State of New Jersey
Schools Development Authority

Section 13

Permits / DCA Inspections

ORACLE Primavera

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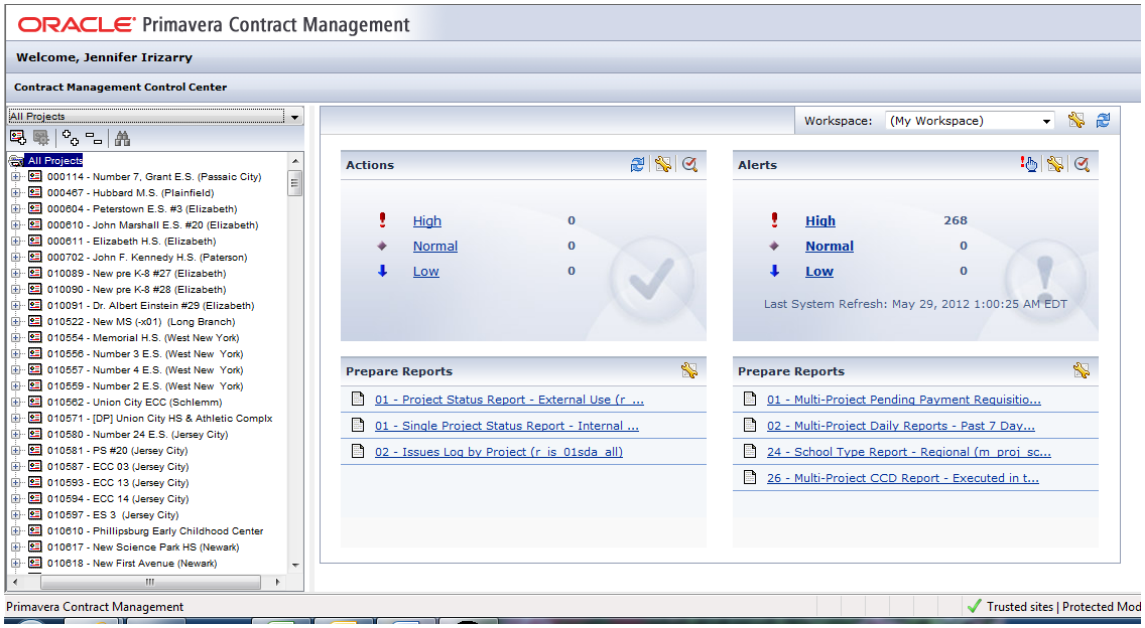
I. Permit/DCA Inspections Overview

This module will be used to capture permit information. It will enable users to monitor the status and expiration information about each permit entered in the system.

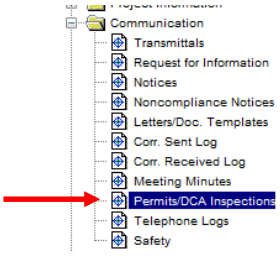
II. Add a Permit/DCA Inspections Document

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



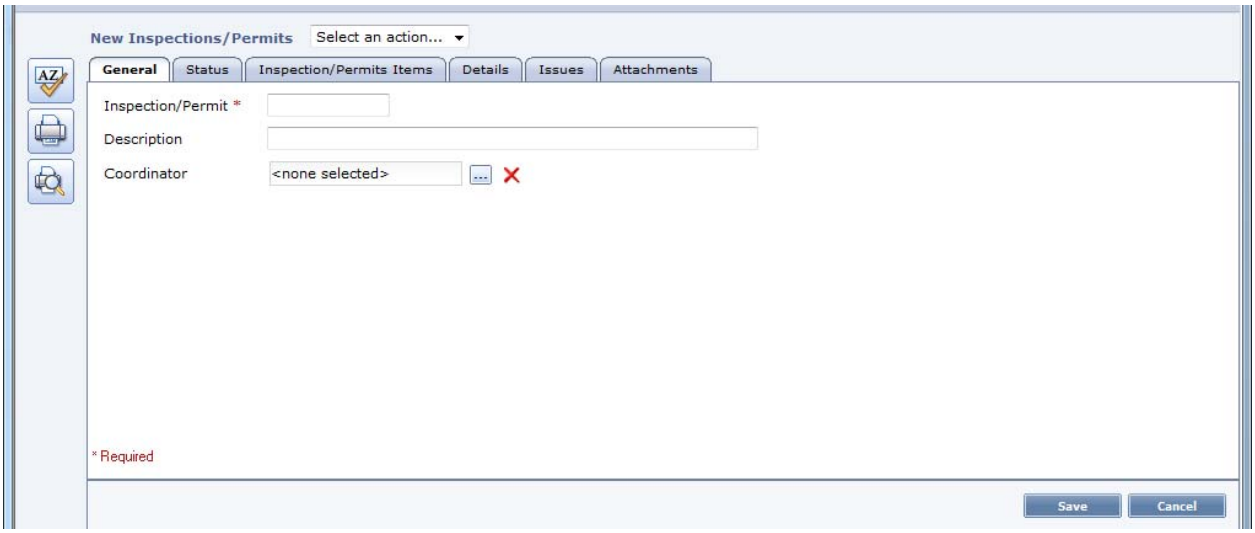
2. Select your desired project.

3. Open the **Communication** folder (a list of modules will display) and select **Permit/DCA Inspections**.

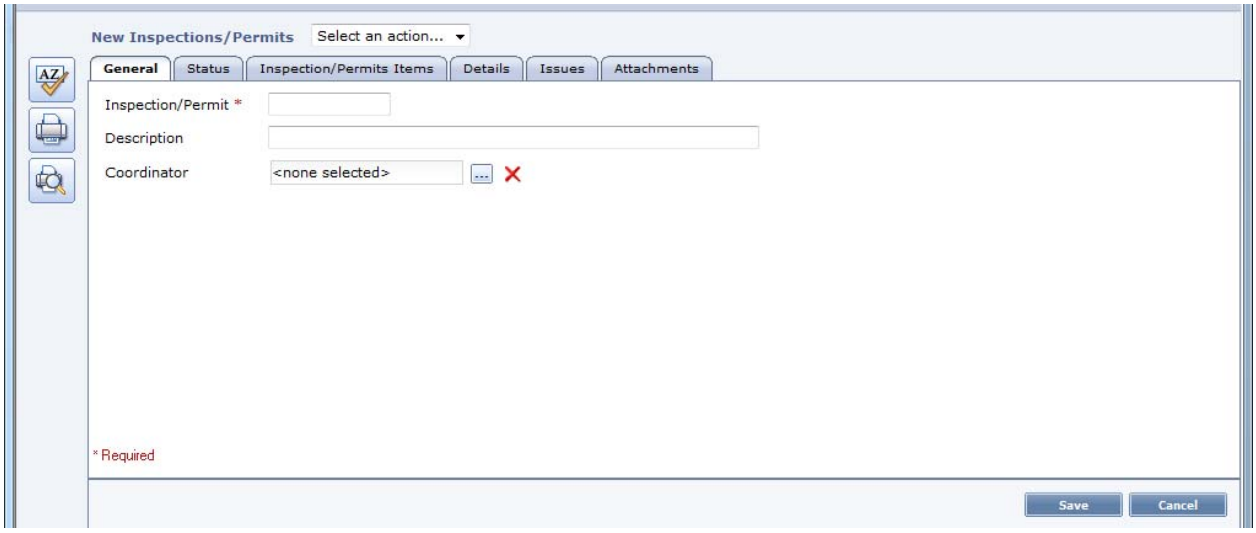


4. The **Permit/DCA Inspections log view** displays. Click the **Add Document** button to add a new permit document.

5. The **Inspections/Permits document** displays. It is divided into several sections.

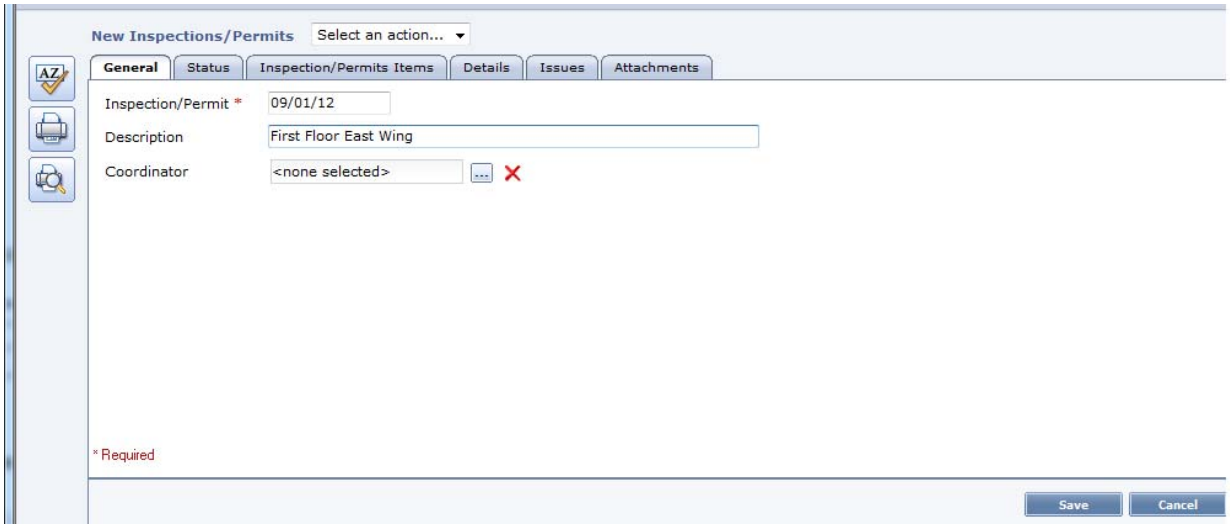


A. General Tab



- **Inspections/Permits** – Enter a date in this field (8 character field). Date must be entered as mm/dd/yy format. This is a required field.
- **Description** – Enter a description for this permit (80 character field). The description will identify the area of the building in which the inspection took place or will be a generic description of the inspection type.
- **Coordinator** – If desired, click the **select** button next to the field to choose a coordinator from the contact list.

An example of a completed section is shown:



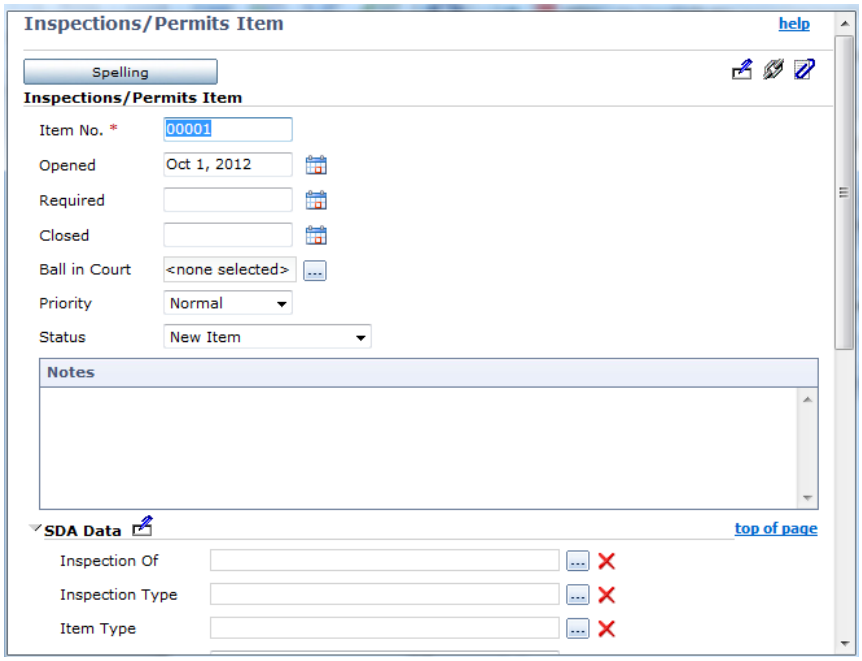
B. Status Tab

- **Ball in Court** – If action is required, click the **select** link next to the field to choose a contact from the contact list. This can also be set on an Inspection/Permit Item (see Section C).
- **Priority** – Will default to **Normal**, but can be changed to **High** or **Low** as desired.

C. Inspections/Permits Items Tab

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

A blank **Inspections/Permits Item** displays. There are several sections in this item:



- **Item No.** – Contract Management automatically sequentially numbers each item. Do not change this number. This is a required field.
- **Opened** – Will default to the current date. If this is incorrect, click the **calendar icon** to select another date.
- **Required** – This date field is <u>not automatically populated</u>. Click the **calendar icon** to select a date. Per the NJ State Uniform Construction Code (UCC), this date should be three days after the Opened date.
- **Closed** – When the item is closed, click the **calendar icon** to select a date.
- **Ball in Court** – If action is required, click the **select** button next to the field to choose a contact from the contact list. If this Ball in Court item appears in a users' Actions list on the Control Center, clicking the link will directly open this Inspections/Permits item.
- **Priority** – Will default to **Normal**, but can be changed to **High** or **Low** as required.
- **Status** – Do not change the default of **New Item**.
- **Notes** – Enter any applicable notes for this item (4000 character field).

Scroll to the **SDA Data section** and complete the following:

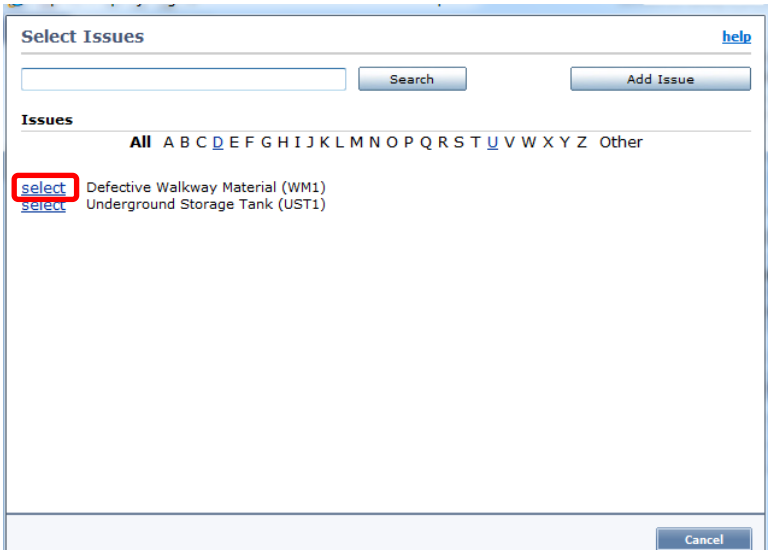
- **Inspection Of** – Identifies the category of the item being inspected. Click the **select** button next to the field to choose an option.
- **Inspection Type** – Offers further description of the category. Click the **select** button next to the field to choose an option.
- **Item Type** – Identifies if this item is an Inspection or Permit.
- **Permit Number** – Enter the document number of the inspection or permit (50 character field).

An example of a completed SDA Data section is shown:

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

Note: Issues can also be linked at the Inspections/Permits document level in addition to this Inspections/Permits Item level.

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 document.

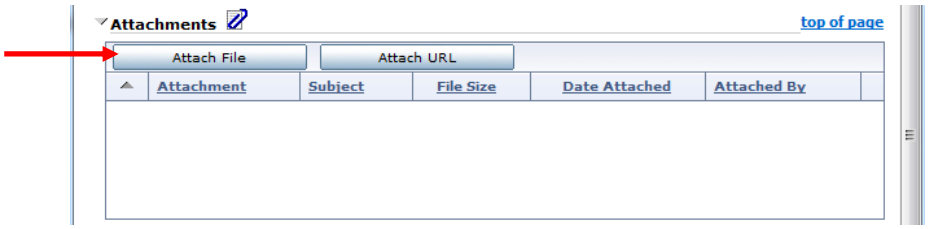


The Issue now shows in the Issues section of the item.

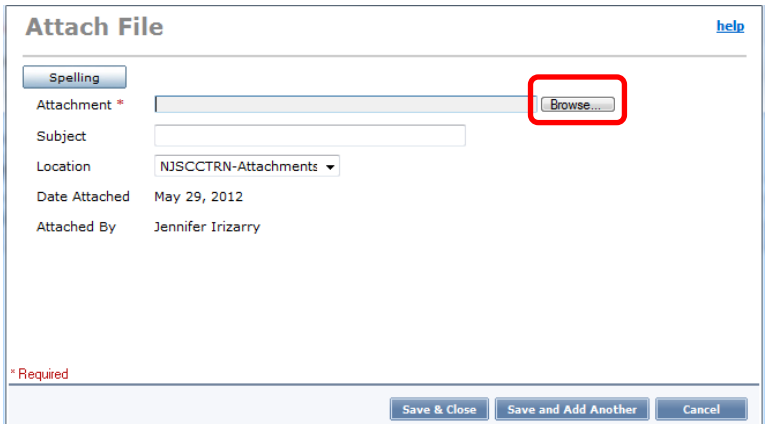
Scroll to the **Attachments** section and complete the following, if applicable.

Note: Attachments can also be linked at the Inspections/Permits document level in addition to this Inspections/Permits Item level.

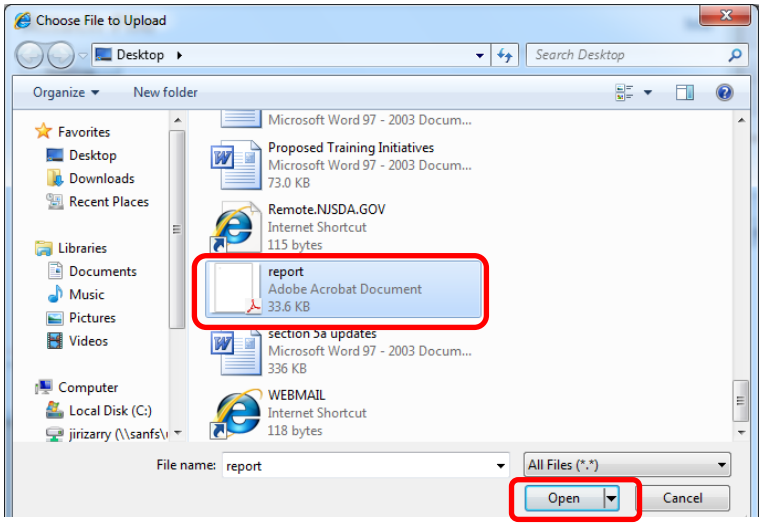
- To attach supporting documentation to this Inspections/Permits Item, scroll to the **Attachments** section and click the **Attach File** button.



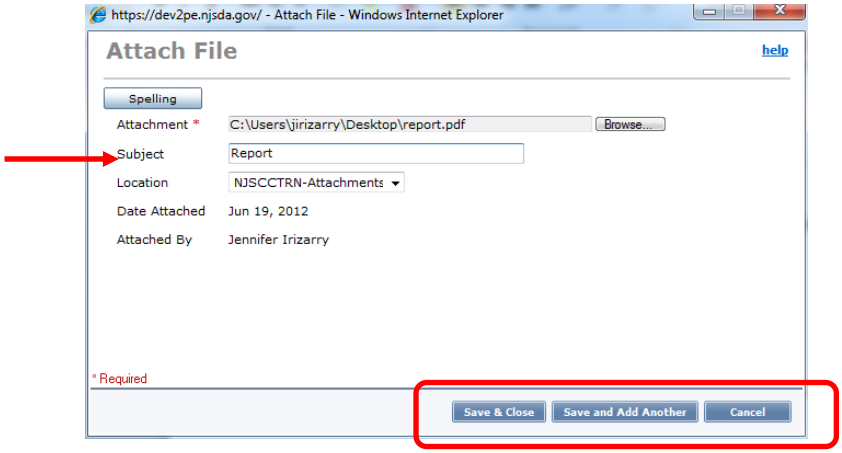
- Click the **Browse** button to navigate to the document you wish to attach.



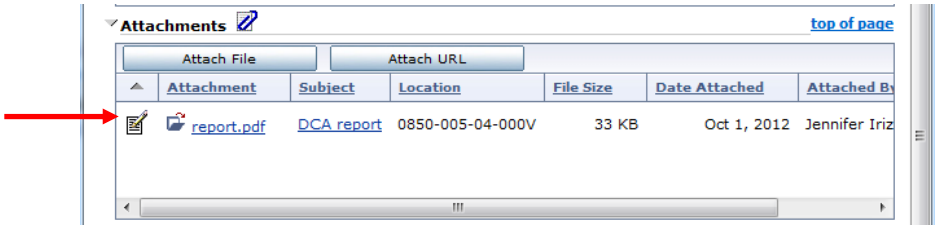
- The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



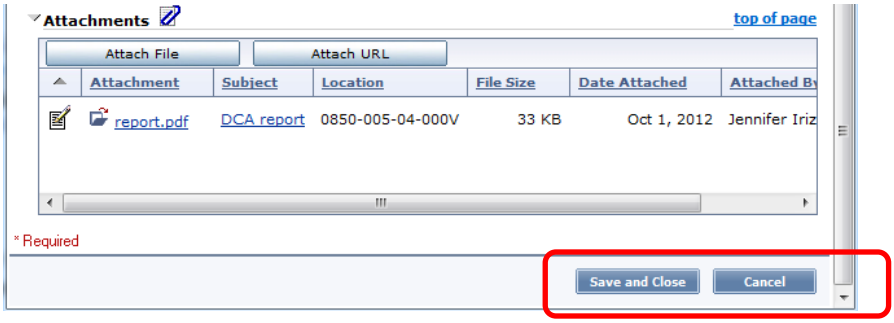
- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



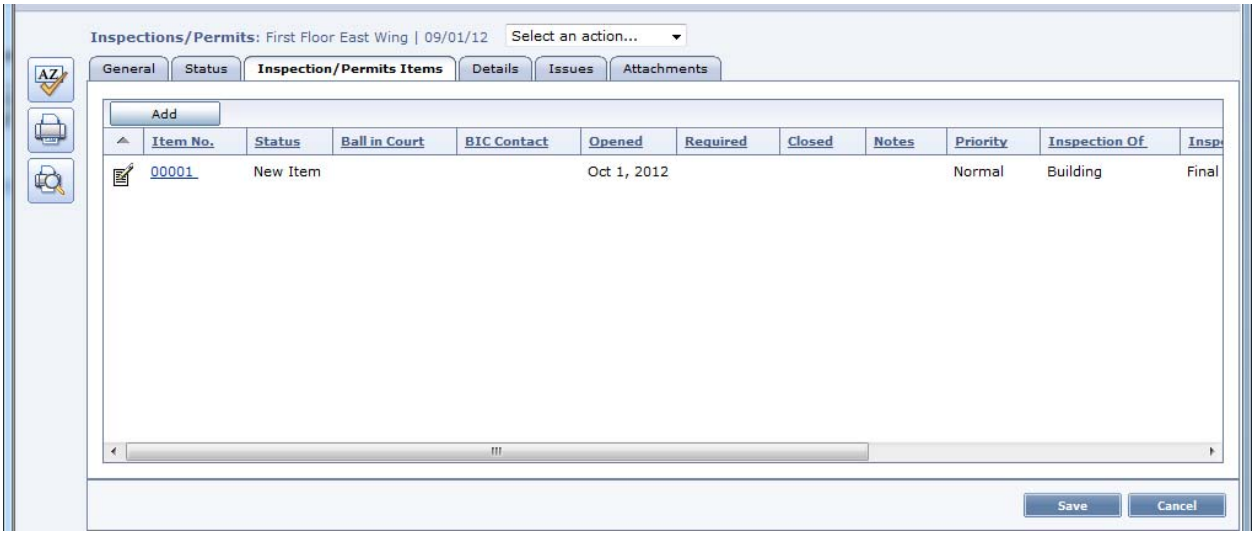
- The attached file will display in the **Attachments** section.



When completed, 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 Inspections/Permits document.



An example of a completed Inspections/Permits item is shown:



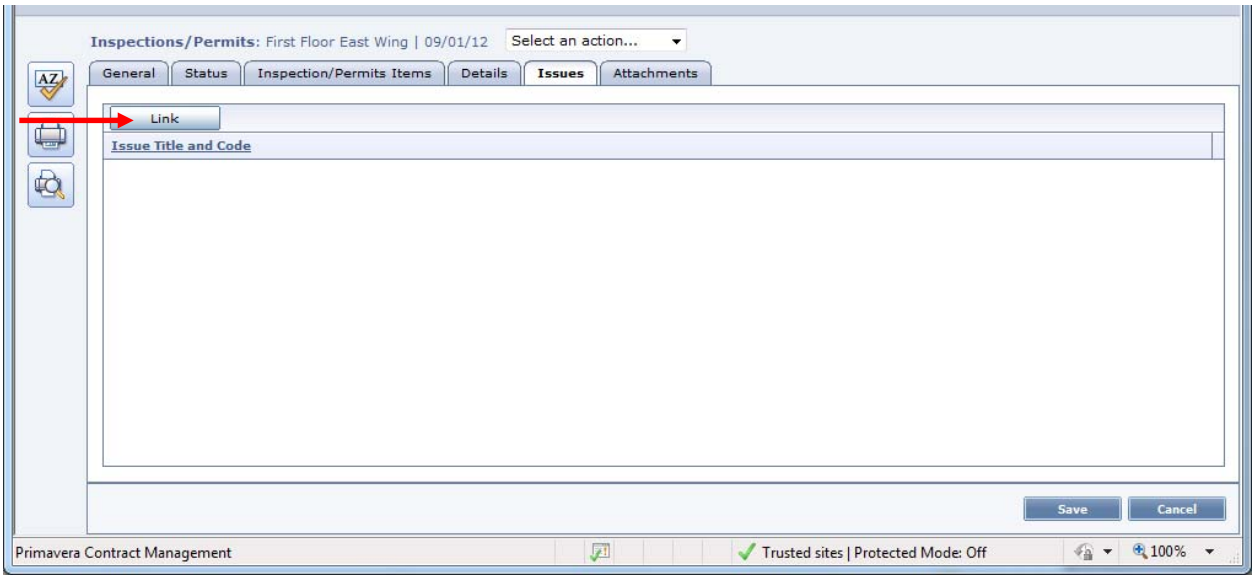
E. Details Section

- **Contract** – If this inspection or permit is related to a specific contract, click the **select** button next to the field to choose the associated contract.
- **Change Management Number** – Will be automatically populated if Change Management is initiated from this document.

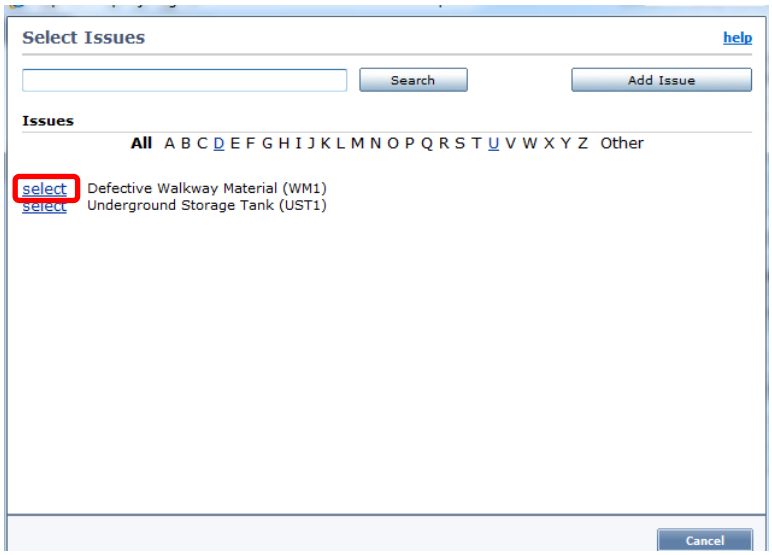
F. Issues Tab

If this Inspections/Permits 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 Inspections/Permits Items level in addition to the document level.



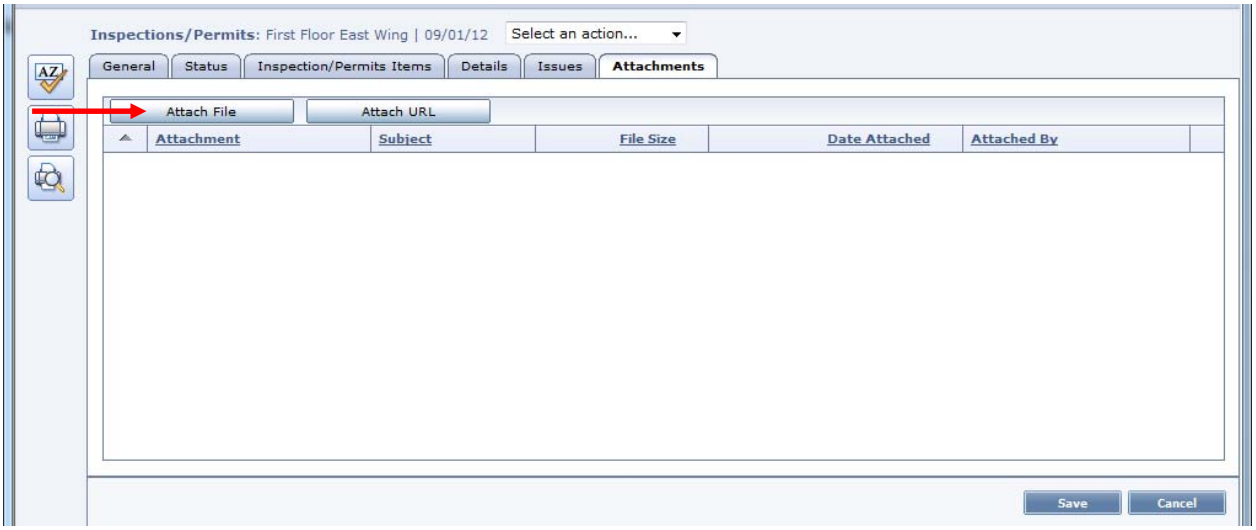
The **Select Issues dialog box** displays. Locate your desired issue and click the **select** link to the left of the issue title to link it to the letter. Once you click the select link, you will return to the document.



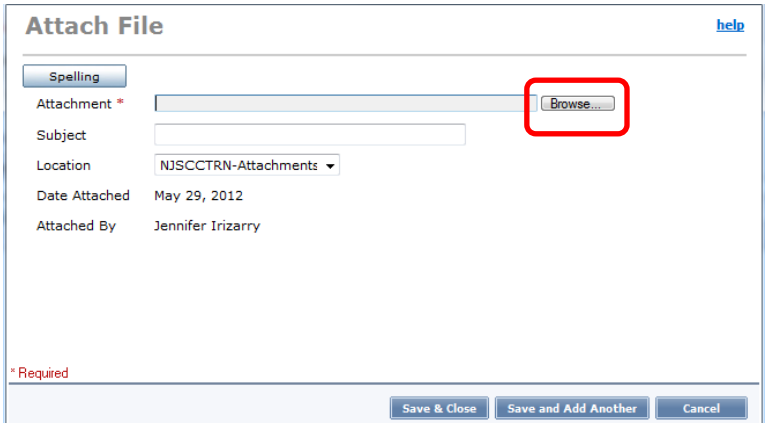
The Issue now shows in the Issues section of the document.

G. Attachments Tab

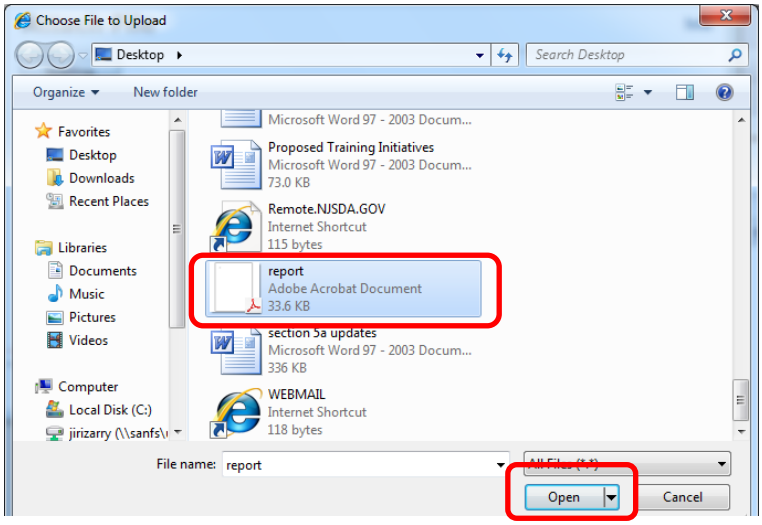
- To attach supporting documentation, click the **Attach File** button.
  Note: Attachments can also be linked at the Inspections/Permits Items level in addition to the document level.



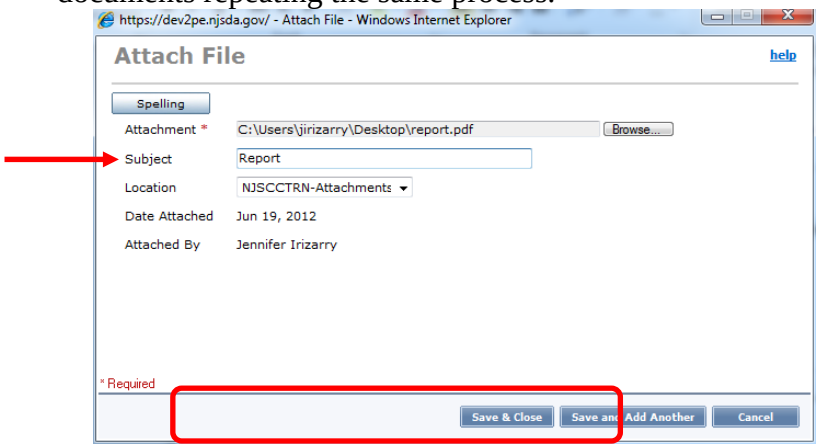
- Click the **Browse** button to navigate to the document you wish to attach.



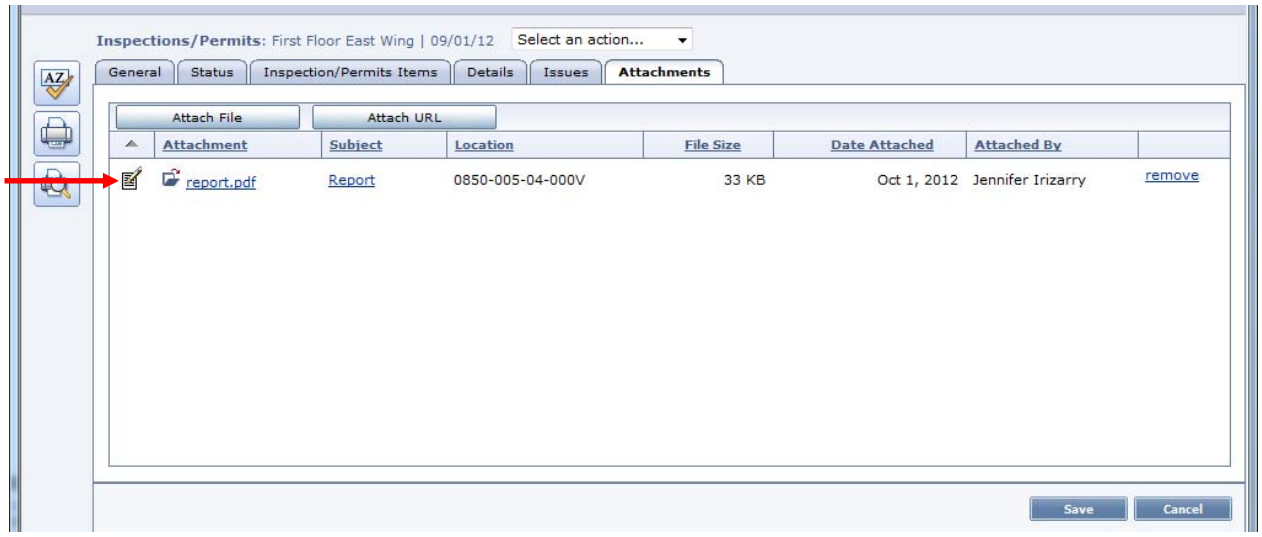
- The **Choose File** window will display. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



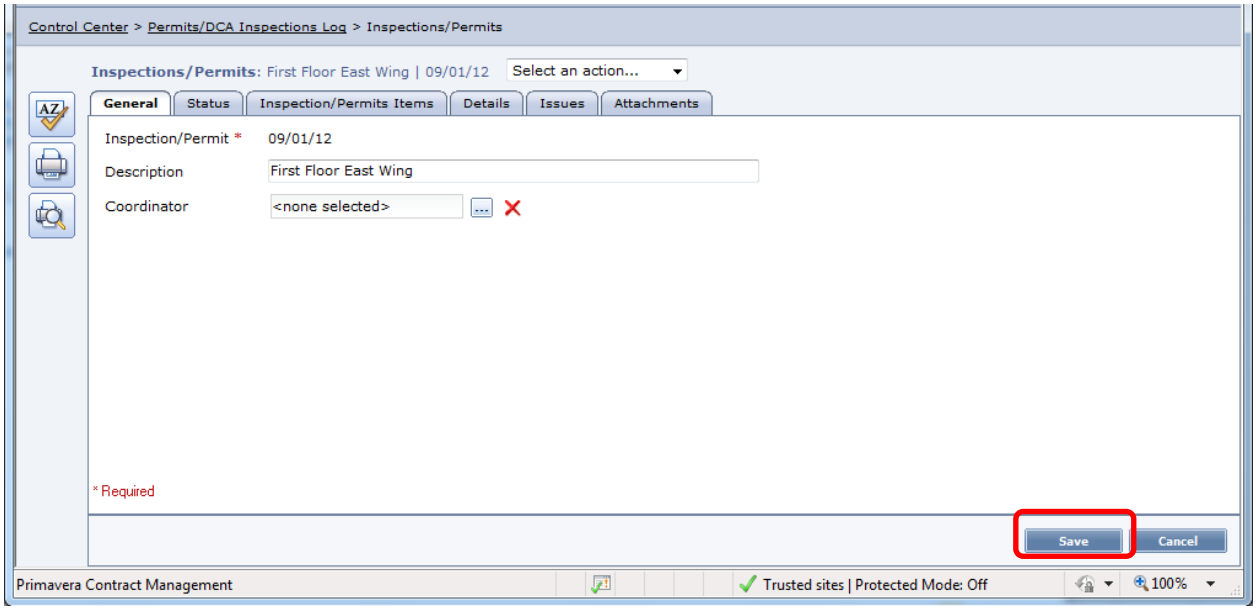
- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



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



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



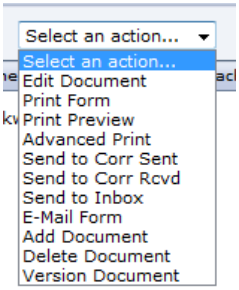
III. Version Document

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.

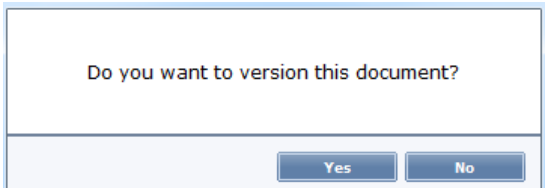
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

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.

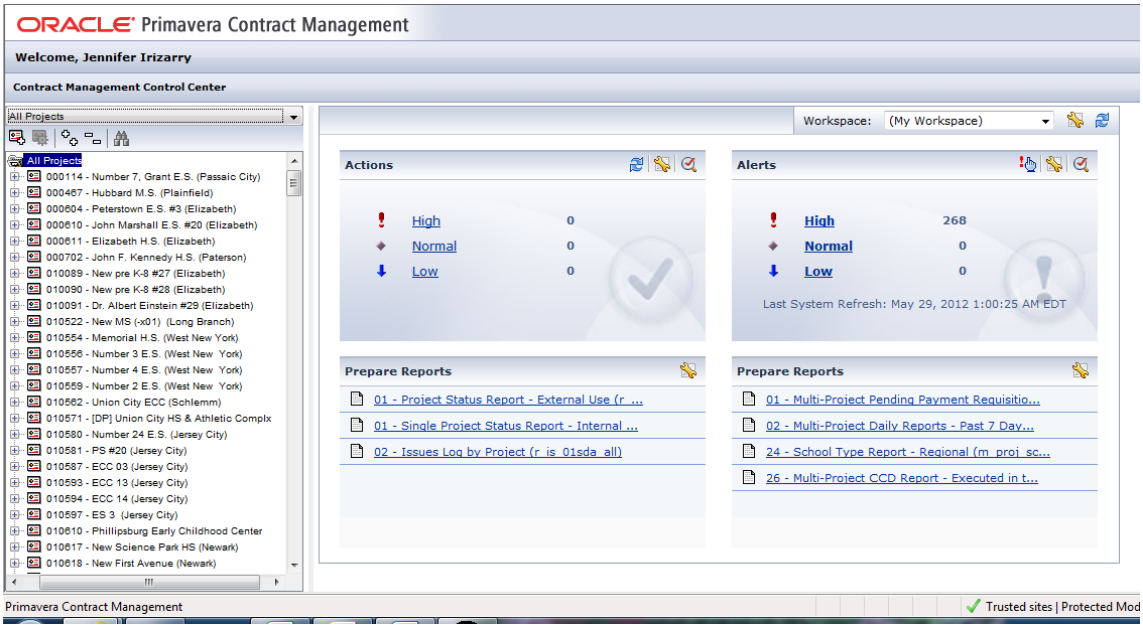


3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version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

IV. Initiate Change Management From a Permit/DCA Inspections Document

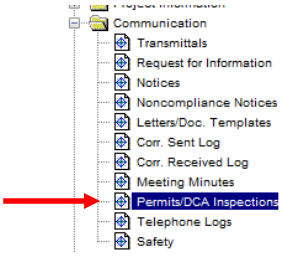
If it is necessary, Change Management can be initiated from a Permit/DCA Inspections document.

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



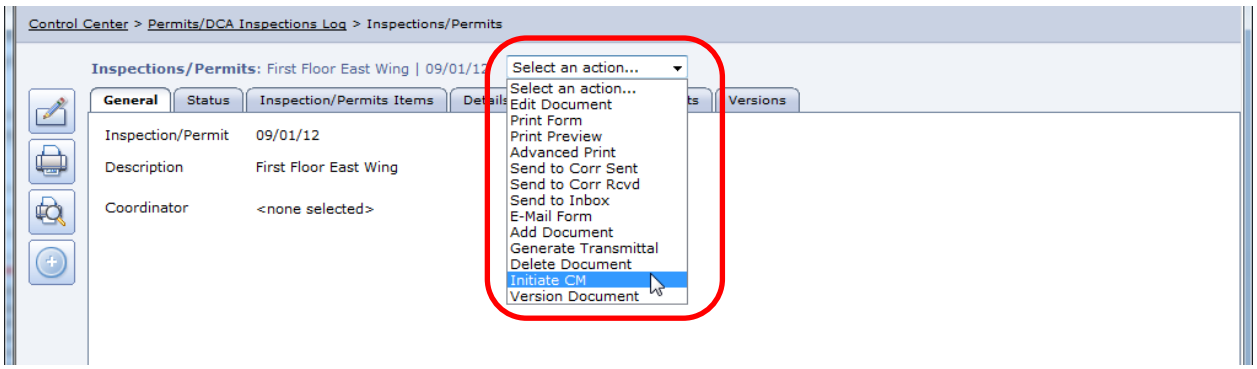
2. Select your desired project.

3. Open the **Communication** folder (a list of modules will display) and select **Permit/DCA Inspections**.

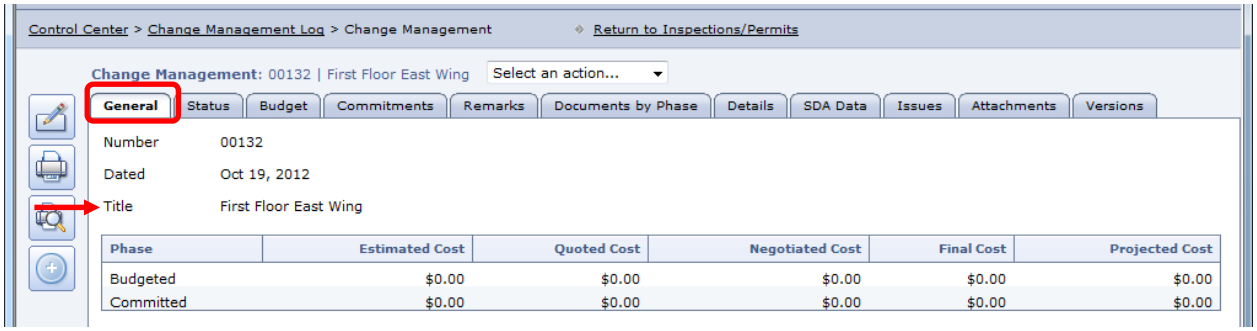


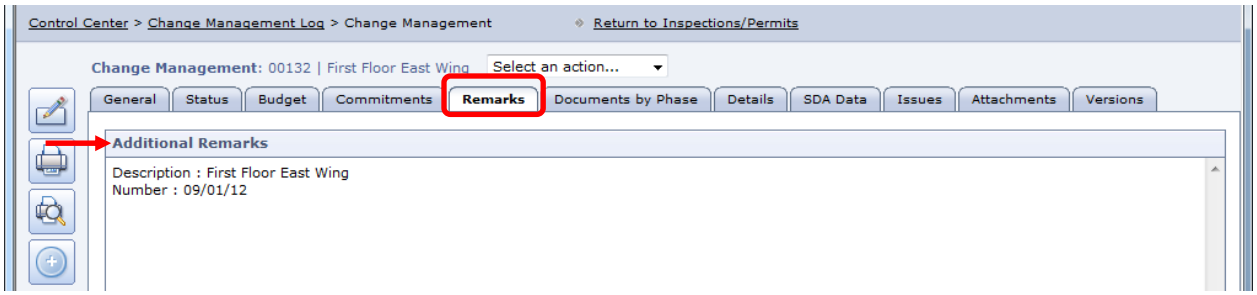
4. The **Permit/DCA Inspections log view** displays. Locate your desired document and click the **blue title link** to open it.

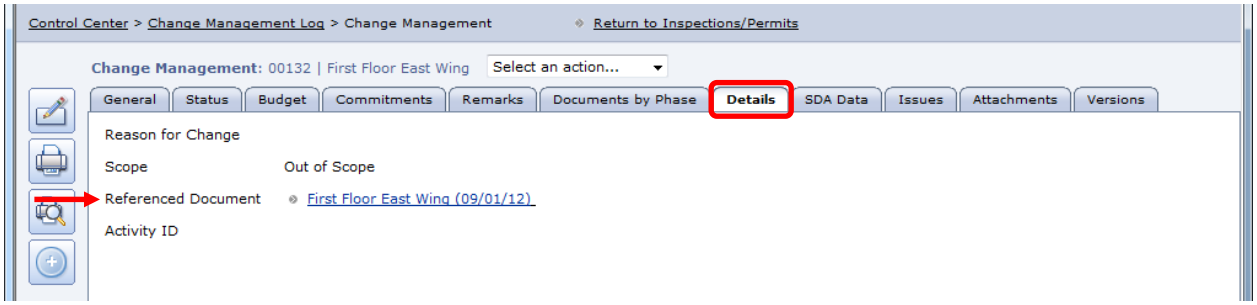
5. The **Inspections/Permits document** displays. With the document open, click the drop down arrow on the **Select an action** menu on the top of the screen, and choose **Initiate CM**.



6. A **Change Management document** displays. The following fields were populated from the Inspections/Permits document when the Initiate CM command was selected.
   - General Tab - Title (from the Permit Description field)
   - Remarks Tab - Remarks (Permit Description and Number (from the Permit Description field)
   - Details Tab - Referenced Document (a link to the Inspections / Permits document)





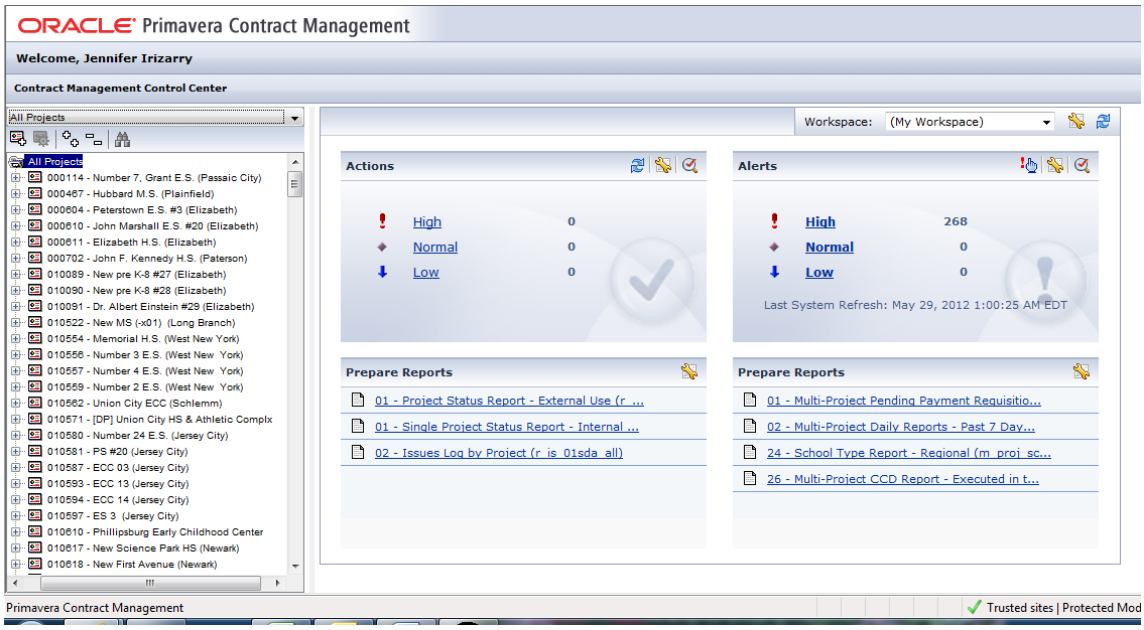


7. Continue to follow the described Change Management processes as contained in Section 27-30 of the Contract Management User Manual.

V. Closing an Inspections/Permits Item

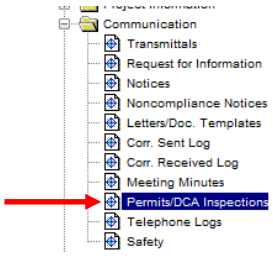
As Inspections/Permits items are completed, their status should be changed and the item should be closed.

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



2. Select your desired project.

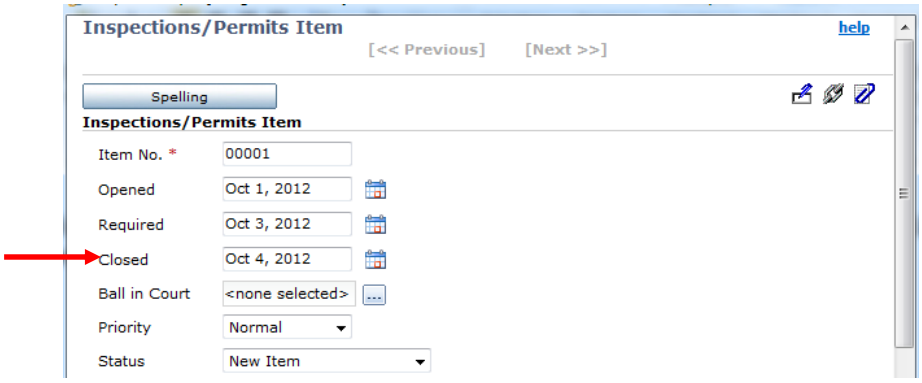
3. Open the **Communication** folder (a list of modules will display) and select **Permit/DCA Inspections**.



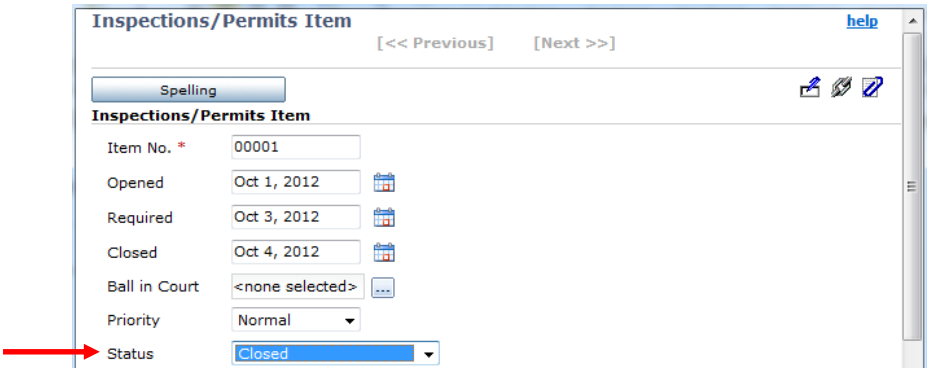
4. The **Permit/DCA Inspections log view** displays. Locate your desired document and click the **edit icon** to open it.

5. The **Inspections/Permits document** displays. Click the Inspection/Permits Items tab. Locate the item you wish to update and click the **edit icon** to the left of the title to open it.

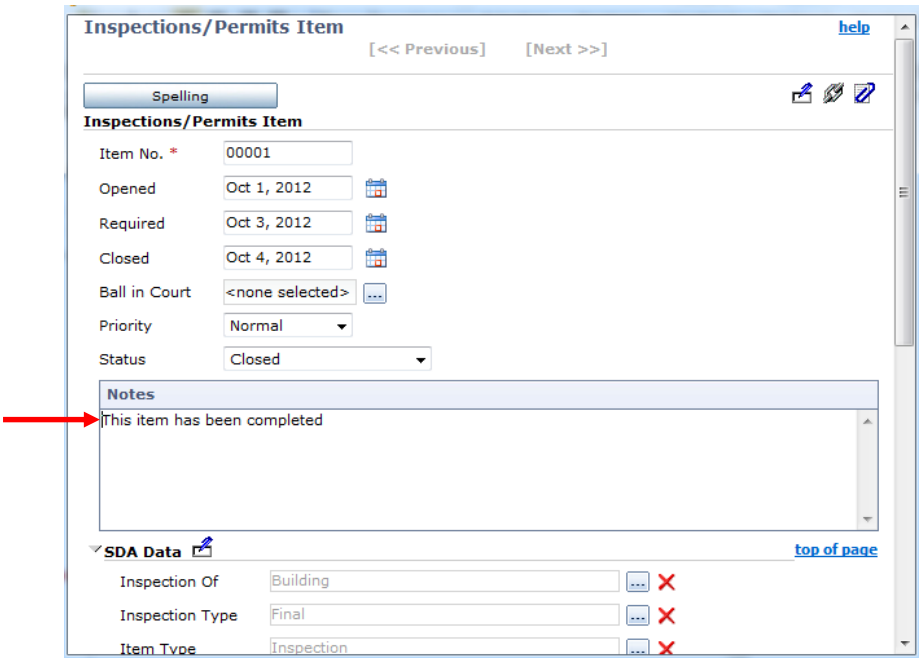
6. The **Inspections/Permits Item dialog box** will display. If this item has been closed, a **Closed** date must be entered by clicking the **calendar icon** to the right of the field.



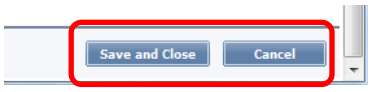
7. Click the drop down box on the **Status** field to choose the updated status for this item.



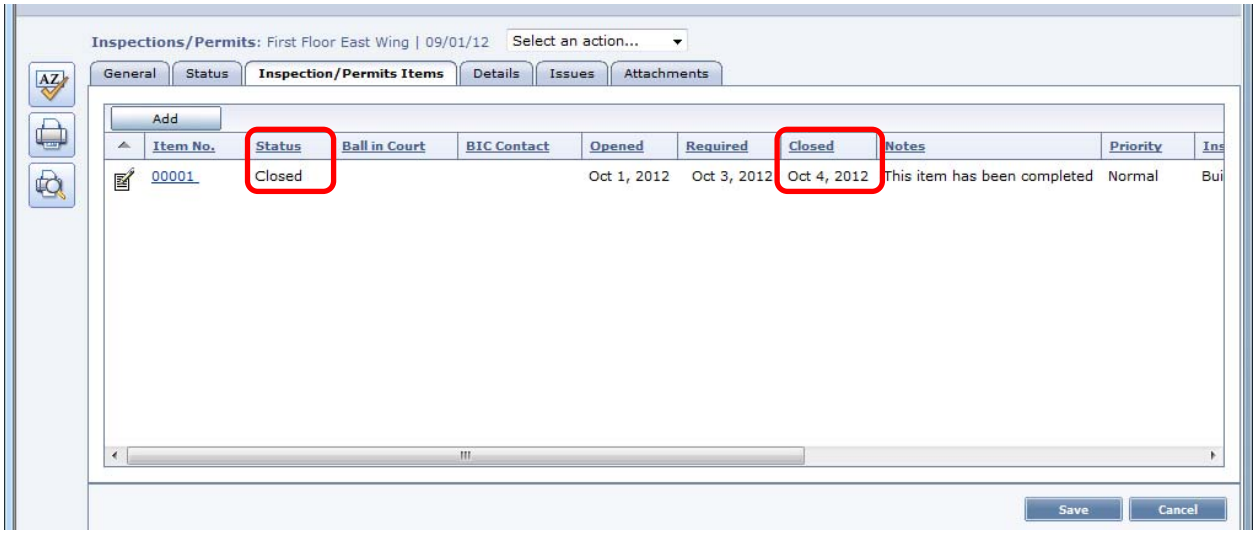
8. Enter any applicable comments regarding the status change in the **Notes** field.



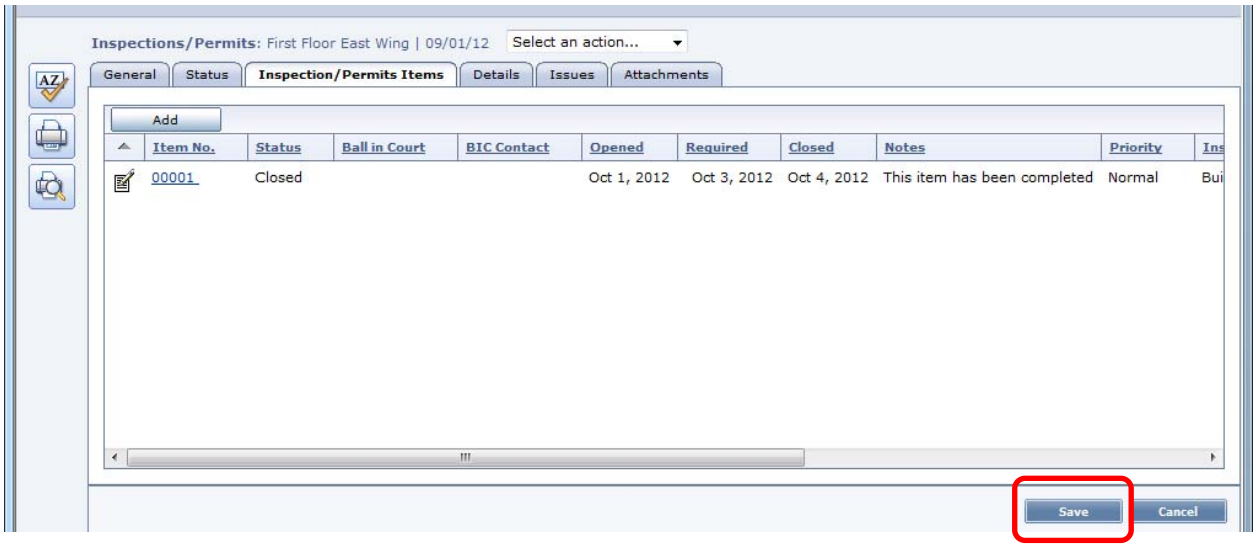
9. When all changes are completed, scroll to the bottom of the window and click the **Save & Close** button to return to the Inspections/Permits document screen.



10. The updated Status and Closed date for the Inspections/Permits Item will display in the Inspections/Permits Items section. In the example shown, the status of the item now displays as **Closed** and the date the item was closed is also displayed.



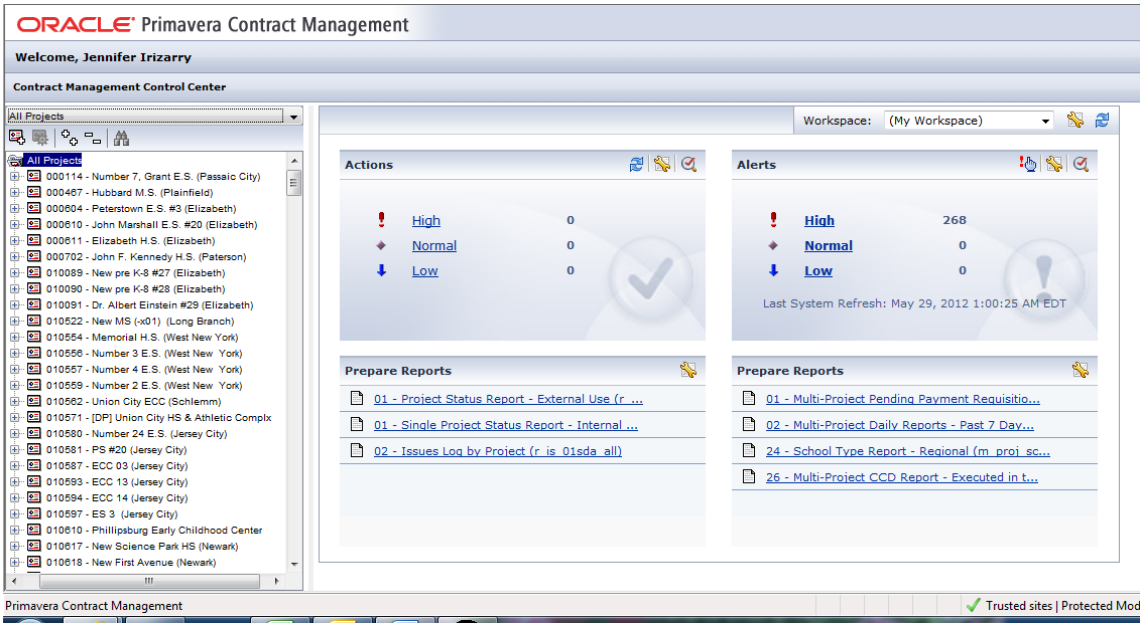
11. Click the **Save** button at the bottom of the screen.



VI. Advanced Reports

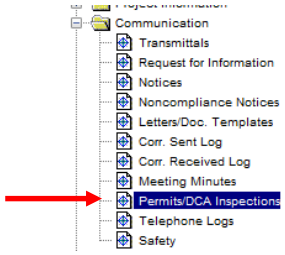
There are several reports available from the Permit/DCA Inspections module.

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



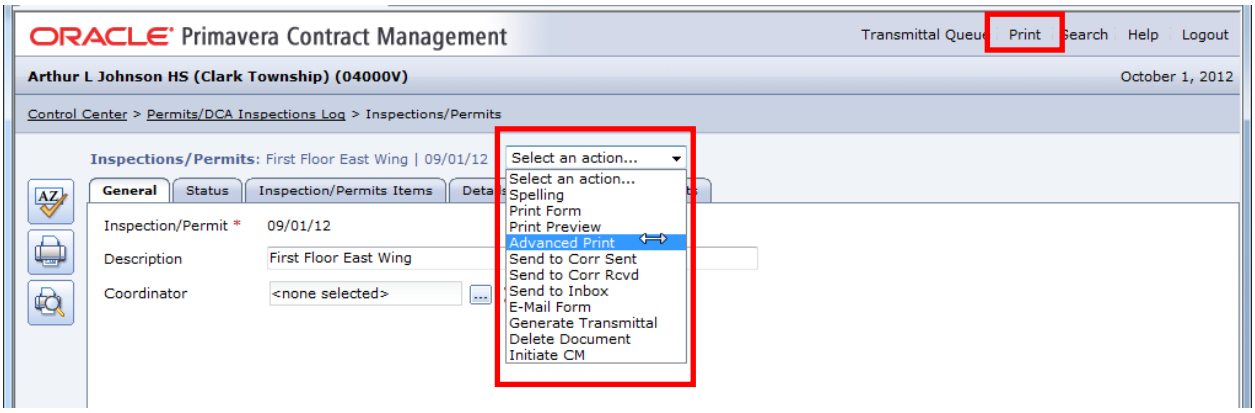
2. Select your desired project.

3. Open the **Communication** folder (a list of modules will display) and select **Permit/DCA Inspections**.

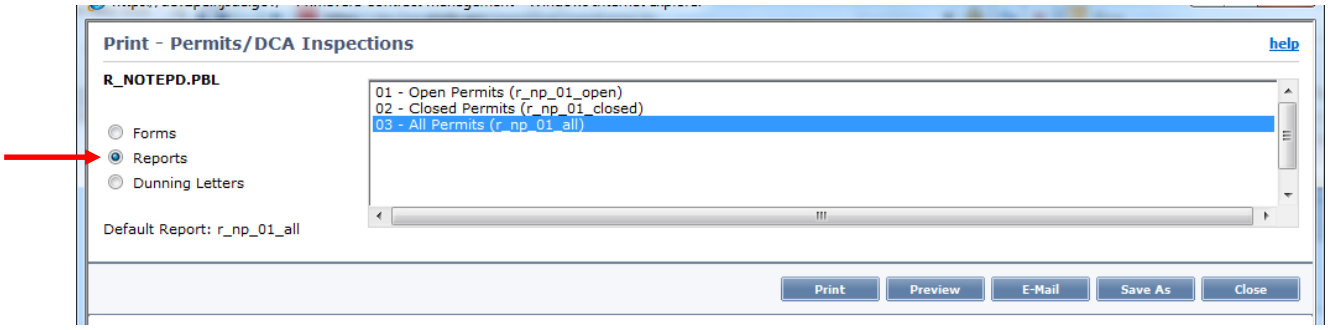


4. The **Permit/DCA Inspections log view** will display. Locate your desired document and click the **blue title link** to open it.

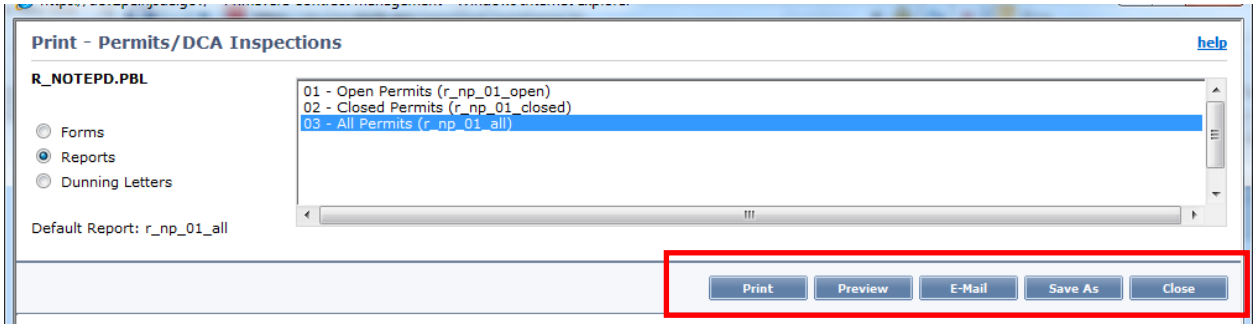
5. The **Inspections/Permits document** displays. With the document open, click the drop down box on the **Select an action** menu on the top of the screen and select the **Advanced Print** option. You can also select the **Print link** on the upper right side of the screen.



6. The **Print – Permit/DCA Inspections** window displays. Click the **Reports** radio button to display the list of reports.



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



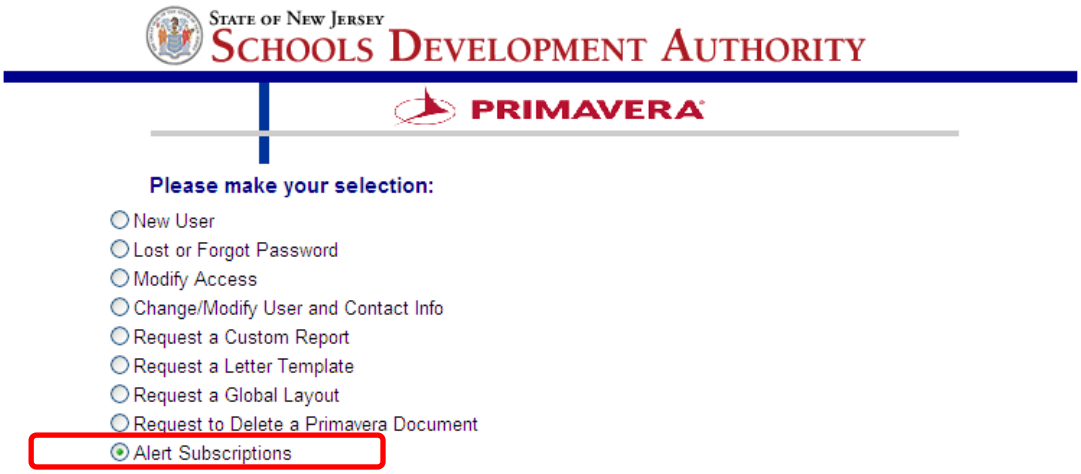
- Click **Print** to get a printed output.
- Click **Preview** to see your output displayed in the window.
- Click **E-Mail** to electronically send the output to another user.
- Click **Save As** to save the output to your local computer or other desired location.
- Click **Close** when finished to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

VII. 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.

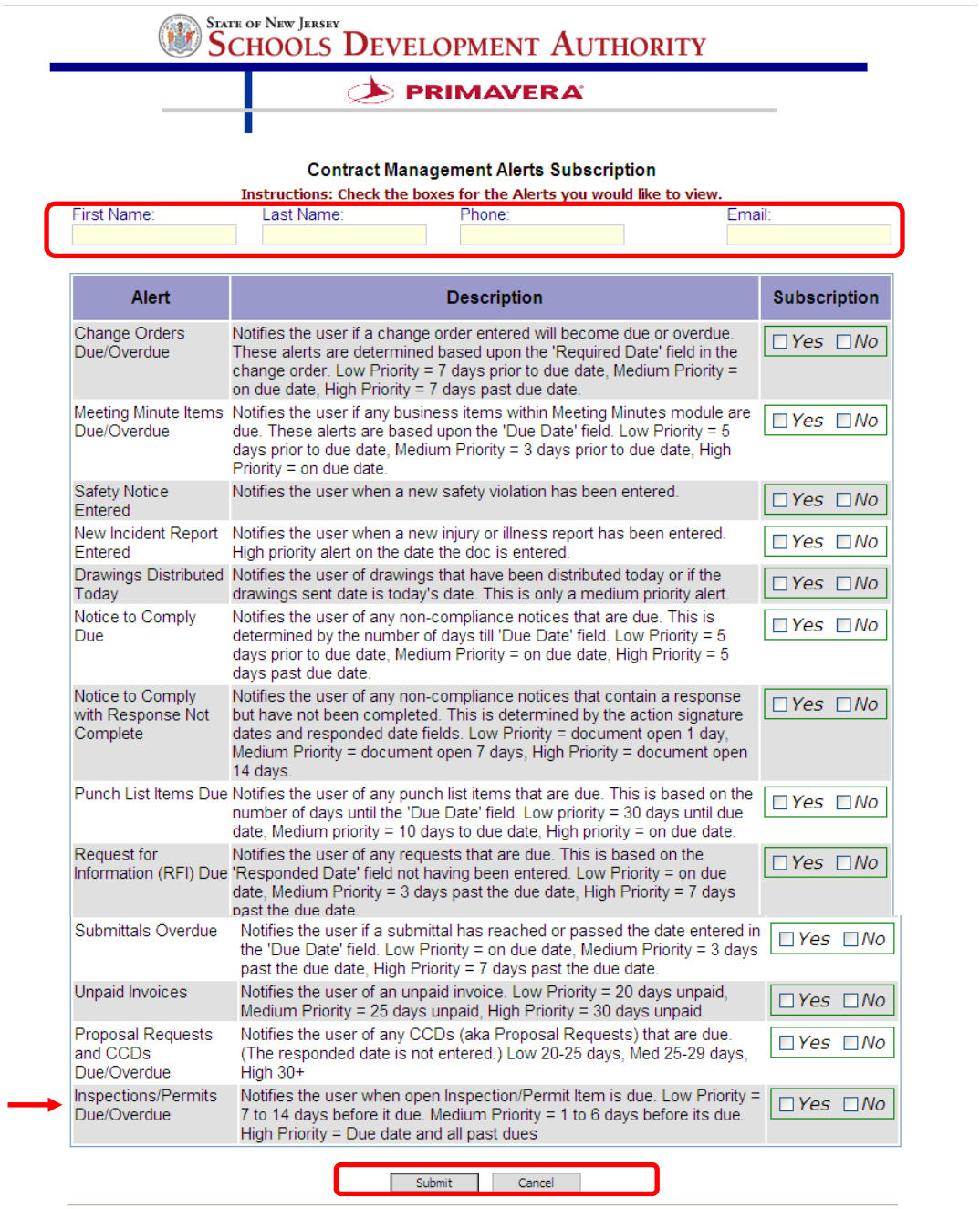
1. To subscribe to the Permit/DCA Inspections alert, select the **Requests and Access Forms** link under the **Contract Management Login** section of the **Contract Management Splash Page**.

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 Permit/DCA Inspections alert, click the **Yes** box located to the right of the **Inspections/Permits 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

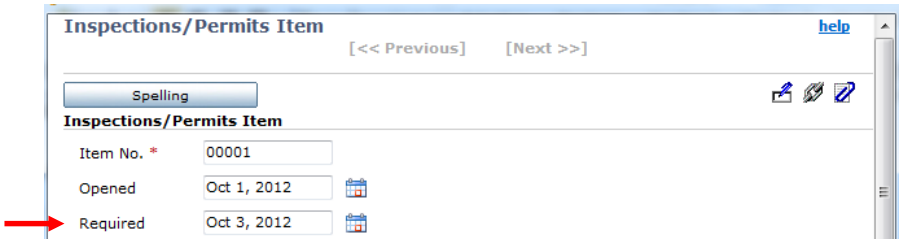
Instructions: Check the boxes for the Alerts you would like to view.

First Name: Last Name: Phone: Email:

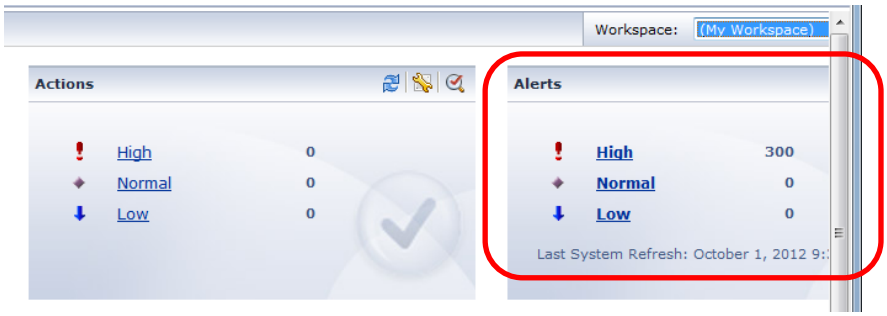
Alert	Description	Subscription
Change Orders Due/Overdue	Notifies the user if a change order entered will become due or overdue. These alerts are determined based upon the 'Required Date' field in the change order. Low Priority = 7 days prior to due date, Medium Priority = on due date, High Priority = 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
Inspections/Permits Due/Overdue	Notifies the user when open Inspection/Permit Item is due. Low Priority = 7 to 14 days before it due. Medium Priority = 1 to 6 days before its due. High Priority = Due date and all past dues	☐ Yes ☐ No

Submit Cancel

5. This alert will be triggered when the **Required Date** on an Inspections/Permits 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 (High, Normal or Low) to view the alert, or click the **View All Alerts** link to view them.



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