Project Initiation

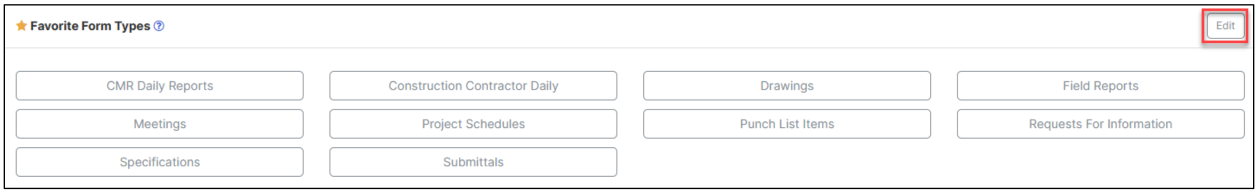
Set up Favorite Form Types

Each user will set up forms that are applicable to their role as Favorite Form Types to make them readily available from the project's Home Page and also from the list that opens when "Forms" is selected from the left navigation.

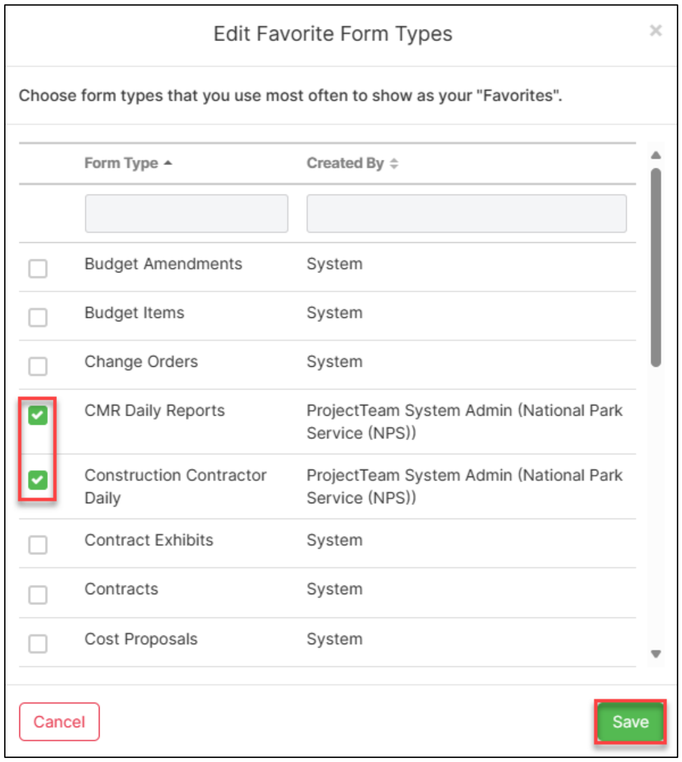
NPS Form Types:

- CMR Daily Reports
- Construction Contractor Daily
- Drawings
- Field Reports (for Inspections)
- Meetings
- Project Schedules
- Punch List Items
- Requests for Information
- Specifications
- Submittals

1. Open the project.
2. Click Edit from above the Favorite Form Types.



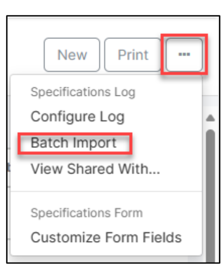
3. Check the box beside the applicable Form Types and Save.



Batch Import Project Specifications

The list of Specifications will need to be set up for the project, either at the beginning of the project or one at a time as Submittal Items are added. The Batch Import feature allows you to upload the entire list at one time.

1. Open the Specifications form.
2. From the Log View screen, click on the 3-dot menu and select Batch Import.



3. Download the Template.
4. Prepare the Data.
    a. Enter the Specification Descriptions in the **Subject** column (required field).
    b. If entering the **Division**, it ***must*** be formatted to exactly match the list from the dropdown in that field.

01 - General Requirements
02 - Existing Conditions
03 - Concrete
04 - Masonry
05 - Metals
06 - Wood, Plastics, and Composites
07 - Thermal and Moisture Protection
08 - Openings
09 - Finishes
10 - Specialties
11 - Equipment
12 - Furnishings
13 - Special Construction
14 - Conveying Equipment
20 - Mechanical Support
21 - Fire Suppression
22 - Plumbing
23 - Heating Ventilating and Air Conditioning
25 - Integrated Automation
26 - Electrical
27 - Communications
28 - Electronic Safety and Security
31 - Earthwork
32 - Exterior Improvements
33 - Utilities
34 - Transportation
35 - Waterways and Marine Construction
40 - Process Interconnections
41 - Material Processing and Handling Equipment
42 - Process Heating, Cooling, and Drying Equipment
43 - Process Gas and Liquid Handling, Purification and Storage Equipment
44 - Pollution Control Equipment
45 - Industry-Specific Manufacturing Equipment
46 - Water and Wastewater Equipment
48 - Electrical Power Generation

    c. Enter the **Specification #**s.
    d. Enter the **Revision #**s. (This is a required field, enter “0” if there is no additional revision.)

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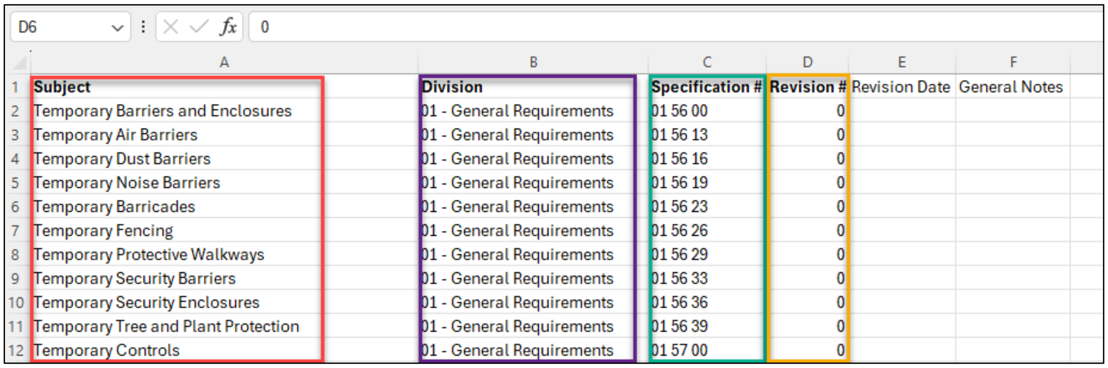
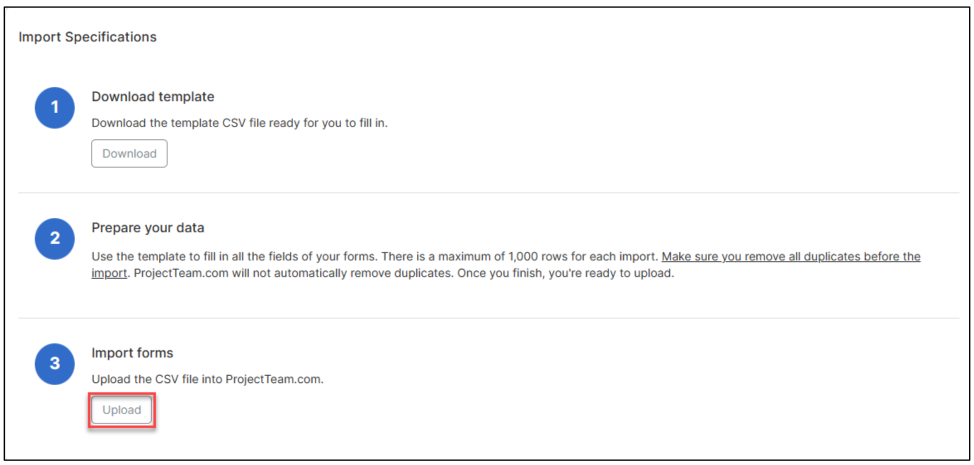


Subject	Division	Specification #	Revision #	Revision Date	General Notes
Temporary Barriers and Enclosures	01 - General Requirements	01 56 00	0		
Temporary Air Barriers	01 - General Requirements	01 56 13	0		
Temporary Dust Barriers	01 - General Requirements	01 56 16	0		
Temporary Noise Barriers	01 - General Requirements	01 56 19	0		
Temporary Barricades	01 - General Requirements	01 56 23	0		
Temporary Fencing	01 - General Requirements	01 56 26	0		
Temporary Protective Walkways	01 - General Requirements	01 56 29	0		
Temporary Security Barriers	01 - General Requirements	01 56 33	0		
Temporary Security Enclosures	01 - General Requirements	01 56 36	0		
Temporary Tree and Plant Protection	01 - General Requirements	01 56 39	0		
Temporary Controls	01 - General Requirements	01 57 00	0		

    e. Save the form.

5. Upload the CSV file.



Review the Directory and Add Additional Users

The Call Order for adding the project to ProjectTeam includes a list of Initial Users. When the project is set up, users are added to the project and invited to set up their account. Upon accepting the invitation, users will have access to the Share Group that was selected in the Call Order. **The project team can add Additional Users at any time and assign them to the respective Share Group(s).** See the Project Directory QRG for help with inviting users: Project_Directory_QRG.pdf

**See Review Share Rules and Review Workflows below for understanding how Share Groups determine when users can access forms and who is assigned each step of a Submittal Package or RFI workflow.

1. With the project open, click Directory from the left navigation.
2. Look over the Users that have been added and Invite/Reinvite, as necessary.
    a. Click Invite.
    b. Select the applicable Share Group(s).
    c. Click Send Invite.

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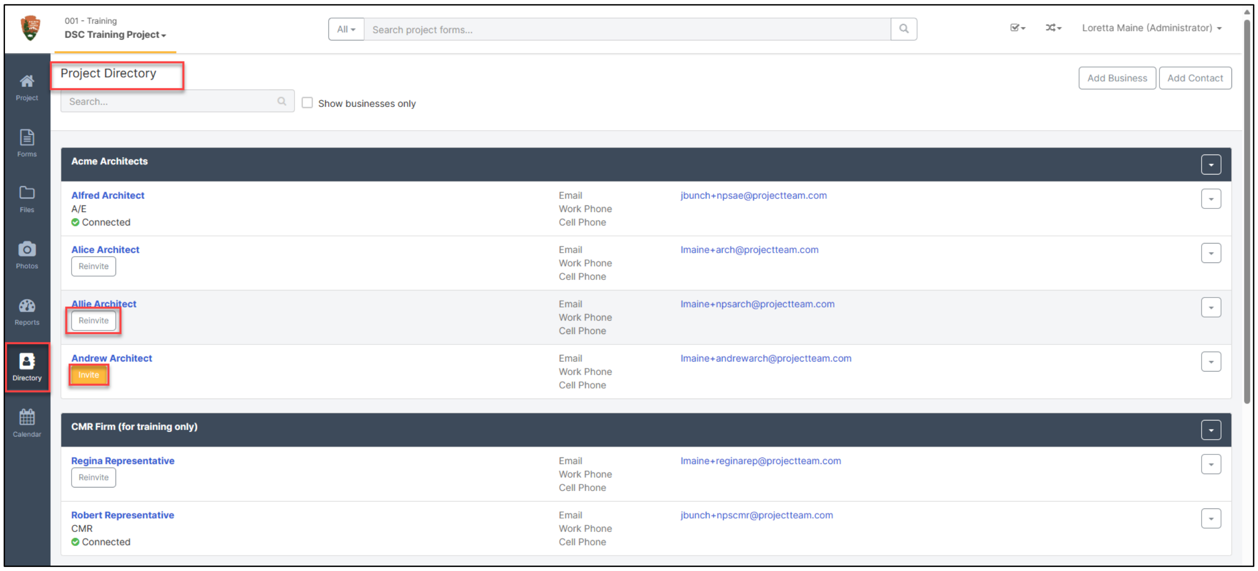
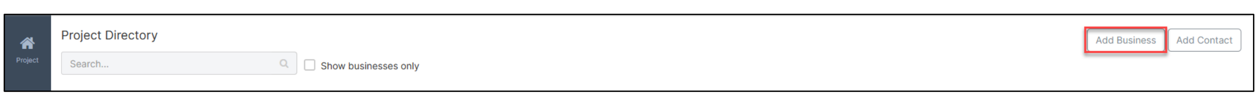


d. Review the assigned Share Group(s) for each user. If a user needs to be added/removed from a share group, reply to the email notifying you that the project has been setup or send an email to support@projectteam.com .

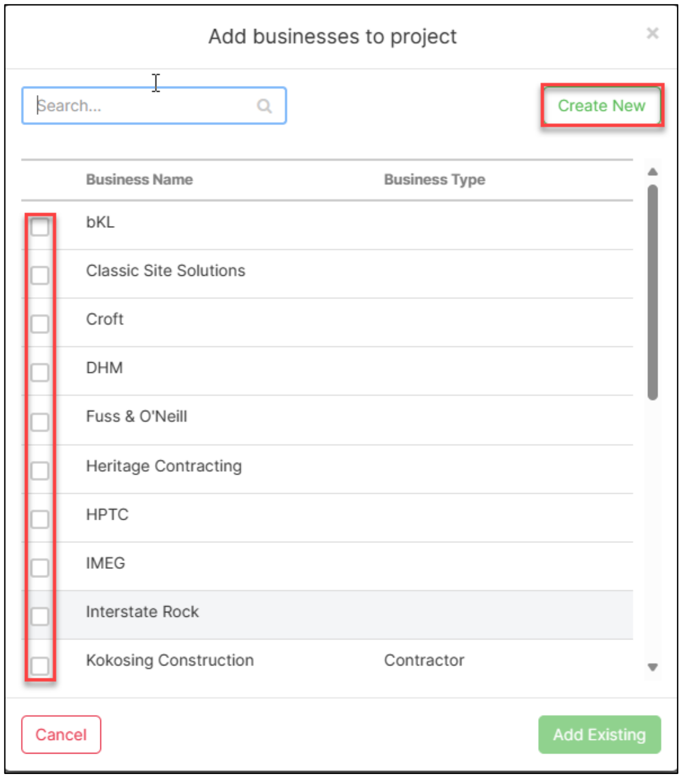
Tip: The invitation link expires after 24 hours so you can **Reinvite** the user or they can get a new link by clicking on *Forgot your password?* on the log in page.

Add a New Business to the Project

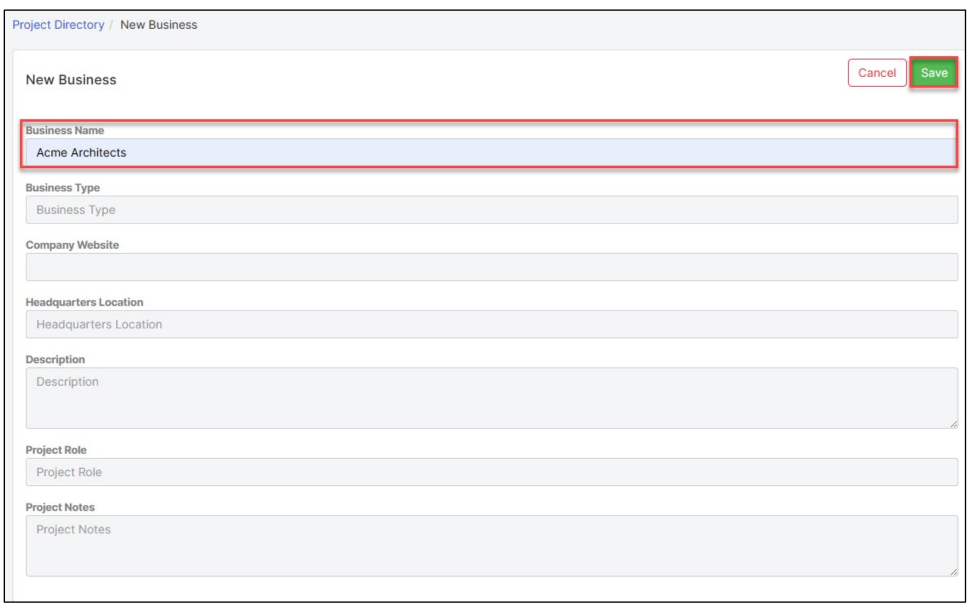
3. Click Add Business.



4. In the Add business to project modal, select from the list of businesses and click Add Existing OR click Create New.



5. If creating a new business, enter the business information and Save. (The Business Name is the only required field.)



Add Additional Users to the Project

6. Click Add Contact.

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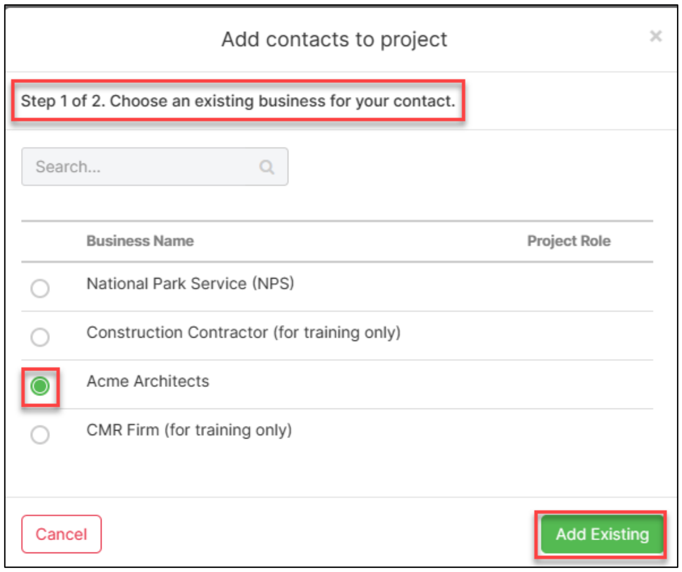
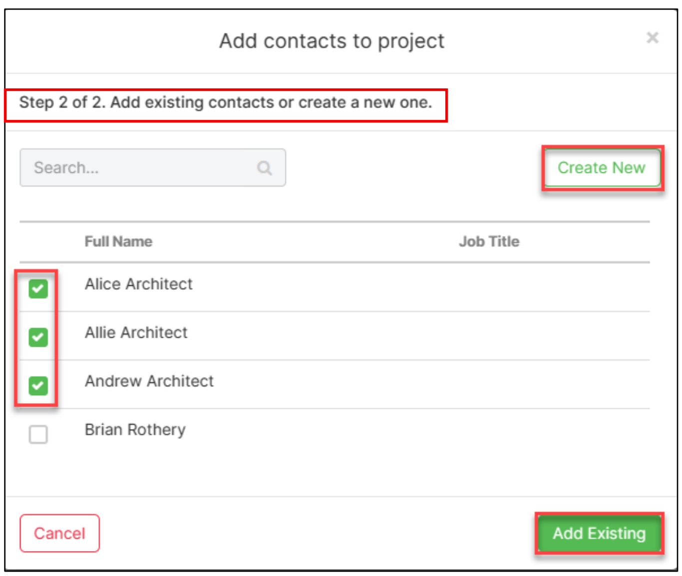
7. Select the business in Step 1 and then click Add Existing.



8. In Step 2, select from the list of users and click Add Existing OR Click Create New.



9. If adding a new user, enter the contact information and Save. (First and Last Name are the only required fields but if you would like them to contribute on your project, you will need to enter the Work Email Address so they can be *Invited* to the project.)

Tip: With the business open, you can add users directly to the Contact tab. After you have added a new user, click on another tab and back to Contacts to get back to the Add button.

10. Invite the user and select the applicable Share Group(s). *See Item 2 above.*

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Review the Workflows

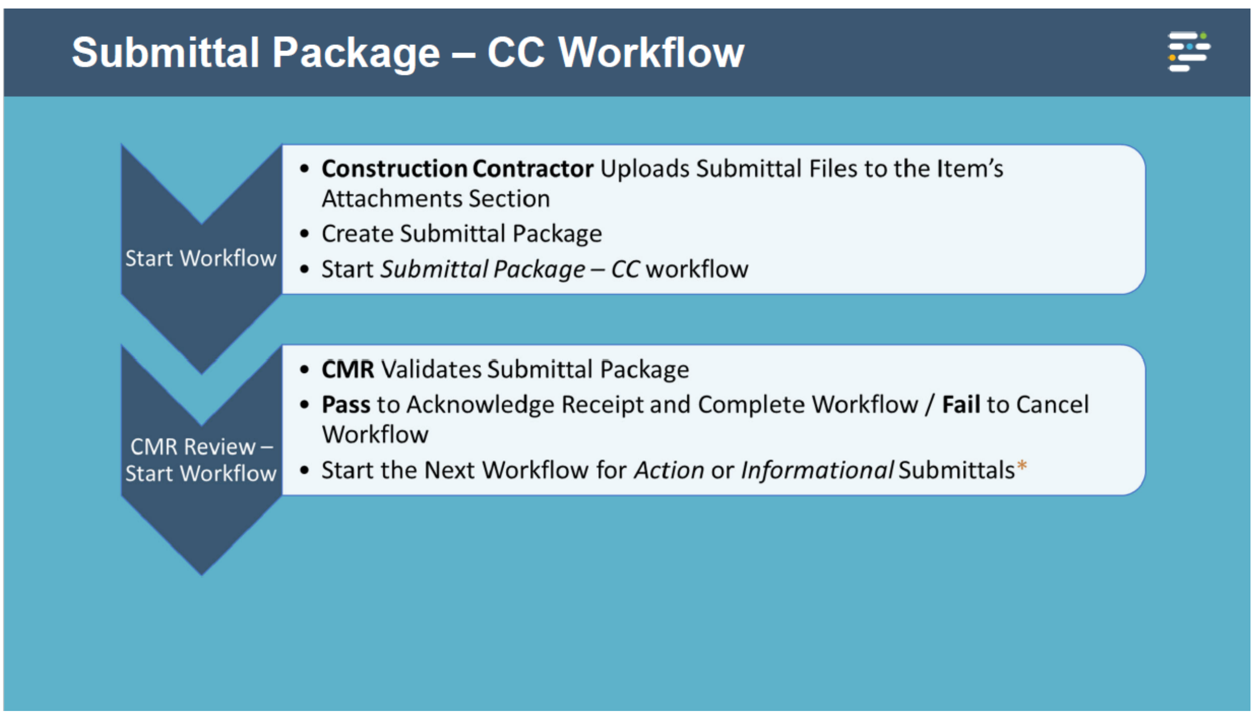
The National Park Service has established workflows for Submittals Packages and Requests for Information (RFIs). These workflows are standard for all projects and work with the standard Share Groups. Users are added to Share Groups at the beginning of a project and workflow steps are assigned to Share Groups as the workflow progresses.

Note: Projects without a CMR will need to enter an NPS representative in the CMR Share Group so that person will be able to move the workflow step along until the CMR has been determined and added to the Group. Send a request to support@projectteam.com to add or remove users from a Share Group.

Submittal Workflow

The Submittal Workflow is only available for **Submittal Packages**. Submittal documents are attached to the Submittal Item and the Item(s) must be pulled into a Submittal Package to start the workflow.

Only the Construction Contractor (Project Manager or Superintendent Share Groups) has access to start the *Submittal Package – CC Workflow* to notify the CMR Share Group that the submittal is ready for review.



The CMR will Pass the workflow step to Complete the *Submittal Package-CC Workflow* and start a new workflow, either for *A/E Input*, *No A/E Input*, or *Information ONLY*.

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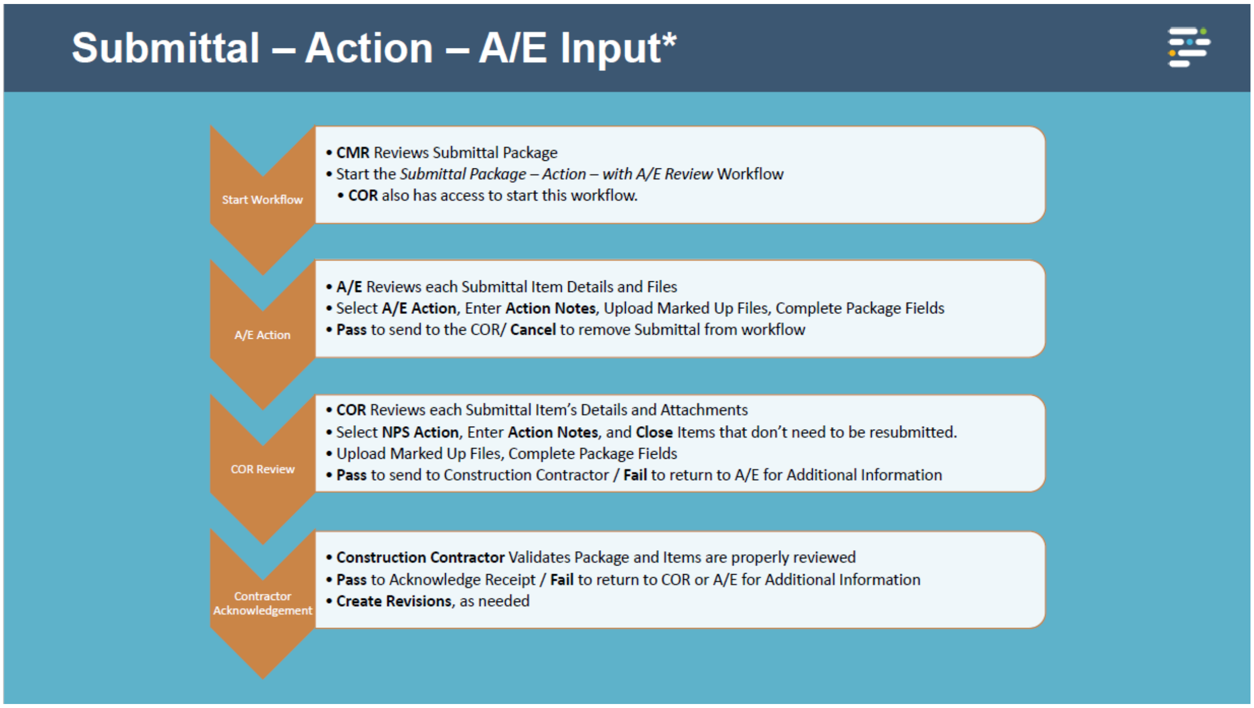
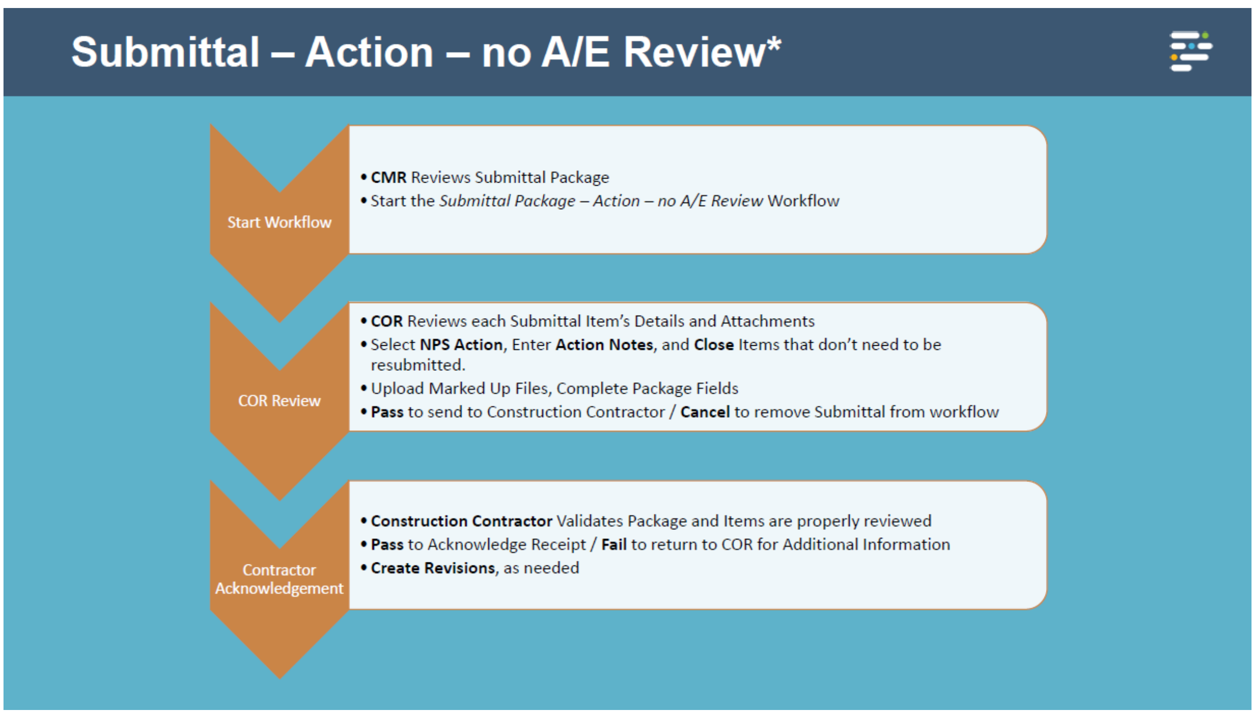
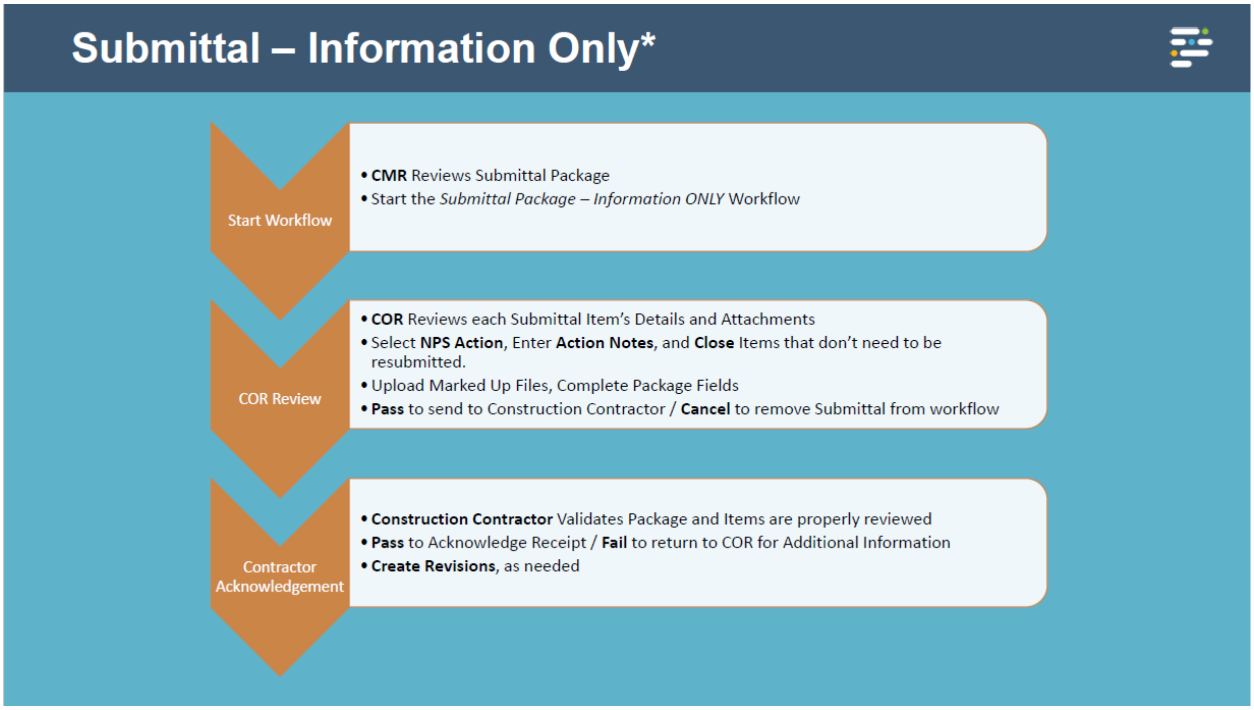

Submittal – Action – A/E Input*
Start Workflow
• CMR Reviews Submittal Package
• Start the Submittal Package – Action – with A/E Review Workflow
• COR also has access to start this workflow.
A/E Action
• A/E Reviews each Submittal Item Details and Files
• Select A/E Action, Enter Action Notes, Upload Marked Up Files, Complete Package Fields
• Pass to send to the COR/ Cancel to remove Submittal from workflow
COR Review
• COR Reviews each Submittal Item's Details and Attachments
• Select NPS Action, Enter Action Notes, and Close Items that don't need to be resubmitted.
• Upload Marked Up Files, Complete Package Fields
• Pass to send to Construction Contractor / Fail to return to A/E for Additional Information
Contractor Acknowledgement
• Construction Contractor Validates Package and Items are properly reviewed
• Pass to Acknowledge Receipt / Fail to return to COR or A/E for Additional Information
• Create Revisions, as needed


Submittal – Action – no A/E Review*
Start Workflow
• CMR Reviews Submittal Package
• Start the Submittal Package – Action – no A/E Review Workflow
COR Review
• COR Reviews each Submittal Item's Details and Attachments
• Select NPS Action, Enter Action Notes, and Close Items that don't need to be resubmitted.
• Upload Marked Up Files, Complete Package Fields
• Pass to send to Construction Contractor / Cancel to remove Submittal from workflow
Contractor Acknowledgement
• Construction Contractor Validates Package and Items are properly reviewed
• Pass to Acknowledge Receipt / Fail to return to COR for Additional Information
• Create Revisions, as needed



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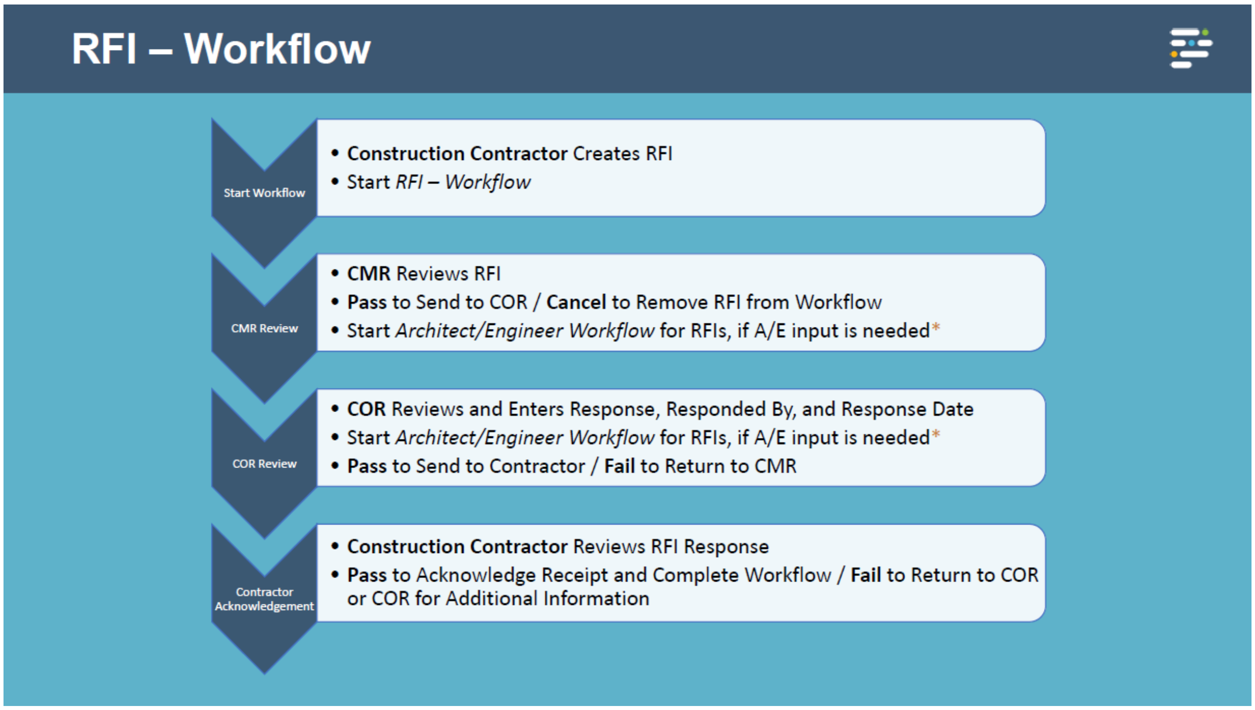
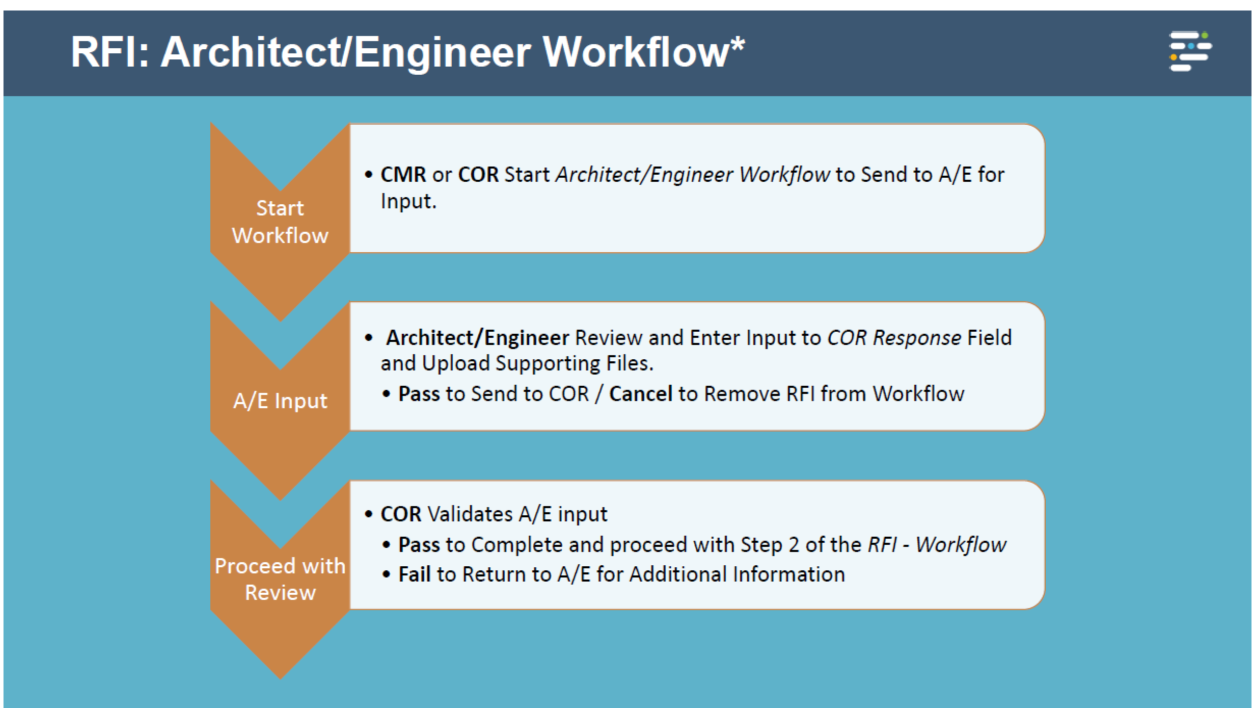
Request for Information (RFI) Workflow
Only the Construction Contractor (Project Manager or Superintendent Share Groups) has access to start the *RFI – Workflow*. The CMR and COR both have the option to start a second workflow that routes the RFI to the A/E for input. If input from the A/E is needed, the COR will wait to Pass the *RFI – Workflow* step until the A/E has responded to the *Architect/Engineer Workflow*.





Review the Share Rules

Related Resources
The National Park Service has established Share Rules that automatically make forms available to different Share Groups at specific points. These rules are standard for all projects and work with the standard Share Groups.

Share Rule #1 – Share All

Forms this Applies to:
- Construction Contractor Daily
- Drawing Packages
- Drawings
- Project Schedules
- Specification Packages
- Specifications

When the PM/COR:
Creates, Shares, or Gets Shared

Shared To:
- Architect / Engineer,
- Construction Contractor PM & Superintendent,
- Construction Manager Representative,
- NPS - PM, PS, COR, CO, CS,
- NPS - DSC Management,
- NPS - Region/Park Staff

Share Rule #2 - Inspections

Forms this Applies to:
- Field Reports

When the PM/COR:
Creates, Shares, or Gets Shared

Shared To:
- Architect / Engineer,
- NPS - PM, PS, COR, CO, CS,
- NPS - DSC Management,
- NPS - Region/Park Staff

Submittal Package Workflow Share Rules

<table>
<tr><td colspan="2">Workflow(s) this Applies To: Start Submittal Package - CC</td></tr>
<tr><td colspan="2">Step Passed:</td></tr>
<tr><td colspan="2">CMR to Validate Submittal Package and Start Workflow</td></tr>
<tr><td colspan="2">Share To:</td></tr>
<tr><td colspan="2">• Construction Contractor - PM
• Construction Contractor - Super
• Contracting Officer & Specialist
• PM/Project Specialist/COR</td></tr>
<tr><td colspan="2">Workflow(s) this Applies To: Submittal Package – Action – with A/E Review</td></tr>
<tr><td colspan="2">Step Passed:</td></tr>
<tr><td>A/E Action</td><td>Release to Construction Contractor</td></tr>
<tr><td colspan="2">Shared To:</td></tr>
<tr><td>DCS Management</td><td>Region/Park Staff</td></tr>
<tr><td colspan="2">Workflow(s) this Applies To: Submittal Package – Action – no A/E Review</td></tr>
<tr><td colspan="2">Step Passed:</td></tr>
<tr><td>COR Finalizes Submittal Package</td><td>Release to Construction Contractor</td></tr>
<tr><td colspan="2">Shared To:</td></tr>
<tr><td>• Architect/Engineer
• Construction Contractor - PM
• Construction Contractor - Super
• Contracting Officer & Specialist
• DSC Management
• PM/Project Specialist/COR</td><td>Region/Park Staff</td></tr>
<tr><td colspan="2">Workflow(s) this Applies To: Submittal Package – Informational ONLY</td></tr>
<tr><td colspan="2">Step Passed:</td></tr>
<tr><td>COR Finalizes Submittal Package</td><td>Release to Construction Contractor</td></tr>
<tr><td colspan="2">Shared To:</td></tr>
<tr><td>• DSC Management</td><td>Region/Park Staff</td></tr>
</table>

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Request for Information (RFI) Workflow Share Rules

Workflow(s) this Applies To: RFI - Workflow		
Step Passed:		
CMR Review	COR Review	Release to Construction Contractor
Share To:		
• Construction Contractor - PM • Construction Contractor - Super • PM/Project Specialist/COR	• Contracting Officer & Specialist • DSC Management • Region/Park Staff	• Architect/Engineer
Workflow(s) this Applies To: RFI - - Requires A/E Input		
Step Passed:		
A/E Input		
Shared To:		
• Construction Manager Representative • PM/Project Specialist/COR		

Additional Resources

- NPS Training Site | ProjectTeam.com
- Help Center Home (projectteam.com)
- support@projectteam.com

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