



STATE OF NEW JERSEY

SCHOOLS DEVELOPMENT AUTHORITY

Section 32

Reports

ORACLE Primavera

Table of Contents

Section Title	Page Number
I. Reporting Overview	3
II. Multi-Project Level Reporting	3
A. Selecting a Multi-Project Level Report	3
III. Project Level Reporting	8
A. Selecting a Project Level Report	8
B. Entering Criteria for Select Project Level Daily Construction Reports	10
IV. Document Level Reporting	12
A. Selecting a Document Level Report or Form	12
V. Exporting Data to Excel	15
VI. Help Desk Information	16
Appendix A – Contract Management Reports	17
Multi-Project Reports	17
Project Level Reports	22

I. Reporting Overview

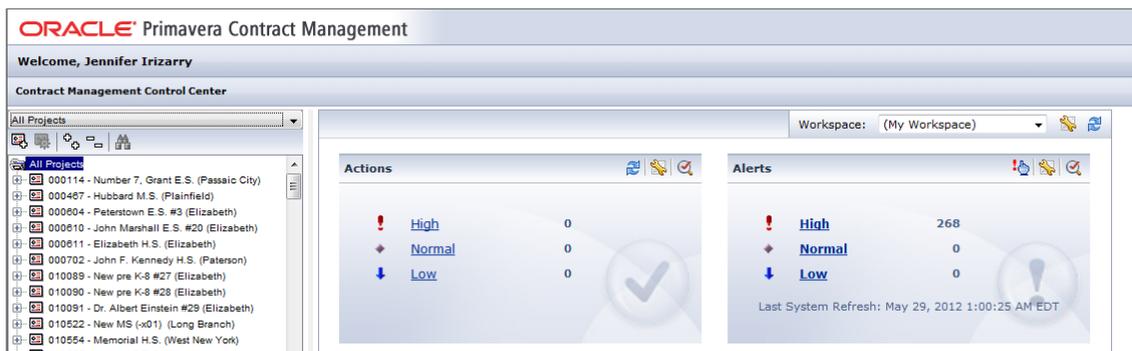
Reporting allows the user to obtain desired information organized by various topics. The reports herein have been customized based on identified needs within the organization. This manual will provide step-by-step instructions on the creation of reports. Refer to Appendix A of this manual for a listing of all reports.

II. Multi-Project Level Reporting

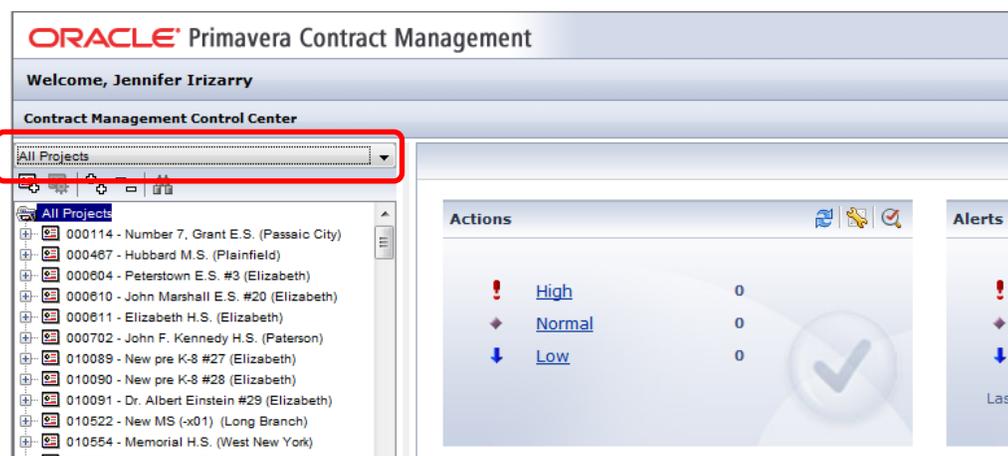
Multi-Project level reporting will allow a user to report against all projects (based on level of access) or a specific group of projects.

A. Selecting a Multi-Project Level Report

1. Once logged into Primavera, the Control Center screen appears (as shown).

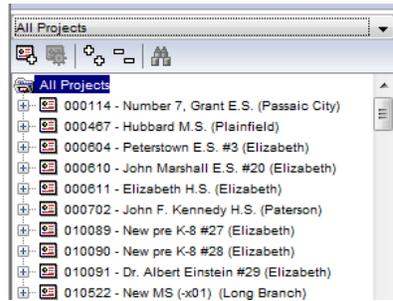


2. The **Project View** drop down list on the top left side of the screen determines how your project list will be displayed on the screen. The default view is the **All Projects** view which shows all projects with no grouping.

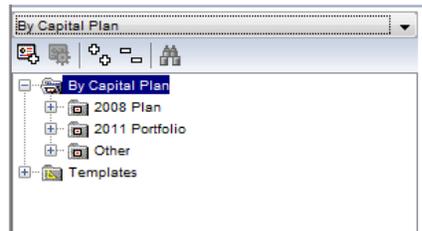


3. To facilitate organization and reporting, additional **Project Views** have been created. All views sort by project number.

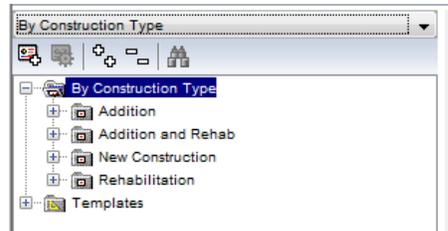
- All Projects



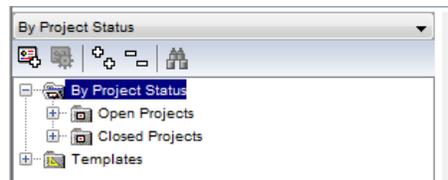
- By Capital Plan



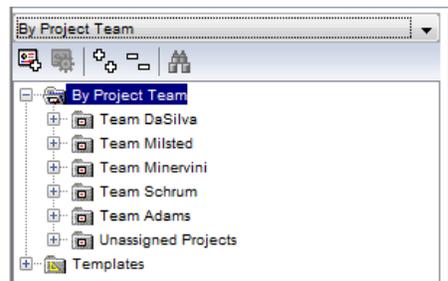
- By Construction Type



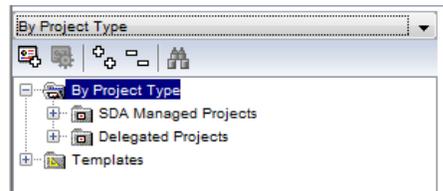
- By Project Status



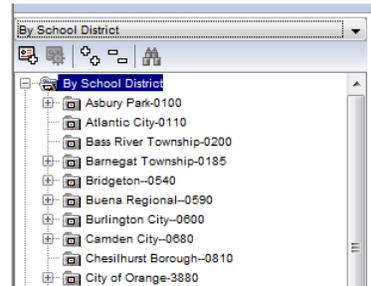
- By Project Team



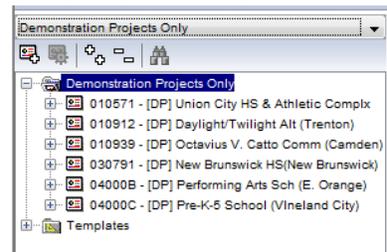
- By Project Type



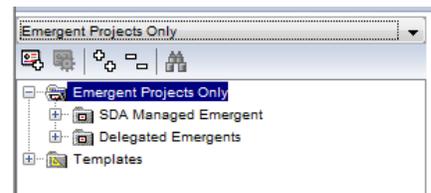
- By School District



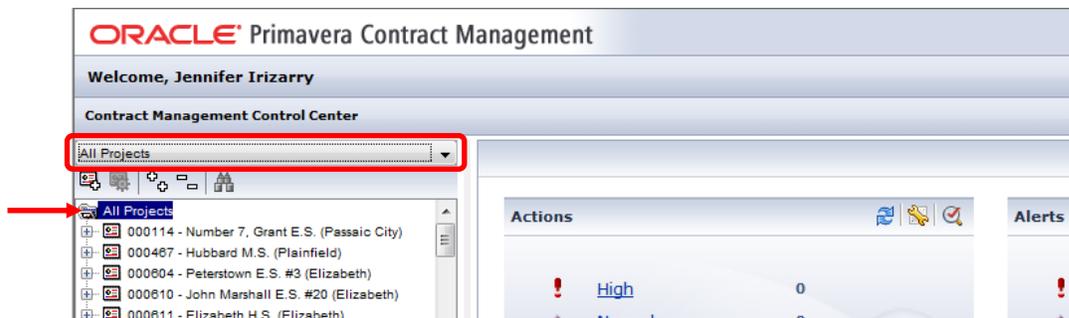
- By Demonstration Projects



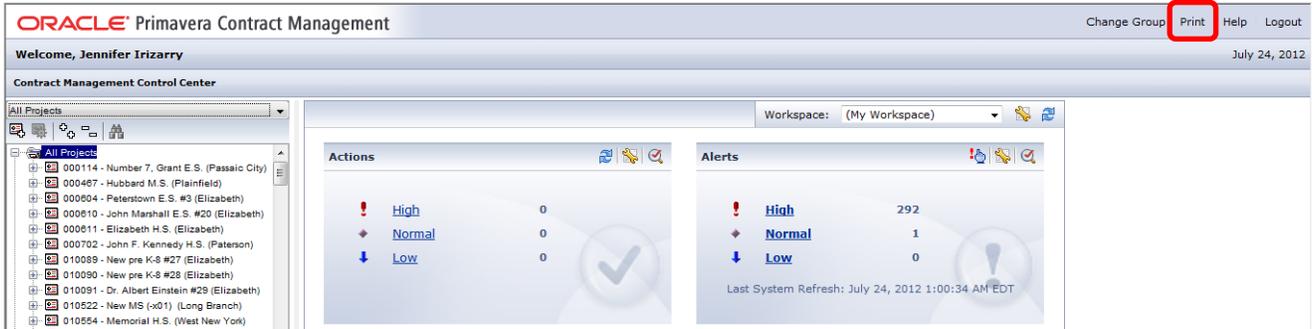
- By Emergent Projects



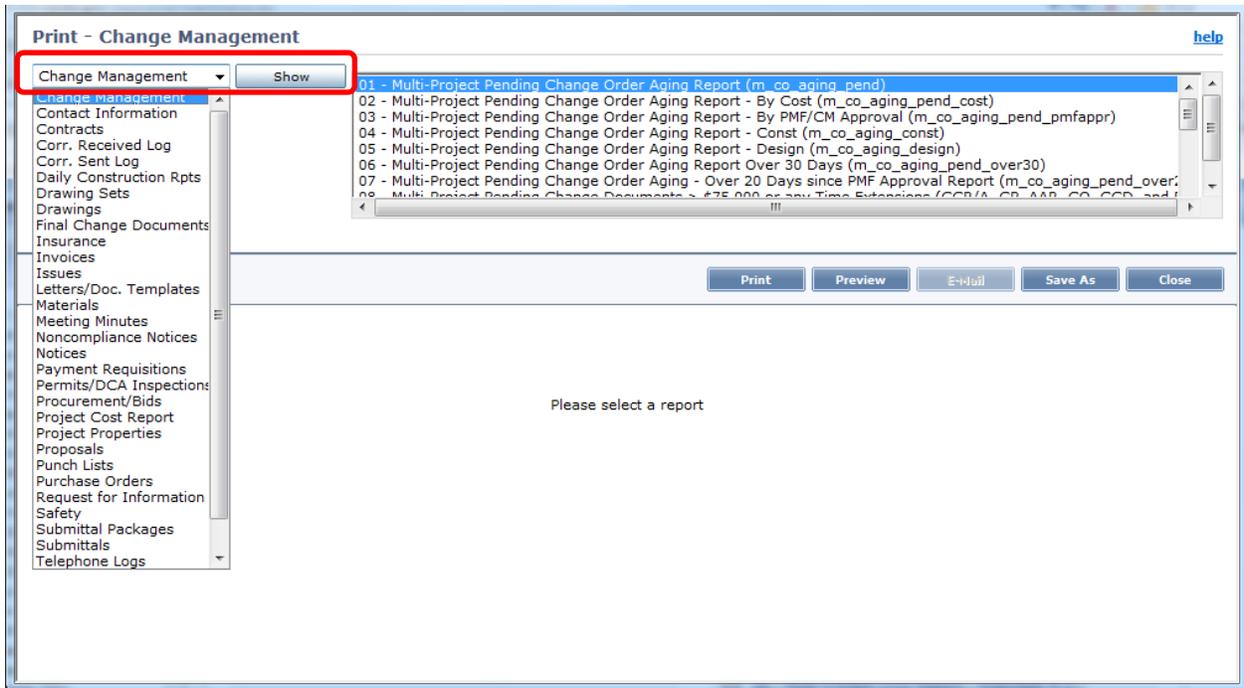
4. Select the view you wish to work with. Click the top folder on the project list.



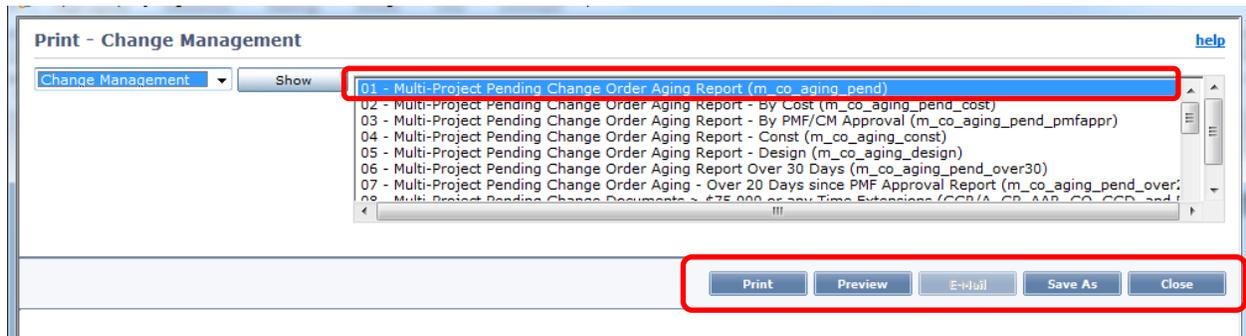
5. Click the **Print link** on the top right corner of the Control Center screen.



6. The **Print window** displays. Select the desired reporting module from the drop down menu on the left side of the screen and click the **Show** button.



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 Control Center screen.

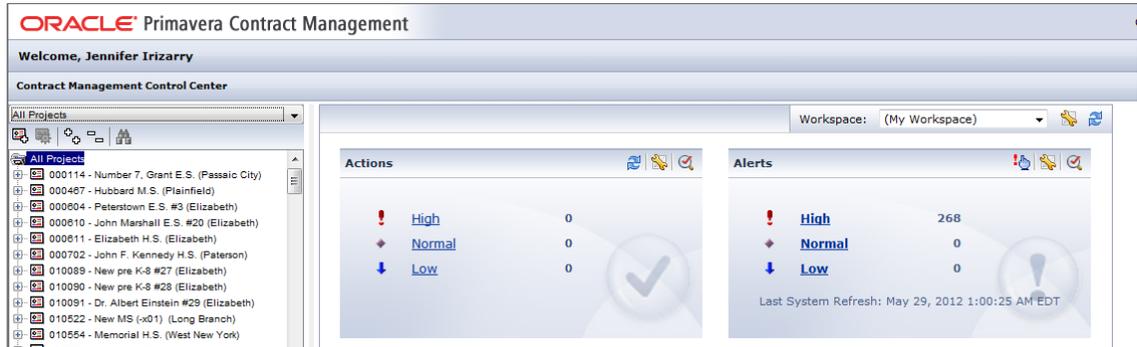
Important: Access to projects and reporting modules is based on each user's level of access to the system.

III. Project Level Reporting

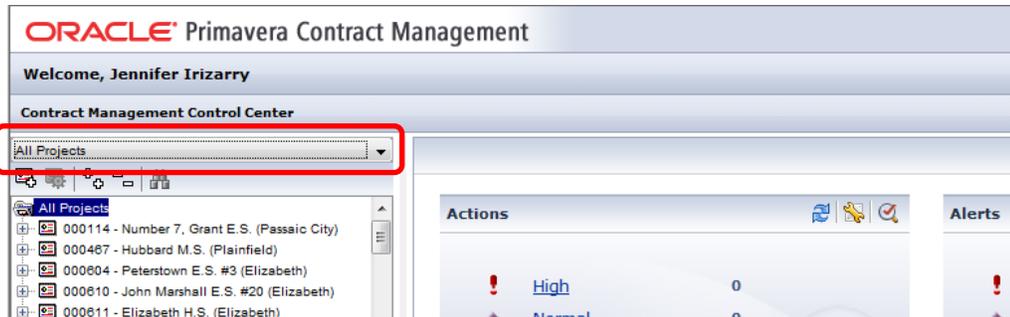
Single Project level reporting will allow a user to select a specific project to report against. Several of the Multi-project level reports are also available as single project-level reports.

A. Selecting a Project Level Report

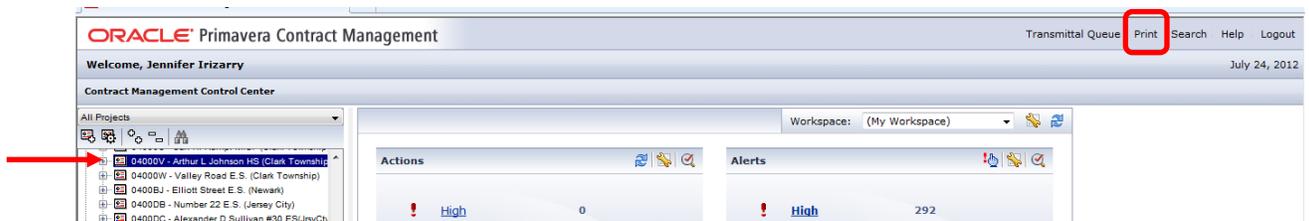
1. Once logged into Primavera, the Control Center screen appears (as shown).



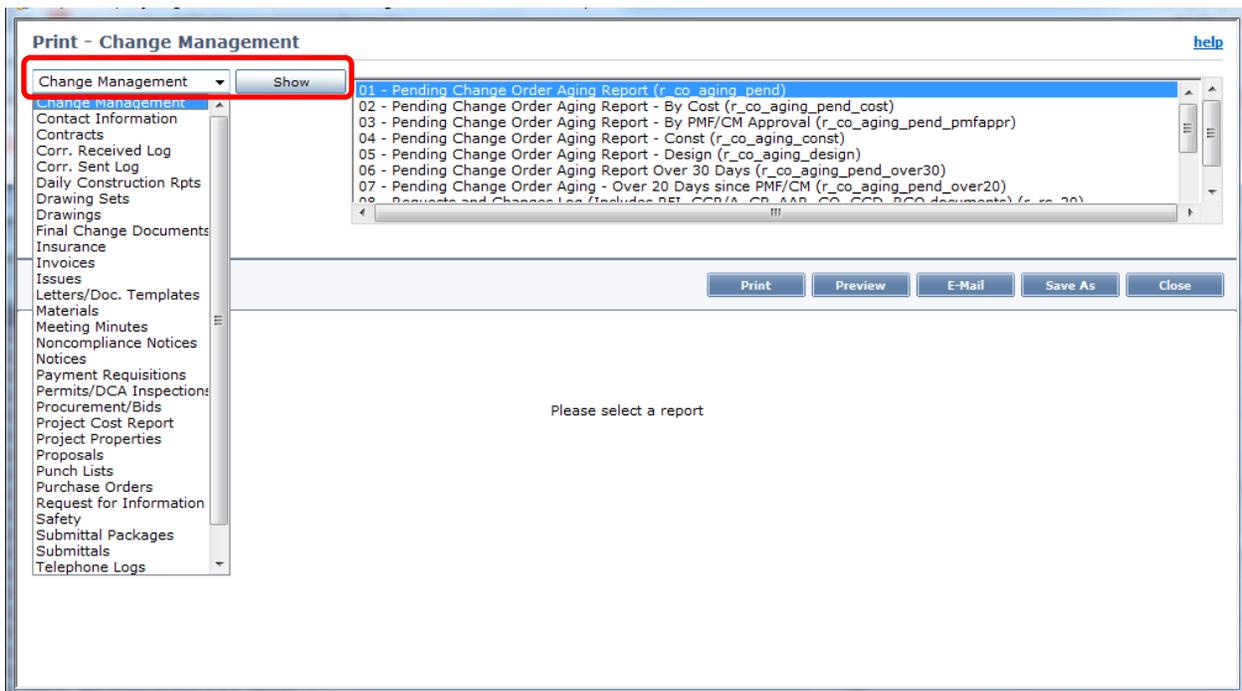
2. The **Project View** drop down list on the top left side of the screen determines how your project list will be displayed on the screen. The default view is the **All Projects** view which shows all projects with no grouping.



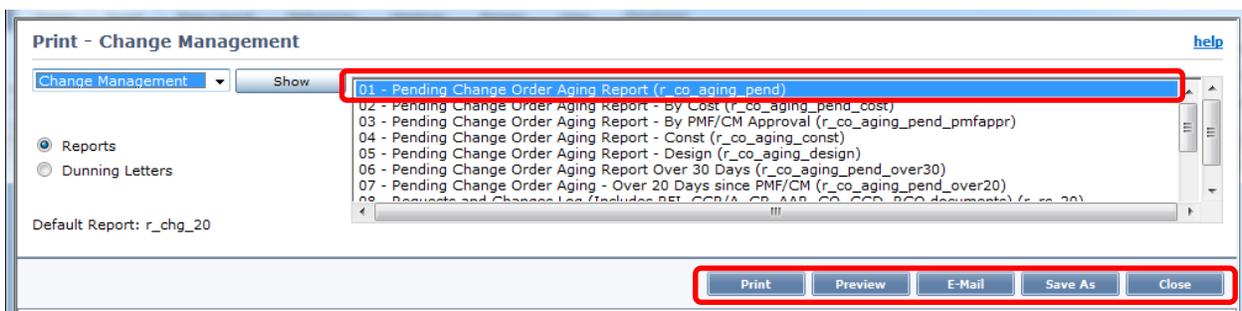
3. Select the project you wish to work with. Click the **Print** link on the top right corner of the Control Center screen.



4. Select the desired reporting module from the drop down menu on the left side of the screen and click the **Show** button.



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



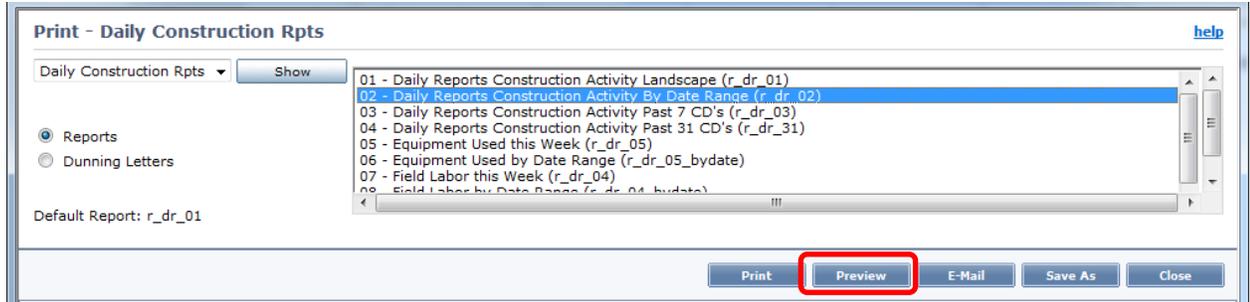
- Click **Print** to get a printed output.
- Click **Preview** to see your output displayed in the window.
- Click **E-Mail** to electronically send the output to another user.
- Click **Save As** to save the output to your local computer or other desired location.
- Click **Close** when finished to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

Important: Access to projects and reporting modules is based on each user's level of access to the system.

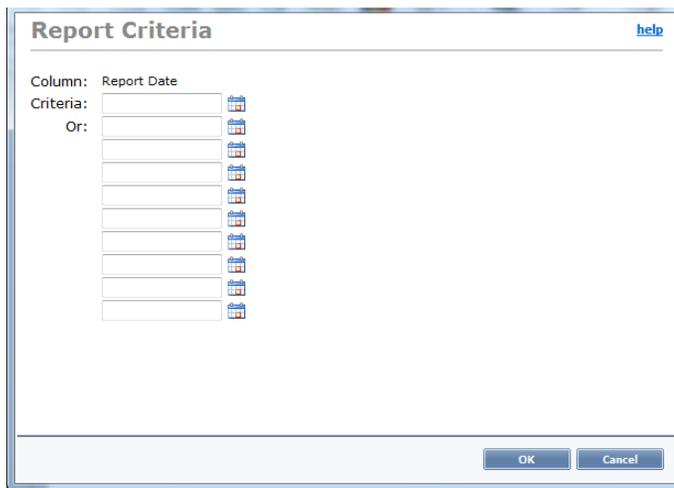
B. Entering Criteria for Select Project Level Daily Construction Reports

Some reports require the entry of date ranges in order to create the report.

1. Select the desired report from the report list and click the **Preview** button.



2. The **Report Criteria** window displays.



- Enter your date ranges in the **Criteria** fields. Be sure to enter your criteria using the formatting shown in the examples below. When completed, click the **OK** button to continue. Your report will display in the report window.

Example 1: Enter two individual dates to search	Example 2: Enter a range of dates to search using “AND”
<p>Report Criteria</p> <hr/> <p>Column: Report Date</p> <p>Criteria: >=Jan 1, 2009</p> <p>Or: <=Dec 31, 2009</p> <p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </p> <hr/> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>	<p>Report Criteria</p> <hr/> <p>Column: Report Date</p> <p>Criteria: >=Jan 1, 2009</p> <p>Or: AND <=Dec 31, 2009</p> <p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </p> <hr/> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>

IV. Document Level Reporting

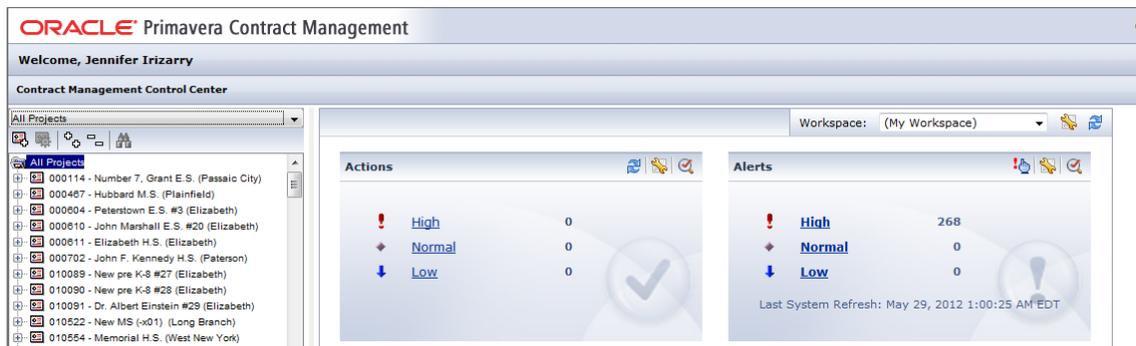
Document level reporting will allow a user to print reports specific to the project and module they have selected. This includes standard NJSDA forms which are populated with data from the currently displayed document.

There are several standard NJSDA forms available in the system. These include, among others:

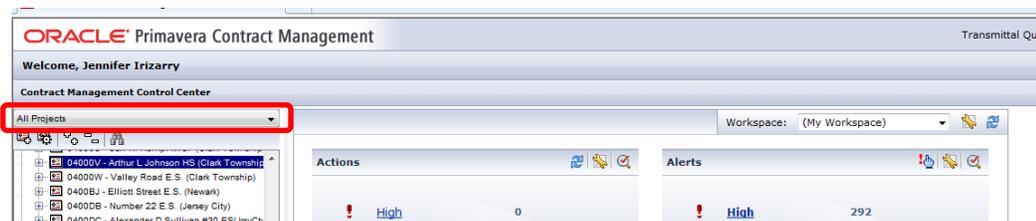
- NJSDA Form 500 within the Contract Change Request/Authority Document
- NJSDA Form 501 within the Authority Agent Recommendation Document
- NJSDA Form 503 within the Final Change Order Document
- NJSDA Form 505 within the Notice of Claim Document
- NJSDA Form 506 within the Construction Change Directive Document
- NJSDA Form 506A within the Construction Change Directive Document
- NJSDA Form 655 within the Request For Information Document
- NJSDA Form 803 within the Payment Requisition Document
- Change Order Checklist within the Change Management Document

A. Selecting a Document Level Report or Form

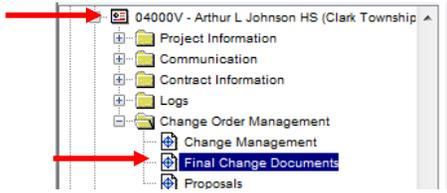
1. Once logged into Primavera, the Control Center screen appears (as shown).



2. The **Project View** drop down list on the top left side of the screen determines how your project list will be displayed on the screen. The default view is the **All Projects** view which shows all projects with no grouping. Select the project you want to report on from this view or any of the other available views.



3. Select the project you wish to work with then Select the desired folder within that project. The example shown is selecting the Final Change Documents within the Change Order Management folder.



4. The folder's log view displays. Select the desired document from the log view.

Control_Center > Final Change Documents

Final Change Documents Select an action... Expand All Collapse All Layout: Change Order log by Contract

Title	Number	Type	Approved?	To	To Contact	From
EX-NT-0032-C04 CO#206	206	Change Order	Yes	New Jersey Schools Development Auth		DandK Construction Co, Inc
EX-NT-0032-C04 CO#189	189	Change Order	Yes	New Jersey Schools Development Auth		DandK Construction Co, Inc
EX-NT-0032-C04 CO#212/CO#213	213	Change Order	Yes	New Jersey Schools Development Auth		DandK Construction Co, Inc
EX-NT-0032-C04 CO#211/CO#212	212	Change Order	Yes	New Jersey Schools Development Auth		DandK Construction Co, Inc
EX-NT-0032-C04 CO#220	220	Change Order	Yes	New Jersey Schools Development Auth		DandK Construction Co, Inc

5. The selected document displays. With the document open, select **Advanced Print** from the **Select an action menu** on the top of the screen.

Control_Center > Final Change Documents Log > Change Order

Change Order: 206 | New Jersey Schools Development Auth

Select an action... Edit Document Print Form Print Preview **Advanced Print** Send to Corr Sent Send to Corr Rcvd Send to Inbox E-Mail Form Generate Transmittal Version Document

General Review Status Summary Line Items Details Issues Attachments Versions

Type Change Order

Contract Construction (NT-0032-C04)

To New Jersey Schools Development Auth
Donna O'Gorman

From DandK Construction Co, Inc
Dilip Verghese

Number 206

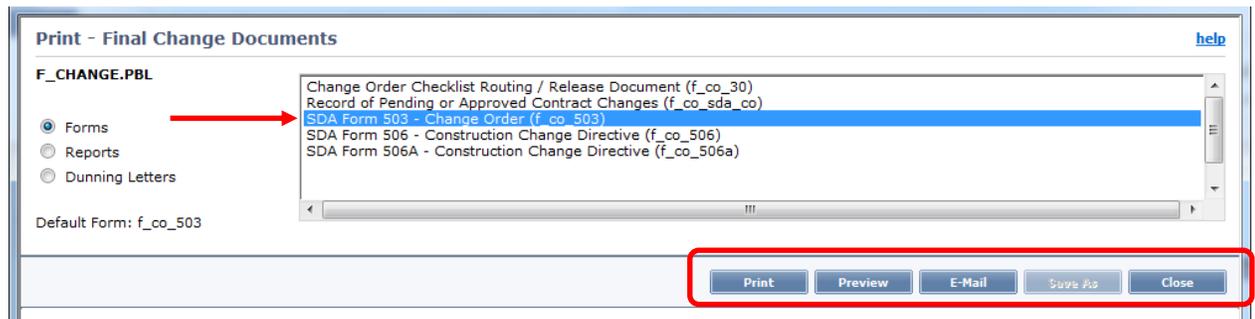
Title EX-NT-0032-C04 CO#206

Date Mar 10, 2009

Total Cost \$6,030.00

Time Change (days) 0

6. The **Print window** will display. Choose the desired report from the report window, then click one of the following buttons.

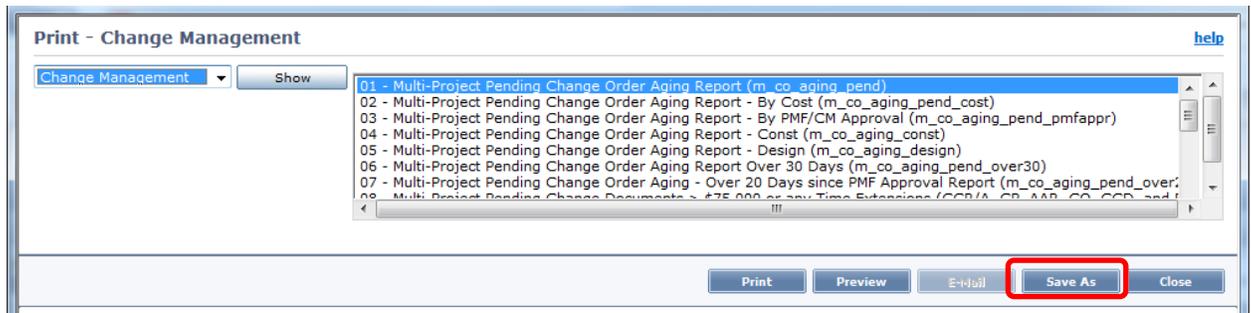


- Click **Print** to get a printed output.
- Click **Preview** to see your output displayed in the window.
- Click **E-Mail** to electronically send the output to another user.
- Click **Save As** to save the output to your local computer or other desired location.
- Click **Close** when finished to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

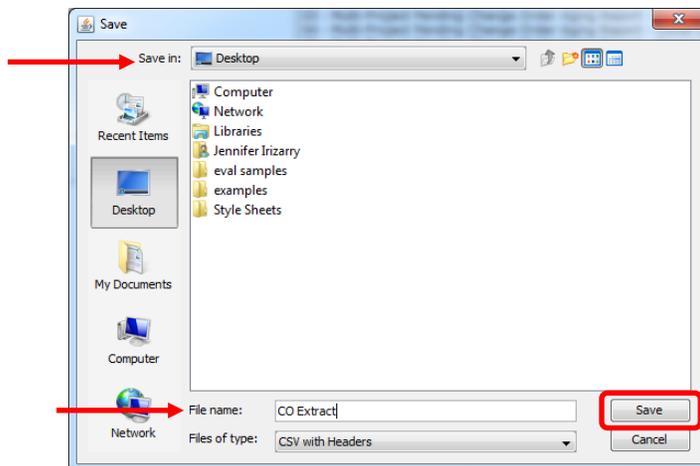
V. Exporting Data to Excel

It may be desirable to export your report information to Excel in order to create a customized report.

1. With the desired report selected, choose the **Save As** option.



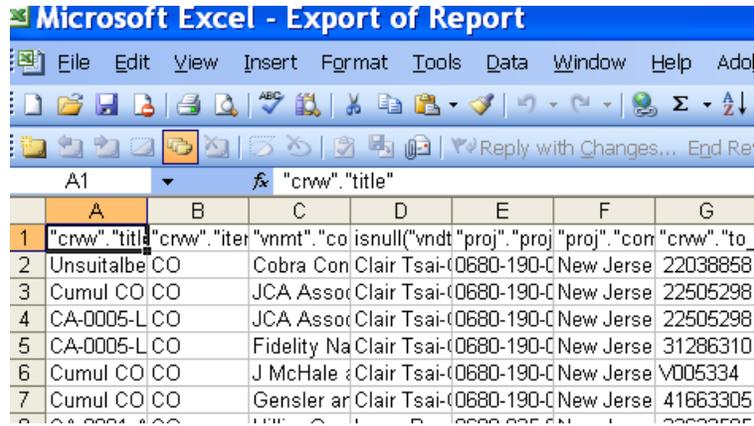
2. When the **Save dialog box** displays, select the desired location from the **Save in:** field (either the desktop or your network drive) and enter the desired file name. Click the **Save** button when completed.



3. Double click on the icon (if saved to your desktop) or file name (from a file list) to display the file.



- The file will display in Excel and can be edited or rearranged as required.



Important: Any changes completed to the exported file cannot be uploaded into Contract Management.

VI. Help Desk Information

If you experience any problems running reports, please contact the SDA Contract Management Help Desk by phone at 609-943-4500 or by Email at pehelpdesk@njeda.gov.

Appendix A – Contract Management Reports

Multi-Project Reports

a. Change Management – Multi-Project Change Management Reports

Report Title
1. Multi-Project Pending Change Order Aging Report <i>Description: Displays pending Change Orders, approvers, cost and processing time</i>
2. Multi-Project Pending Change Order Aging Report – By Cost <i>Description: Displays pending Change Orders, approvers, cost and processing time; sorted by cost</i>
3. Multi-Project Pending Change Order Aging Report – By PMF/CM Approval <i>Description: Displays pending Change Orders, approvers, cost and processing time; sorted by PMF/CM Approval date</i>
4. Multi-Project Pending Change Order Aging Report - Const <i>Description: Displays pending Change Orders, approvers, cost and processing time; filtered to show only Construction contracts</i>
5. Multi-Project Pending Change Order Aging Report - Design <i>Description: Displays pending Change Orders, approvers, cost and processing time; filtered to show only Design contracts</i>
6. Multi-Project Pending Change Order Report Over 30 Days <i>Description: Displays pending Change Orders, approvers, cost and processing time; filtered to show Change Orders with processing time over 30 days</i>
7. Multi-Project Pending Change Order Aging – Over 20 Days Since PMF Approval Report <i>Description: Displays pending Change Orders, approvers, cost and processing time; filtered to show Change Orders with processing time over 20 days beyond PMF's approval</i>
8. Multi-Project Pending Change documents >\$75,000 or >30 Days <i>Description: Displays all pending Change Management documents with a value over \$75,000 or time extensions over 30 days</i>
9. Multi-Project Pending CCD (CCD-TBD, RCO) <i>Description: Displays all pending CCD-TBD and RCO documents</i>
10. Multi-Project Pending Change Order Report (CO's, CCD's and RCO's only) <i>Description: Displays all pending CO, CCD and RCO documents</i>
11. Multi-Project Pending Requests (includes RFI, CCR/A, CP, AAR) <i>Description: Displays all Change Management documents leading up to, but not including, CO/CCD documents</i>
12. Multi-Project Pending Requests (includes RFI, CCR/A, CP, AAR, CO, CCD and RCO documents) <i>Description: Displays all pending Change Management documents</i>
13. Multi-Project Requests and Changes (All Change Documents) <i>Description: Displays all Change Management documents and their statuses</i>
14. Multi-Project Pending Change Documents – Construction Contracts <i>Description: Displays all Change Management documents; filtered to show only Construction contracts</i>
15. Multi-Project Pending Change Documents – Design Contracts <i>Description: Displays all Change Management documents; filtered to show only Design contracts</i>
16. Multi-Project All Change Documents by Change Management Number <i>Description: Displays all Change Management documents grouped by Change Management number</i>
17. Multi-Project Approved Change Orders (CO, CCD, RCO) <i>Description: Displays all Change Orders and Construction Change Directive documents with a status of approved</i>
18. Multi-Project Executed Change Order Aging Report <i>Description: Displays all executed Change Orders</i>
19. Multi-Project Executed Change Order Aging Report – 1st Quarter (Year Prompt) <i>Description: Displays all Executed Change Orders within the first quarter of the year entered</i>
20. Multi-Project Executed Change Order Aging Report – 2nd Quarter (Year Prompt) <i>Description: Displays all Executed Change Orders within the second quarter of the year entered</i>

21. Multi-Project Executed Change Order Aging Report – 3rd Quarter (Year Prompt) <i>Description: Displays all Executed Change Orders within the third quarter of the year entered</i>
22. Multi-Project Executed Change Order Aging Report – 4th Quarter (Year Prompt) <i>Description: Displays all Executed Change Orders within the fourth quarter of the year entered</i>
23. Multi-Project Executed Change Order Aging Report – by Month(s) Entered <i>Description: Displays all Executed Change Orders within the month and year entered</i>
24. Multi-Project Executed GC Change Order Aging Report <i>Description: Displays all Executed Change Orders; filtered to show only Construction contracts</i>
25. Multi-Project Executed A/E Amendment Aging Report <i>Description: Displays all Executed Amendments; filtered to show only Design contracts</i>
26. Multi-Project Executed Settlement Change Order Report <i>Description: Displays all Executed Settlement documents</i>
27. Multi-Project Executed CCD Report - Within the Last 30 Days <i>Description: Displays all Construction Change Directive documents executed within the last 30 days</i>

b. Contracts – Multi-Project Contract Reports

Report Title
1. Multi-Project Budgeted Contracts <i>Description: Displays Budgeted contracts</i>
2. Multi-Project Committed Contract Log by Project <i>Description: Displays Committed contracts</i>

c. Daily Construction Reports – Multi-Project Daily Construction Reports

Report Title
1. Multi-Project Daily Reports <i>Description: Displays Daily Reports including project, climate, activity and description</i>
2. Multi-Project Daily Reports – Past 7 Days <i>Description: Displays Daily Reports for the last 7 days including project, climate, activity and description</i>
3. Multi-Project Daily Reports – Past 31 Days <i>Description: Displays Daily Reports for the last 31 days including project, climate, activity and description</i>

d. Issues – Multi-Project Issue Reports

Report Title
1. Multi-Project Open Issue Log by Project <i>Description: Displays open Issues for selected projects</i>
2. Multi-Project Issue Log by Project <i>Description: Displays all Issues for selected projects</i>

e. Meeting Minutes – Multi-Project Meeting Minute Reports

Report Title
1. Multi-Project Meeting Minutes Business Items by Ball in Court <i>Description: Displays open items for all projects</i>
2. Multi-Project Meeting Minutes Business Items by Ball in Court – Latest Meeting <i>Description: Displays open items for all projects from the latest meeting only</i>

f. Payment Requisitions – Multi-Project Payment Requisition Reports

Report Title
1. Multi-Project Pending Payment Requisition Aging Report <i>Description: Displays pending Payment Requisitions, approvers, cost and time to pay</i>
2. Multi-Project Pending Payment Requisition Aging Report – By Cost <i>Description: Displays pending Payment Requisitions, approvers, cost and time to pay; sorted by cost</i>
3. Multi-Project Pending Payment Requisition Aging Report – By PMF/CM Received Date <i>Description: Displays pending Payment Requisitions, approvers, cost and time to pay; sorted by PMF/CM Received date</i>
4. Multi-Project Pending Requisition Details (Region Use Only) <i>Description: Displays pending Payment Requisitions, SIMS payment detail, retainage and payment amounts</i>
5. Multi-Project Pending Requisition Details Export Report <i>Description: Intended for export to Microsoft Excel only</i>
6. Multi-Project Pending Payment Requisition Aging Over Thirty (30) Days Report <i>Description: Displays pending Payment Requisitions, approvers, cost and time to pay</i>
7. Multi-Project Paid Payment Requisition Aging Report – 1st Quarter (Year Prompt) <i>Description: Displays Payment Requisitions paid within the first quarter of the year entered</i>
8. Multi-Project Paid Payment Requisition Aging Report – 2nd Quarter (Year Prompt) <i>Description: Displays Payment Requisitions paid within the second quarter of the year entered</i>
9. Multi-Project Paid Payment Requisition Aging Report – 3rd Quarter (Year Prompt) <i>Description: Displays Payment Requisitions paid within the third quarter of the year entered</i>
10. Multi-Project Paid Payment Requisition Aging Report – 4th Quarter (Year Prompt) <i>Description: Displays Payment Requisitions paid within the fourth quarter of the year entered</i>
11. Multi-Project Paid Payment Requisition Aging Report – by Month(s) Entered <i>Description: Displays Payment Requisitions paid within month and year entered</i>
12. Multi-Project Paid Payment Requisition Aging Report <i>Description: Displays paid Payment Requisitions, approvers, cost and time to pay</i>
13. Multi-Project Paid Payment Requisition Aging Report – by Selected Vendor <i>Description: Displays Payment Requisitions paid to the selected vendor entered</i>
14. Multi-Project Pending Pay-Reqs Not Approved, 15-Day Deadline <i>Description: Displays pending Payment Requisitions not approved, but need to be approved within a 15-day deadline</i>

g. Project Cost Report – Multi-Project Project Cost Reports

Report Title
1. Multi-Project Status Report – Internal Use Only <i>Description: Displays school description, budget and committed costs, status and Gantt chart. This report is intended only for internal use.</i>
2. Consolidated Project Status Report with Gantt Chart <i>Description: Displays school description, basic budget data and Gantt chart</i>
3. Multi-Project Charter Budget Status Report <i>Description: Displays project budget and committed contract data</i>

h. Project Properties – Multi-Project Project Property Reports

Report Title
<p>1. Project Status Report – External Use <i>Description: Displays a school description, committed costs, status description and Gantt chart. This report is intended for external use.</i></p>
<p>2. Active Projects Report <i>Description: Displays Legislative district(s), County, project name, type, phase, costs and start/completion dates</i></p>
<p>3. Active Projects Report for Substantial Completion Year Entered <i>Description: Displays Legislative district(s), County, project name, type, phase, costs and start/completion dates based on year entered</i></p>
<p>4. Active Projects Report by Substantial Completion Prior to Today <i>Description: Displays Legislative district(s), County, project name, type, phase, costs and start/completion dates based on a substantial completion prior to the current date</i></p>
<p>5. Active Projects Report by Substantial Completion After Today <i>Description: Displays Legislative district(s), County, project name, type, phase, costs and start/completion dates based on a substantial completion after the current date</i></p>
<p>6. Project Phase Report <i>Description: Displays projects by project phase</i></p>
<p>7. Project Phase Report - Regional <i>Description: Displays project by project phase; grouped by regional office</i></p>
<p>8. Project Phase Report (2009) <i>Description: Displays project by project phase (for 2009 projects completed in 2009 only)</i></p>
<p>9. Project Phase Report – Capital Plan <i>Description: Displays project by project phase; grouped by capital plan funding year</i></p>
<p>10. Project Phase Report – Capital Plan and Substantial Completion Year <i>Description: Displays project by project phase; grouped by capital plan funding year; filtered by substantial completion year entered</i></p>
<p>11. Project Phase Report - District <i>Description: Displays project by project phase; grouped by district</i></p>
<p>12. Project Phase Report – District and Substantial Completion Year <i>Description: Displays project by project phase; grouped by district; filtered by substantial completion year entered</i></p>
<p>13. Project Phase Report – Region and Substantial Completion Year <i>Description: Displays project by project phase; grouped by regional office; filtered by substantial completion year entered</i></p>
<p>14. District Summary Report <i>Description: Displays school name, type, key contacts and comments; grouped by regional office; filtered by district</i></p>
<p>15. District Summary Report – Capital Plan <i>Description: Displays school name, type, key contacts and comments; grouped by capital plan year; filtered by district</i></p>
<p>16. District Summary Report – District <i>Description: Displays school name, type, key contacts and comments; grouped by district</i></p>
<p>17. District Summary Report – Region <i>Description: Displays school name, type, key contacts and comments; grouped by regional office and district</i></p>
<p>18. Project Phase Report – Substantial Completion Year <i>Description: Displays project by project phase; grouped by substantial completion year</i></p>
<p>19. Projects Created Within the Last 30 Days <i>Description: Displays date entered, DOE number and Project Manager</i></p>
<p>20. School Type Report <i>Description: Displays school type (ECC, ES, MS, HS, Other)</i></p>
<p>21. School Type Report – Capital Plan <i>Description: Displays school type (ECC, ES, MS, HS, Other); grouped by capital plan year</i></p>

22. School Type Report – District

Description: Displays school type (ECC, ES, MS, HS, Other); grouped by district

23. Project Team Report

Description: Displays project's key members (PM, GC, AE, CM, Project Budget Managers, RES Members)

24. School Type Report – Regional

Description: Displays school type (ECC, ES, MS, HS, Other); grouped by regional office

i. Request for Information – Multi-Project Request for Information Reports**Report Title****1. Multi-Project Open RFI Log**

Description: All RFI log view, dates and costs for all RFIs not closed or approved

2. Multi-Project RFI Log

Description: All RFI log view, dates and costs for all RFIs

3. Multi-Project Open Request and Answer Log with Cost or Schedule Impact

Description: Displays all open RFIs with cost or schedule impact

j. Submittal Packages – Multi-Project Submittal Package Reports**Report Title****1. Multi-Project Open Submittal Log by Package**

Description: Displays submittal packages, submittals (not closed or approved), revisions, dates and titles

2. Multi-Project Submittal Log by Package

Description: Displays submittal packages, submittals (not closed or approved), revisions, dates and titles; grouped by package

k. Submittals – Multi-Project Submittal Reports**Report Title****1. Multi-Project Open Submittal Log by Package**

Description: Displays submittal packages, submittals (not closed or approved), revisions, dates and titles

2. Multi-Project Submittal Log by Package

Description: Displays submittal packages, submittals (not closed or approved), revisions, dates and titles; grouped by package

l. Safety – Multi-Project Safety Reports**Report Title****1. OSHA Form 300**

Description: Displays log of work-related injuries and illnesses

Project Level Reports

a. Change Management – Project Level Change Management Reports

Report Title
1. Pending Change Order Aging Report <i>Description: Displays pending Change Orders, approvers, cost and processing time</i>
2. Pending Change Order Aging Report – by Cost <i>Description: Displays pending Change Orders, approvers and processing time grouped by cost</i>
3. Pending Change Order Aging Report – by PMF/CM Approval <i>Description: Displays pending Change Orders, cost and processing time grouped by approvers</i>
4. Pending Change Order Aging Report – Const <i>Description: Displays pending Change Orders, approvers, cost and processing time; filtered to show only Construction contracts</i>
5. Pending Change Order Aging Report – Design <i>Description: Displays pending Change Orders, approvers, cost and processing time; filtered to show only Design contracts</i>
6. Pending Change Order Report Over 30 Days <i>Description: Displays pending Change Orders, approvers, cost and processing time; filtered to show Change Orders with processing time over 30 days</i>
7. Pending Change Order Aging – Over 20 Days Since PMF/CM Approval Report <i>Description: Displays pending Change Orders, approvers, cost and processing time; filtered to show Change Orders with processing time over 20 days beyond PMF's approval</i>
8. Requests and Changes Log (includes RFI, CCR/A, CP, AAR, CO, CCDA, RCO documents) <i>Description: Displays all Change Management documents and their status</i>
9. All Change Documents by Change Management Number <i>Description: Displays all Change Management documents grouped by Change Management number</i>
10. Executed Change Order Aging Report <i>Description: Displays all Executed Change Orders</i>
11. Executed Change Order Aging Report – 1st Quarter (Year Prompt) <i>Description: Displays all Executed Change Orders within the first quarter of the year entered</i>
12. Executed Change Order Aging Report – 2nd Quarter (Year Prompt) <i>Description: Displays all Executed Change Orders within the second quarter of the year entered</i>
13. Executed Change Order Aging Report – 3rd Quarter (Year Prompt) <i>Description: Displays all Executed Change Orders within the third quarter of the year entered</i>
14. Executed Change Order Aging Report – 4th Quarter (Year Prompt) <i>Description: Displays all Executed Change Orders within the fourth quarter of the year entered</i>
15. Executed Change Order Aging Report – by Month(s) Entered <i>Description: Displays all Executed Change Orders within the month and year entered</i>
16. Executed GC Change Order Aging Report <i>Description: Displays all Executed Change Orders; filtered to show only Construction contracts</i>
17. Executed A/E Amendment Aging Report <i>Description: Displays all Executed Amendments; filtered to show only Design contracts</i>
18. Executed CO Settlement Report <i>Description: Displays all Executed Settlement documents</i>

b. Contact Information – Project Level Contact Information Reports

Report Title
1. Project Status Report – External Use <i>Description: Displays summary project data including picture, project costs and project schedule</i>
2. Default Contact Addresses <i>Description: Lists names, addresses and contact information for default contacts of each company</i>
3. Primary Contact List <i>Description: Lists names, addresses and contact information for primary contacts of each company</i>
4. Primary Contact List by Role <i>Description: Lists names, addresses and contact information for primary contacts of each company; grouped by job role</i>
5. Primary Contact List by Spec Section <i>Description: Lists names, addresses and contact information for primary contacts of each company; grouped by spec section</i>
6. All Contact Addresses and Remarks <i>Description: Displays names, addresses, contact information and remarks; grouped by company</i>
7. All Contact Addresses <i>Description: Displays names, addresses, contact information; grouped by company</i>

c. Contract Information – Project Level Contract Information Reports

Report Title
1. Contract Log <i>Description: Displays contracts, cost centers and approved, pending, revised amounts associated with each contract</i>
2. Committed Contracts with Changes <i>Description: Displays contracts, vendors and all changes associated with the contract</i>
3. Committed Contracts by To Company <i>Description: Displays contract number, description, total cost, approved and revised amounts; groups contracts by To Vendor</i>

d. Correspondence Received – Project Level Correspondence Received Reports

Report Title
<p>1. All Correspondence by Item Type <i>Description: Displays to/from company, document type, person who created the document and short description; groups by Correspondence Sent/Received, sorted by date</i></p>
<p>2. Correspondence Received Log <i>Description: Displays to/from company, document type, person who created the document and short description; groups by Correspondence Sent/Received, sorted by date</i></p>
<p>3. Correspondence Received Log – Landscape (All Fields) <i>Description: Displays to/from company, document type, person who created the document and short description; groups by Correspondence Sent/Received, sorted by date</i></p>
<p>4. Correspondence Received Log by From Company <i>Description: Displays to/from company, document type, person who created the document and short description; groups by Correspondence Sent/Received, sorted by date</i></p>
<p>5. Correspondence Received Log by Month Received <i>Description: Displays to/from company, document type, person who created the document and short description; groups by Correspondence Sent/Received, sorted by date</i></p>

e. Correspondence Sent – Project Level Correspondence Sent Reports

Report Title
<p>1. All Correspondence by Item Type <i>Description: Displays to/from company, document type, person who created the document and short description; groups by Correspondence Sent/Received, sorted by date</i></p>
<p>2. Correspondence Sent Log – Landscape (All Fields) <i>Description: Displays to/from company, document type, person who created the document and short description; groups by Correspondence Sent/Received, sorted by date</i></p>
<p>3. Correspondence Sent Log by To Company <i>Description: Displays to/from company, document type, person who created the document and short description; groups by Correspondence Sent/Received, sorted by date</i></p>
<p>4. Correspondence Sent Log by Month Sent <i>Description: Displays to/from company, document type, person who created the document and short description; groups by Correspondence Sent/Received, sorted by date</i></p>

f. Daily Reports – Project Level Daily Reports

Report Title
1. Daily Reports <i>Description: Displays daily reports including project, climate, and activity description</i>
2. Daily Reports Construction Activity by Date Range <i>Description: Displays daily reports including project, climate, and activity description by date range</i>
3. Daily Reports – Past 7 Days <i>Description: Displays daily reports for the last 7 days including project, climate, and activity description</i>
4. Daily Reports – Past 31 Days <i>Description: Displays daily reports for the last 31 days including project, climate, and activity description</i>
5. Equipment This Week <i>Description: Displays equipment used in the last week</i>
6. Equipment Used by Date Range <i>Description: Displays equipment used within a date range</i>
7. Field Labor This Week <i>Description: Displays field laborers working in the last week</i>
8. Field Labor by Date Range <i>Description: Displays field laborers working within a date range</i>
9. Visitors This Week <i>Description: Displays visitors to the job site within the last week</i>
10. Visitors by Date Range <i>Description: Displays visitors to the job site within a date range</i>

g. Drawings – Project Level Drawing Reports

Report Title
1. Drawing Set Catalog Report <i>Description: Displays region, district, school, project number, title, phase, set name, date, location, Ball-in-Court and Ball-in-Court contact</i>
2. Drawings Grouped by Set <i>Description: Displays drawing number, latest rev, title, area, discipline, phase, bid package, progress, received and designer; sorted by set</i>
3. Drawings Sent for Distribution – All Revisions <i>Description: Displays drawing number, latest rev, title, area, discipline, phase, bid package, progress, received and date issued; displays all drawings with the distribution populated</i>
4. Drawing History for Distribution <i>Description: Displays drawing number, latest rev, title, area, discipline, phase, bid package, progress, received and designer</i>
5. Drawing Log Grouped by Area with Latest Revision <i>Description: Displays drawing number, latest rev, title, area, discipline, phase, bid package, progress, received and designer; sorted by revision number</i>
6. Drawing Log Grouped by Bid Package with Latest Revision <i>Description: Displays drawing number, latest rev, title, area, discipline, phase, bid package, progress, received and designer; sorted by bid package</i>
7. Drawing Log Grouped by Discipline with Latest Revision <i>Description: Displays drawing number, latest rev, title, area, discipline, phase, bid package, progress, received and designer; sorted by discipline</i>
8. Drawing Log Grouped by Percent Progress with Latest Revision <i>Description: Displays drawing number, latest rev, title, area, discipline, phase, bid package, progress, received and designer; sorted by percent progress</i>

9. Drawing Log Grouped by Phase with Latest Revision

Description: Displays drawing number, latest rev, title, area, discipline, phase, bid package, progress, received and designer; sorted by phase

10. Drawing Reproduction Based on Transmittal - Today

Description: Displays attention, company, description, transmittal date, drawing size and number of copies; shows transmittals created from drawings within the last 24 hours

11. Drawing Reproduction Based on Transmittal – Prompted For Dates

Description: Displays attention, company, description, transmittal date, drawing size and number of copies; shows transmittals created from drawings for the dates entered

12. Drawing Sent for Distribution by Distribution Contact

Description: Displays attention, company, description, transmittal date, drawing size and number of copies; shows transmittals created from drawings with their distributions

h. Invoices – Project Level Invoice Reports

Report Title**1. Invoices by Contract / Purchase Order**

Description: Displays invoice title, contract, payment information, amount and subtotals

i. Issues – Project Level Issue Reports

Report Title**1. Open Issues Log by Project**

Description: Displays open issues regardless of status including document number, type, title, Ball-in-Court, value, issue, open, closed, involved and status dates

2. Issues Log by Project

Description: Displays all issues regardless of status including document number, type, title, Ball-in-Court, value, issue, open, closed, involved and status dates

3. Issues – Change Documents

Description: Displays issues related to Change Management

4. Issue History by To Company

Description: Displays issues grouped by To Company

j. Letters – Project Level Letter Reports

Report Title**1. Correspondence Letters**

Description: Displays log number, document date, to, from and subject

2. Correspondence Letters Requiring Response

Description: Displays letters with no response date including log number, document date, to, from and subject

k. Meeting Minutes – Project Level Meeting Minute Reports

Report Title
1. Meeting Minutes Business Items – Latest Meeting <i>Description: Displays business items from the latest meeting including business item number, Ball-in-Court, description, date due and comply</i>
2. Meeting Minutes Business Items <i>Description: Displays all business items including business item number, Ball-in-Court, description, date due and comply</i>
3. Meeting Minutes List <i>Description: Displays all meeting minutes pertaining to the selected project</i>

l. Non-Compliance Notices – Project Level Non-Compliance Notice Reports

Report Title
1. Non-Compliance Notice Log <i>Description: Displays contract, to, from, document number, title, status, costs and dates relating to each non-compliance notice</i>

m. Notices – Project Level Notice Reports

Report Title
1. Notice Log <i>Description: Displays document type, to, from, document number, status, cost and dates relating to each notice</i>

n. Payment Requisitions – Project Level Payment Requisition Reports

Report Title
1. Pending Requisition Aging Report <i>Description: Displays pending payment requisitions, approvers, cost and time-to-pay</i>
2. Pending Payment Requisition Report Over 30 Days <i>Description: Displays pending payment requisitions, approvers, cost and time-to-pay; filtered to show payment requisitions over 30 days since PMF/CM approval</i>
3. Pending Payment Requisition Aging Report – by Cost <i>Description: Displays pending payment requisitions, approvers, cost and time-to-pay; sorted by cost</i>
4. Pending Payment Requisition Aging Report – by PMF/CM Received Date <i>Description: Displays pending payment requisitions, approvers, cost and time-to-pay; sorted by PMF/CM received date</i>
5. Paid Payment Requisition Aging Report – 1st Quarter (Year Prompt) <i>Description: Displays paid payment requisitions within the first quarter of the year entered</i>
6. Paid Payment Requisition Aging Report – 2nd Quarter (Year Prompt) <i>Description: Displays paid payment requisitions within the second quarter of the year entered</i>
7. Paid Payment Requisition Aging Report – 3rd Quarter (Year Prompt) <i>Description: Displays paid payment requisitions within the third quarter of the year entered</i>
8. Paid Payment Requisition Aging Report – 4th Quarter (Year Prompt) <i>Description: Displays paid payment requisitions within the fourth quarter of the year entered</i>
9. Paid Payment Requisition Aging Report – by Month(s) Entered <i>Description: Displays paid payment requisitions within the month and year entered</i>
10. Paid Payment Requisition Aging Report <i>Description: Displays paid payment requisitions</i>
11. Paid Payment Requisition Aging Report - by Selected Vendor <i>Description: Displays paid payment requisitions; filtered to show requisitions paid to the selected vendor entered</i>
12. Requisition Summary Totals by Contract <i>Description: Displays all payment requisitions against grouped contracts including retainage, paid to date and remaining balance values</i>
13. Pending Pay-Reqs Not Approved, 15-Day Deadline <i>Description: Displays pending Payment Requisitions not approved, but need to be approved within a 15-day deadline</i>

o. Permits – Project Level Permit Reports

Report Title
1. Open Permits <i>Description: Displays all open permits</i>
2. Closed Permits <i>Description: Displays all closed permits</i>
3. All Permits <i>Description: Displays all permits</i>

p. Project Cost Report – Project Level Project Cost Reports

Report Title
1. Single Project Status Report – Internal Use <i>Description: Displays school description, budget and committed costs, school picture, statues description and gantt chart; used for monthly status meetings</i>
2. Project Charter Budget Status Report <i>Description: Displays budgeted and committed costs; cost codes are grouped in accordance with Budget Manager requirements</i>
3. Actual and Variance Costs <i>Description: Displays received, issued and variance costs relating to each cost code</i>
4. Budget vs. Actual Variance <i>Description: Displays budgeted, actuals and variance costs relating to each cost code</i>
5. Budgeted Costs <i>Description: Displays all budgeted costs relating to each cost code</i>
6. Budgeted, Committed and Actual Costs - Landscape <i>Description: Displays budgeted, committed, actual and variance costs related to each cost code</i>
7. Committed Costs <i>Description: Displays all committed costs relating to each cost code</i>
8. Committed vs. Actual Variance <i>Description: Displays all committed and variance costs relating to each cost code</i>
9. Cost Code Definitions and Titles <i>Description: Displays all cost codes broken out by category (CC1, CC2, BTL) and provides the title of each</i>
10. Committed Cost Detail by Cost Code <i>Description: Displays all documents that affect the committed cost column of the Project Cost Report</i>

q. Project Properties – Project Level Project Property Reports

Report Title
1. Project Status Report – External Use <i>Description: Displays school description, budget and committed costs, school picture, statues description and gantt chart; used for monthly status meetings</i>
2. NJSDA – Users Who Have Not Logged in Within 15 Days <i>Description: Displays users by user account type and the number of days they have been inactive</i>
3. Spec Section Report – List of All Sections Available <i>Description: Displays section number and description of all specs in the system</i>
4. Distribution Lists <i>Description: Displays the distribution lists relating to each project and all contacts that are members of that list</i>
5. NJSDA – Modified Document in the Last 30 Days w/Date and User Name <i>Description: Displays all documents modified within the last 30 days</i>
6. NJSDA – Modified Document in the Last 7 Days w/Date and User Name <i>Description: Displays all documents modified within the last 7days</i>

r. Punch Lists – Project Level Punch List Reports

Report Title
1. Punch Lists <i>Description: Displays punch list number, Ball-in-Court by vendor ID, short description, location and value</i>
2. Open Punch List Items by Ball in Court <i>Description: Displays full Ball-in-Court contact company and name, status, dates, location and description; grouped by Ball-in-Court</i>
3. Open Punch List Items by Location <i>Description: Displays full Ball-in-Court contact company and name, status, dates, location and description; grouped and totaled by location</i>

s. Request for Information – Project Level Request for Information Reports

Report Title
1. All – Request and Answer Log <i>Description: Displays all RFI's relating to the selected project, includes full request and answer dialog</i>
2. Open – Request and Answer Log <i>Description: Displays open RFI's relating to the selected project, includes full request and answer dialog</i>
3. Request for Information by Issue Only <i>Description: Displays RFI's relating to an issue</i>
4. Request and Answer Log by Architect Number - Landscape <i>Description: Displays RFI's relating to an A/E number</i>
5. Request and Answer Log by Subcontractor - Landscape <i>Description: Displays RFI's relating to a subcontractor</i>
6. Request and Answer Log with Drawings and Distribution List <i>Description: Displays all RFI's relating to the selected project, includes full request and answer dialog, and any drawings and distribution lists</i>
7. Open Request and Answer Log with Cost or Schedule Impact <i>Description: Displays all open RFI's with a cost or schedule impact</i>

t. Safety – Project Level Safety Reports

Report Title
1. OSHA's Form 300 (Landscape) <i>Description: Displays OSHA's latest form 300 populated with data</i>
2. OSHA's Form 300a (Landscape) <i>Description: Displays OSHA's latest form 300a populated with data</i>
3. Safety Log by To Vendor <i>Description: Displays all safety documents including Ball-in-Court and date created; grouped by To Vendor</i>

u. Submittal Packages – Project Level Submittal Package Reports

Report Title
1. Submittal Log by Package Open <i>Description: Displays all submittal packages, submittals, revision, dates, title and submittals not closed or approved</i>
2. Submittal Log by Package <i>Description: Displays all submittal packages, submittals, revision, dates, and title; grouped by package in title</i>
3. Submittals Status Report by Days Held <i>Description: Displays package, submittal, revision, title, Ball-in-Court and dates; grouped and sorted by days held</i>
4. Submittals Status Report by Days Overdue <i>Description: Displays package, submittal, revision, title, Ball-in-Court and dates; grouped and sorted by days held beyond due date</i>
5. Submittal Log by Ball-in-Court <i>Description: Displays title, submittal, revision and dates; grouped by Ball-in-Court company</i>
6. Submittal Packages Summary <i>Description: Displays an overall summary of all submittal packages including package number, title, required start/finish dates, status and the total number of submittals included in the package</i>
7. Submittals Not Received by Ball-in-Court <i>Description: Displays package, submittal revision, title and number of days held; grouped by Ball-in-Court company and contact</i>
8. Submittals Revision Cycles Detail - Landscape <i>Description: Displays the review cycle information for all submittals in a package; grouped by package number</i>
9. Submittals Revision Cycles Detail including Sets - Landscape <i>Description: Displays the review cycle information for submittals with multiple reviewers in a package; grouped by package number</i>

v. Submittals – Project Level Submittal Reports

Report Title
1. Submittal Log by Package Open <i>Description: Displays all submittal packages, submittals, revision, dates, title and submittals not closed or approved</i>
2. Submittal Log by Package <i>Description: Displays all submittal packages, submittals, revision, dates, and title; grouped by package in title</i>
3. Submittals Status Report by Days Held <i>Description: Displays package, submittal, revision, title, Ball-in-Court and dates; grouped and sorted by days held</i>
4. Submittals Status Report by Days Overdue <i>Description: Displays package, submittal, revision, title, Ball-in-Court and dates; grouped and sorted by days held beyond due date</i>
5. Submittal Log by Ball-in-Court <i>Description: Displays title, submittal, revision and dates; grouped by Ball-in-Court company</i>
6. Submittal Packages Summary <i>Description: Displays an overall summary of all submittal packages including package number, title, required start/finish dates, status and the total number of submittals included in the package</i>
7. Submittals Not Received by Ball-in-Court <i>Description: Displays package, submittal revision, title and number of days held; grouped by Ball-in-Court company and contact</i>
8. Submittals Revision Cycles Detail - Landscape <i>Description: Displays the review cycle information for all submittals in a package; grouped by package number</i>
9. Submittals Revision Cycles Detail including Sets - Landscape <i>Description: Displays the review cycle information for submittals with multiple reviewers in a package; grouped by package number</i>

w. Transmittals – Project Level Transmittal Reports

Report Title

1. Transmittal Log

<i>Description: Displays all transmittal information including to, from, subject, document number and attention; sorted by date</i>

2. Transmittal Log by To Company

<i>Description: Displays all transmittal information including to, from, subject, document number and attention; grouped by company and sorted by date</i>
--

3. Transmittals by Package Number
--

<i>Description: Displays all transmittal information including to, from, subject, document number and attention; sorted by package number</i>

x. Trends – Project Level Trend Reports

Report Title

1. Trends

<i>Description: Displays budgeting information such as the budget revision number, title, status and the value of the budget</i>
--