue	Notifies the user if a submittal has reached or passed the date entered in the 'Due Date' field. Low Priority = on due date, Medium Priority = 3 days past the due date, High Priority = 7 days past the due date.	☐ Yes ☐ No
Unpaid Invoices	Notifies the user of an unpaid invoice. Low Priority = 20 days unpaid, Medium Priority = 25 days unpaid, High Priority = 30 days unpaid.	☐ Yes ☐ No
Proposal Requests and CCDs Due/Overdue	Notifies the user of any CCDs (aka Proposal Requests) that are due. (The responded date is not entered.) Low 20-25 days, Med 25-29 days, High 30+	☐ Yes ☐ No

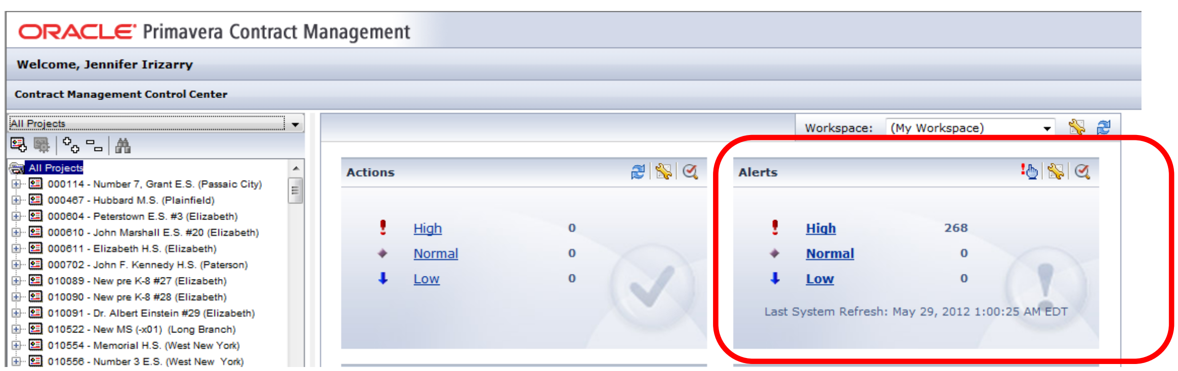
Submit Cancel

NJSDA Home

5. This alert will be triggered when the **Due** date on a Business Item approaches or goes beyond the current date.



6. Once the Due date approaches or goes beyond the current date, alerts will be sent via the Control Center in the **Alerts** option box. Click the applicable priority link to view the alert.



7. The **Alerts** screen will display all applicable documents. Click on a **blue title link** to open the document for review.