

# PM4+ LEARNING CENTER



PM4+

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PM4+

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## 1. Get Started

### 1.1. Get Started with the PM4+ Learning Center

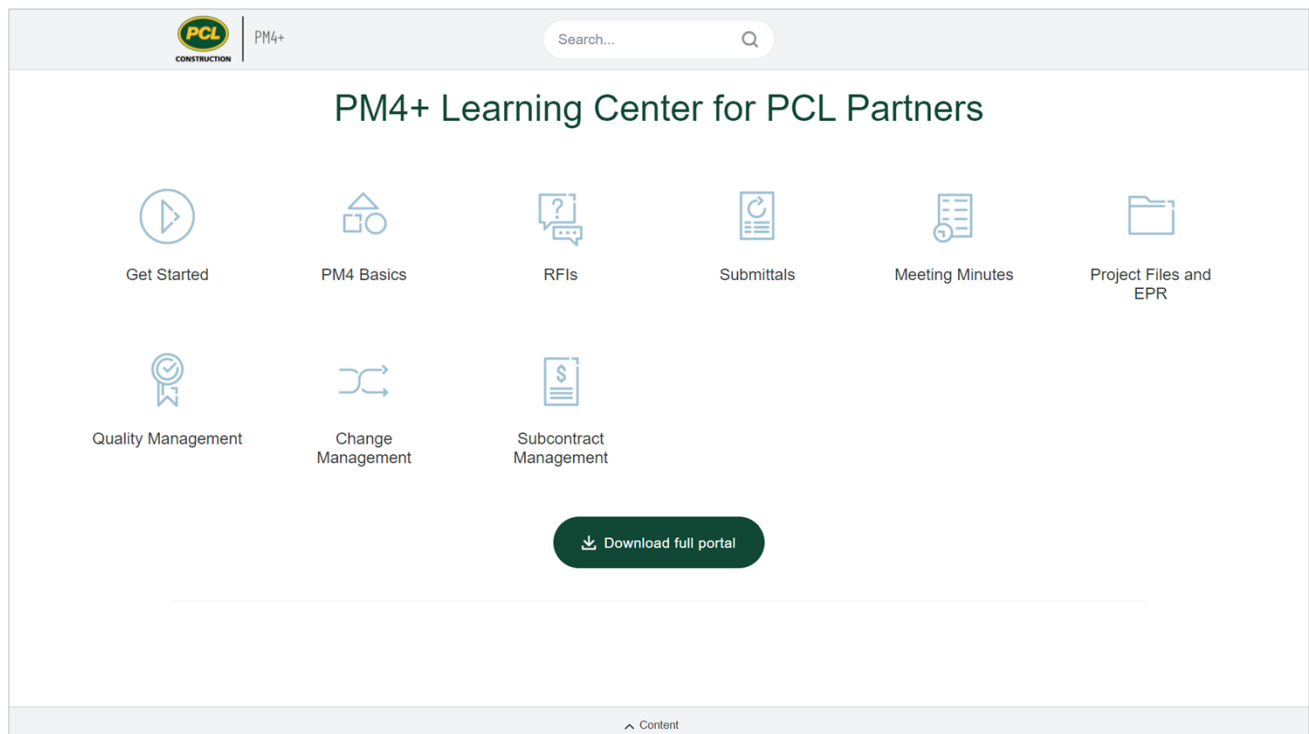
#### 1.1.1. Introduction

##### 1.1.1.1. Objective

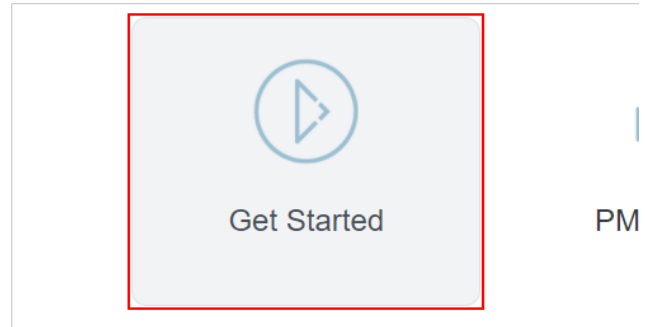
This work instruction covers how to use, and navigate the PM4+ Learning Center for PCL Partners.

#### 1.1.2. Work Instructions

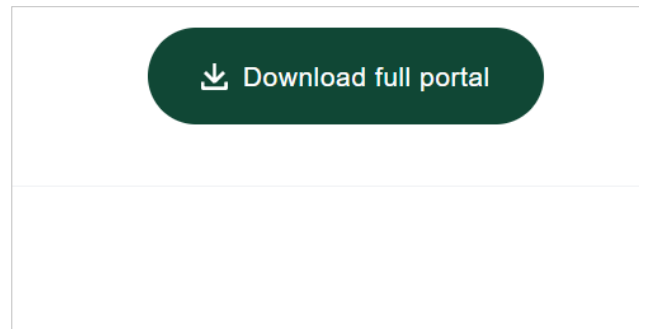
The content provided is closely aligned with the menus in PM4+.



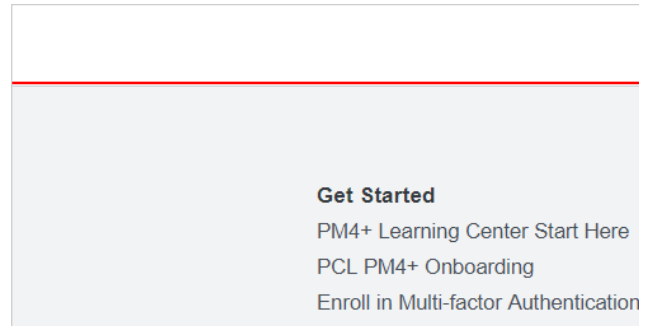
Click on any of the **Book** icons to begin exploring.



Alternatively, click on the **Content** button to expose the content of the entire site. Use the Slider Bar to locate the appropriate topic



The list of work instructions display.



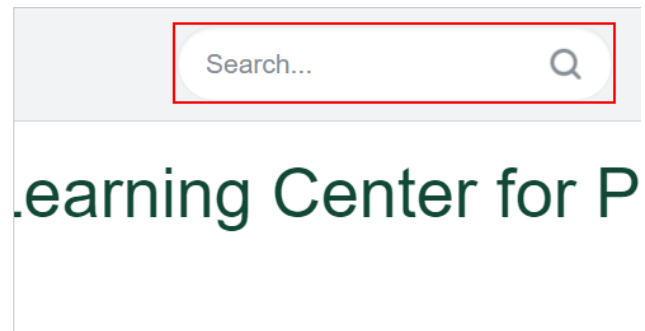
The list of work instructions display.



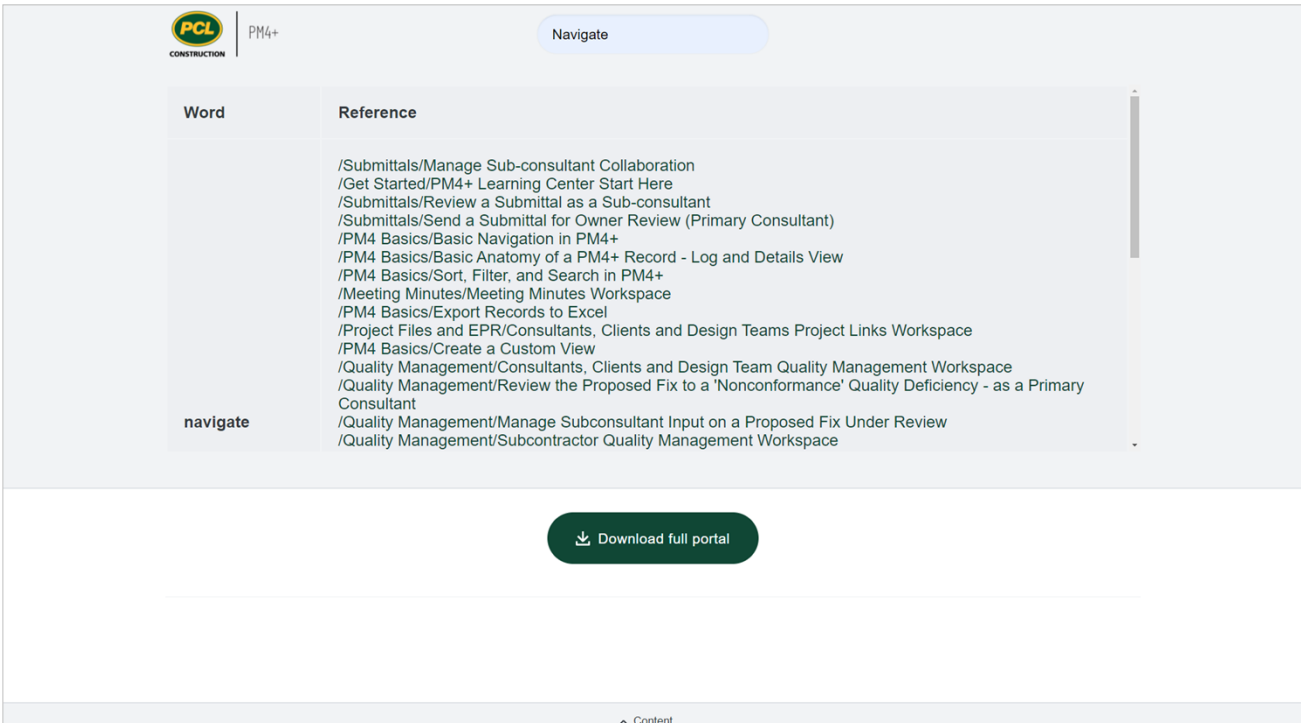
Click on the **Work Instruction** to begin viewing.

The full portal can also be downloaded to a PDF file by clicking on the **Download full portal button**. Please note that this is a large file.

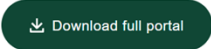
To search for keywords, start typing in the **Search** bar at the top of the screen




The search results display in order of relevance to the key search word.



Word	Reference
	<ul style="list-style-type: none"> <li>/Submittals/Manage Sub-consultant Collaboration</li> <li>/Get Started/PM4+ Learning Center Start Here</li> <li>/Submittals/Review a Submittal as a Sub-consultant</li> <li>/Submittals/Send a Submittal for Owner Review (Primary Consultant)</li> <li>/PM4 Basics/Basic Navigation in PM4+</li> <li>/PM4 Basics/Basic Anatomy of a PM4+ Record - Log and Details View</li> <li>/PM4 Basics/Sort, Filter, and Search in PM4+</li> <li>/Meeting Minutes/Meeting Minutes Workspace</li> <li>/PM4 Basics/Export Records to Excel</li> <li>/Project Files and EPR/Consultants, Clients and Design Teams Project Links Workspace</li> <li>/PM4 Basics/Create a Custom View</li> <li>/Quality Management/Consultants, Clients and Design Team Quality Management Workspace</li> <li>/Quality Management/Review the Proposed Fix to a 'Nonconformance' Quality Deficiency - as a Primary Consultant</li> </ul>
navigate	<ul style="list-style-type: none"> <li>/Quality Management/Manage Subconsultant Input on a Proposed Fix Under Review</li> <li>/Quality Management/Subcontractor Quality Management Workspace</li> </ul>



 Content

Click on one of the **Search result** entries to see the content. Move the vertical slider to reveal the desired content.

/Submittals/Manage Sub-consultant Collabor  
 /Get Started/PM4+ Learning Center Start He  
 /Submittals/Review a Submittal as a Sub-con  
 /Submittals/Send a Submittal for Owner Revi  
 /PM4 Basics/Basic Navigation in PM4+  
 /PM4 Basics/Basic Anatomy of a PM4+ Reco  
 /PM4 Basics/Sort, Filter, and Search in PM4+  
 /Meeting Minutes/Meeting Minutes Workspac  
 /PM4 Basics/Export Records to Excel

The key search term will appear highlighted on the content page. You can view this content in multiple formats.

Using either the **Table of Content** or by moving the vertical slider scroll to view the content.

Click the **Show Me** button to play a video for this content. Overview or Lifecycle content is best viewed in this manner.

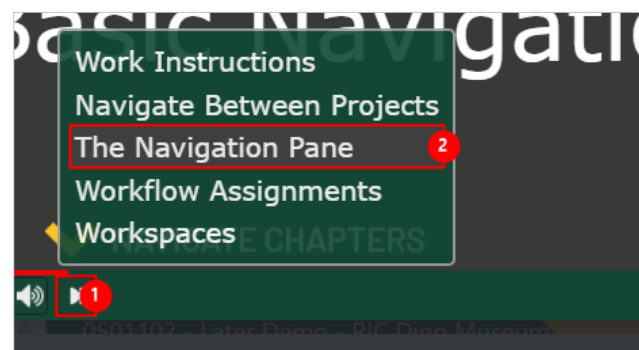
The **Video** appears as a pop-out from the portal



Click on the **Click to Learn** button to begin the show me video.



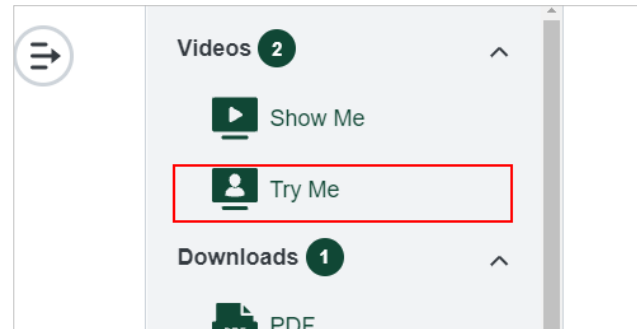
1. Click on the **Skip ahead** button to open the chapter navigation menu.
2. Click on the desired **Chapter** to skip ahead.



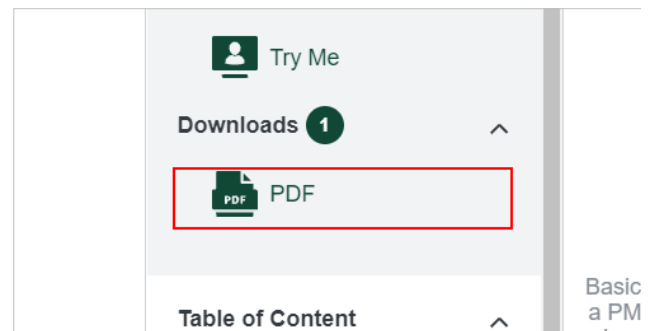
Click on the **Close** button to exit the video.



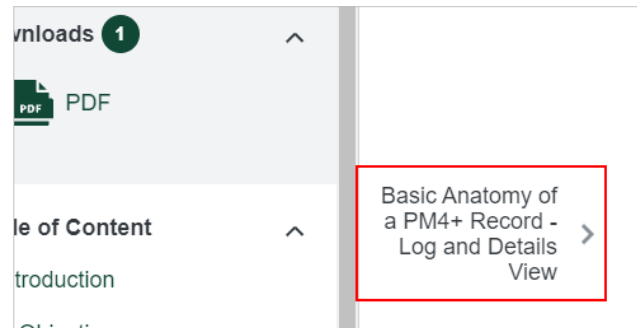
Click the **Try Me** button to explore and try out the PM4+ system.



Click the **PDF** button to display and/or download a PDF file.



To display the next topic or prior topic, click on the **Next Topic** or **Previous Topic** buttons on either the right or left of the currently displayed topic.



### 1.1.3. Conclusion

Now that you have an understanding of how to use and navigate the PM4+ Learning Center for Partners, proceed to the next work instruction.

## 1.2. PCL PM4+ Onboarding

### 1.2.1. Introduction

#### 1.2.1.1. Objective

This work instruction explains the steps to follow when you have been invited to a PM4+ project.

#### 1.2.1.2. Background Information



PCL's construction management system, PM4+, uses two foundational software providers: Microsoft and Egnyte. When the Project Manager or their delegate invites you to a PM4+ project, you will receive several emails related to establishing or linking your Microsoft and Egnyte accounts.

The onboarding process shown here, demonstrates the most common scenarios. Talk to the PCL Project Manager or Coordinator if you encounter any issues.

### 1.2.2. Work Instructions

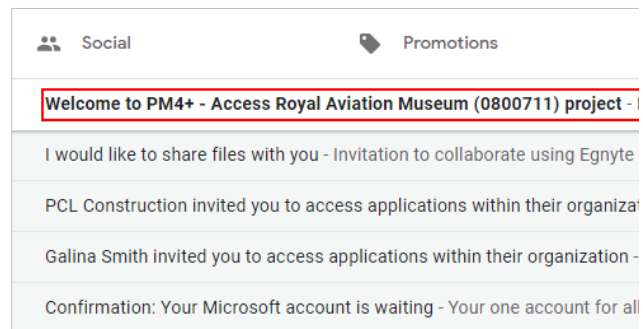
This section describes the three emails you may receive as part of the PM4+ onboarding process. The PCL 'Welcome' email, the Microsoft invitation email, and the Egnyte invitation email.

The Microsoft invitation email process explains two variations, depending on if your email address is already linked to your organizations Microsoft account.

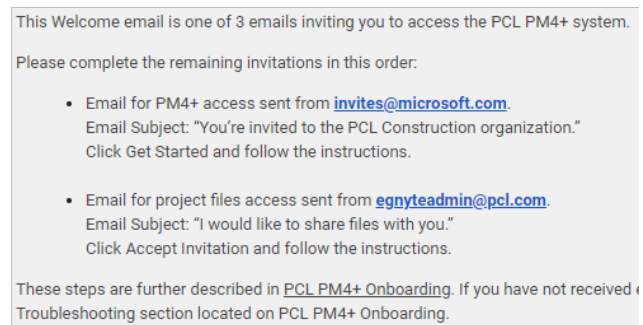
#### 1.2.2.1. PCL Welcome Email

The Welcome email from PCL is one of three emails inviting you to access PM4+.

Click on the **Welcome to PM4+** email to view its content.

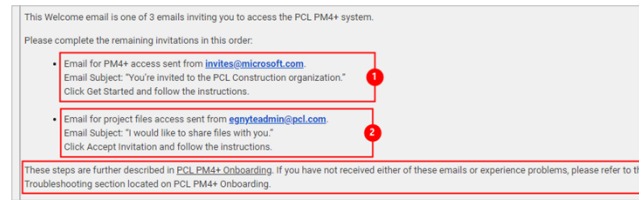


If you are a **First Time PM4+ and Egnyte User**, the email provides instructions on how to gain access and complete the onboarding steps to set up your PM4+ and Egnyte access.



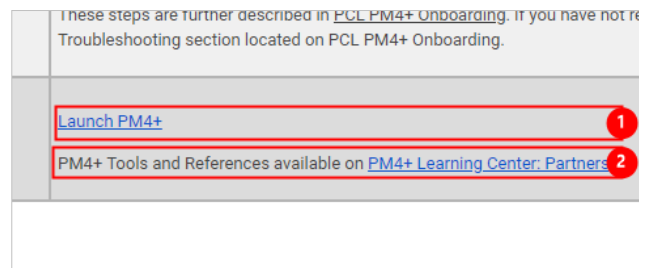
There are three sections:

1. Instructions on completing the **Microsoft** invitation.
2. Instructions on completing the **Egnyte** invitation.
3. Where you can locate the **Troubleshooting guide**.



If you are an existing PM4+ and Egnyte user, the email provides:

1. A link to **Launch PM4+**.
2. A link to the **PM4+ Partners Learning Center**.



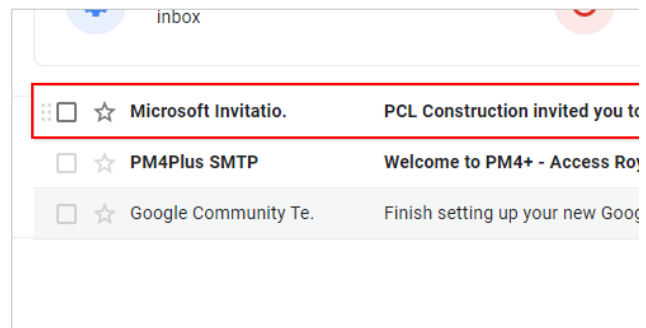
### 1.2.2.2. Microsoft Invitation Email (without an Existing Microsoft Account)

This section explains how to gain access to PM4+, and how to create a Microsoft account in the process. Many organizations already have Microsoft accounts linked to their employee's email addresses. In that case, Microsoft does not require new account creation, and instead links your existing account to PM4+. If the steps described in this section do not match what you see on your screen, go to the next section called 'Microsoft Invitation Email (with an Existing Microsoft Account)'.

You will receive an email from Microsoft that will redirect you to the Microsoft account page.

Click on the **Microsoft Invitation** email.

Note: The sender email address is [invites@microsoft.com](mailto:invites@microsoft.com)



In the body of the email, click on the **Accept invitation** hyperlink.

Organization: PCL Construction  
Domain: [pclconnects.onmicrosoft.com](https://pclconnects.onmicrosoft.com)

If you accept this invitation, you'll be sent to <https://pcl-ax101.operations.dynamics.c>

[Accept invitation](#)

Microsoft checks to determine if your email address is already linked to an existing Microsoft account. A message displays if you do not have an existing Microsoft account, click on the **Next** button to create one.

Looks like you don't have an account with us. We'll create one for you using **pclconsultant95@gmail.com**.

[Next](#)

1. Enter a secure password to create your Microsoft account, which will be linked to your email address.
2. Click on the **Next** button.

Enter the password you would like to use with your account.

..... 1

Show password

[Next](#) 2

Once the password is created, you are prompted to return to your email to retrieve a verification code to complete the setup.

← [pclconsultant95@gmail.com](mailto:pclconsultant95@gmail.com)

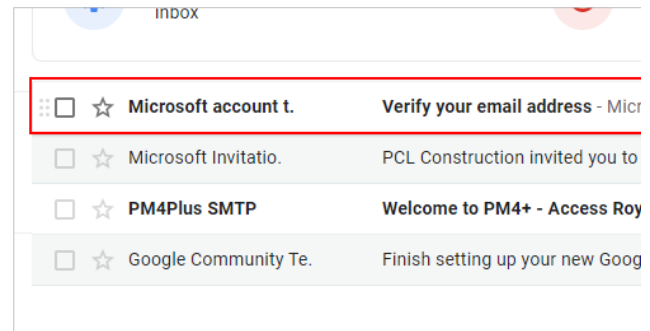
## Verify email

Enter the code we sent to **pclconsultant95@gmail.com**. If you didn't get the email, check your junk folder or [try again](#).

Enter code



In your inbox, open the **Microsoft Verification** email to copy the verification code.



1. Paste or type the verification code.
2. Click on the **Next** button.

### Verify email

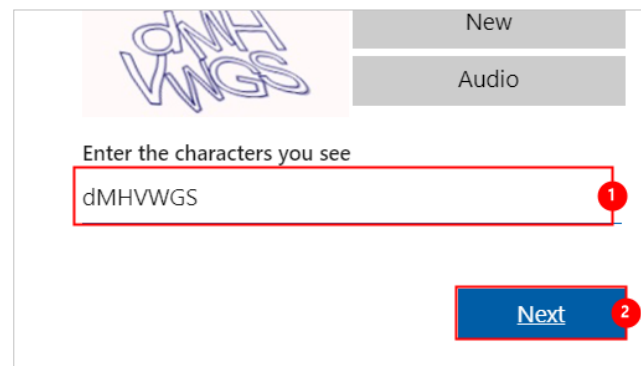
Enter the code we sent to **pclconsultant95@gmail.com**. If you didn't get the email, check your junk folder or [try again](#).

  
 I would like information, tips, and offers about Microsoft products and services.  

Choosing **Next** means that you agree to the [Microsoft Services Agreement](#) and [privacy and cookies statement](#).

**Next**

1. You may be required to follow an additional security **validation** step to create your account. Follow the instructions on the screen.
2. Click on the **Next** button.



Enter the characters you see

**Next**

If you would like to stay signed in, click on the **Yes** button.

### Stay signed in?

Stay signed in so you don't have to sign in again next time.

Don't show this again

No

Yes

Once you review your permissions, click on the **Accept** button.

You should only accept if you trust PCL Construction. By accepting, you allow this organization to access and process your data to create, control, and administer an account according to their policies. Contact [privacy@pcl.com](mailto:privacy@pcl.com) regarding privacy. PCL Construction may log information about your access. You can remove these permissions at <https://myapps.microsoft.com/pclconnects.onmicrosoft.com>

Cancel

Accept

PLEASE NOTE: PCL is in the process of enabling multi factor authentication (MFA) for all application users external to PCL. Please review the instructions in this link if you are prompted to enroll in MFA. Continue with the rest of the onboarding instructions after you have enrolled a device in MFA.

<https://secure.pcl.com/External/Enroll>

When invitation acceptance is complete, you will be directed to PM4+. If you are the first person from your company to enter the project site, you are prompted to sign an End User Agreement (E-U-A) to access project data or take action within the system. In most cases, an EUA is necessary for each project that your company requires access to.

Click on the **Click here to get started** button to read and accept the EUA.

## Welcome, Sondra Bopp

Please accept a user agreement to continue

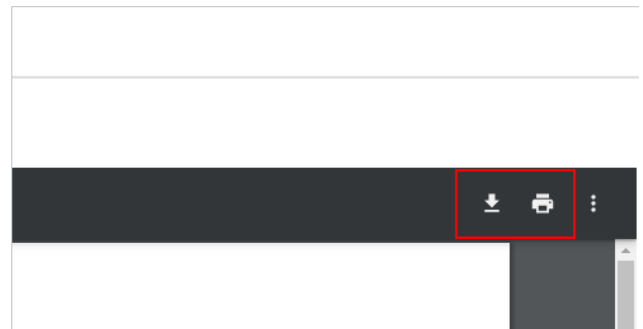
Click here to get started

Click here to get started

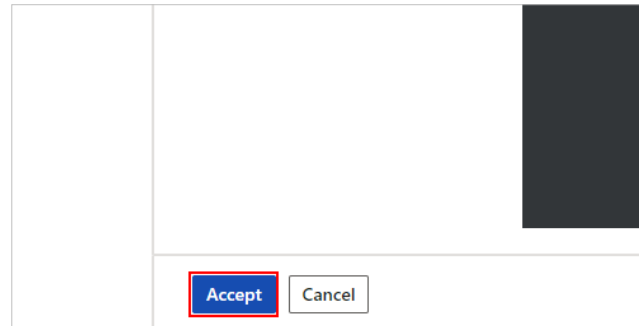
Review the contents of the EUA.



To save a copy of the EUA, click on the **Download** or **Print** button.



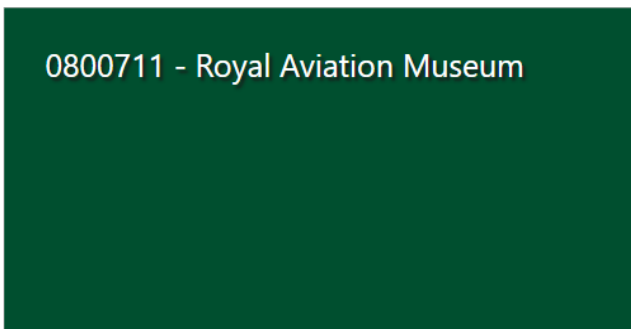
Once you have read the EUA, click on the **Accept** button.



When access is granted to your company, the landing page or dashboard will contain a series of workspaces related to activities you may perform in PM4+.

The next time you log into PM4+, use the email address and password combination you used to establish your access to the project.

Recommendation: To easily access PM4+, bookmark the project's URL in your preferred browser (Edge, Chrome or Safari are recommended).

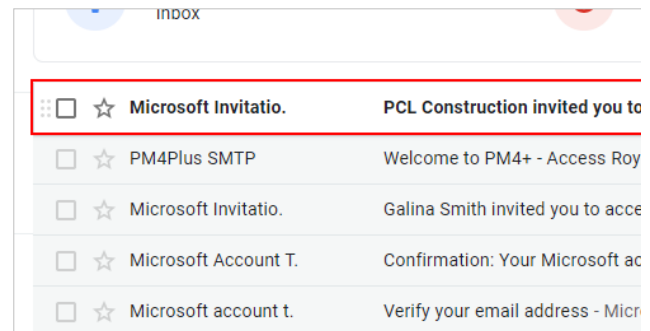


### 1.2.2.3. Microsoft Invitation Email (with an Existing Microsoft Account)

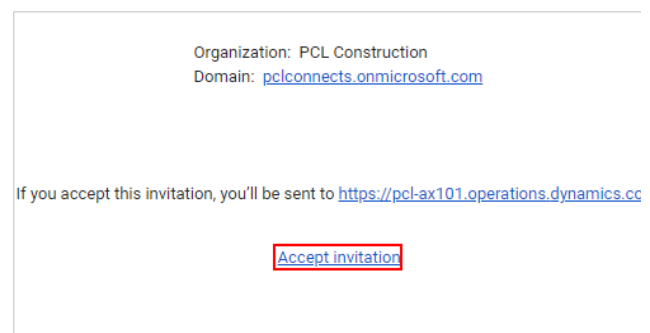
You will receive an email from Microsoft that will redirect you to the Microsoft account page.

Click on the **Microsoft Invitation** email.

Note: The sender is [invites@microsoft.com](mailto:invites@microsoft.com)

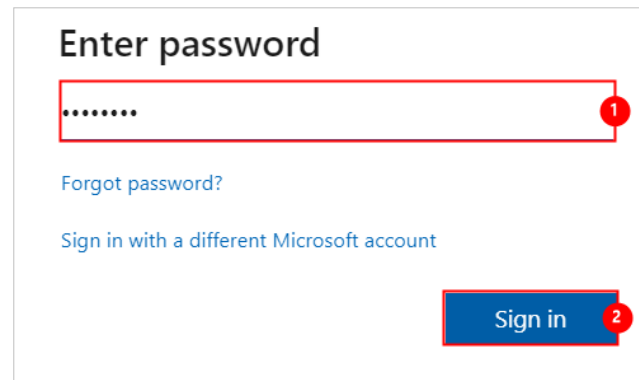


In the body of the email, click on the **Accept invitation** hyperlink.



At this point, the system attempts to detect if a Microsoft account is already linked to your email address. If an account is detected, you will not be prompted to create one.

Instead, you will be prompted to enter a password. Use the same password you use for daily logins for your work email. It is very unlikely (but possible) that you are maintaining a separate password if the Microsoft account was set up by your organization.



1. Click on the **Password** field - Enter your password.
2. Click on the **Sign in** button.

If you would like to stay signed in, click on the **Yes** button.

### Stay signed in?

Stay signed in so you don't have to sign in again next time.

Don't show this again

No

Yes

Once you review your permissions, click on the **Accept** button.

You should only accept if you trust PCL Construction. By accepting, you allow this organization to access and process your data to create, control, and administer an account according to their policies. Contact [privacy@pcl.com](mailto:privacy@pcl.com) regarding privacy. PCL Construction may log information about your access. You can remove these permissions at <https://myapps.microsoft.com/pclconnects.onmicrosoft.com>

Cancel

Accept

PLEASE NOTE: PCL is in the process of enabling multi factor authentication (MFA) for all application users external to PCL. Please review the instructions in this link if you are prompted to enroll in MFA. Continue with the rest of the onboarding instructions after you have enrolled a device in MFA.

<https://secure.pcl.com/External/Enroll>

When invitation acceptance is complete, you will be directed to PM4+. If you are the first person from your company to enter the project site, you are prompted to sign an End User Agreement (EUA) to access project data or take action within the system. In most cases, an EUA is necessary for each project that your company requires access to.

Click on the **Click here to get started** button to read and sign the EUA.

Welcome, Davie Earl Wotte

Please accept a user agreement to continue.

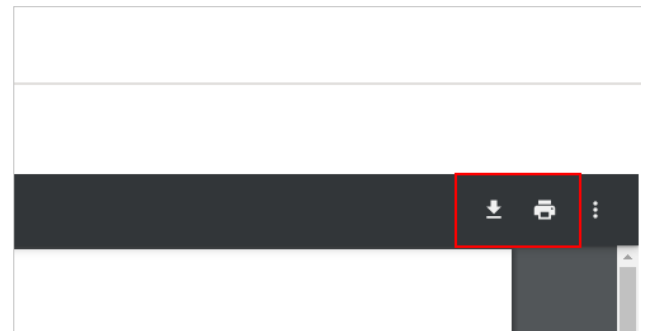
Click here to get started

Click here to get started

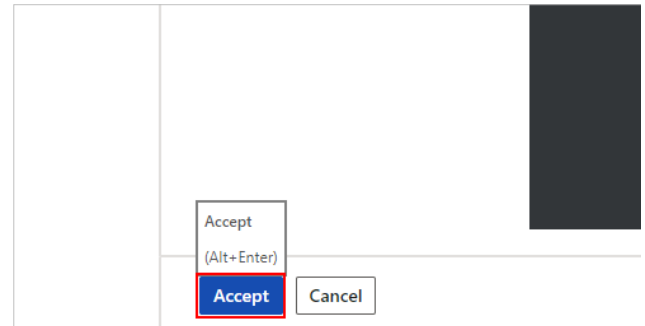
Review the contents of the EUA.



To save a copy of the EUA, click on the **Download** or **Print** button.



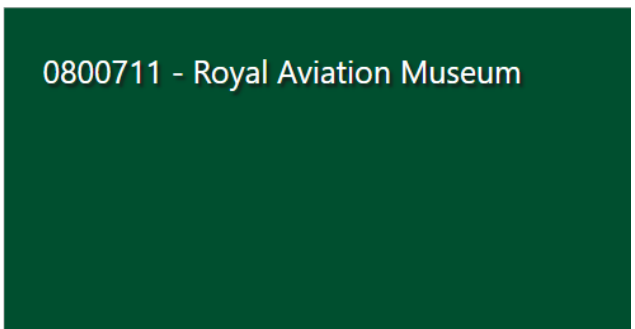
Once you have read the EUA, click on the **Accept** button.



When access is granted to your company, the landing page or dashboard will contain a series of workspaces related to activities you may perform in PM4+.

The next time you log into PM4+, use the same email address and password combination you just used to access and accept the EUA.

Recommendation: To easily access PM4+, bookmark the project's URL in your preferred browser (Edge, Chrome or Safari are recommended).



#### 1.2.2.4. Multi-factor Authentication (MFA) Enrollment

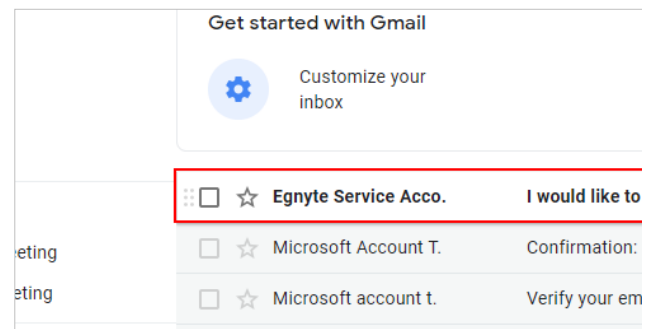
PCL is in the process of enabling multi factor authentication (MFA) for all application users external to PCL. Please review the instructions in this link explaining the steps to take if you are prompted to enroll in MFA.

<https://secure.pcl.com/External/Enroll>

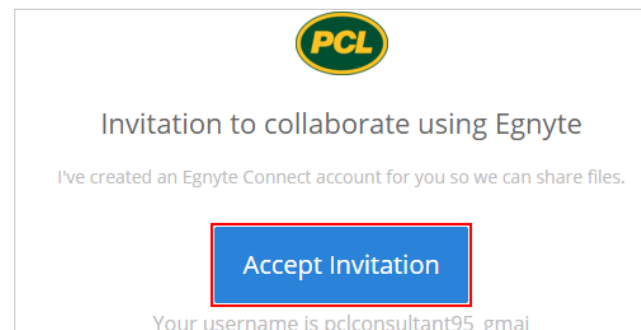
#### 1.2.2.5. Egnyte Invitation Email (First PM4+ Project)

Accepting the Egnyte invitation allows you to access the project files folder structure.

Click on the **Egnyte Invitation** email.

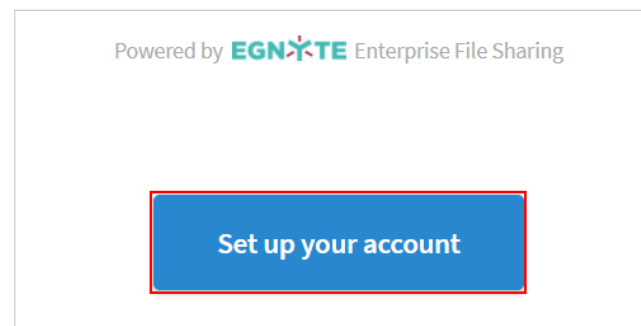


In the body of the email, click on the **Accept Invitation** button.



The system performs a check to see if your email address is already linked to an Egnyte access account. If this is your first time accessing Egnyte with this email address, you are redirected to setup your account.

Click on the **Set up your account** button.



To create your Egnyte account, you are required to complete four fields.

The **First name** and **Last name** fields will auto-populate. Edit these fields if necessary.

### Welcome to PCL Set up your account

First name*	<input type="text" value="Sondra"/>
Last name*	<input type="text" value="Bopp"/>
New password*	<input type="password"/>
Confirm password*	<input type="password"/>

Enter a password of your choosing in the **New password** field.

For convenience, you may want to use the same password you use to access PM4+.

First name*	<input type="text" value="Sondra"/>
Last name*	<input type="text" value="Bopp"/>
New password*	<input type="password"/>
Confirm password*	<input type="password"/>

Confirm your **Password**.

First name*	<input type="text" value="Sondra"/>
Last name*	<input type="text" value="Bopp"/>
New password*	<input type="password" value="....."/> <span>Strong</span>
Confirm password*	<input type="password"/>

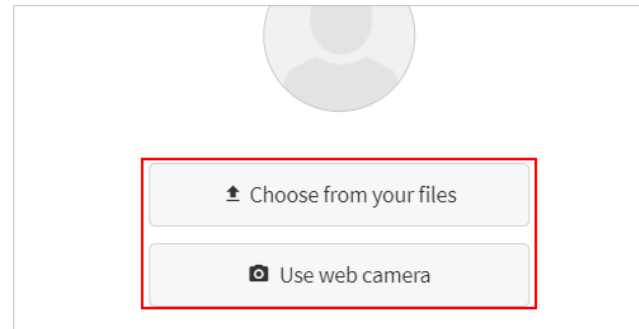
Make sure your information is correct and that your password is 'Strong' before you proceed.

Click on the **Next** button.

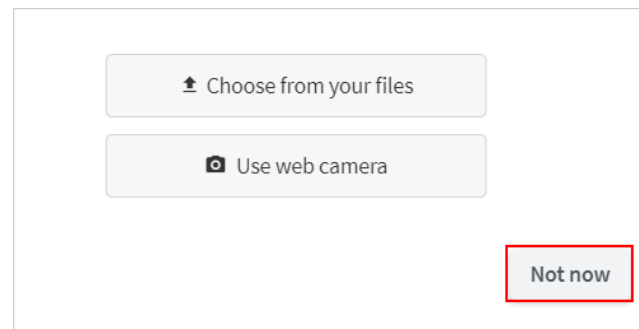
password*	<input type="password" value="....."/> <span>Strong</span>
confirm password*	<input type="password" value="....."/>
<a href="#">Privacy Policy</a>	<input type="button" value="Next"/>



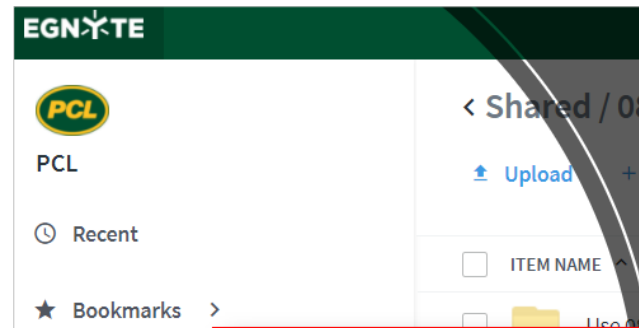
You may add a profile picture by clicking on the **Choose from your files** or **Use web camera** button.



You may also click on the **Not now** button to add your profile picture later.



Finally, the Egnyte site opens, and a brief tour of the user interface is provided.



If you encounter any issues during the onboarding process, contact the Project Manager or Coordinator. The written 'Troubleshooting' Q&A section following this work instruction, may also assist with common questions.

#### 1.2.2.6. Troubleshooting

Some common issues are listed below. Contact the Project Manager or Coordinator if you are not able to resolve the issue.

Q: I already have a Microsoft account and it is asking me which one to use?

A: If you are asked to choose between a Work/School account or a Personal account, choose the 'Work or school account' option.

Q: I am not seeing the account create screen and it is just asking for a password. How do I create a password?

A: This is an indication that the system has detected a Microsoft account already associated to your email address. If you have an existing Microsoft account linked to your work email address, you bypass the account creation step. Enter the work email/password combination that you normally use. You not need to create a new password.

Q: I have not received the Microsoft email described in the Welcome email from PCL. Who should I contact?

A: Here are some first steps that may help you locate this email before you request a resend from Support. Check in both your SPAM or JUNK folders in your mail tool (ie. Outlook). If you are unable to 'whitelist' the 'invite.microsoft.com' yourself (which allows it to be accepted in your email inbox), advise your IT department.

Q: I have not received the Egnyte email described in the Welcome email from PCL. Who should I contact?

A: Here are some first steps that may help you locate this email before you request a resend from Support. Check in both your SPAM or JUNK folders in your mail tool (ie. Outlook). If you are unable to 'whitelist' the 'invite.egnyte.com' yourself, advise your IT department.

Q: I was able to create my PM4+ account but I don't seem to be able to open anything on the dashboard. Is there something else I need to do?

A: An authorized End User Agreement (EUA) is necessary for each project that your company requires access to. When you log in to PM4+ you are given the opportunity to accept an online EUA from your dashboard. You will see a link in the top left-hand corner of your screen. If you are unable to do this, please contact your PCL project manager to request an EUA be sent to an authorized representative of your company to sign. The executed EUA can be returned electronically. Upon receipt, PCL will upload the document to your account and access is granted. Use the link in the Welcome email from PCL to access your project on PM4+. Use the password you created after following the Microsoft invitation link. Don't forget to bookmark the URL in your browser.

Q: I was able to create my PM4+ account but I am not authorized to accept the End User Agreement (EUA). What should I do so I can get access?

A: Authorizing an EUA is a necessary step in the PM4+ access process. Please contact the PCL project manager to request an EUA be sent to an authorized representative of your company to sign. The executed EUA can be returned electronically. Upon receipt, PCL will upload the document to your account and access is granted. Use the link in the Welcome email from PCL to access your project on PM4+. Use the password you created after following the Microsoft invitation link. Don't forget to bookmark the URL in your browser.

Q: I was able to create and access my PM4+ account but I am having trouble creating my Egnyte account.

A: Please review the message you received after you followed the link 'Accept Invitation'.

Did you receive the dialog a.'Log in' or b. 'Set up your account'?

If 'a.', then you have an existing account linked to the email account you provided, and you will be able to login using the password you have always used. This password is not associated to the PM4+ account you created using the link from the Microsoft email. If 'b.', then follow the process for setting up your new Egnyte account. You are then requested to assign a name to your account and set up a new/confirm password.

Q: I have followed all the above tips and need the invitation emails sent again. How do I initiate this request?

A: Please send an email to the PCL Project manager stating your request in the subject line with any pertinent details in the email such as what troubleshooting steps you have already taken.

### **1.2.3. Conclusion**

Now that you have an understanding of how to get started with PM4+, proceed to the next work instruction.

## **1.3. Enroll in Multi-factor Authentication (MFA)**

### **1.3.1. Introduction**

PCL takes the security of accounts, personal information, and data very seriously for all employees, partners, and clients.

Azure AD Multi-Factor Authentication (MFA) helps safeguard access to data and applications. It provides an additional layer of security using a second form of authentication.

MFA is a strong security control that keeps all our data safe. When using PM4+, MFA is required.

### 1.3.2. Work Instructions

PCL has enabled MFA for all application users external to PCL. Please review the instructions in this link explaining the steps to take if you are prompted to enroll in MFA. <https://secure.pcl.com/External/Enroll>

If you require further assistance such as resetting your password or adding a new device visit the [Help](#) tab.

For further information, visit the [FAQ](#) tab.

### 1.3.3. Conclusion

Now that you have an understanding of how to enroll into MFA, proceed to the next work instruction.

## 1.4. Troubleshoot a Password Reset

### 1.4.1. Introduction

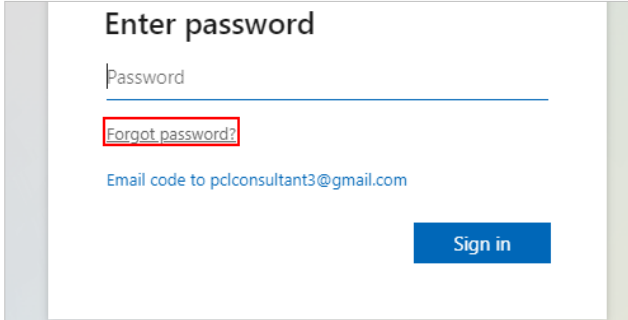
PCL uses MFA to provide an additional layer of security using a second form of authentication. MFA is required for any user external to PCL that access PM4+.

Over time a user may lose or replace an authenticator device, move to a new mobile number, or perhaps forget their password. This is likely to impact MFA and prevent access to PM4+.

### 1.4.2. Work Instructions

**If at any point you need to update or reset your password, you will need to contact your own company's IT department. As PCL leverages a user's existing work account (i.e. Azure Active Directory account), we are unable to assist with password changes.**

Note: If an attempt is made to reset your password when trying to access PM4+ and the **Forgot password?** hyperlink is selected...



Enter password

password

**Forgot password?**

Email code to pclconsultant3@gmail.com

Sign in

A common error would be the following:

**Microsoft**

Get back into your account

We're sorry

You can't reset your own password because password reset isn't available with your organization's licens

You must [contact your administrator](#) to both reset your password and to check your organization's setu

Show additional details

### 1.4.3. Conclusion

Now that you have an understanding of how to troubleshoot resetting your password, proceed to the next work instruction.

## 2. PM4 Basics

### 2.1. Basic Navigation in PM4+

#### 2.1.1. Introduction

##### 2.1.1.1. Objective

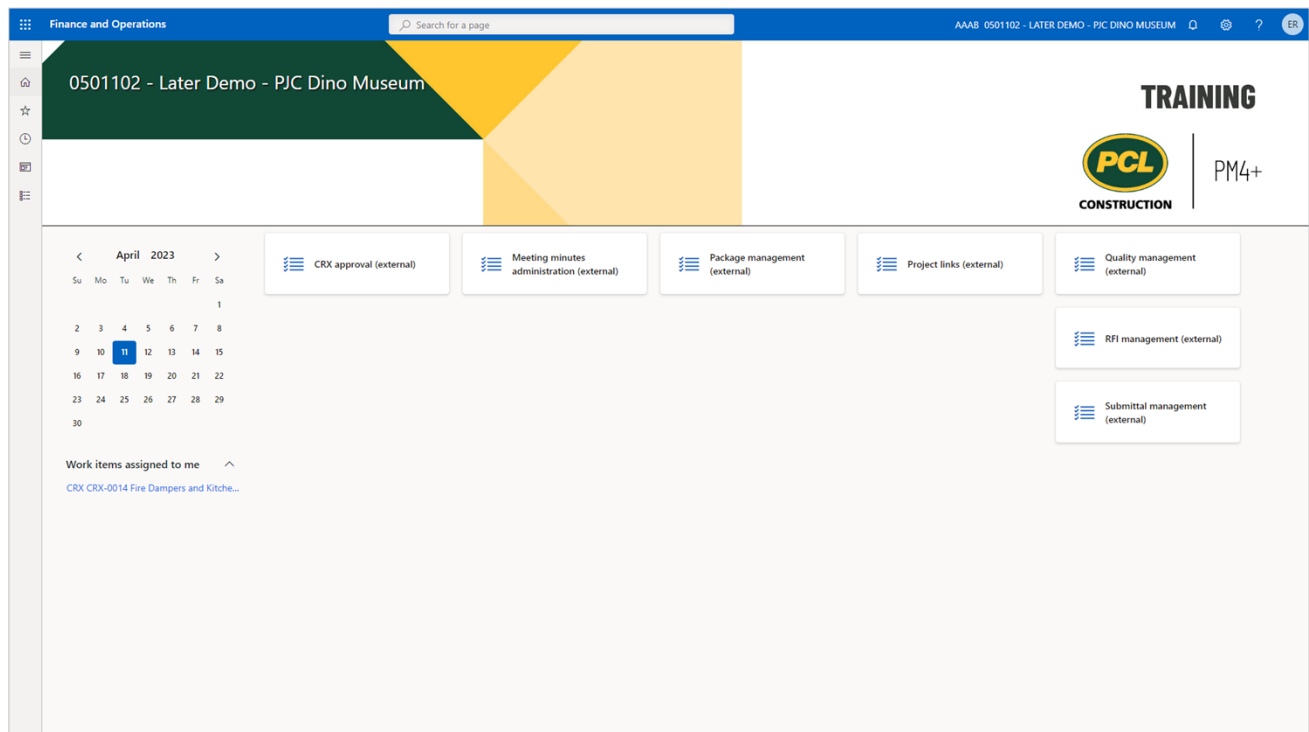
This work instruction covers basic navigation in PM4+.

##### 2.1.1.2. Background Information

Use this work instruction to guide you through the basic ways to navigate your PM4+ project. It also introduces terminology used to describe parts of the screens you will access.

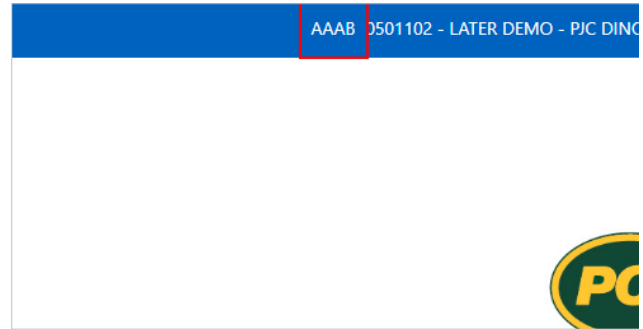
#### 2.1.2. Work Instructions

The dashboard is the landing page that displays when you first log in. It will open to your default project. For easy future access, consider creating a 'bookmark' or 'favorite' in your web browser while you are in the dashboard. The center of the dashboard contains 'workspaces', each of which contains information relevant project details. Explore the workspaces. Until you are familiar with the information available in each workspace, use the full navigation pane to find your way around PM4+.



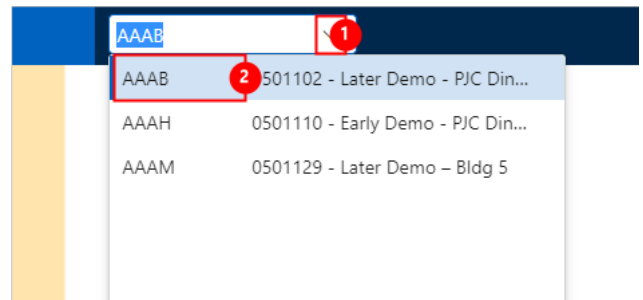
##### 2.1.2.1. Navigate Between Projects

If you are working on more than one PM4+ project, you may navigate between projects. To change to a different project in this same browser window, click on the four letter code to the left of the **Project number**.



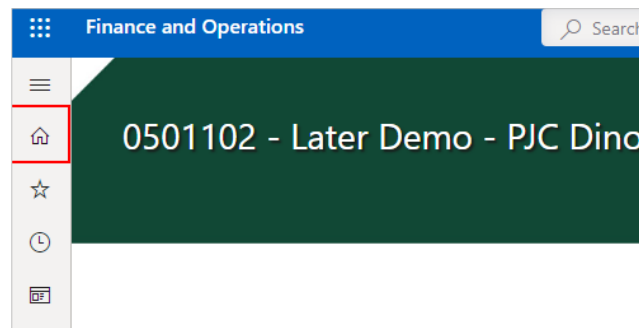
1. Click on the **Project** drop-down.
2. Select the **Project** from the list.

Depending on which screen you are viewing when switching to another project, this same screen will be displayed in the new project. For example, if you are viewing the RFI log, and you jump to another project, you will be taken directly to the RFI log in the selected project. If you jump between projects frequently, be careful to keep track of which one you are in.

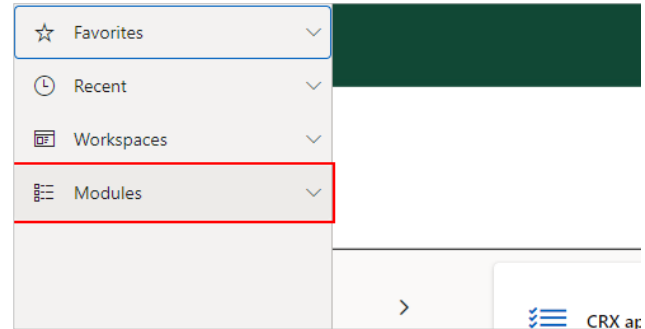


### 2.1.2.2. The Navigation Pane

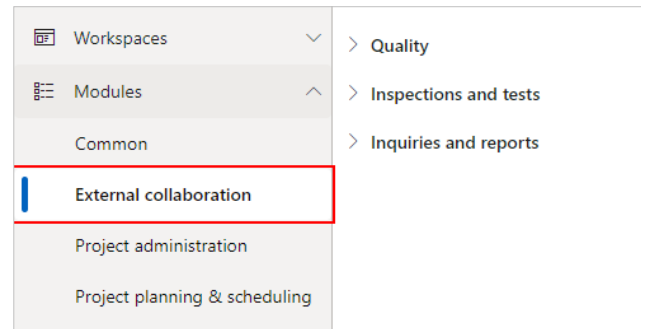
Click on the **Navigation pane** expander icon (a.k.a. 'The Hamburger') to reveal more menu navigation options.



Click on the **Modules** section to view the modules you have access to.

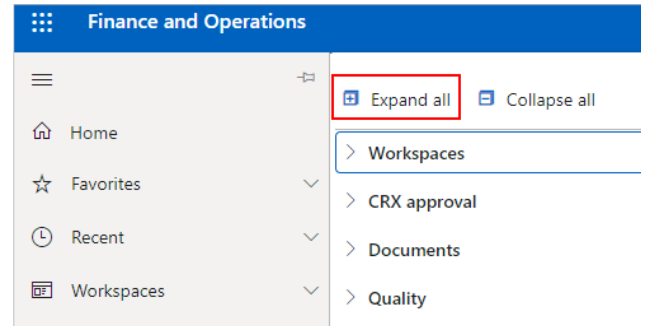


Click on the **Module** to reveal the logs and screens you have access to.

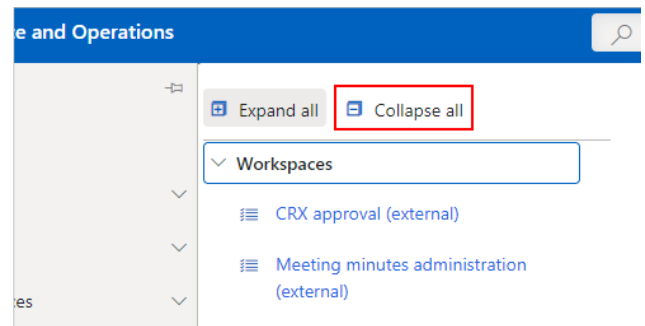


Note: the menu items you see depend on your company's security access. This example shows what Consultants can see in PM4+.

Click on the **Expand all** button at the top of the menu area page. This displays all the menu item links.

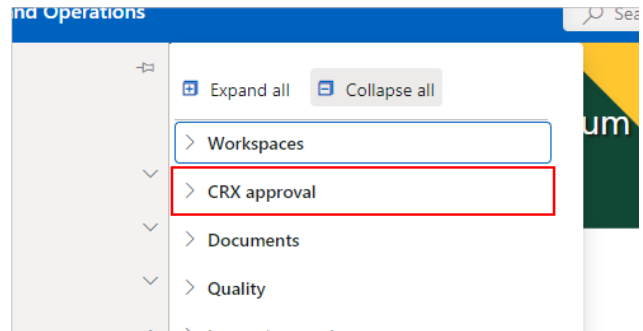


Click on the **Collapse all** button at the top of the menu area page. This collapses all the menu item links. It is helpful to collapse all when many menu links are cluttering your view.

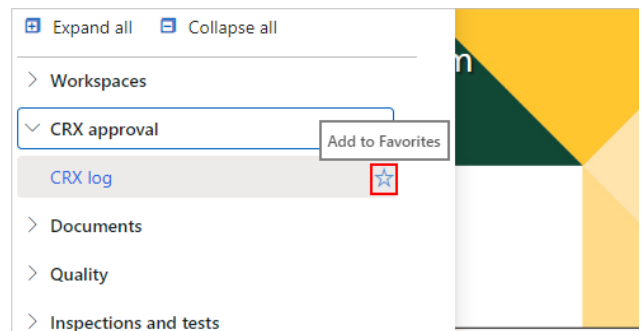




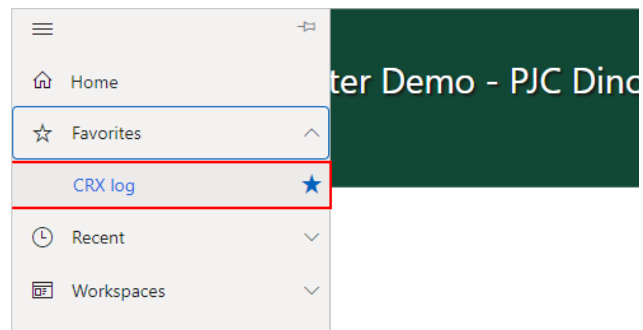
Click on any **Menu section** to reveal the menu links nested below it.



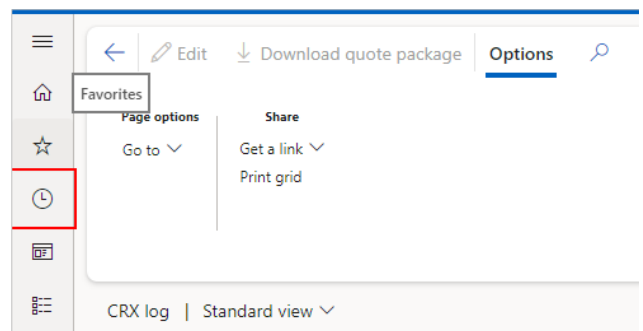
Click on the **Star** icon beside any menu item you access frequently, to add it to your Favorites.



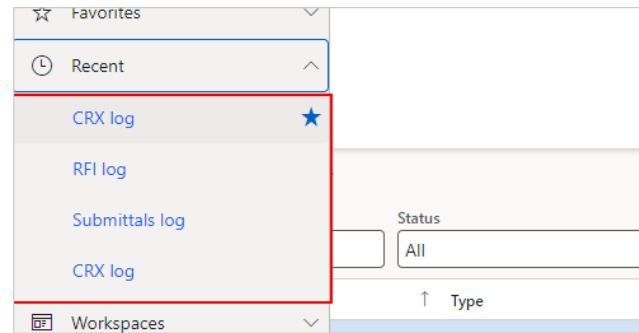
The newly added favorite is accessed under the **CRX log** menu area.



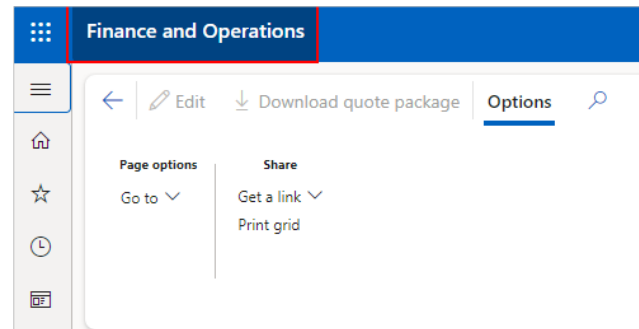
Click on the **Recent** menu section.



This area displays the last 10 menu links you clicked. Use this as a quick way to navigate.



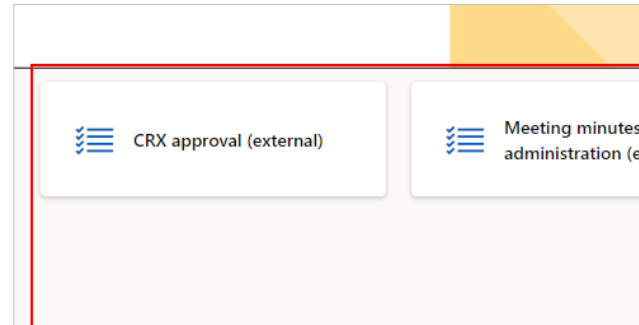
Click on the **Finance and Operations** button to return to the home dashboard.



Use this button (or the 'Home' button) if you get lost in PM4+.

### 2.1.2.3. Workspaces

Depending on your security, you will see a series of workspaces on your dashboard.



Workspaces provide an overview of activities that are executed in PM4+. They are centralized collections of information based around specific topics, designed to make you more efficient in your daily tasks.

### 2.1.3. Conclusion

Now that you have an understanding of basic navigation in PM4+, proceed to the next work instruction.

## 2.2. Basic Anatomy of a PM4+ Record - Log and Details View

### 2.2.1. Introduction

#### 2.2.1.1. Objective

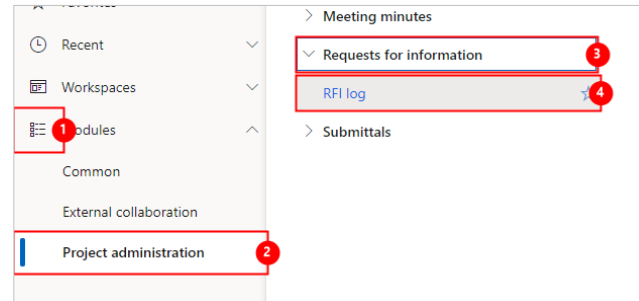
This work instruction covers the log and details view of the PM4+ record.

#### 2.2.1.2. Background Information

Logs are used in PM4+ to list records. For example, the RFI log lists all RFIs for the project. Each RFI is referred to as a 'record' in the 'log'. There are common aspects in most logs. Some may have features specific to the type of records the log houses.

### 2.2.2. Work Instructions

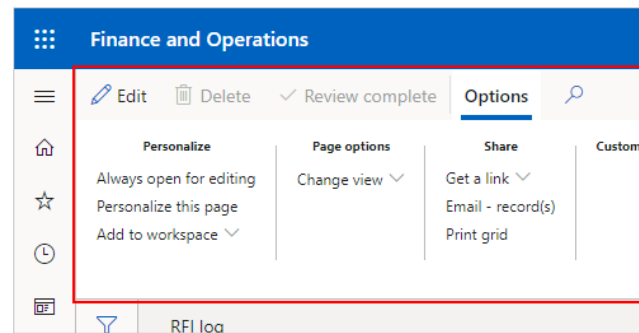
1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Requests for information** menu section.
4. Click on the **RFI log** menu item.



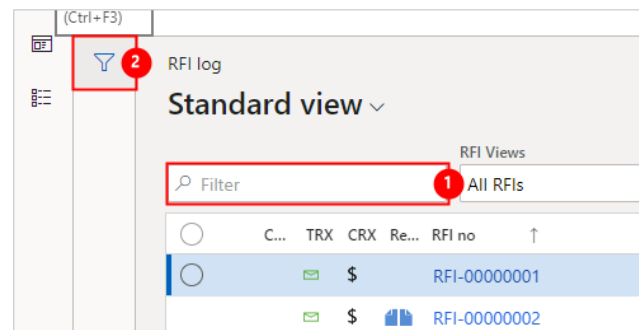
#### 2.2.2.1. Basic Form Parts - Log

The **Action pane** contains a combination of commands and actions related to the log you are in.

When an action pane item opens a 'ribbon', more commands are visible, organized into button groups.



1. **Advanced filter** can be opened and any fields in the log can be queried using a variety of operators.
2. **Quick filter** can filter any field on the log by typing in a partial value and selecting which column to search on.



Each row in the **Log** represents a separate record, or in some circumstances, a revision of a record. Once you are familiar with using PM4+, you may choose to add or hide fields by personalizing the log.

	C...	TRX	CRX	Re...	RFI no	↑	Rev	Title
		\$			<a href="#">RFI-00000001</a>		0	Data & Access
		\$			<a href="#">RFI-00000002</a>		0	Electrical Requ
					<a href="#">RFI-00000003</a>		0	Compressed /
					<a href="#">RFI-00000004</a>		0	Main Floor Bo
					<a href="#">RFI-00000005</a>		0	Main Entrance
					<a href="#">RFI-00000006</a>		0	Main Entrance
					<a href="#">RFI-00000007</a>		0	Structural Bas

The ID field of any log record is a hyperlink. Click the hyperlink to view the same record in 'details view'.

If the log you are viewing includes a **Related information** fact box, click it to expand and view additional details that may not display when you are in 'log view'.

Days overdue	RFI coordinator	Primary discipl
	Laurie Norman	Electrical
0	Laurie Norman	Civil
517	Laurie Norman	Mechanical

### 2.2.2.2. Basic Form Parts - Details

To view the details of a record, click the **hyperlink** in a row (usually the record ID).

	C...	TRX	CRX	Re...	RFI no	↑	Rev	Title
		\$			<a href="#">RFI-00000001</a>		0	Data & Access
		\$			<a href="#">RFI-00000002</a>		0	Electrical Requ
					<a href="#">RFI-00000003</a>		0	Compressed /
					<a href="#">RFI-00000004</a>		0	Main Floor Bo
					<a href="#">RFI-00000005</a>		0	Main Entrance
					<a href="#">RFI-00000006</a>		0	Main Entrance
					<a href="#">RFI-00000007</a>		0	Structural Bas

This example shows an RFI record in details view.

The **Title** can be a combination of two or more fields. In the example, the RFI title for this record is a combination of the RFI no., Revision number, and Title.

RFI log | Standard view

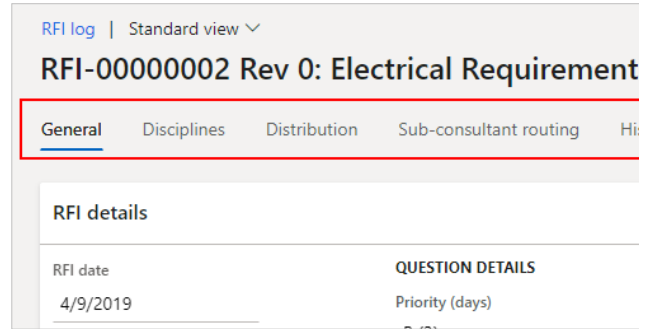
**RFI-00000002 Rev 0: Electrical Requirement**

General | Disciplines | Distribution | Sub-consultant routing | Hi

RFI details

RFI date	QUESTION DETAILS
4/9/2019	Priority (days)

**Tab pages** contain related information for the record. Common tab pages are **General, History, Associations, Comments**; however, each module may have specific tabs.



RFI log | Standard view ▾

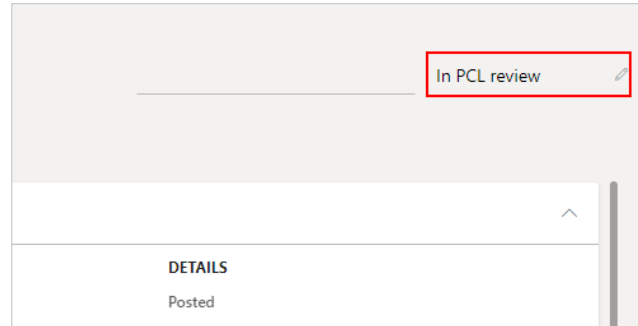
### RFI-0000002 Rev 0: Electrical Requirement

General | Disciplines | Distribution | Sub-consultant routing | History

**RFI details**

RFI date	QUESTION DETAILS
4/9/2019	Priority (days)

Generally when a **Status** is relevant to records in the log you are viewing, it displays in the title section, when in details view.



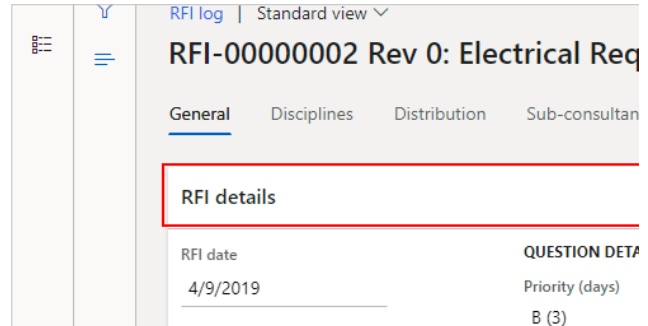
In PCL review

**DETAILS**

Posted

It can also display other relevant information that isn't immediately available when viewing a record in detail (e.g. in Submittals it displays both the status and most recently applied stamp or reviewer).

**Fast tabs** contain logical groupings of information. Most expand and collapse when clicked. Each tab page contains at least one fast tab.



RFI log | Standard view ▾

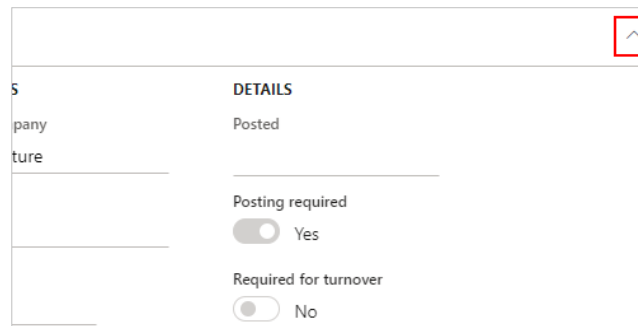
### RFI-0000002 Rev 0: Electrical Requirement

General | Disciplines | Distribution | Sub-consultant routing

**RFI details**

RFI date	QUESTION DETAILS
4/9/2019	Priority (days)
	B (3)

You can expand and collapse a **Fast tab** by clicking on the **Arrow**



**DETAILS**

Posted

Posting required  Yes

Required for turnover  No

The **Field Group** is a grouping of related fields with a similar classification or function.

	<b>QUESTION DETAILS</b> Priority (days) B (3) Calculated due date 4/12/2019 Primary discipline Civil	<b>PARTICIPANTS</b> RFI coordinator Laurie Norm: Initiated by con Geomatics In Initiated by Thomas Fox
--	--	--

The **Filter bar** allows you to navigate between records in the log, while in details view.

The screenshot shows the details view for RFI-00000002 Rev 0: Electrical Req. The filter bar on the left contains a funnel icon and a list icon. The list icon is highlighted with a red box.

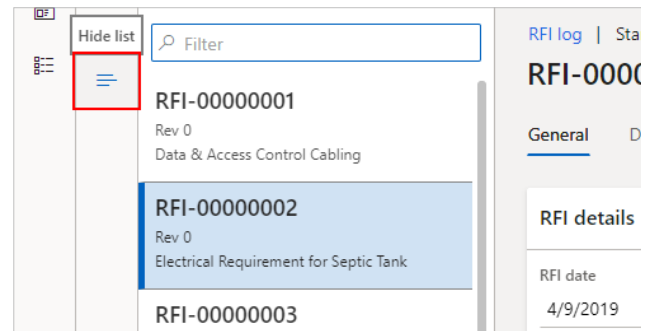
Click on the **Show list** icon in the filter bar.

This screenshot is identical to the previous one, but the list icon in the filter bar is now highlighted with a red box, indicating it has been clicked.

A listing of all records in the log opens (or a filtered list if a filter is currently applied), while record details remain in view.

The screenshot shows the RFI log view. A search filter is applied. A list of records is displayed on the left, with the second record, RFI-00000002 Rev 0: Electrical Requirement for Septic Tank, highlighted in blue. The details view for this record is visible on the right.

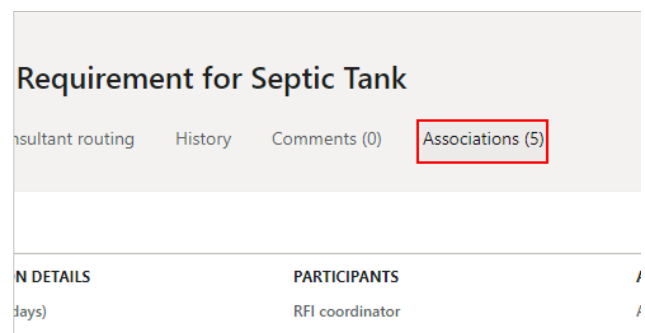
To return to the regular details view, click on the **Show list** button to collapse



### 2.2.2.3. The Associations Tab

Click on the **Associations** tab

This tab contains links to other records in PM4+ which are related to one another. Many of the records listed may have internal access only. In that case, clicking the hyperlink will not navigate to the record.



The 'Associations' tab also contains some automatic links. For example:

1. If an RFI resulted in a change some kind of change, it may links to the **CRX** log.
2. Which drawing sheets from the **Document** log are affected by an RFI.
3. If RFI one is related to another, they may be linked here.
4. If an RFI was created from an **RFI request**, those two records are automatically linked for you.
5. When an email is sent from a record, in most cases this creates an automatically linked record in the **Transmission** log.

Record type	ID
CRX	1 RX-0004
Documents	2 520
RFI	3 FI-00000014-0
RFI request	4 FIQ-00013
Transmission	5 RX-00019

Type of linked record

### 2.2.3. Conclusion

Now that you have an understanding of the log and details view of the PM4+ record, proceed to the next work instruction.

## 2.3. Sort, Filter, and Search in PM4+

### 2.3.1. Introduction

#### 2.3.1.1. Objective

This work instruction covers how to sort, filter, and search records in a log.

#### 2.3.1.2. Background Information

The sort, search and filter capabilities in PM4+ help you to quickly analyze or find data. This includes, but is not limited to:

- Sort contents of a column
- Filter a log on a column header
- Create an advanced filtered log
- Reset or clear a filter

### 2.3.2. Work Instructions

#### 2.3.2.1. Sort Contents of a Column

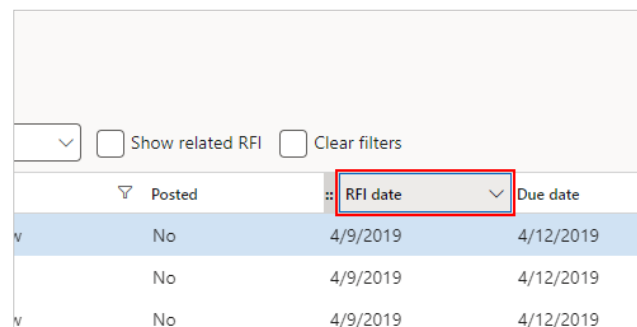
In this example, we will be using the RFI log.

By default, logs are sorted in ascending order based on the ID column. Sorting records directly in the log only allows for sorting one column at a time.

Refer to the 'Advanced Sorting and Filtering' work instruction if advanced sorting is required.

Click on the **Column** to sort.

The columns available for sorting or filtering display a drop-down indicator to the right of the label when you hover over the column name.



	Posted	RFI date	Due date
v	No	4/9/2019	4/12/2019
	No	4/9/2019	4/12/2019
v	No	4/9/2019	4/12/2019

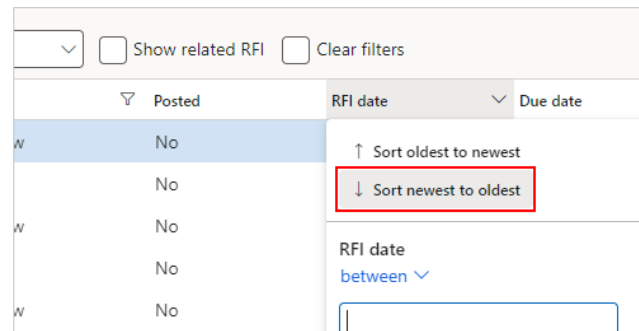
This feature does not work if the column is 'display only'.



The RFI Date has two options to sort from:

6. Oldest to newest
7. Newest to oldest

Click on any **sort value**.



The column is now sorted based on the picked value.

Depending on the type of data, the system displays different sort selections.

To remove the sort, press F5 on your keyboard or exit the log.

### 2.3.2.2. Search and Filter - Quick Filter

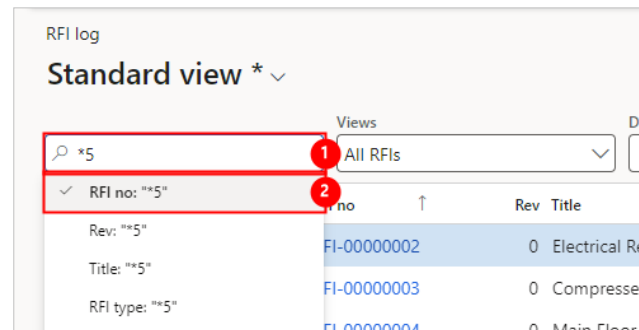
You can type values into the search and filter field, and then apply the search to a selected column in your list. Only results matching the search criteria display in the list. Single and multiple wildcard searches are supported, as indicated below:

Asterisk (\*): Placed before or after search phrase and indicates any number of characters. Used to broaden search results.

Question mark (?): Placed before or after search phrase as substitute for a single character. Use as many as is required

In this example, we want to search for any RFIs ending in '5'.

1. Click on the **Filter** field - Enter an asterisk (\*) followed by 5.
2. Click on the **Item** to filter by. Here, we are choosing RFI no.



The RFI list filters to show RFIs ending in '5'.

	C...	TRX	CRX	Re...	RFI no	↑	Rev	Title
<input type="radio"/>					RFI-0000005		0	Main Entrance
<input type="radio"/>					RFI-0000015		0	Mechanical Sc
<input type="radio"/>					RFI-0000025		0	Electrical in Sta

To clear a search from the field, delete the contents from the field and press the **Enter** key.

	C...	TRX	CRX	Re...	RFI no	↑	Rev	Title
<input type="radio"/>					RFI-0000005		0	Ma
<input type="radio"/>					RFI-0000015		0	Me

The RFI list is no longer filtered and shows all the RFIs.

	C...	TRX	CRX	Re...	RFI no	↑	Rev	Title
<input type="radio"/>					RFI-0000002		0	Electrical Req
<input type="radio"/>					RFI-0000003		0	Compressed /
<input type="radio"/>					RFI-0000004		0	Main Floor Bc
<input type="radio"/>					RFI-0000005		0	Main Entrance
<input type="radio"/>					RFI-0000007		0	Structural Bas

### 2.3.2.3. Search and Filter - Column Headings

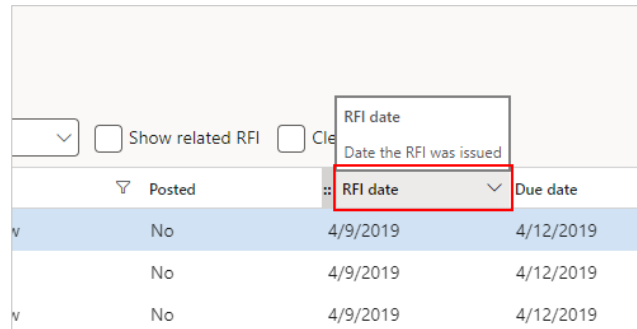
Choose a list to filter.

For example, pick one of the tabbed lists available to you in your workspace or choose a log from the Navigation pane.

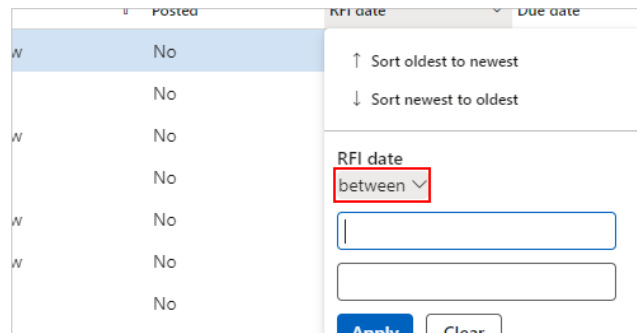
	C...	TRX	CRX	Re...	RFI no	↑	Rev	Title
<input type="radio"/>					RFI-0000002		0	Electrical Req
<input type="radio"/>					RFI-0000003		0	Compressed ,
<input type="radio"/>					RFI-0000004		0	Main Floor Bc

Find the first **Column** to filter.

The columns available for sorting or filtering display a drop-down indicator to the right of the label when you hover over the column name.



Select the **operator** for the operator list and choose a value. Available values change depending on the type of field you select



Available operators to filter your column by are:

### COLUMN FILTER OPERATORS

Operator	Column Field Type	Results only include records where the data in the column...	Example
Is exactly	Dates or Text	Matches the value in the filter	“Blue” results in “Blue”
Is not	Dates or Text	Does not match the value in the filter	“Blue” results in “Yellow”, “Red”, “Green”
Contains	Text	Contains the value in the filter	“Blue” results in “Blue table”, “Red and blue desk”
Does not contain	Text	Does not contain the value in the filter	“Blue” results in “Red table”, “Red and yellow desk”
Begins with	Text	Begins with the value in the filter	“Blue” results in “Blue table”, “Blue desk”, “Blue phone”
Is one of <small>*Can copy and paste values separated by commas</small>	Text	Matches one of the values in the filter	“Blue table”, “Red table”, “Yellow table” results in “Blue table”, “Red table”, and “Yellow table”

## COLUMN FILTER OPERATORS

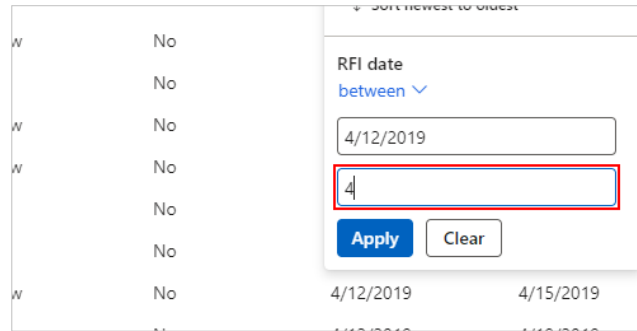
Operator	Column Field Type	Results only include records where the data in the column...	Example
After	Dates or Text	Comes after the specified value in the filter, chronologically or alphabetically	"7/1/2021" results in "7/2/2021", "7/14/2021", "7/26/2021"
Before	Dates or Text	Comes before the specified value in the filter, chronologically or alphabetically	"7/1/2021" results in "6/30/2021", "6/26/2021", "6/25/2021"
Between	Dates or Numbers	Is between the two values in the filter	"7/1/2021" to "7/25/2021" results in "7/2/2021", "7/14/2021"
Matches	Dates, Numbers, or Text	Exactly matches the value in the filter	"7/1/2021" results in "7/1/2021"

## COLUMN FILTER OPERATORS

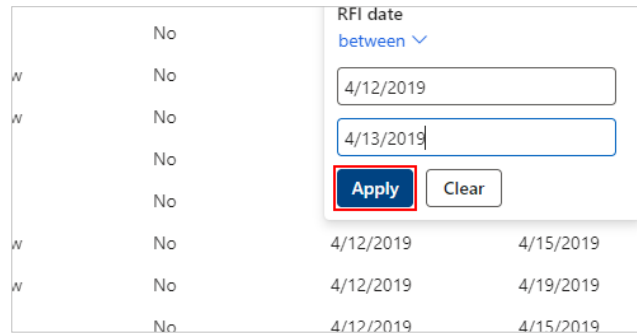
Operator	Column Field Type	Results only include records where the data in the column...	Example
Is equal to	Numbers	Matches the value in the filter	"1000" results in "1000"
Not equal to	Numbers	Does not match the value in the filter	"1000" results in "1001", "1010", "1006"
Greater than or equal to	Numbers	Is greater than or the same as the value in the filter	"1000" results in "1000", "1001", "1002"
Less than or equal to	Numbers	Is less than or the same as the value in the filter	"1000" results in "1000", "999", "998"

The filter is applied to the log and displays the list of records matching the filter criteria. If a sort value was assigned to the column, the system retains that value as well.

Click on the **Filter** field - Input the value to apply as the filter.

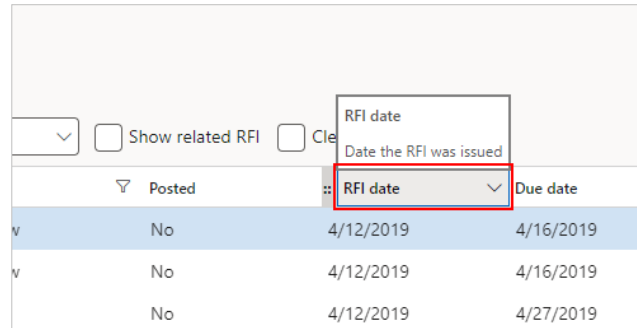


Click on the **Apply** button.

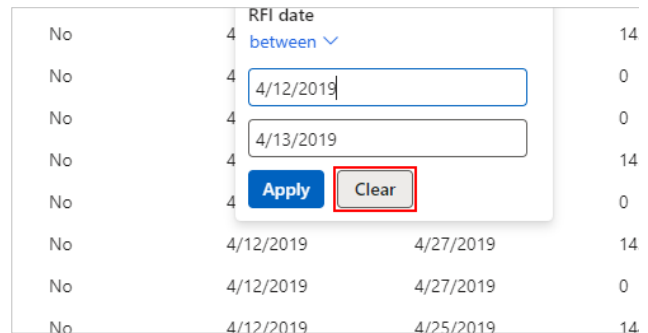


Note: The list retains the sort and filter values applied to a column until you clear them or exit the log.

To clear the filter, click on the filtered **Column**.



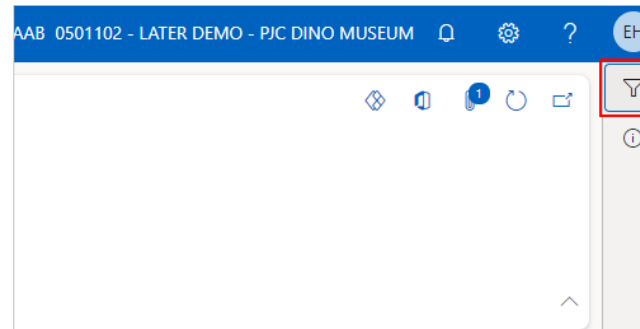
Click on the **Clear** button.



#### 2.3.2.4. Use the Filter Pane

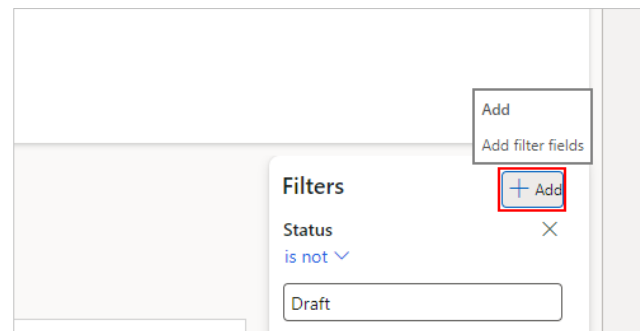
The advantage of using the advanced filters is to include fields that are not shown in the grid, and are housed within the details of a record, whereas filtering at the column header only lets you pick from columns visible in the log.

When the log opens, select the **Funnel** icon to the right of the grid.



You cannot use advanced filters if viewing a list or log within a workspace. You must navigate to a log.

Click on the **Add** button.



The 'Add filter fields' dialog opens. Browse the list to see which fields are available to be filtered. This will depend on which log you are in.

Select one or more **Filters** from the list.

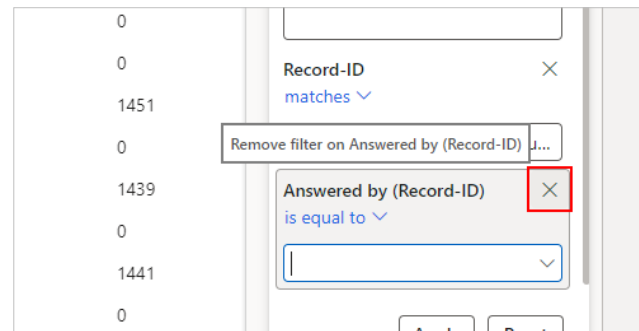
Filter	Field	Type	Table
<input type="checkbox"/>	Answered by	Text	RFI
<input type="checkbox"/>	Answered by (Record-ID)	Number	RFI
<input type="checkbox"/>	Answered date	Date	RFI
<input type="checkbox"/>	Assigned to	Text	RFI
<input type="checkbox"/>	Assigned to (Record-ID)	Number	RFI

Click on the **Update** button.

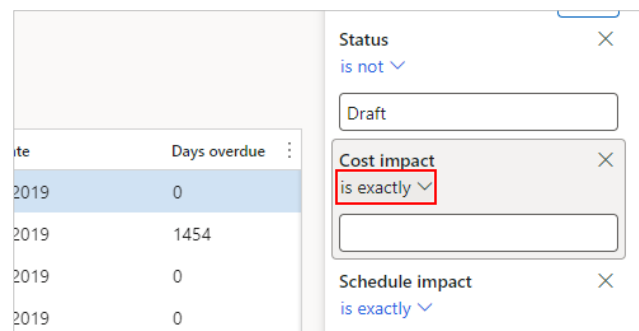
document reference	Text	RFI
issue date	Date	RFI
initiated by	Text	RFI
initiated by (Record-ID)	Number	RFI
initiated by company	Text	RFI

Update (Alt+Enter)  
**Update** Cancel

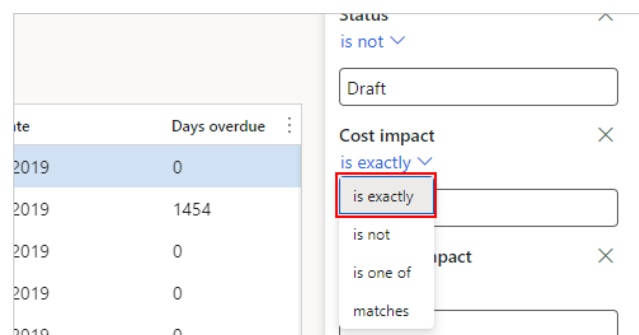
Selected fields are added to the 'Filters' list. You can remove a filter field box by clicking on the **X** in its display box.



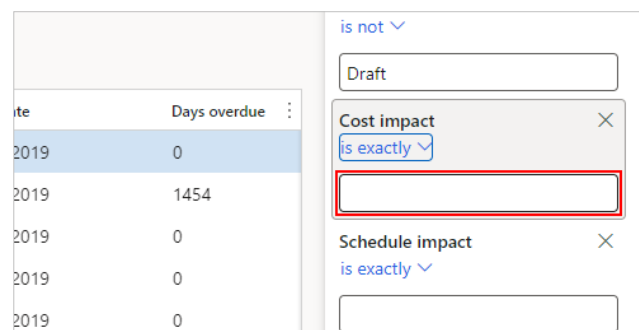
Click on the **operator** drop-down below the field name to choose the parameter of your search.



Available values are dependent on the type of field selected.

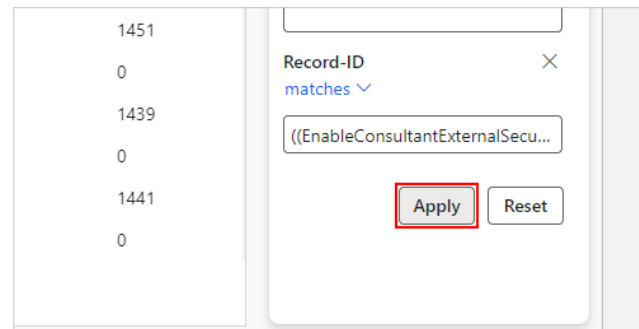


Click on the 'Filter' field and enter search text.



Repeat until all filter values have been selected and defined.

Click on the **Apply** button.



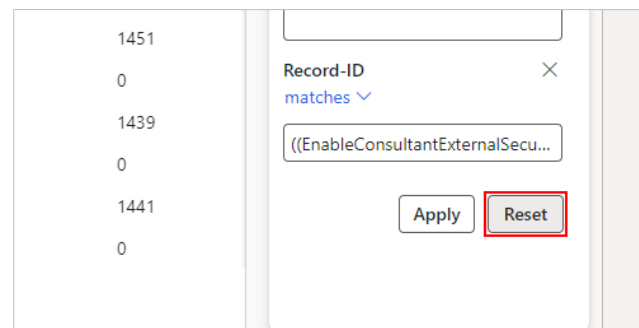
The log filters based on your selections.

### 2.3.2.5. Reset a Filter

If you are viewing a log and select the funnel icon in the filter bar, any filters currently in use are displayed. Filtered columns also display the funnel icon beside the label in the column header.

Resetting a filter will remove all modifications to the filters list and reset the values to default.

Click on the **Reset** button.



### 2.3.3. Conclusion

Now that you have an understanding of how to sort, filter, and search in PM4+, proceed to the next work instruction.

## 2.4. Export Records to Excel

### 2.4.1. Introduction

#### 2.4.1.1. Objective

This instruction covers how to export records from PM4+ into Excel.

#### 2.4.1.2. Background Information



The ability to export records from a log provides partners with additional information to generate offline reports, perform calculations, or share data with those who do not have access to PM4+.

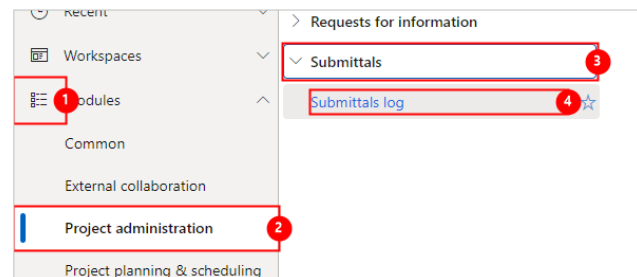
There are three ways to download records from a log list:

1. Select the 'Open in Microsoft Office' icon and 'Export to Excel'.
2. Export all (displayed) rows in a log to Excel.
3. 'Print grid' (to Word, PDF, or Excel).

## 2.4.2. Work Instructions

Note: This example shows navigation to the 'Submittals log'. Navigate to a log you have access to.

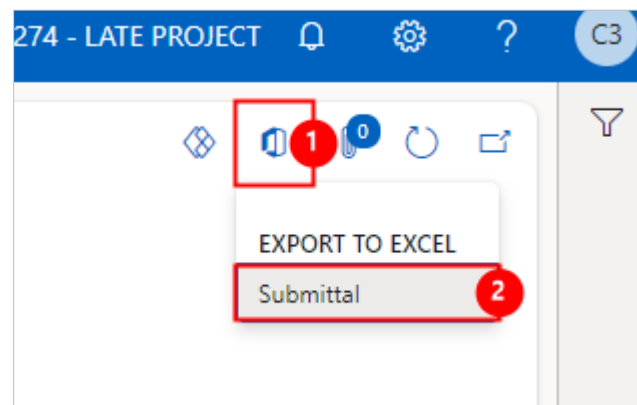
1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.



### 2.4.2.1. Export from 'Open in Microsoft Office'

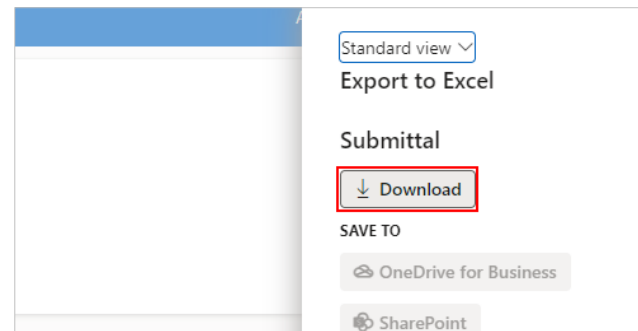
This command is found on the action pane of a log. You cannot see this command if you are looking at a log displayed in a workspace.

1. Click on the **Open in Microsoft Office** icon.
2. Click on **Submittal**.



The 'Export to Excel' dialog opens.

Click on the **Download** button.



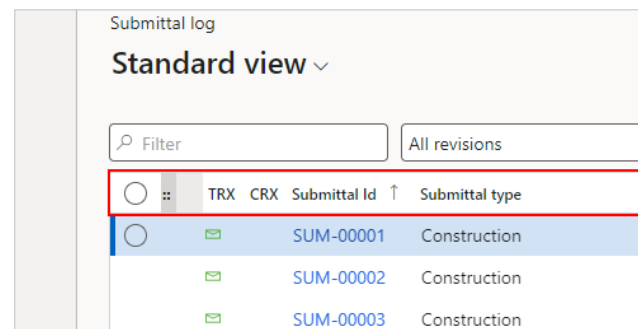
If you are using Chrome, the document will be downloaded to your 'Downloads' folder.

If you are using Edge, you will be prompted to open or save the file.

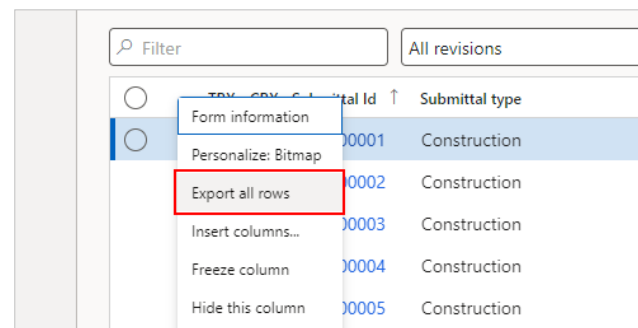
#### 2.4.2.2. Export Displayed Rows

This option only exports rows currently displayed in the log.

Hover over the **Header** and right-click.

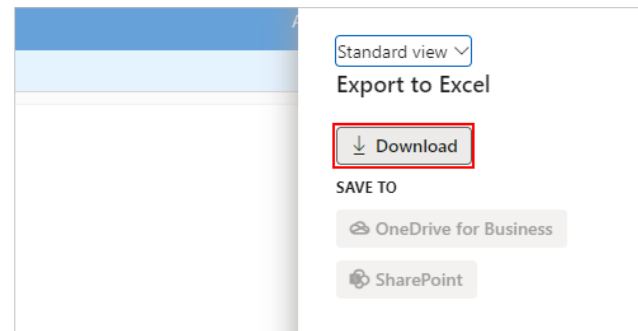


From the menu, click on **Export all rows**.



The 'Export to Excel' dialog opens.

Click on the **Download** button.



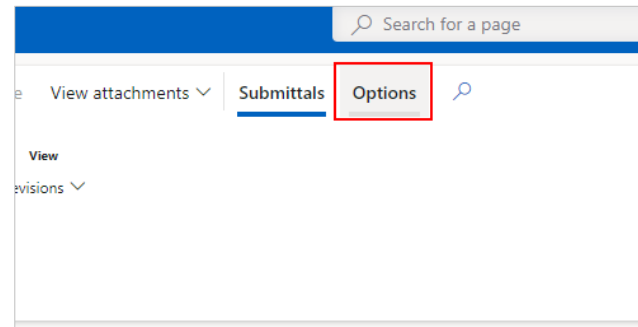
If you are using Chrome, the document will be downloaded to your 'Downloads' folder.

If you are using Edge, you will be prompted to open or save the file.

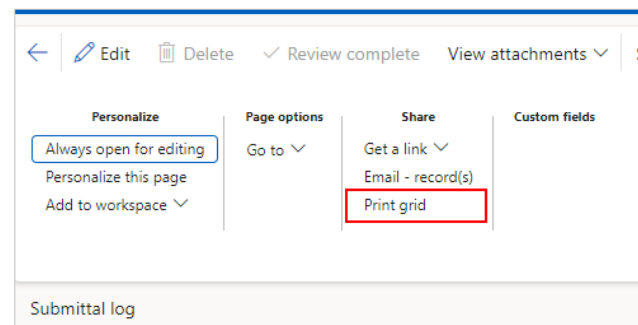
### 2.4.2.3. Export Using the 'Print Grid' Feature

'Print grid' gives you the option to print your log lists to a format of your choice, one of which is Excel. If you wish to print to any other format, there are additional parameters that you can set for the 'Header and footer', 'Report format', and 'Page output'.

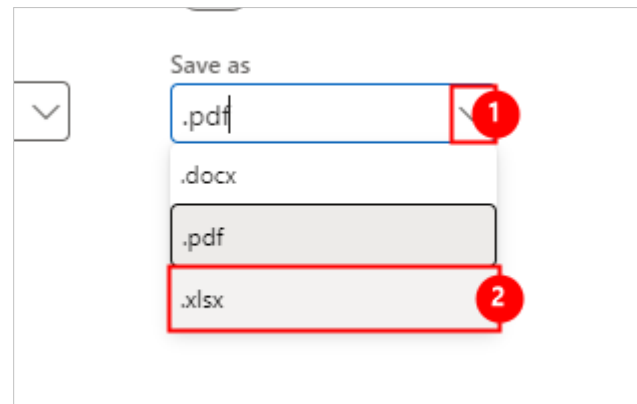
Click on the **Options** button in the action pane.



In the 'Share' group, click on the **Print grid** button.



1. In the 'Page output' fast tab, click on the **Save as** drop-down.
2. Select **.xlsx**.



Click on the **OK** button to export the records.



### 2.4.3. Conclusion

Now that you have an understanding of how to export records to Excel, proceed to the next work instruction.

## 2.5. Format Text with the Rich Text Editor

### 2.5.1. Introduction

#### 2.5.1.1. Objective

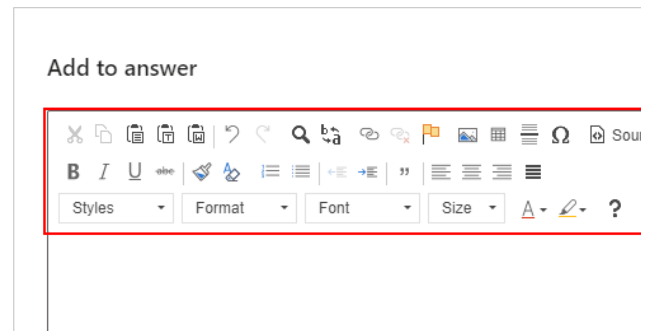
This work instruction covers how to format rich text fields in PM4+.

#### 2.5.1.2. Background Information

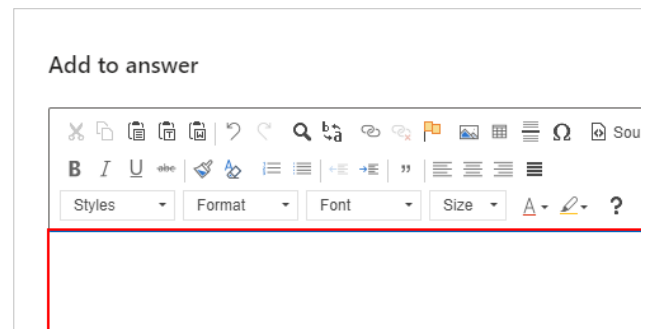
Formatting text with the rich text editor exists in various processes within PM4+ such as sending emails, providing RFI answers, and providing a proposed fix to a quality deficiency.

### 2.5.2. Work Instructions

In this example, the rich text editor is used to format the response to an RFI.

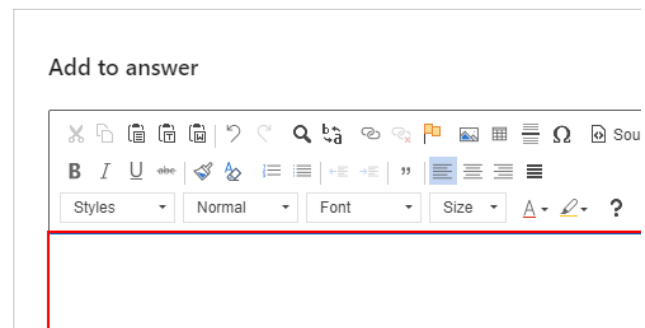


Click on the **Text body** field to begin typing.



If you need to copy-paste text into the rich text editor, it is recommended to paste the content into Notepad. Then, copy and paste the content from Notepad into PM4+. This process removes any hidden formatting applied by Word or other word processing applications.

In the **Text body**, paste the content copied from the Notepad by pressing CTRL+V.



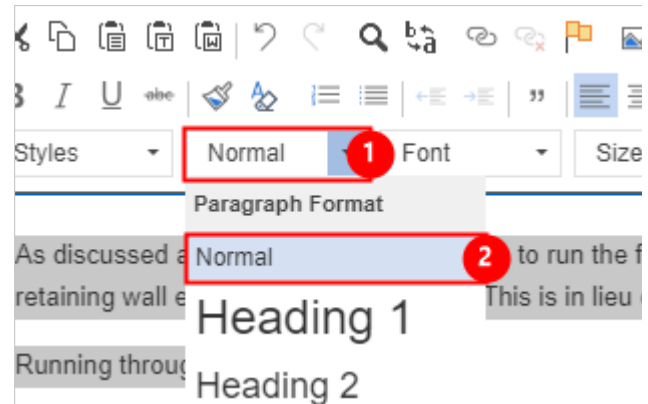
### 2.5.2.1. Change Font and Formatting

The ability to change the font and formatting for text is not available for every occurrence that the rich text editor appears. Familiarize yourself with where partial or all formatting is applied in PM4+.

In this example, the RFI answer's font and font size can be changed. Formatting does not.

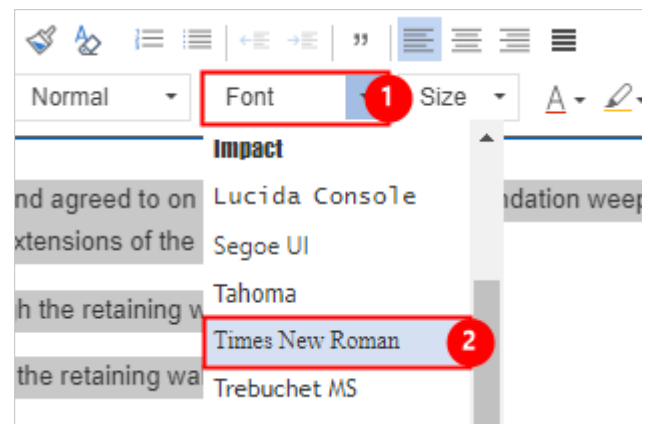
Change the format if necessary.

1. Click on the **Format** drop-down.
2. Select the **Format**.



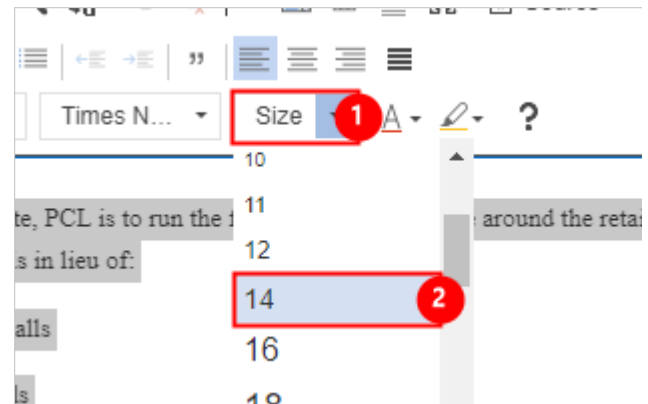
Change the font if necessary.

1. Click on the **Font** drop-down.
2. Select the **Font**.



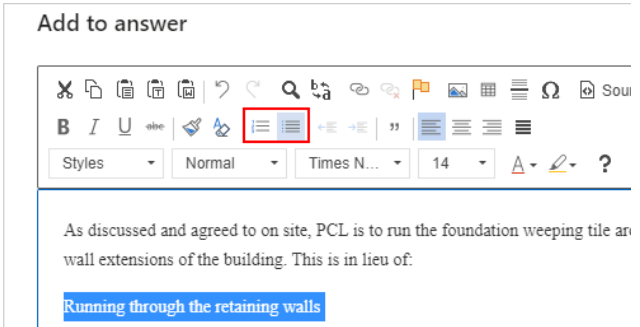
Change the font size if necessary.

1. Click on the **Font Size** drop-down.
2. Select the **Font size**.



Content can be formatted to include bullets or a numbered list.

Select the text to apply the bullets or numbering to, click on the **Insert/Remove Bulleted List** or **Insert/Remove Numbered List** button.

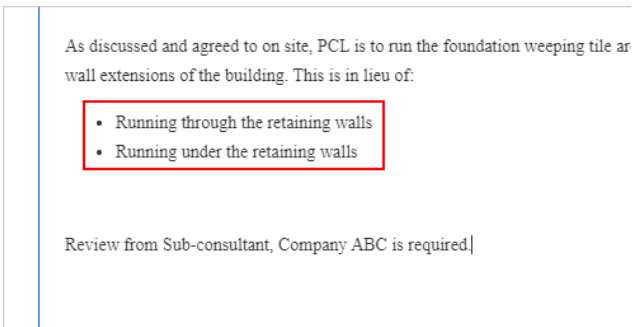


Add to answer

As discussed and agreed to on site, PCL is to run the foundation weeping tile around wall extensions of the building. This is in lieu of:

Running through the retaining walls

The text now displays in a bulleted list.



As discussed and agreed to on site, PCL is to run the foundation weeping tile around wall extensions of the building. This is in lieu of:

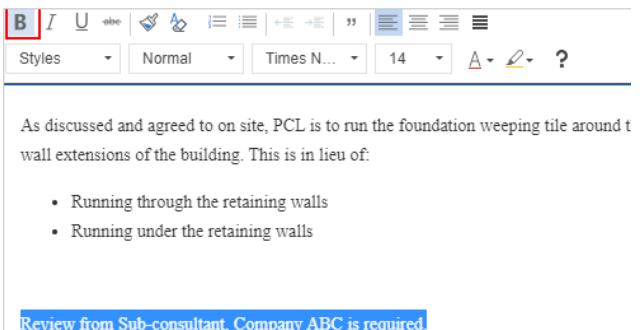
- Running through the retaining walls
- Running under the retaining walls

Review from Sub-consultant, Company ABC is required.

Content can be bolded, italicized, or underlined.

Select the text and click on the appropriate button.

In this example, the highlighted text is **Bolded**.



As discussed and agreed to on site, PCL is to run the foundation weeping tile around wall extensions of the building. This is in lieu of:

- Running through the retaining walls
- Running under the retaining walls

Review from Sub-consultant, Company ABC is required.

#### 2.5.2.2. Apply Default Formatting for New Text

If additional text needs to be added after formatting the existing text, you can copy-paste the new text. This applies the formatting to the new text.

Click on the area you want to insert the copied text.

As discussed and agreed to on site, PCL is to run the foundation weeping tile at wall extensions of the building. This is in lieu of:

- Running through the retaining walls
- Running under the retaining walls

Review from Sub-consultant, Company ABC is required.

Paste the copied content by pressing CTRL+V.

As discussed and agreed to on site, PCL is to run the foundation weeping tile at wall extensions of the building. This is in lieu of:

- Running through the retaining walls
- Running under the retaining walls

Review from Sub-consultant, Company ABC is required.

The pasted text uses the same formatting as the default text.

Note To keep line breaks in the text, hold down the **Shift** and **Enter** keys.

As discussed and agreed to on site, PCL is to run the foundation weeping tile at wall extensions of the building. This is in lieu of:

- Running through the retaining walls
- Running under the retaining walls

Review from Sub-consultant, Company ABC is required.

Please see attached for more details.

### 2.5.2.3. Spellcheck Text

Spellcheck text by holding down the CTRL key and right-clicking on the work to spellcheck.

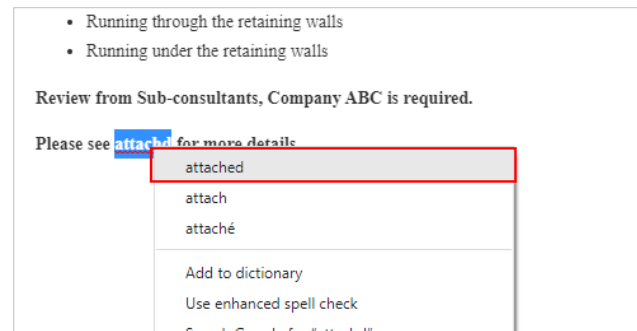
- Running through the retaining walls
- Running under the retaining walls

Review from Sub-consultants, Company ABC is required.

Please see attachd for more details.



Select the correct work from the list of suggestions if applicable.



### 2.5.3. Conclusion

Now that you have an understanding of how to format text in the rich text editor, proceed to the next work instruction.

## 2.6. Acceptable File Types in PM4+

### 2.6.1. Introduction

There are various activities in PM4+ that requires you to upload a file, this includes but is not limited to:

- Uploading an attachment when answering an RFI
- Uploading a report for an inspection and test item
- Uploading an attachment when providing a proposed fix or proposed fix evaluation

In addition, an attachment can be uploaded as a general document to any record in PM4.

### 2.6.2. Work Instructions

Below are acceptable file types when you upload an attachment in PM4+. **There is a 85MB limit per single file upload.**

Note: Some file types are more compatible than other file types when PM4+ creates a merged PDF package, this is indicated in the 'Included in Merged PDF' column. These merged PDFs are generated in various scenarios such as creating a quote package for a CRX.

Acceptable File Types						
Module	DESCRIPTION/ACTION/TASK	Microsoft Word Document (.docx)	Microsoft Excel Worksheet (.xlsx)	Note (.txt)	Size Limit	
		PDF (.pdf)				
General File Upload	Uploading an attachment to a record in PM4+.	✓	✓	✓		
RFI	Uploading an attachment when responding to an RFI.	✓	✗	✗		
Submittals	Uploading a marked-up submittal package.	✓	✗	✗		
Quality	Uploading an attachment when providing a proposed fix evaluation.	✓	✓	✓		
Inspections and Tests	Attaching a report to an inspection and test item.	✓	✓	✓		
CRX	Upload a marked-up quote package.	✓	✓	✓		

### 2.6.3. Conclusion

Now that you have an understanding of the acceptable file types that can be uploaded into PM4+, proceed to the next work instruction.

## 2.7. Create a Custom View

### 2.7.1. Introduction

#### 2.7.1.1. Objective

This work instruction covers how to create a custom view in any PM4+ log.

### 2.7.1.2. Background Information

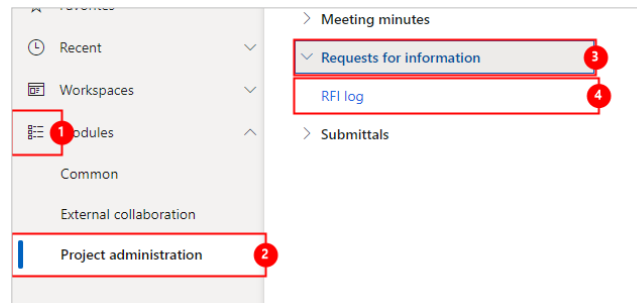
Most log and details forms you have access to can be customized to suit your viewing requirements. New columns can be created, and fields only visible in details view can be brought to the log view. Columns can be re-sized, re-arranged, or hidden. Please note that not all forms can be personalized. If a form is unable to be personalized, the personalization button will not be available.

Note: Custom views cannot be applied to screens with a tabbed list or tiles.

### 2.7.2. Work Instructions

This example shows the customization of a View in the RFI log. You can navigate to any log on PM4+ and follow these steps.

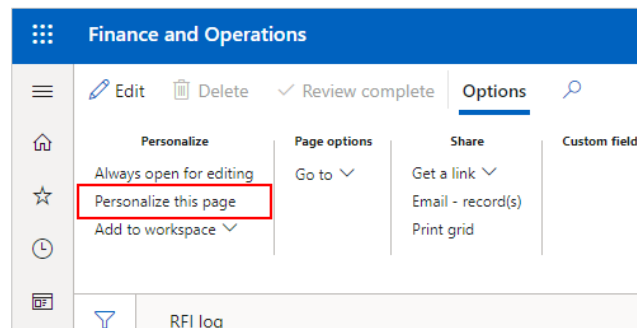
1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Requests for information** menu section.
4. Click on the **RFI log** menu item.



#### 2.7.2.1. Personalize a Log

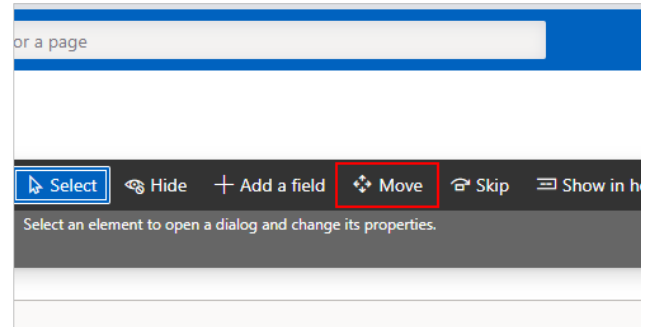
When you are in a log, you can change how the data is displayed by moving, hiding, adding or changing the width of any column. You can also change any column header name. When you finish personalizing your view, you can save the changes to a personal view.

Under the 'Personalize' group, click on the **Personalize this page** button.

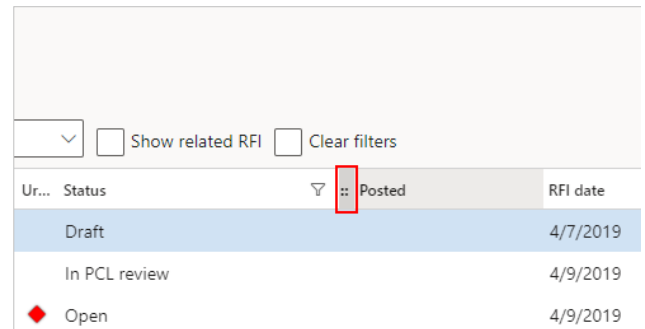


#### 2.7.2.1.1. Move a Column

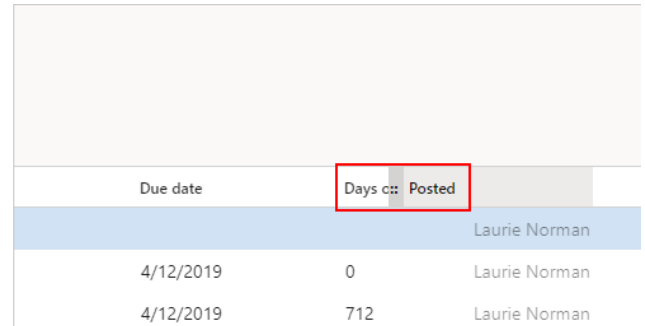
In the 'Personalize form' toolbar, click on the **Move** button.



Click on the **Move** icon and drag the column to the new location.

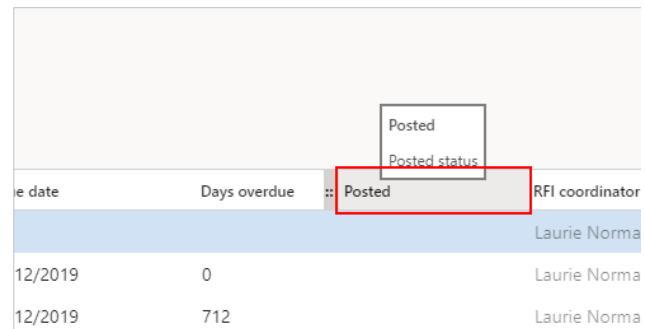


Release the **Move** icon to place the column in the new location.



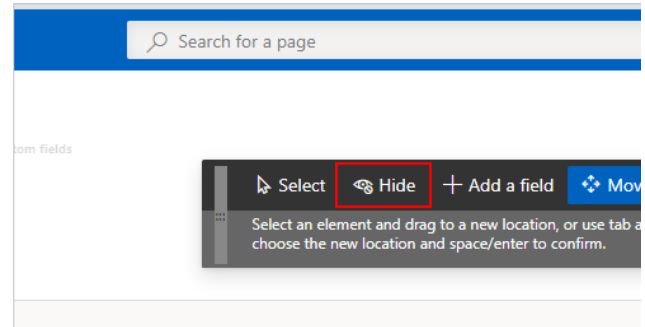
Verify the columns are in the desired position.

Repeat the above steps until your columns are in the desired order.



### 2.7.2.1.2. Hide a Column

Click on the **Hide** button from the 'Personalize form' toolbar.



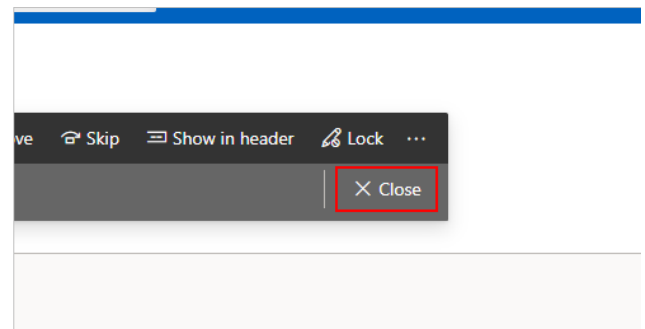
If you previously hid fields, they show with the field in the active row with an orange background. If you leave them, they are hidden again when you are finished.

Select the column to hide by clicking on the **Column header**.

The field in the active row of the column you selected turns orange.

Posted	RFI coordinator
Posted	Laurie Norma
12/2019	Laurie Norma
12/2019	Laurie Norma

Click on the **Close** button.



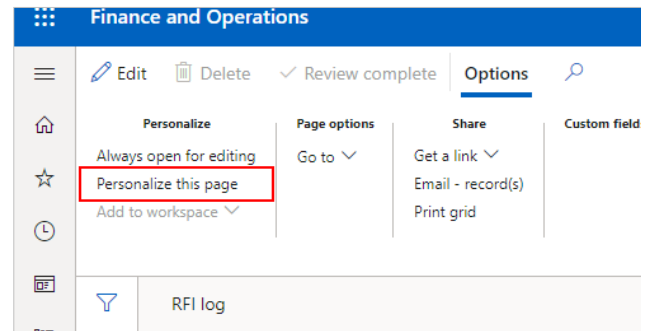
The selected columns no longer display.

If you want to 'un-hide' a column, select a column that is orange and once you close the form, the column will no longer be hidden.

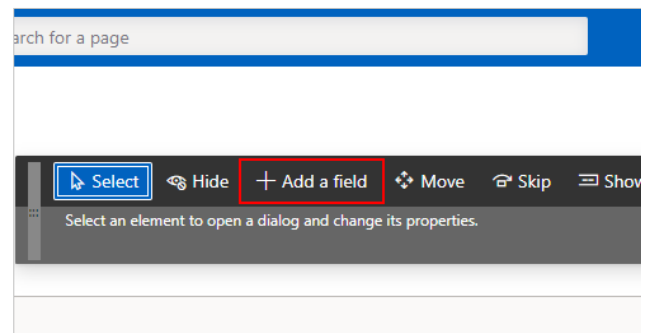
	C...	TRX	CRX	Re...	RFI no	↑	Rev	Title
○			\$		RFI-00000001		0	Data & Acces
					RFI-00000002		0	Electrical Req
					RFI-00000003		0	Compressed .
					RFI-00000004		0	Main Floor Bk
					RFI-00000005		0	Main Entranc
					RFI-00000006		0	Main Entranc
					RFI-00000007		0	Structural Bas

### 2.7.2.1.3. Add a Column

Click on the **Personalize this page** button.



Click on the **Add a field** button from the 'Personalize form' toolbar.



Select the position in the columns where you want your new column to appear.

Due date	Days overdue	RFI coordinator	Pri
		Laurie Norman	El
4/12/2019	0	Laurie Norman	Ci
4/12/2019	712	Laurie Norman	M

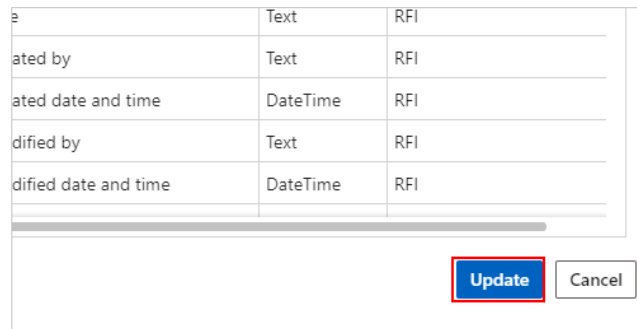
The 'Insert columns' dialog opens.

Select all the columns you want to add by clicking on the **Selection** checkbox.

To clear a checkmark, select the checkbox again.

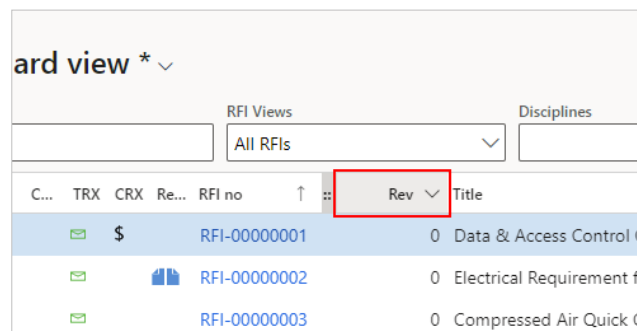
	S... ↓	Field	Type	Table
<input checked="" type="checkbox"/>		Answered date	Date	RFI
<input type="checkbox"/>		Cost activity	Text	RFI
<input type="checkbox"/>		Cost impact	Option	RFI
<input type="checkbox"/>		Distribution required	Option	RFI

Once you have selected the columns to add, click on the **Update** button.



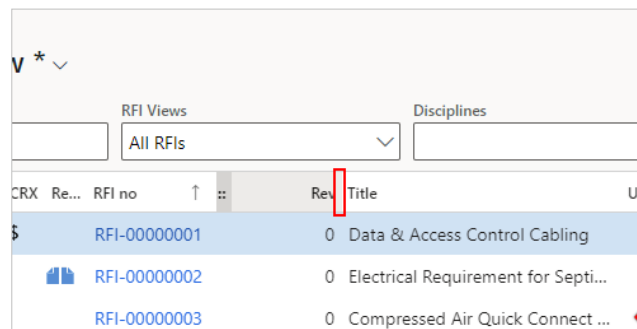
### 2.7.2.1.4. Adjust a Column Width in a List

Find the column whose size you would like to adjust (make either larger or smaller).



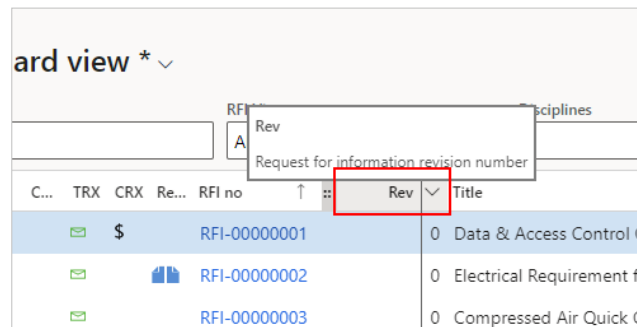
Move the mouse over the right side of the column border until the pointer changes to a double arrow.

Click and hold the mouse button, and drag in the direction to make the column larger or smaller.



Release the mouse button when the column is the size you want.

Repeat the above steps until all the columns are the desired width.



Once you have completed personalizing the log, you can save the view.

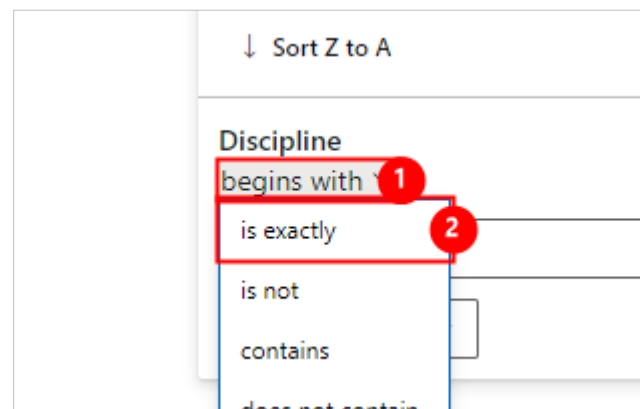
### 2.7.2.1.5. Filter a Column in a Log

To save a custom view with filtered columns use the column headings filter. Do not use the quick filter to filter on columns when the filter is intended to be saved with a view. Only filter on column headings as shown.

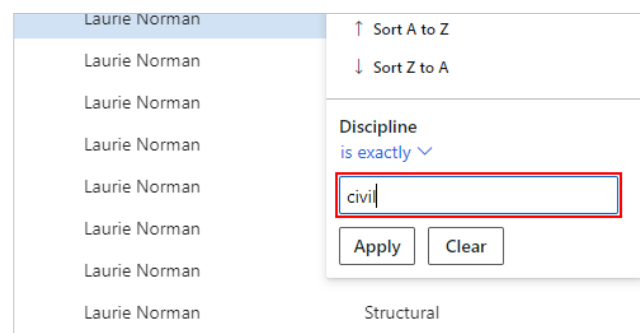
Click on a **Column** heading.

Operator	RFI coordinator	Primary discipline	Area
Laurie Norman		Electrical	
Laurie Norman		Civil	
Laurie Norman		Mechanical	

1. Click on the **operator** for the operator list.
2. Select a value.

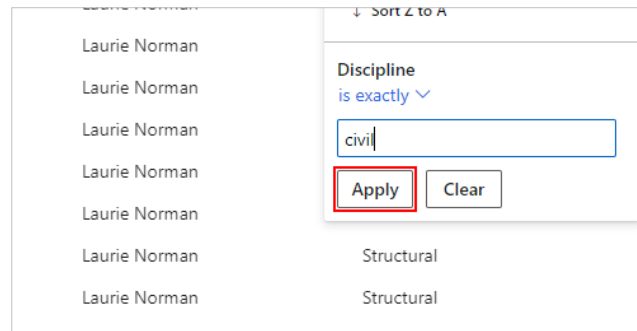


Enter the value to filter by.





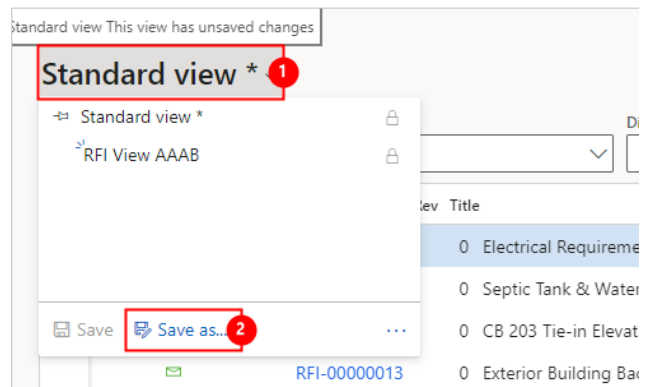
Click on the **Apply** button.



### 2.7.2.2. Save a Personalized View

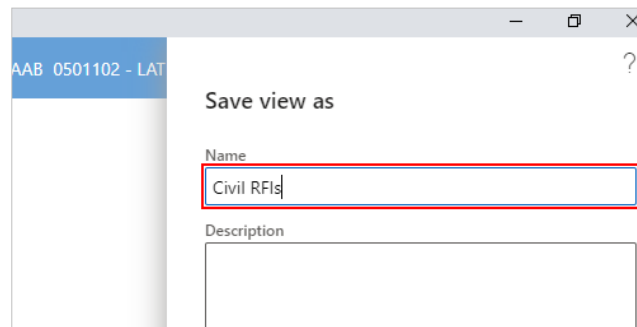
After you finish personalizing the log, you must save it so you can use it again. Any log that supports views will include a collapsed view selector control at the top of the log that shows the name of the current view. Unless a different default view has been selected, you will see the name 'Standard view'. You will see an asterisk (\*) beside the name of the view to indicate that there are unsaved changes.

1. Click on the drop down next to the named view to show the list of available views for this log and to access more functions.
2. Click on the **Save as...** button.

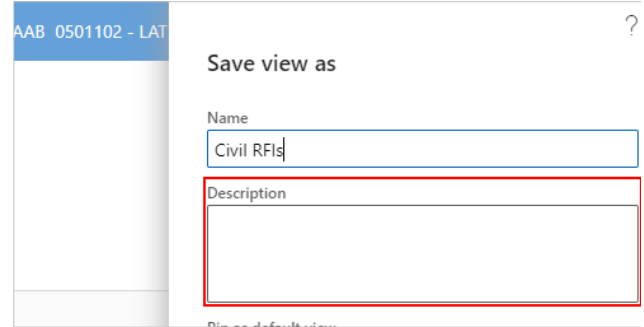


The 'Save view as' dialog opens.

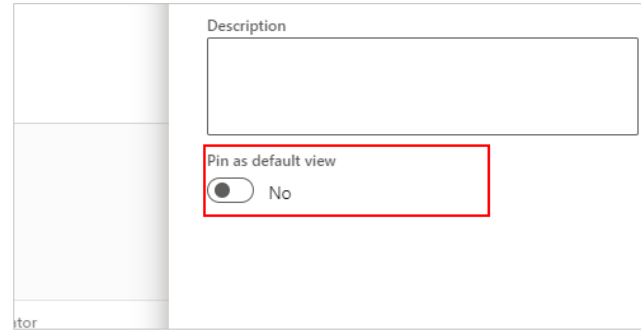
In the **Name** field, enter a Name for the view. This name must be unique.



Give the new view a **Description** to help recall what the view contains.

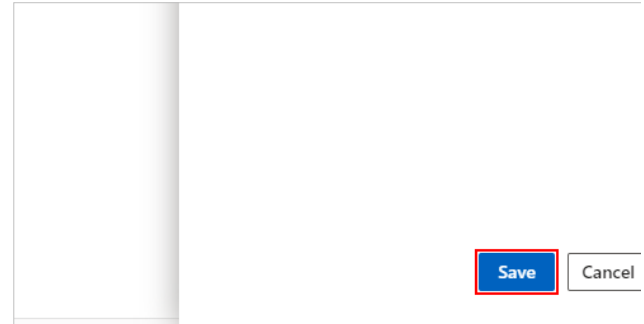


Click on the **Pin as default view** toggle to set it to 'Yes' if you want this view to load each time you access the log.



Click on the **Save** button.

The dialog closes and your saved view becomes the current view.



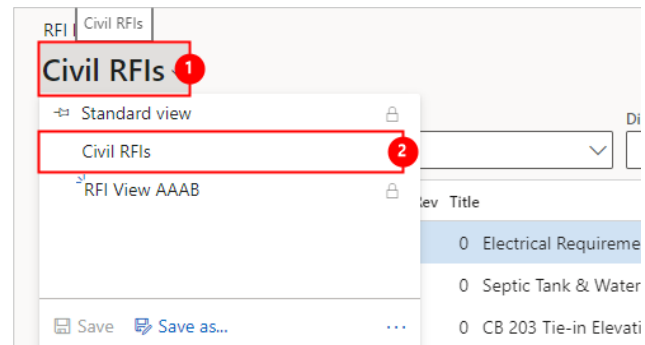
Warning: Your project may use custom fields created for the log. You cannot save a view with a filter or sort on a custom field column. This does not apply to columns that appear in your log by default. If you attempt to save a view with a filters or sort on custom fields, a warning is presented and the filter or sort will not be included as part of the saved view.

Filters and sorts on custom fields can cause duplication of records within the log and are not supported. Filter and sort criteria on custom fields will be removed from the view Civil RFIs. Do you wish to proceed?



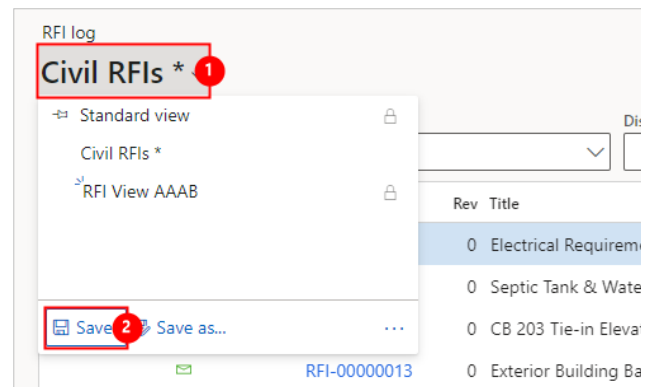
### 2.7.2.3. Modify a Personal View and Save Changes

1. Click on the drop down next to the named view to show the list of available views for this log.
2. Click on the **View** that needs to be modified.



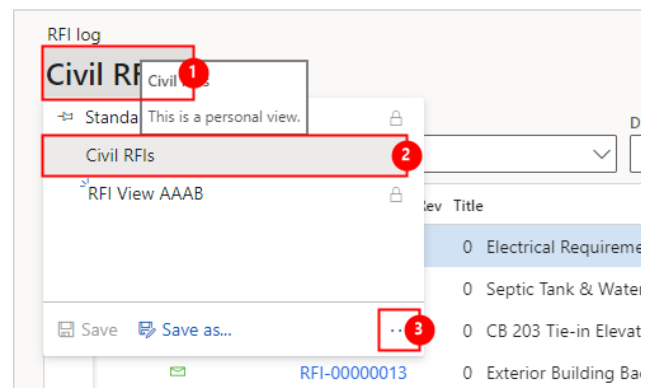
Make some modifications such as adjusting the width of columns, moving columns, adding columns, filtering columns or hiding columns.

1. Click on the drop down next to the named view.
2. Click on the **Save** button.

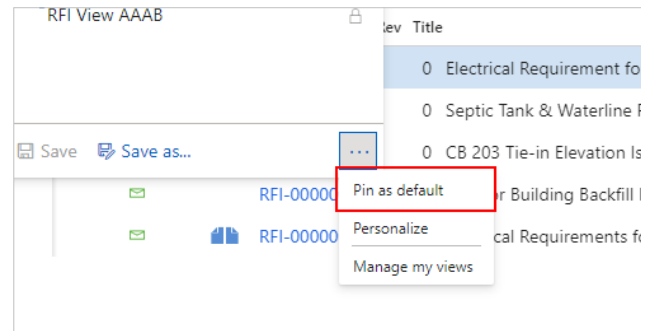


#### 2.7.2.4. Select a Different View to be your Default

1. Click on the drop down next to the named view to show the list of available views for this log.
2. Select the view that you want to make your default view.
3. Click on the **Ellipses** icon.

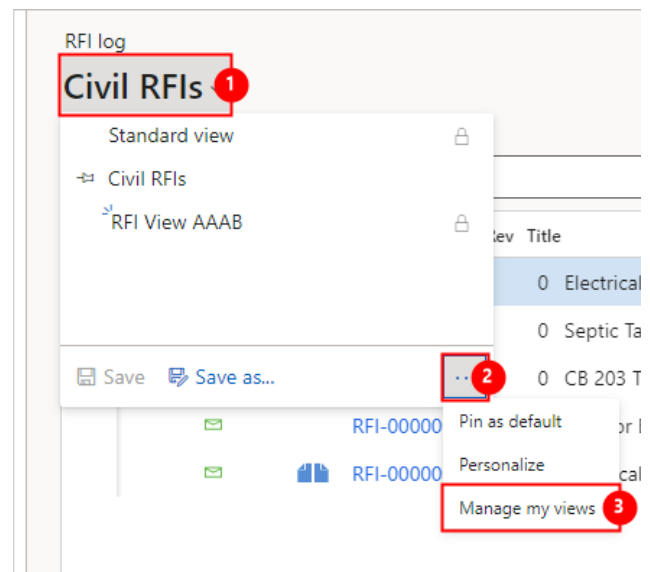


Click on the **Pin as default** button.



### 2.7.2.5. Remove a View

1. Click on the drop down next to the named view to show the list of available views for this log.
2. Click on the **Ellipses** icon.
3. Click on the **Manage my views** button.

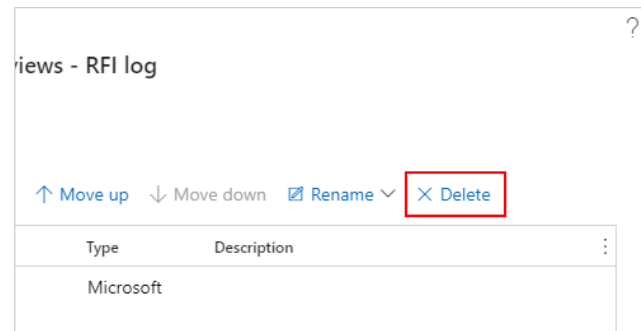


The 'Manage my views' dialog opens.

Click on a view where the 'Type' is **Personal view**.

View name	Type	Description
Standard view	Microsoft	
Civil RFIs (default)	Personal view	
RFI View AAAB	Published to me	

Click on the **Remove** button.

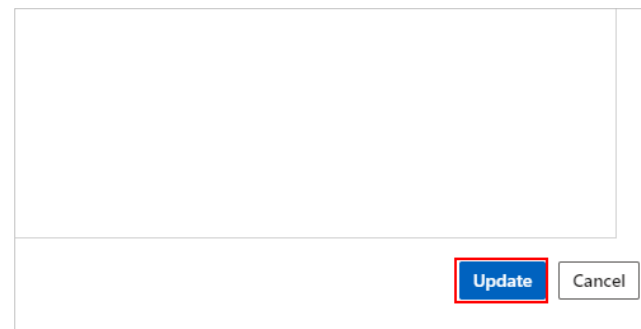


Views - RFI log

↑ Move up ↓ Move down ☑ Rename ▾ × Delete

Type	Description
Microsoft	

Click on the **Save** button.



Update Cancel

The view is now removed from the list of available views.

### 2.7.3. Conclusion

Now that you have an understanding of how to create a custom view, proceed to the next work instruction.

## 2.8. Create a Custom Workspace

### 2.8.1. Introduction

#### 2.8.1.1. Objective

This work instruction covers how to create a custom workspace.

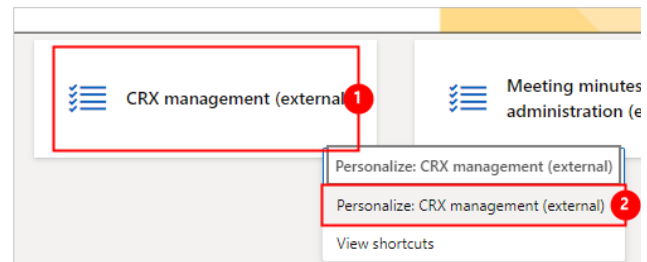
#### 2.8.1.2. Background Information

Workspaces can be personalized to fit the project needs. You can create a new workspace which you can add tiles, lists, and links to related activities or personalize an existing one as well.

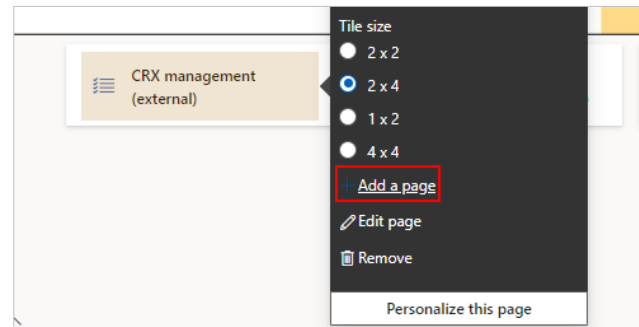
Use this feature to create additional workspaces, if the existing ones do not contain the information you need to view frequently.

### 2.8.2. Work Instructions

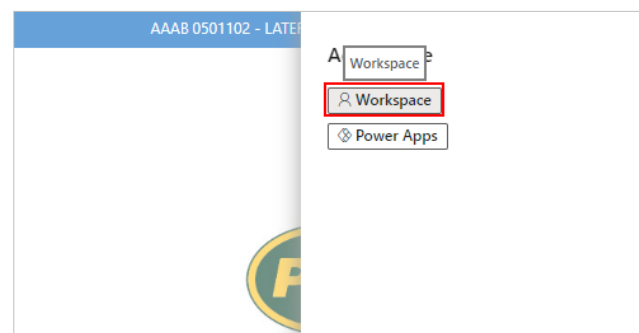
1. In your dashboard, right-click on any **Workspace** tile to show the context menu.
2. Click on the **Personalize** option.



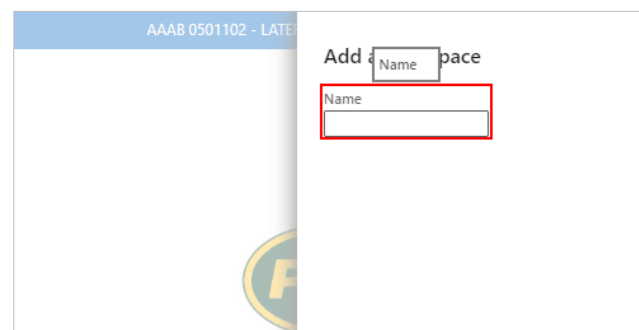
Click on the **Add a page** option.



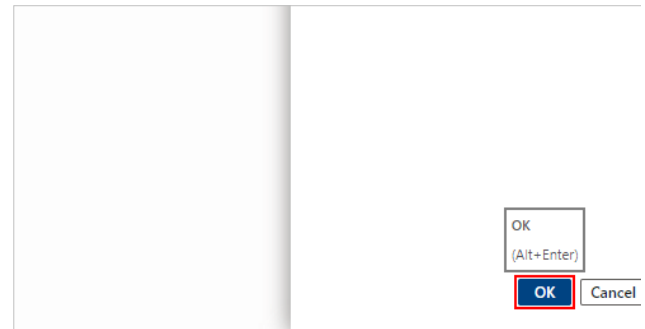
In the 'Add a page' dialog, click on the **Workspace** button.



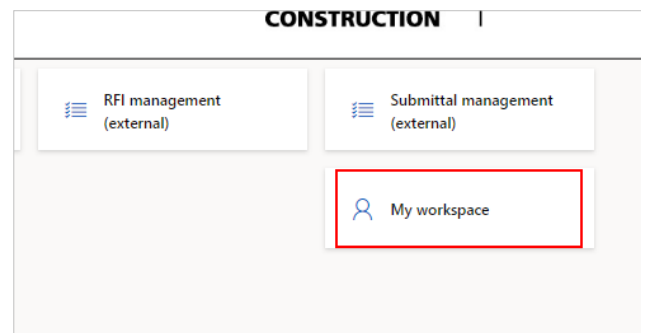
Enter in the name of your new workspace in the **Name** field.



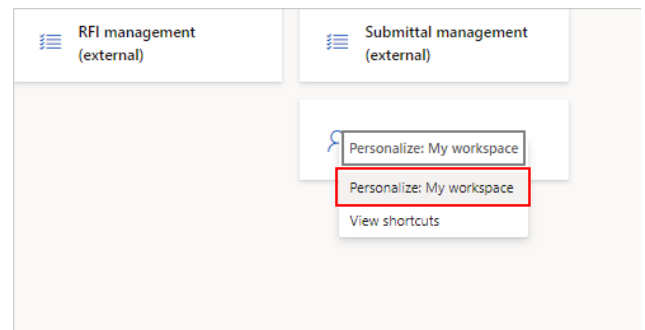
Click on the **OK** button.



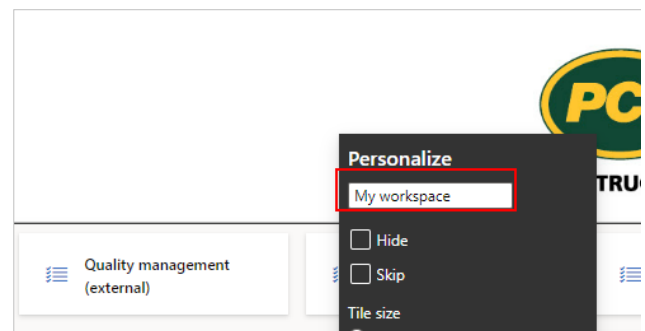
The workspace tile is created on your dashboard. To personalize, right-click on the newly created **Workspace** tile.



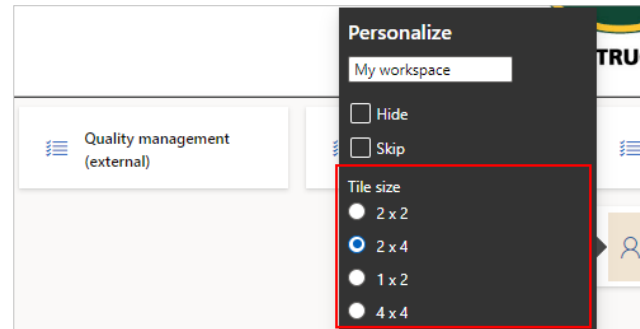
Click on **Personalize: My workspace**.



The workspace name can be changed in the **Name** field.



To change the **Tile size**, select from one of the options listed.



For more information on how to add lists, tiles, and links to a workspace, view the 'Personalize a Workspace List', the 'Personalize a Workspace Tile', or the 'Personalize a Workspace Link' work instructions.

### 2.8.3. Conclusion

Now that you have an understanding of how to create a workspace, proceed to the next work instruction.

## 2.9. Personalize a Workspace Link

### 2.9.1. Introduction

#### 2.9.1.1. Objective

This work instruction covers how to personalize a workspace by adding a link.

#### 2.9.1.2. Background Information

Most existing and custom created workspaces can be personalized to fit the project's needs. In this instruction, learn how to add a link to a workspace to allow quick navigation to another screen in PM4+. Please note that not all forms and workspaces can be personalized. If a form or workspace is unable to be personalized, the personalization button will not be available.

### 2.9.2. Work Instructions

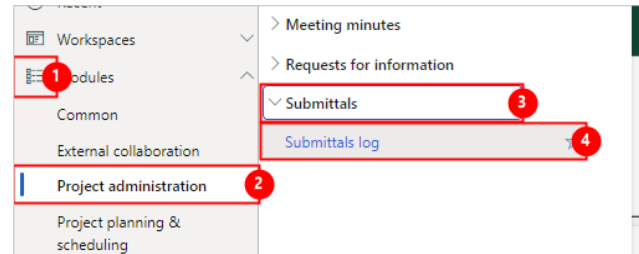
#### 2.9.2.1. Create a New Link

Create a link in any workspace if the information you would like to see is not accessible by default. Remember, personalizations are only visible to you.

This example is in the Submittal log, but you can only create workspace links to any log that your security profile has access to.

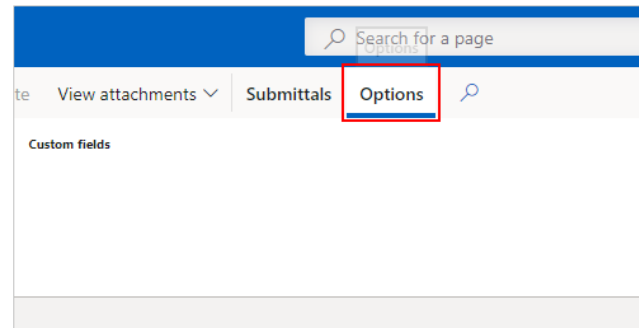


1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.



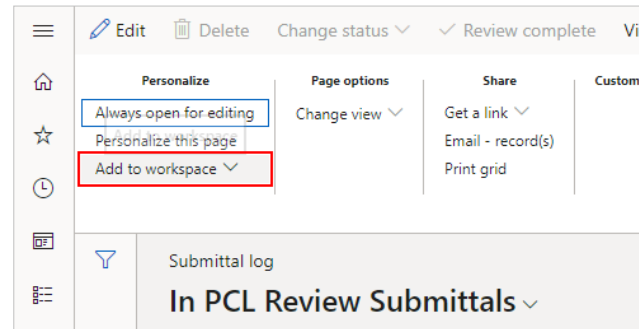
Filter and re-arrange the log, according to the view you want to see each time you click the custom link in the workspace. See the work instruction called [Create a Custom View](#) for more information.

When the log is filtered to the desired view, and the view is saved, click on the **Options** tab from the action pane.

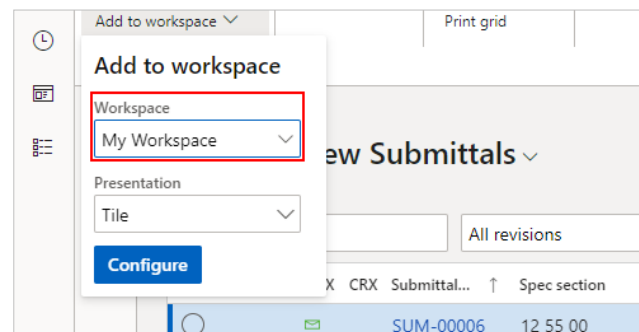


Ensure you have created and saved the view you want to make a custom link out of.

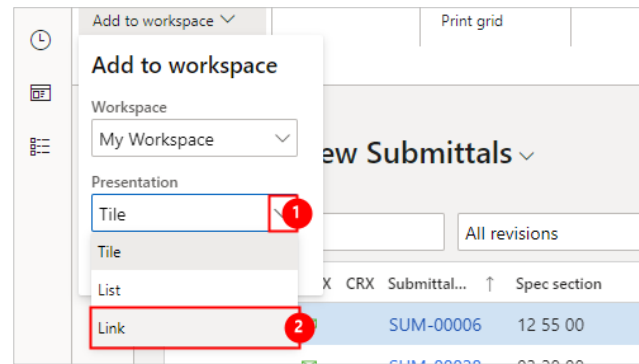
Under the 'Personalize' group, click on the **Add to workspace** drop-down.



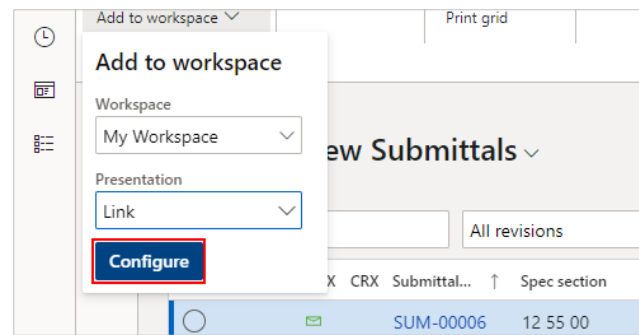
Ensure the right workspace is selected from the **Workspace** drop-down.



1. Click on the **Presentation** field.
2. Click on **Link**.

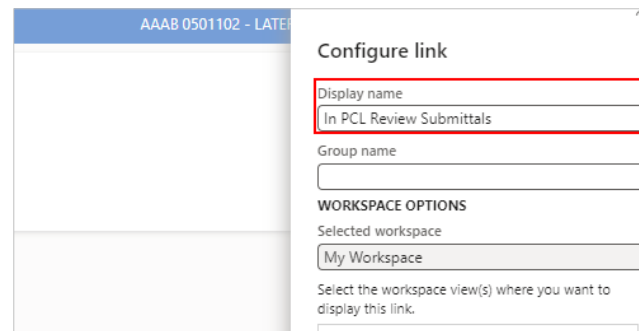


Click on the **Configure** button.

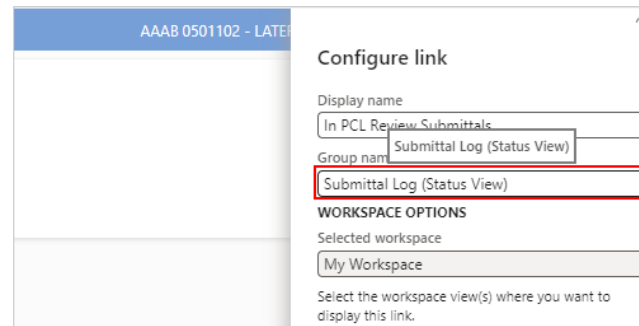


The 'Configure link' dialog opens.

You can change the default **Display Name**, if desired.



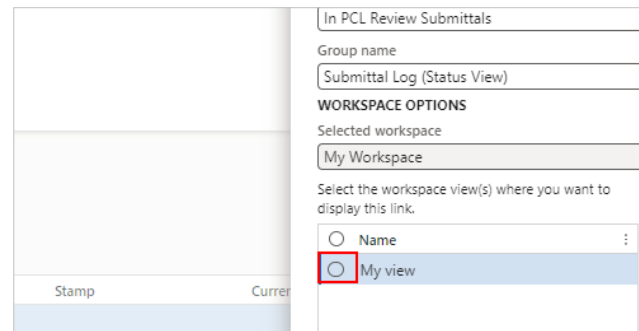
In the **Group name** field, you can enter a name or leave it blank.



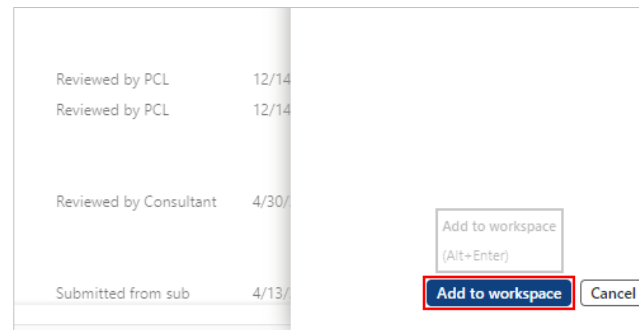
You can choose which workspace views you want the link to display in.

Click on the **View** to apply the customization.

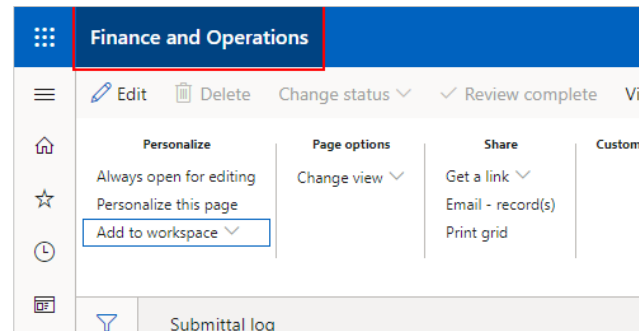
Note: Only 'Personal views' can be customized. For more information on how to create a personal view, refer to [Create a Custom Viewwork instruction](#).



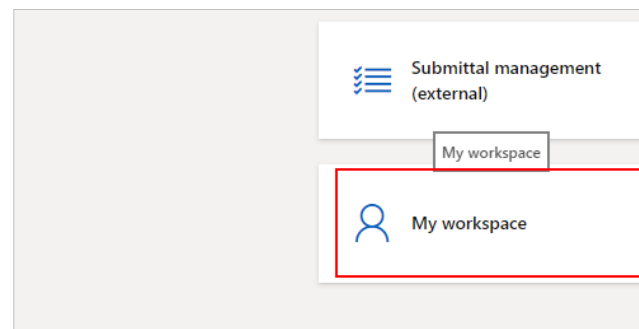
Click on the **Add to workspace** button to add the link to the workspace.



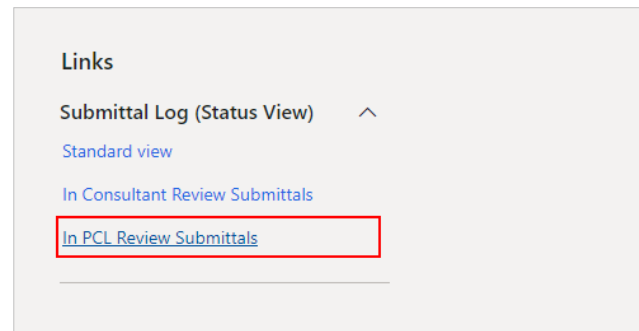
To view the link that was created, click on the **Finance and Operations** button to return to the PM4+ Dashboard.



Return to the **Workspace** the workspace link was added to.

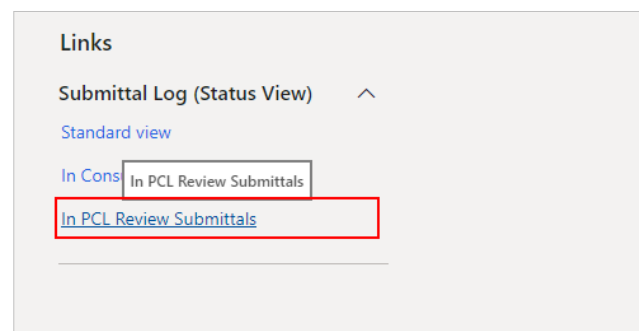


Confirm the link was created and added to the workspace.

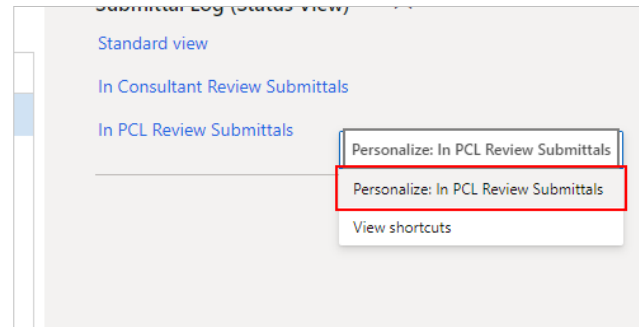


### 2.9.2.2. Rename or Remove a Link

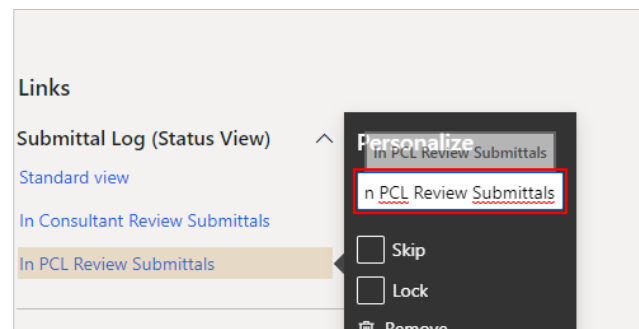
Right-click on the **Link** you want to remove or modify.



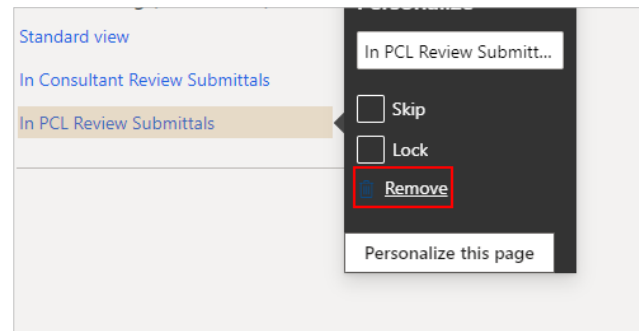
Click on **Personalize: [Name of link]**



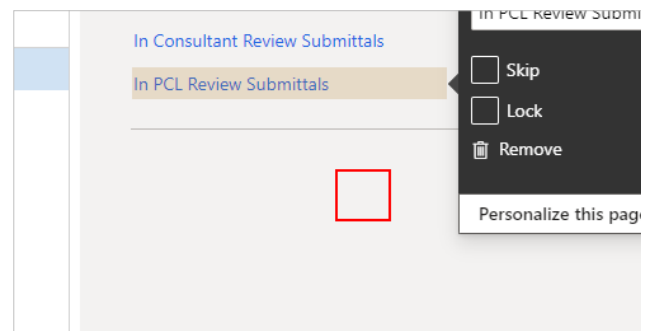
To change the name of a link, update the name in the **Name** field.



To remove the Link, click on the **Remove** button.



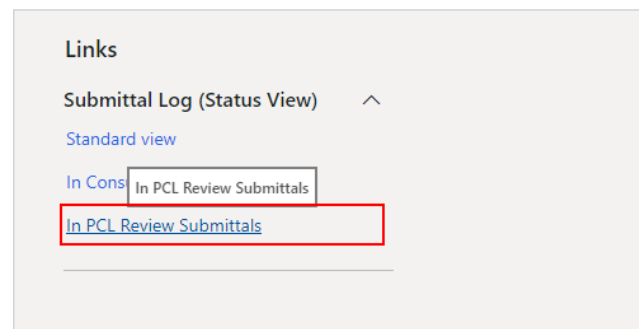
Click outside the menu area to close the menu.



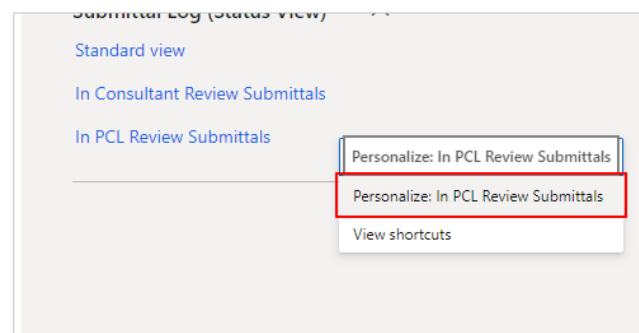
### 2.9.2.3. Reorder a Link Item in the Link Column

You can change the order in which any link appears in the Links column.

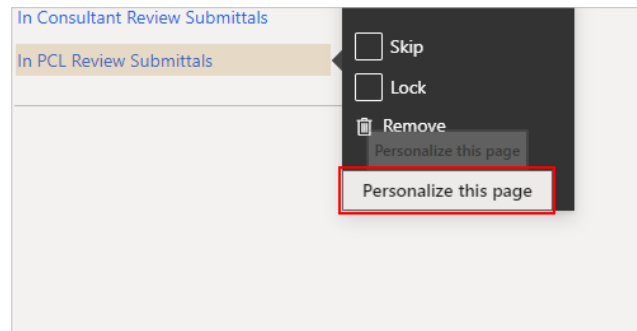
Right-click on the **Link** you want to move.



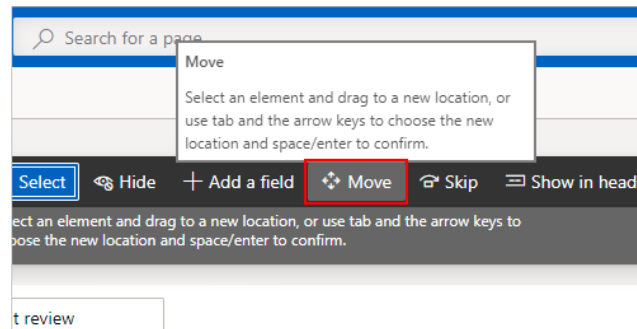
Click on **Personalize: [Name of Link]**.



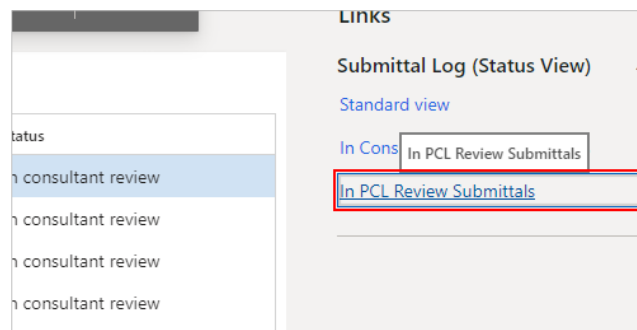
Click on the **Personalize this page** button.



In the toolbar, click on the **Move** button.

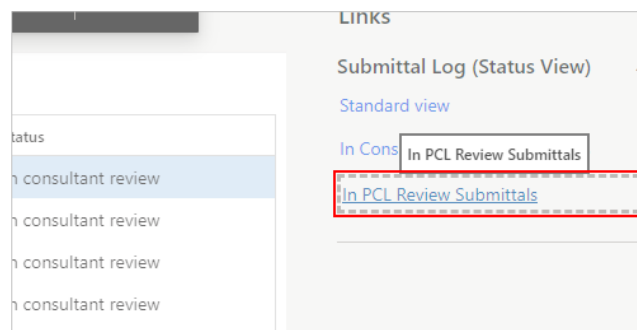


Click on the **Link** to move.

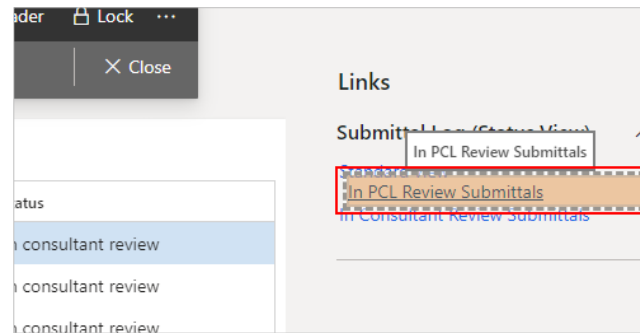


A dotted line appears around the name.

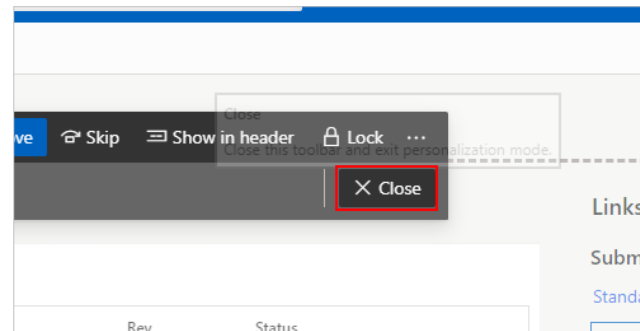
Click and hold the **Link** with the dotted line around the name and then drag the **Link** until it appears in the correct place.



Release the mouse once the Link is moved to the new location.



In the toolbar, click on the **Close** button.



### 2.9.3. Conclusion

Now that you have an understanding of how to personalize a workspace link, proceed to the next work instruction.

## 2.10. Personalize a Workspace List

### 2.10.1. Introduction

#### 2.10.1.1. Objective

This work instruction covers how to personalize a workspace by adding a new tabbed list.

#### 2.10.1.2. Background Information

Most existing and custom created workspaces can be personalized to fit the project's needs. In this instruction, learn how to add a tabbed list to a workspace to allow a quick view of specific records in a log that your security profile has access to. Please note that not all forms and workspaces can be personalized. If a form or workspace is unable to be personalized, the personalization button will not be available.

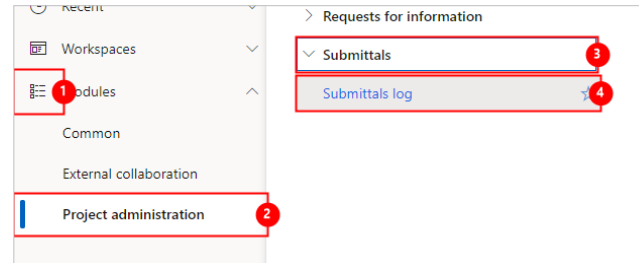
### 2.10.2. Work Instructions

#### 2.10.2.1. Create a New List

Your workspaces in PM4+ are predefined with activities and information lists that help you to work efficiently. Customize a workspace further by adding a new list created from a custom view.

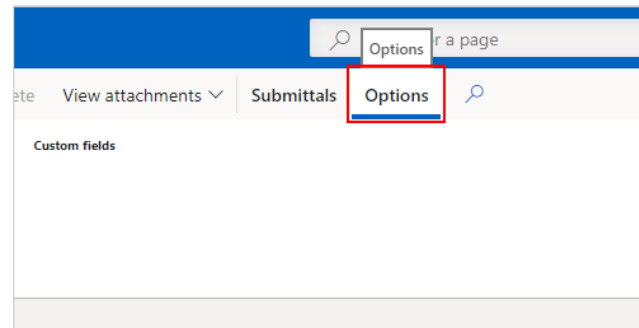
This example shows how to add a custom tabbed list about the Submittal log, but can be done for any log that your security profile has access to.

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.



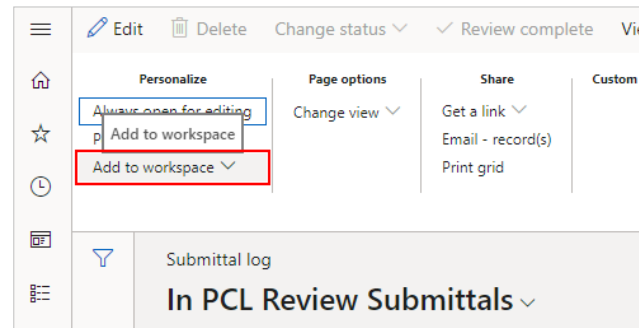
Ensure you have created and saved the view you want to make a list out of. See the work instruction called 'Create a Custom View' for more information.

When the log is filtered to the desired view, and the view is saved, click on the **Options** tab from the action pane.



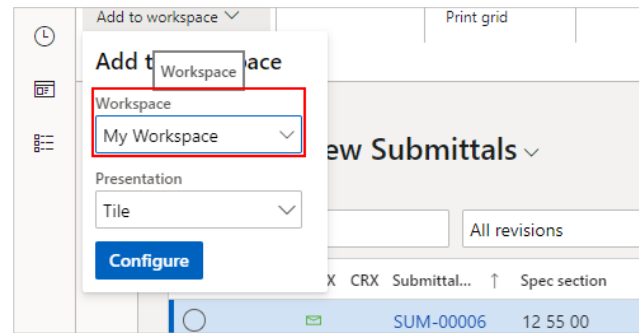
Ensure you have created and saved the view you want to make a list out of.

From the 'Personalize' group, select **Add to workspace** button.

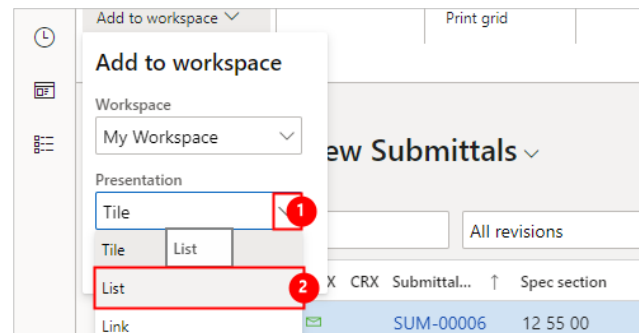




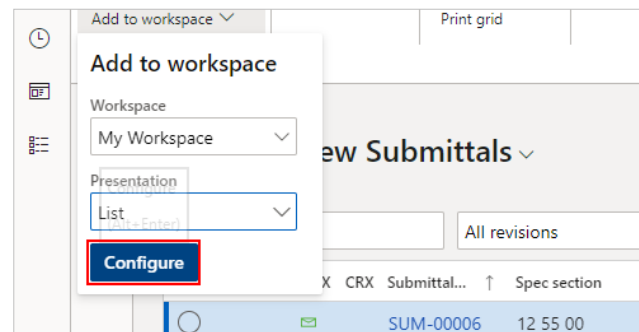
Ensure the right Workspace is selected from the **Workspace** drop-down.



1. Click on the **Presentation** drop-down.
2. Click on **List**.

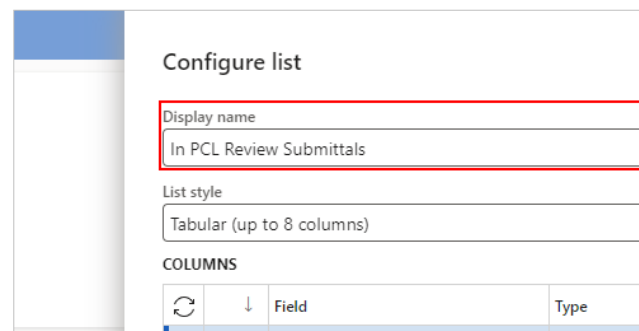


Click on the **Configure** button.

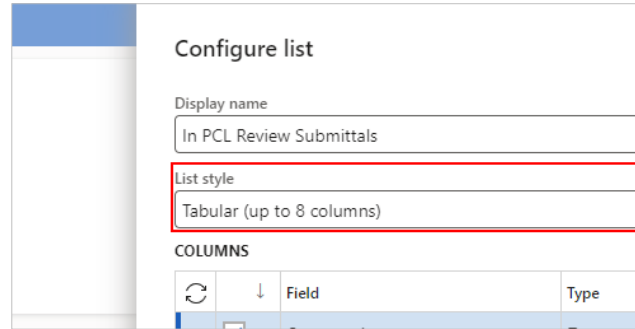


The 'Configure list' dialog opens.

Click on the **Display Name** field - Enter the name for the tab. This appears in the workspace on the tab the user will click on to see the list.



In the **List style** field, select the number of columns to display in the list.



**Configure list**

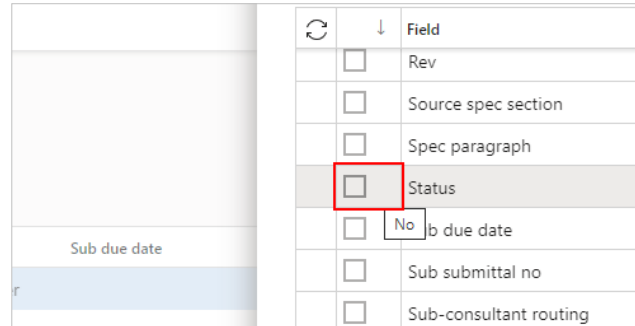
Display name  
In PCL Review Submittals

List style  
Tabular (up to 8 columns)

**COLUMNS**

	Field	Type
<input type="checkbox"/>	Rev	
<input type="checkbox"/>	Source spec section	
<input type="checkbox"/>	Spec paragraph	
<input type="checkbox"/>	Status	
<input type="checkbox"/>	Sub due date	
<input type="checkbox"/>	Sub submittal no	
<input type="checkbox"/>	Sub-consultant routing	

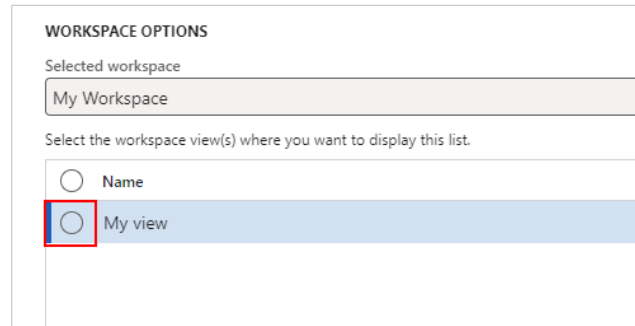
Click on the **Selection** checkbox beside the fields you want to display in the list.



	Field	Type
<input type="checkbox"/>	Rev	
<input type="checkbox"/>	Source spec section	
<input type="checkbox"/>	Spec paragraph	
<input checked="" type="checkbox"/>	Status	
<input type="checkbox"/>	Sub due date	
<input type="checkbox"/>	Sub submittal no	
<input type="checkbox"/>	Sub-consultant routing	

The main fields that may be most useful to add to the list are displayed at the top of the list of selections. For example if you are working with a job contact list, the address book is the first table you see. Make your selections from this part of the list first.

You can choose which workspace views you want the list to display in. Click on the **View** to apply the customization. Note: Only 'Personal views' can be customized. For more information on how to create a personal view, refer to [Create a Custom View work instruction](#).



**WORKSPACE OPTIONS**

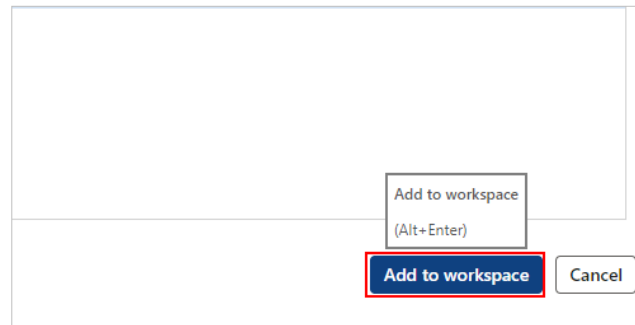
Selected workspace  
My Workspace

Select the workspace view(s) where you want to display this list.

Name

My view

Click on the **Add to workspace** button.

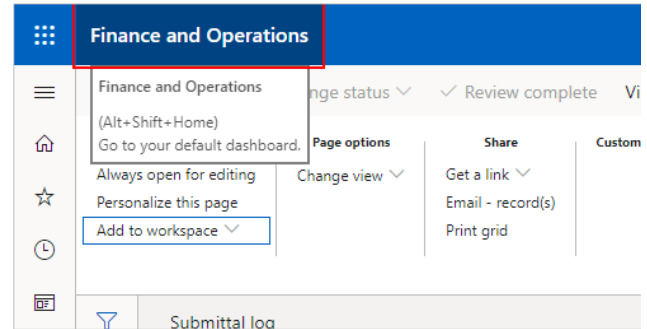


Add to workspace  
(Alt+Enter)

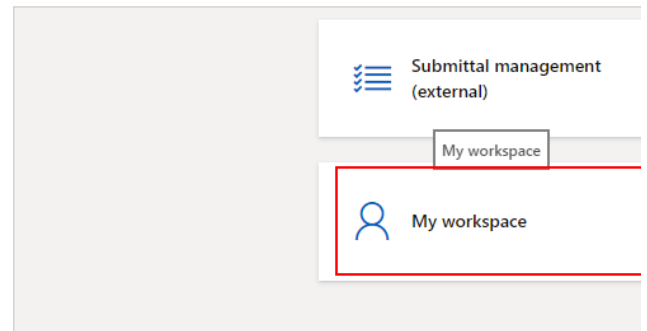
**Add to workspace** Cancel

If you select too many fields to display, the system displays an error message. You cannot advance until you correct the error. Review the list and deselect until you have an allowable number of fields.

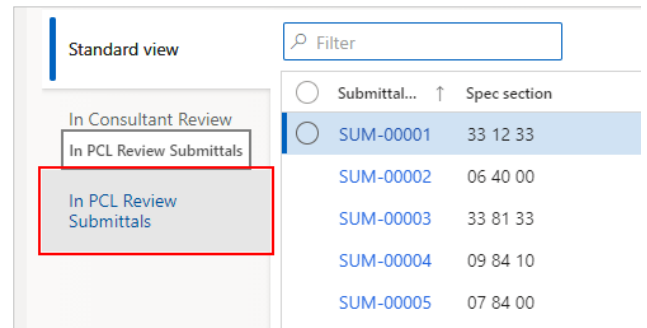
To view the list that was created, click on the **Finance and Operations** button to return to the PM4+ Dashboard.



Return to the **Workspace** the workspace list was added to.



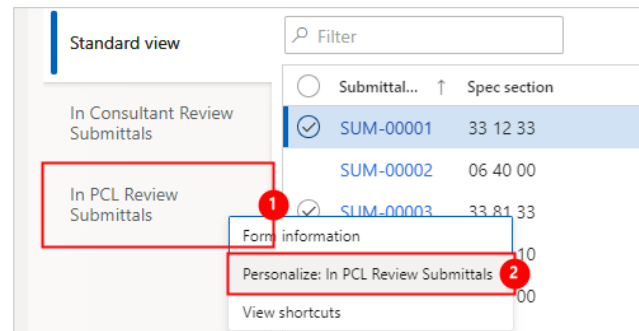
Confirm the list was created and added to the bottom of tabbed lists.



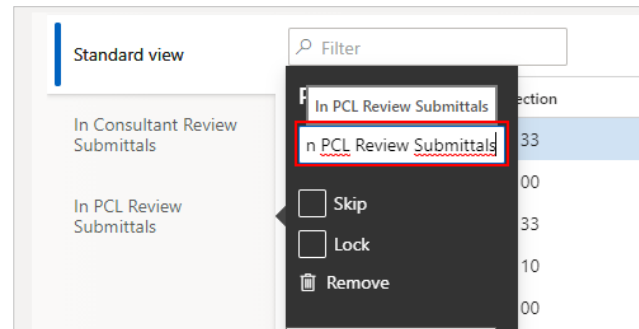
You can only modify the name of, or remove tabbed lists you created. The following sections describe the actions you can take once the list is visible in the workspace to which you added it.

### 2.10.2.2. Rename or Remove a List

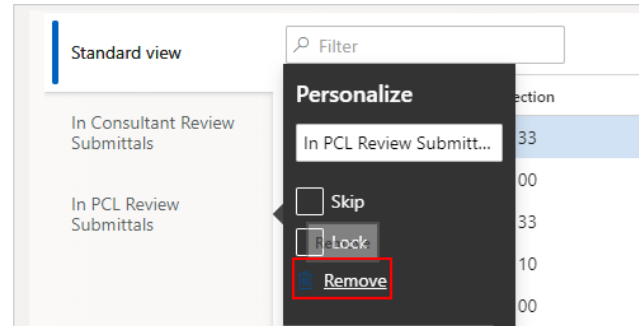
1. Right-click the **List** you want to remove or modify.
2. Click on **Personalize: [Name of List]**.



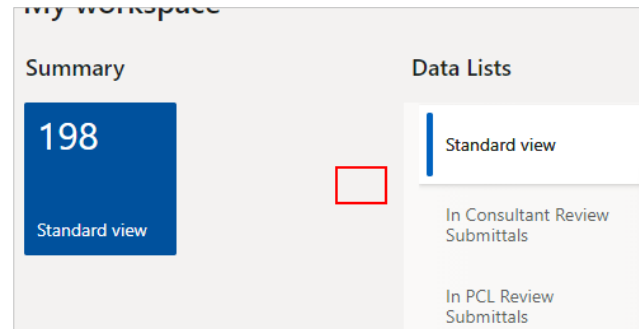
To change the name of a list, update the name in the **Name** field.



To remove the list, click on the **Remove** button.

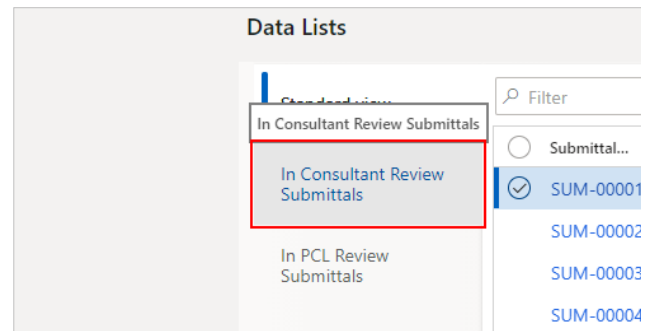


Click outside the menu area to close the menu.

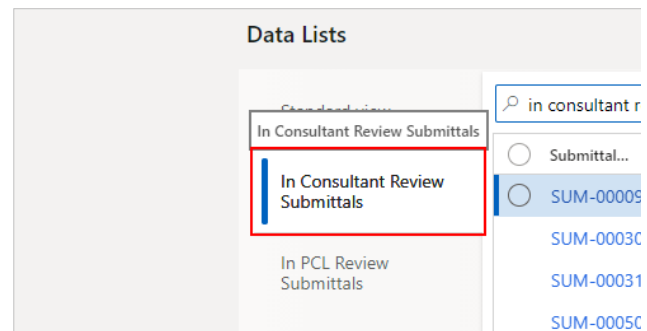


### 2.10.2.3. Reorder a List Item in the Tabbed List Group

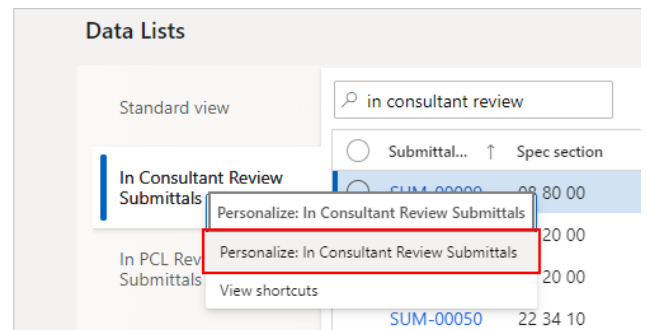
Click on the **List** you want to reorder.



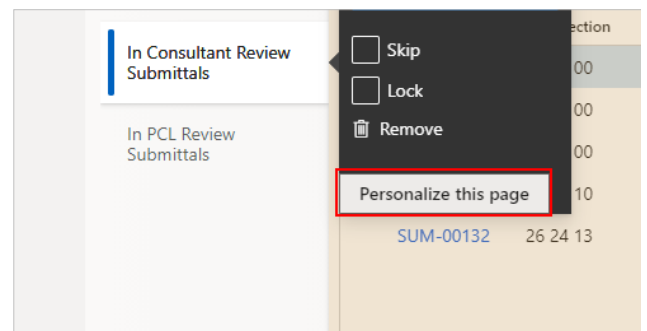
Right click on the **List**.



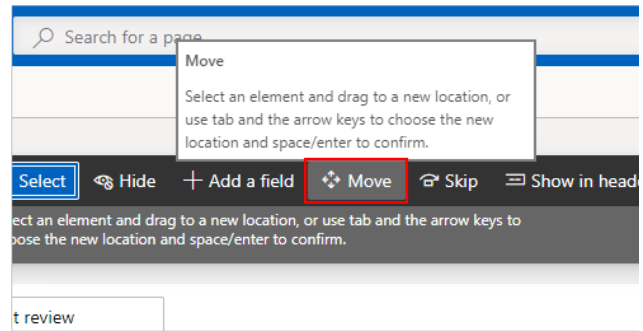
Click on **Personalize: [Name of List]**.



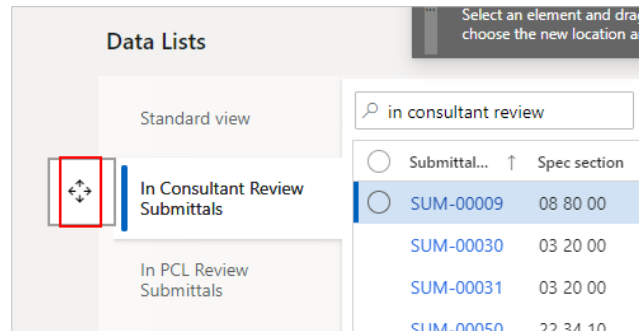
Click on the **Personalize this page** button.



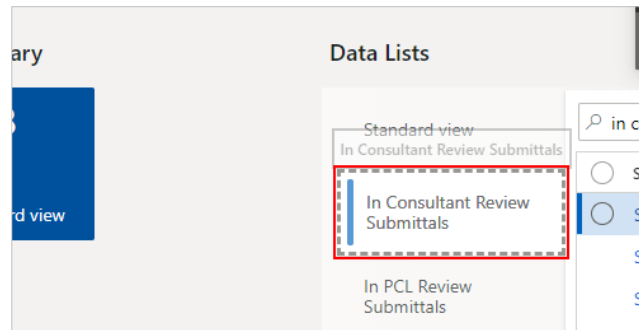
From the toolbar, click on the **Move** button.



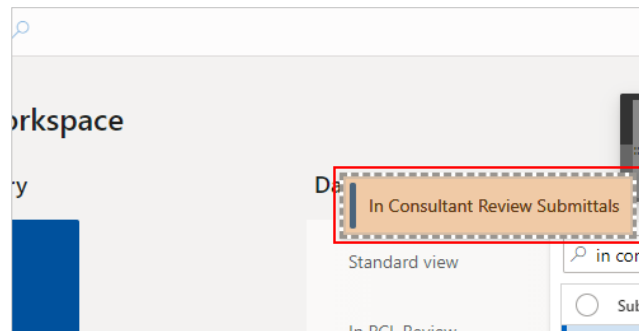
Click on the **Move** icon located on the tab you want to move.



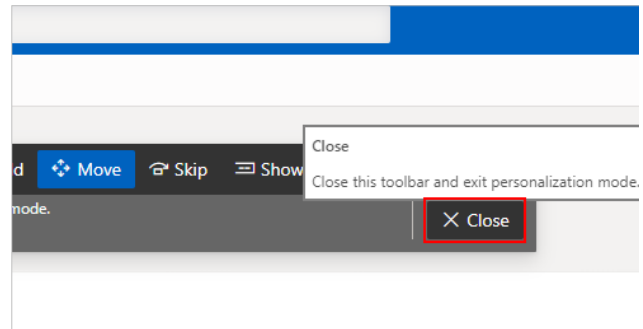
Click and drag the tab to the desired position.



Release the mouse to place the **List** in the new location.

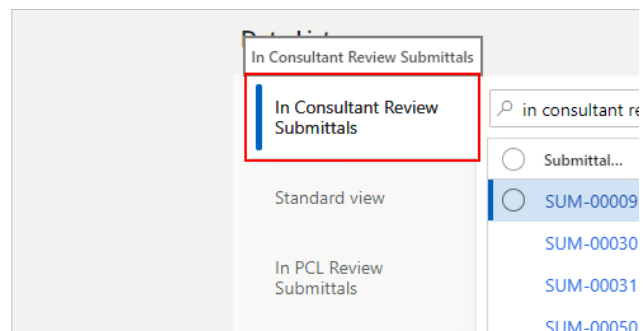


Click on the **Close** button to close the toolbar.

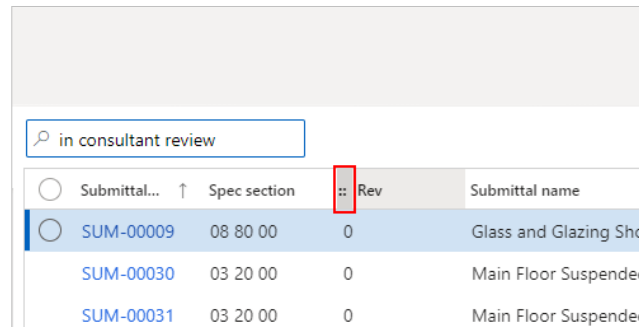


### 2.10.2.4. Move a Column

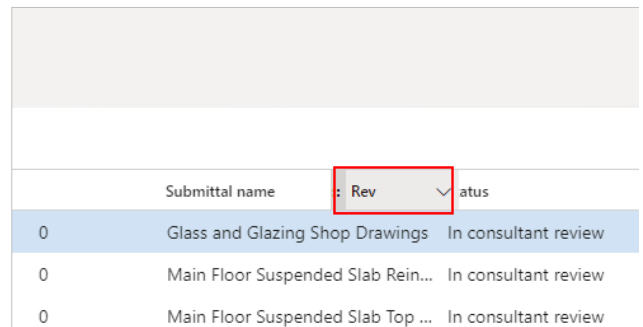
Click on the **List** you want to move a column in.



Click on and drag the **Move** icon in the column header you want to relocate.



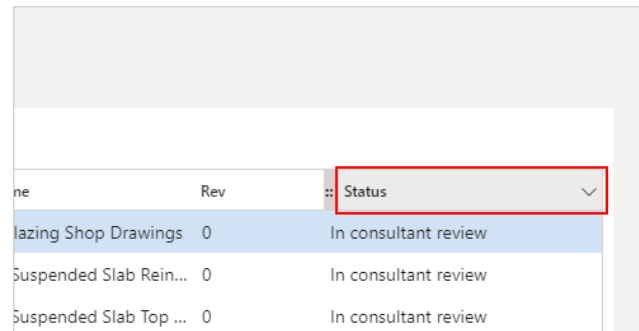
Release the **Column header** to place the column in the new location.



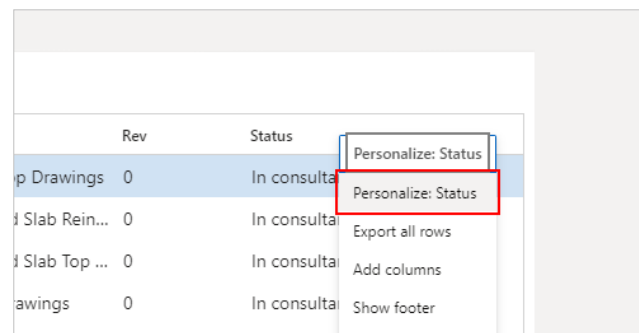
Repeat these steps until your columns are in the desired order.

### 2.10.2.5. Remove a Column

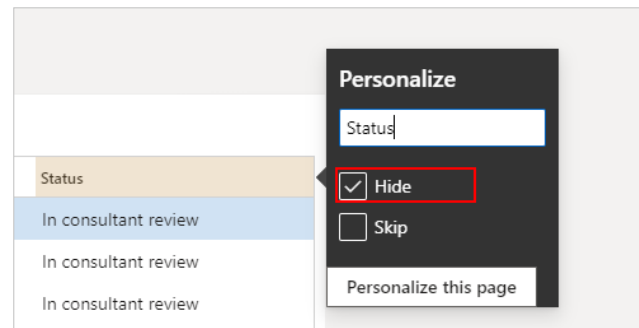
Right-click on the **Header column** you want to modify.



Click on **Personalize: [Column Name]**.



Click on the **Hide** checkbox.



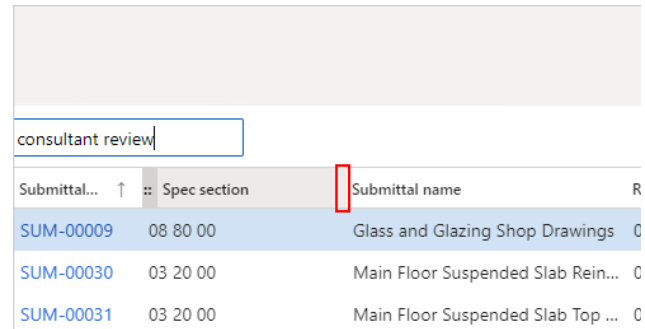
The column is now hidden from the list.

Submittal...	↑	Spec section	Submittal name	R
SUM-00009		08 80 00	Glass and Glazing Shop Drawings	0
SUM-00030		03 20 00	Main Floor Suspended Slab Rein...	0
SUM-00031		03 20 00	Main Floor Suspended Slab Top ...	0
SUM-00050		22 34 10	Water Heater Shop Drawings	0
SUM-00132		26 24 13	Service Distribution	0

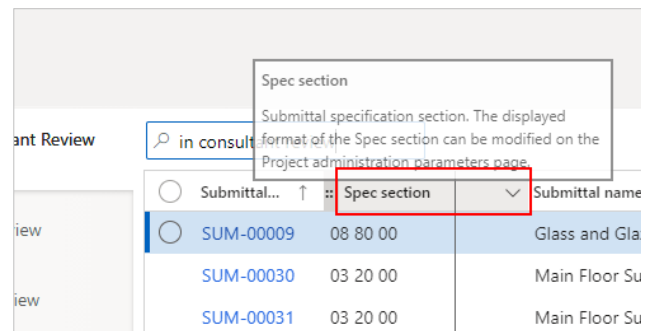
### 2.10.2.6. Adjust a Column Width in a List



Find the Column you want to make wider or narrower and move the mouse over the right side of the column border until the pointer changes to a double arrow.



Click and hold the mouse button, and drag in the direction to either make the column larger or smaller.



Release the mouse button when the column is the size you want.

Repeat these steps until all the columns are the desired width.

### 2.10.3. Conclusion

Now that you have an understanding of how to personalize a workspace list, proceed to the next work instruction.

## 2.11. Personalize a Workspace Tile

### 2.11.1. Introduction

#### 2.11.1.1. Objective

This work instruction covers how to personalize a workspace by adding a new tile.

#### 2.11.1.2. Background Information

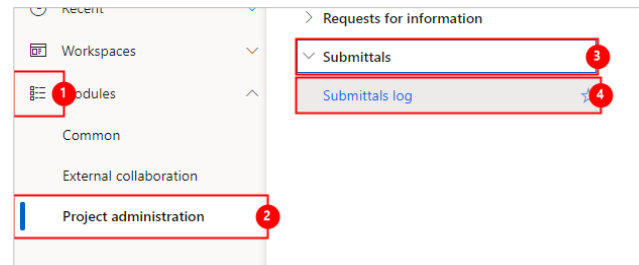
Existing and custom created workspaces can be personalized to fit the project's needs. In this instruction, learn how to add a tile to a workspace to allow a quick view of, and navigation to, a filtered log.

### 2.11.2. Work Instructions

Create additional information or count tiles in any workspace if the information you would like to see is not available by default. Remember, personalizations are only visible to you. Clicking on an information tile navigates you to the source log the tile was based on.

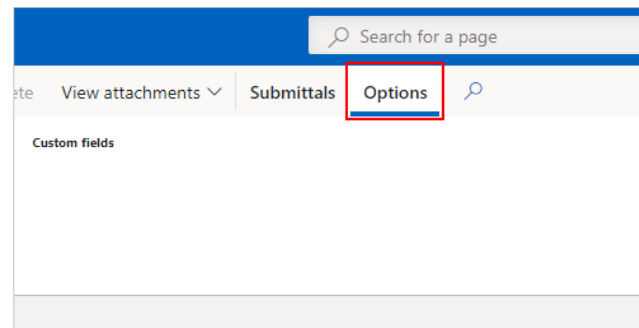
This example is in the Submittal log, but you can only create workspace tiles for any log that your security profile has access to.

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.



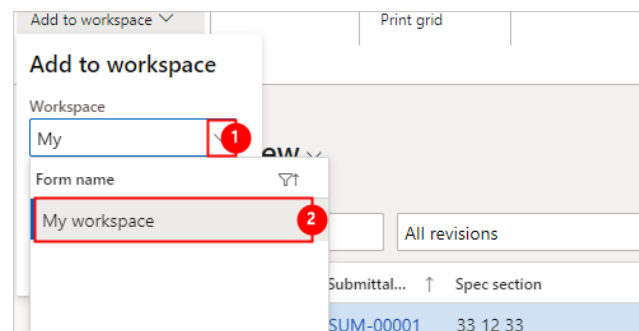
Filter and re-arrange the log, according to the view you want to see each time you click the custom information tile in the workspace. See the work instruction called 'Create a Custom View' for more information.

When the log is filtered to the desired view, and the view is saved, click on the **Options** tab from the action pane.

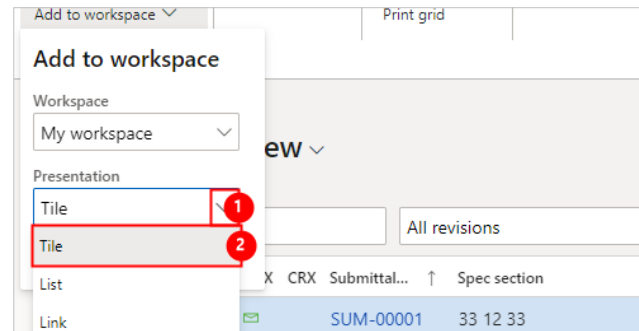


Ensure you have created and saved the view you want to make an information tile out of.

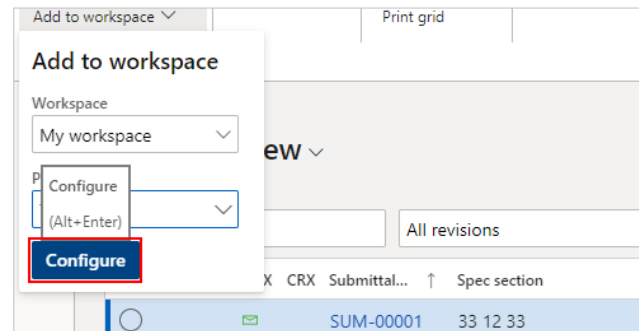
1. Click on the **Workspace** drop-down and start typing the name of the workspace you want to add the tile to (this could be a default workspace or a custom workspace you created).
2. Select the desired **Workspace** the tile should appear in.



1. Click on the **Presentation** field.
2. Click on the **Tile** option.

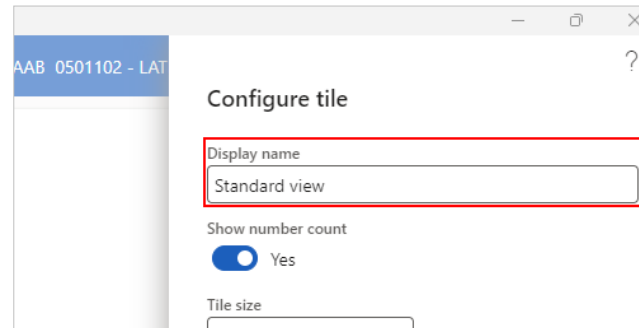


Click on the **Configure** button.

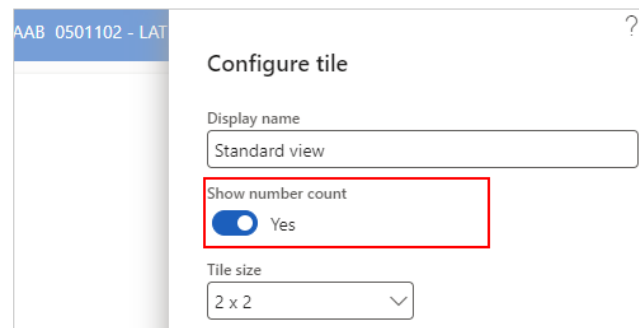


The 'Configure tile' dialog opens.

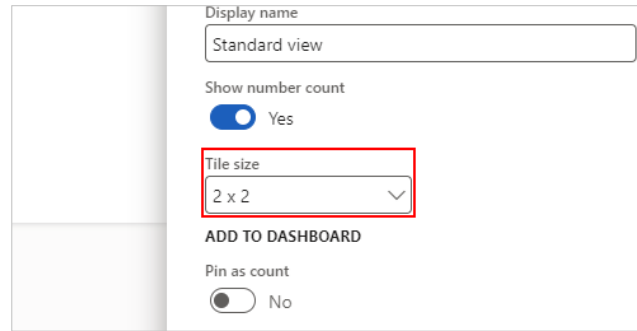
If desired, you can edit the **Display name** field with the text you want to appear as the tile label.



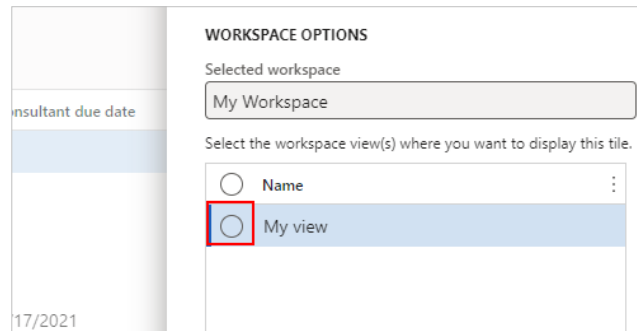
Set the **Show number count** toggle to 'Yes', to include a numeric count of records currently matching the filtered view.



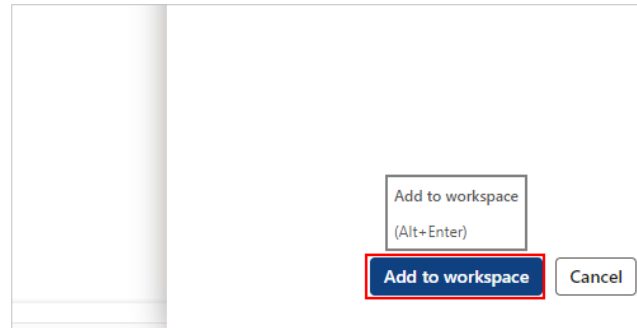
You can set the **Tile size** by selecting from the drop-down. This will determine how large or small your tile will display in your workspace. If you are creating multiple tiles for different filtered views, this may help identify ones of greater importance so they stand out from the other tiles.



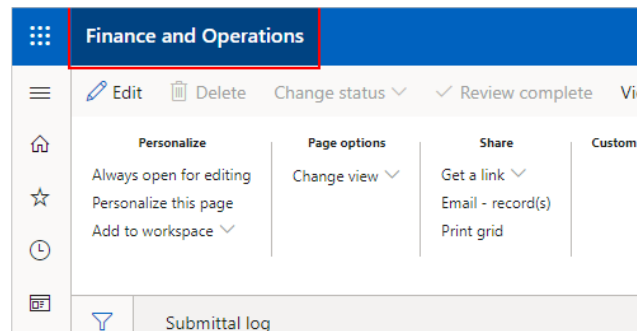
You can choose which workspace views you want the tile to display in. Click on the **View** to apply the customization. Note: Only 'Personal views' can be customized. For more information on how to create a personal view, refer to [Create a Custom View work instruction](#).



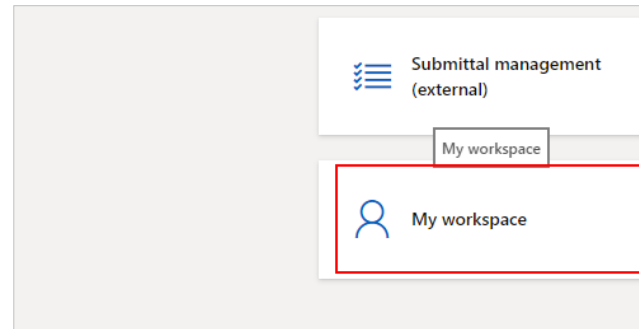
Click on the **Add to workspace** button.



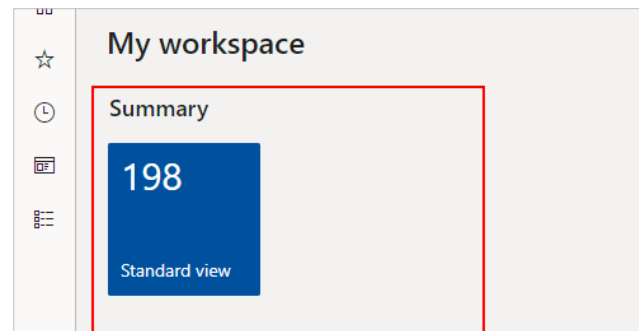
Click on the **Finance and Operations** button to return back to the Dashboard.



Click on the **Workspace** to confirm the new tile is visible.



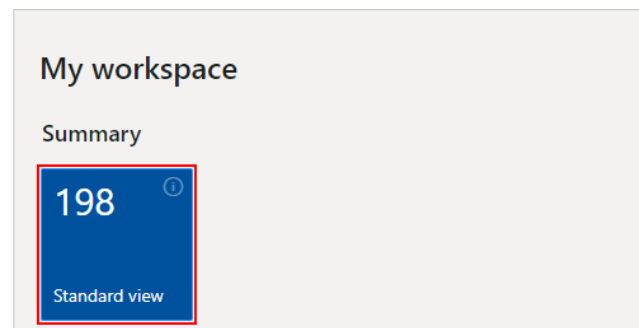
Select the **Tile** to test and confirm the record count. Use it to jump to your personalized view of a log.



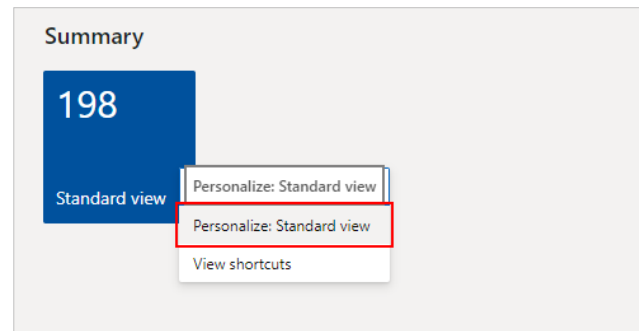
### 2.11.2.1. Remove a Tile or Modify a Tile Name

You can change the label on any tile that you find in your workspace; however, you can only delete a tile you created.

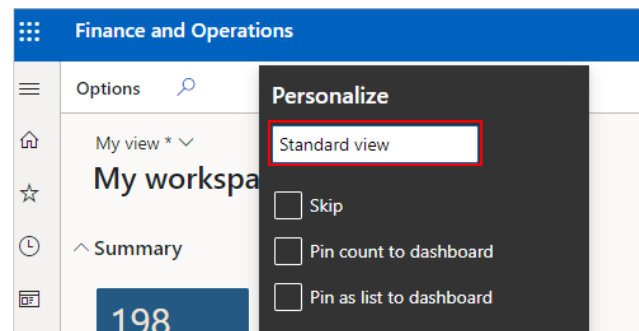
Right-click on the **Tile** to remove or modify.



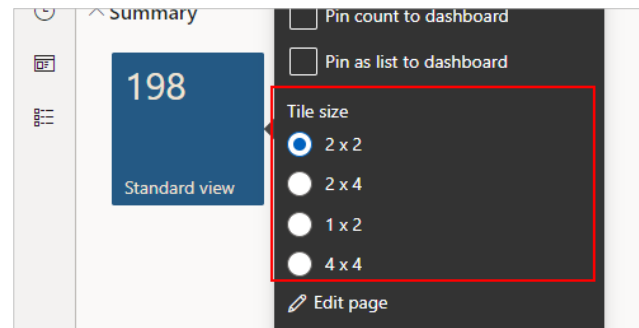
From the list, click on **Personalize: [Name of Tile]**.



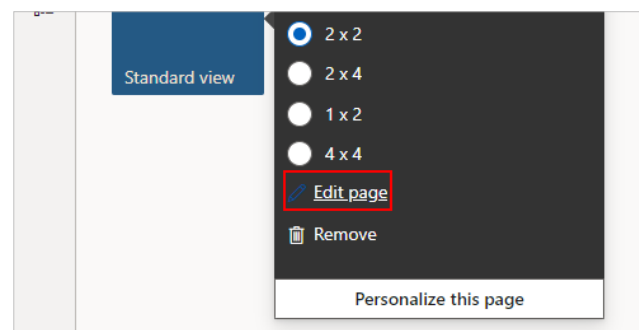
To change the name of a tile, update the text in the **Title** field.



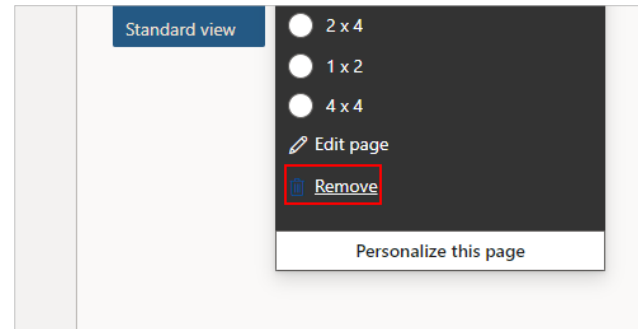
To change the **Tile size**, select from one of the options listed.



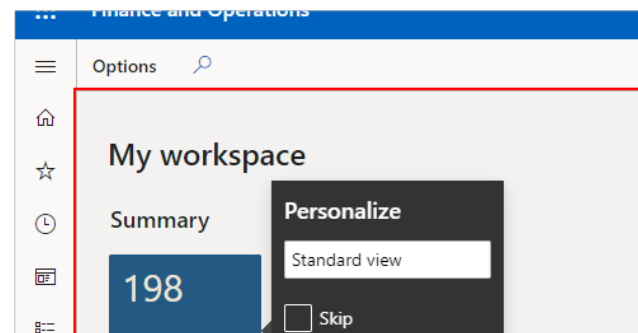
Alternatively, you can click the **Edit page** link to change the name of the tile.



To remove the title, click on the **Remove** link.



Click outside the menu area to close the menu.



### 2.11.3. Conclusion

Now that you have an understanding of how to personalize a workspace tile, proceed to the next work instruction.

## 2.12. Set Your User Options

### 2.12.1. Introduction

#### 2.12.1.1. Objective

This work instruction covers how to set your user options.

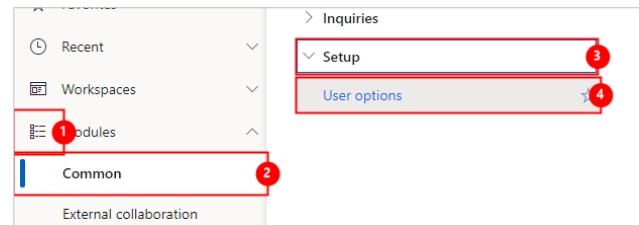
#### 2.12.1.2. Background Information

PM4+ permits users to customize your screen layout by changing values in the User Options. Options are linked to each user and are not project specific.

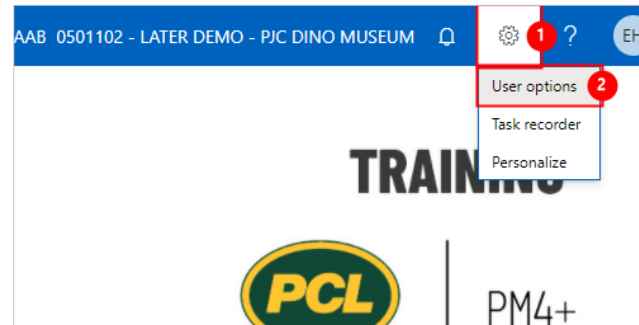
### 2.12.2. Work Instructions

#### 2.12.2.1. Navigation Options

1. Click on the **Modules** icon.
2. Click on the **Common** module.
3. Click on the **Setup** menu section.
4. Click on the **User options** menu item.

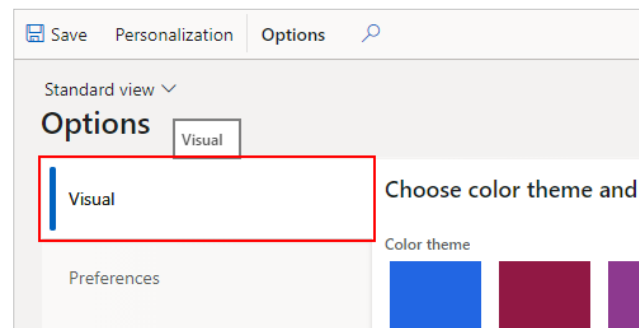


1. Alternatively, click on the **Cog** icon in the top right-hand corner of the Dashboard.
2. Click on **User options**.

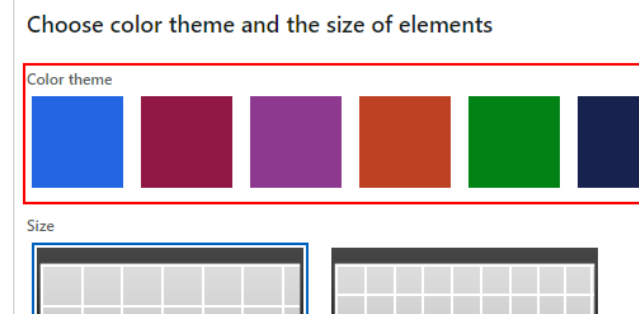


#### 2.12.2.2. Visual Tab

Click on the **Visual** tab to view available options.



If desired, click on a **Color Tile** to set a new color for the interface. This changes the background color in your instance of PM4+.



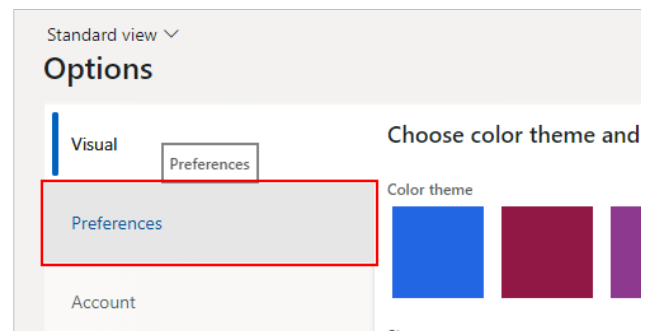


Set the **Grid size** of PM4+ to control how much content you see on the screen. Choose the small tiles to zoom out your view of PM4+ and fit more content on the screen.



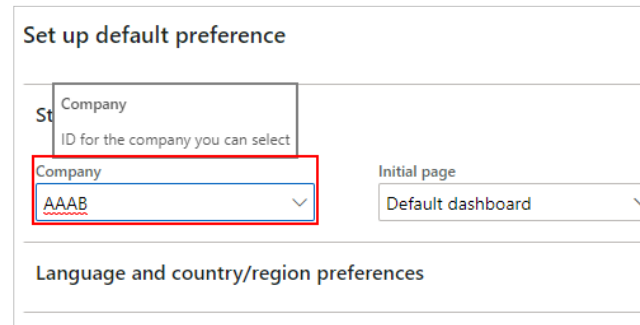
### 2.12.2.3. Preferences Tab

Click on the **Preferences** tab.



The most common reason to visit this tab might be if you work on multiple PM4+ projects and you want to change your default project (i.e. the one you are navigated to, if you click a generic link to PM4+).

The **Company** field lists all PM4+ projects you have access to. Keep in mind you can save 'favorites' or 'bookmarks' in your browser to each PM4+ project site individually.



The **Initial page** field will allow you to select which screen you want to see when you launch PM4+. The 'Home' and 'Finance and Operations' buttons also will navigate you to your selected 'Initial page'.

By default, the 'Default dashboard' opens which displays the workspaces you have access to. The available logs to choose as your default depends on your project role. Alternatively, you can choose one of the following logs:

3. CRX log
4. Current forecast
5. DSR log
6. Field production log
7. Quality log
8. RFI log
9. Submittals log

Note: To ensure your selected 'Initial page' launches, make sure you navigate to PM4+ using the root URL.

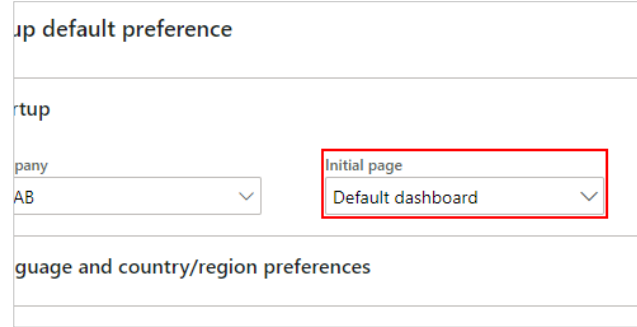
Note: If you have a different 'Initial page' selected other than 'Default dashboard' and you would like to see the 'Default dashboard' you can use can select 'Common - Common - Default dashboard' from the navigation pane.

The **Default view/edit mode** field controls whether a newly opened log is in 'Edit' or 'View' mode.

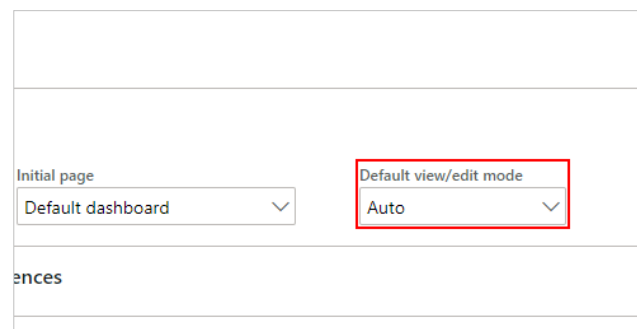
When a screen is in 'Edit' mode, the button in the top left of a log says 'Save'. When a screen is in 'View' mode, the same button says 'Edit'.

The 'Auto' option makes the determination for you based on the type of page you are opening and the likelihood of what you would consistently require.

Note: There are very few elements you can edit. If you set to 'Edit', you will not be prompted to go to edit view when trying to update them.

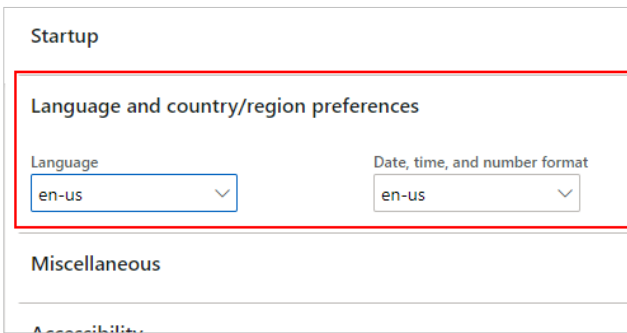


The screenshot shows a settings panel titled 'Initial page default preference'. It contains a dropdown menu for 'Company' with 'AB' selected. To its right is a dropdown menu for 'Initial page' with 'Default dashboard' selected. This 'Initial page' dropdown is highlighted with a red rectangular box. Below this section is a section titled 'Language and country/region preferences'.



The screenshot shows a settings panel with a dropdown menu for 'Initial page' with 'Default dashboard' selected. To its right is a dropdown menu for 'Default view/edit mode' with 'Auto' selected. This 'Default view/edit mode' dropdown is highlighted with a red rectangular box. Below this section is a section titled 'Preferences'.

The **Language and country/region preferences** section contains values that are usually set by the District Project Administrator. Change only if necessary.



Startup

Language and country/region preferences

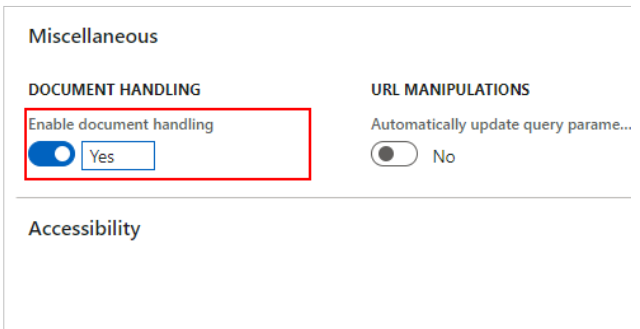
Language: en-us

Date, time, and number format: en-us

Miscellaneous

Accessibility

Leave the **Enable document handling** toggle set to 'Yes'.



Miscellaneous

DOCUMENT HANDLING

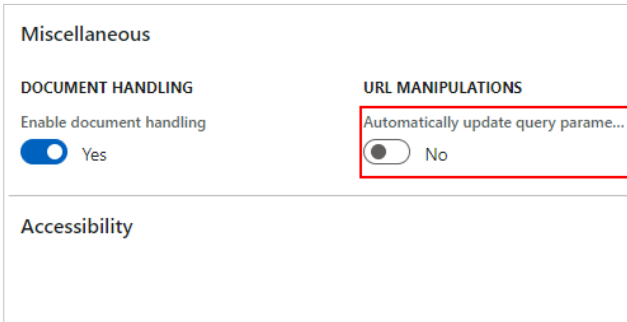
Enable document handling:  Yes

URL MANIPULATIONS

Automatically update query parameter:  No

Accessibility

Leave the **Automatically update query parameter** toggle set to default 'No'.



Miscellaneous

DOCUMENT HANDLING

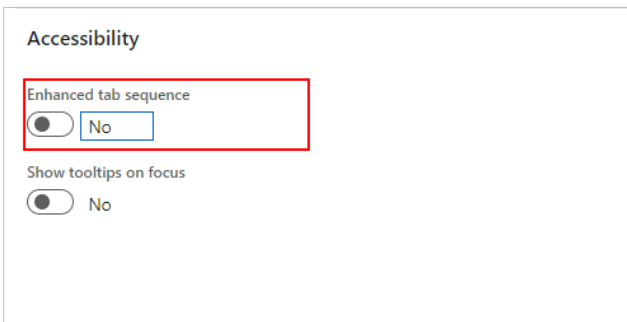
Enable document handling:  Yes

URL MANIPULATIONS

Automatically update query parameter:  No

Accessibility

The **Enhanced tab sequence** toggle makes all editable and read-only fields part of the tab sequence when Accessibility features for your environment are used. It is recommended to leave this set to 'No'.




Accessibility

Enhanced tab sequence:  No

Show tooltips on focus:  No

#### 2.12.2.4. Account Tab

Click on the **Account** tab.



Visual | Set up default preferences

Preferences | Startup

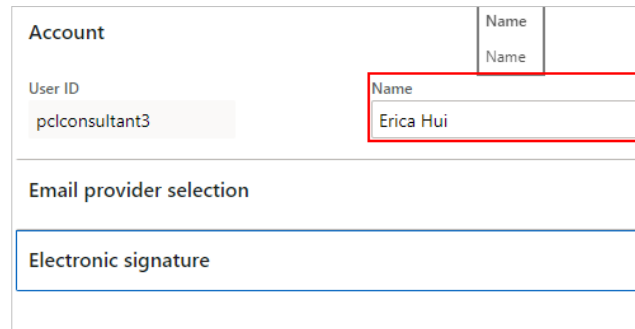
**Account** | Language and country/region

Workflow | Miscellaneous

| Accessibility

This tab contains information that is created from your user profile and does not require any modifications.

In the **Account** fast tab, the **Name** field is the only field that can be changed.



Account

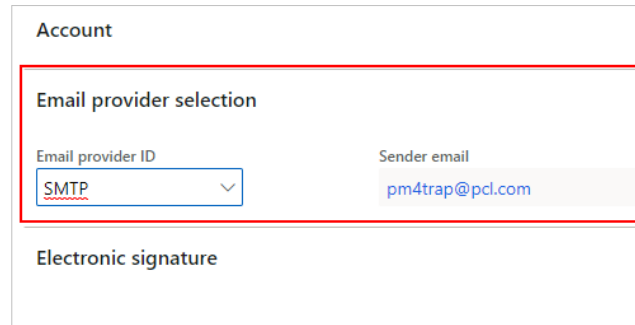
User ID: pclconsultant3

Name: Erica Hui

Email provider selection

Electronic signature

The **Email provider selection** section contains the values used by PM4+ when sending emails.



Account

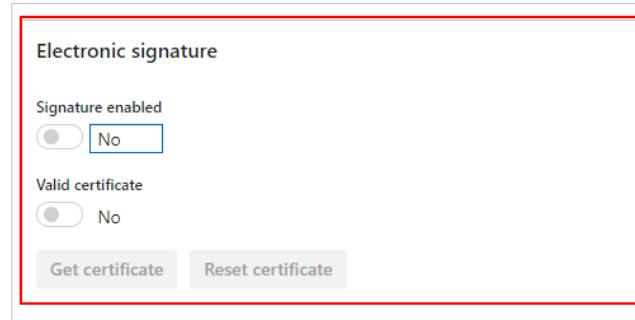
Email provider selection

Email provider ID: SMTP

Sender email: pm4trap@pcl.com

Electronic signature

The **Electronic signature** fast tab is not in use at this time and can be disregarded.



Electronic signature

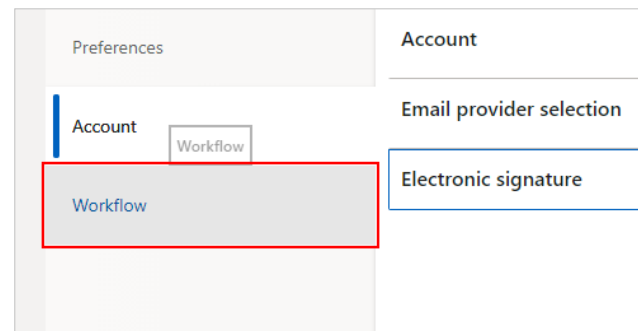
Signature enabled: No

Valid certificate: No

Get certificate | Reset certificate

### 2.12.2.5. Workflow Tab

The **Workflow** tab is not used in PM4+.



### 2.12.3. Conclusion

Now that you have an understanding of how to set your user options, proceed to the next work instruction.

### 3. RFIs

#### 3.1. RFI Management Workspace

##### 3.1.1. Introduction

###### 3.1.1.1. Objective

This work instruction covers the RFI Management workspace for Consultants and the Design Team.

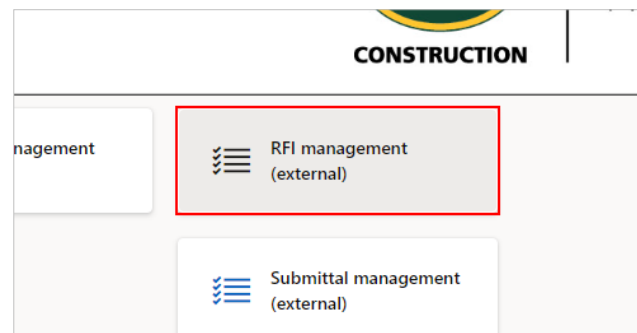
###### 3.1.1.2. Background Information

You can track and monitor the RFIs assigned to you for review in your company's specific collaborative workspace.

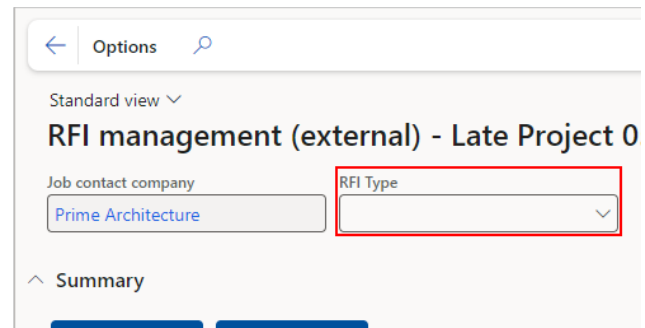
##### 3.1.2. Work Instructions

Click on the **RFI management (external)** tile in the PM4+ dashboard.

This workspace provides a single location where you can track and monitor the RFIs that you need to review.



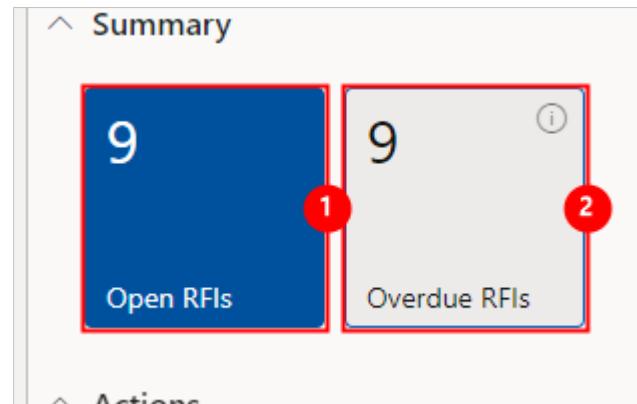
The **RFI Type** field filters the workspace according to the selected RFI type. By default all RFI types you have access to, are included when this field is blank. Multiple RFI types are optional and may not be in use on your project. Talk to the PCL Project Manager for clarification on what types you should see.



###### 3.1.2.1. Tiles

Click on a count tile to navigate you to the RFI log, filtered to only display the records from the selected count.

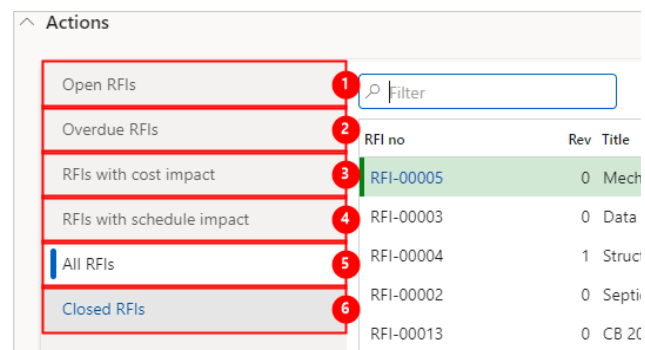
1. The **Open RFIs** count tile displays all RFIs assigned to you in 'Open' status and requires a response from you or your company. When a project team determines that the 'Owner review' feature is appropriate, an additional status called, 'In Owner Review' is also included in the count.
2. The **Overdue RFIs** count tile displays all RFIs assigned to you in 'Open' status where the due date has passed and requires a response from you or your company.



### 3.1.2.2. Tabbed Lists

There are six tabbed lists in the workspace:

1. The **Open RFIs** tabbed lists displays the same number of records as the count tile, but more details are visible including the Ball in court of and Sub-consultant routing columns.
2. The **Overdue RFIs** tabbed list displays the same number of records as the count tile, but more details are visible.
3. The **RFIs with cost Impact** tabbed list displays RFIs assigned to your company where a cost impact has been identified.
4. The **RFIs with schedule Impact** tabbed list displays RFIs assigned to your company where a schedule impact has been identified.
5. The **All RFIs** tabbed list displays all RFIs for the project and who's court they are in regardless of assigned responsibility for a response.
6. The **Closed RFIs** tabbed list displays all



RFIs with a 'Closed' status.

### 3.1.3. Conclusion

Now that you have an understanding of the RFI Management workspace, proceed to the next work instruction.

## 3.2. Use the RFI Ball in Court View

### 3.2.1. Introduction

#### 3.2.1.1. Objective

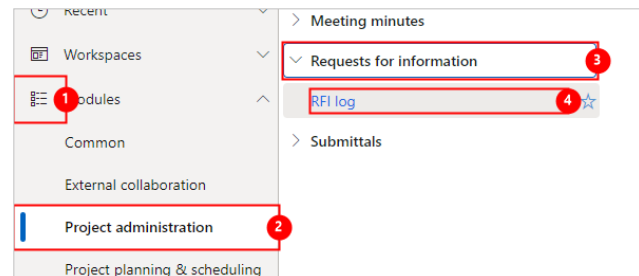
This work instruction covers the RFI Ball in Court view.

#### 3.2.1.2. Background Information

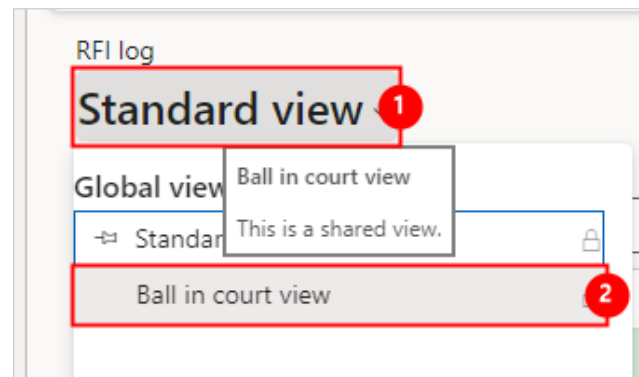
The RFI ball in court view helps you quickly determine who is currently responsible for an RFI review or response.

### 3.2.2. Work Instructions

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Requests for information** menu section.
4. Click on the **RFI log** menu item.

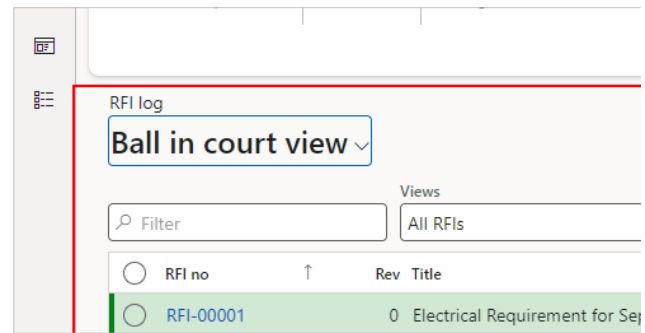


1. Click on the drop down next to the named view to show the list of available views for this log.
2. Select the **Ball in court view**.





The **Ball in court view** is applied to the RFI log.



The RFI log is filtered to only display records in 'Open', 'In owner review', and 'In PCL review' statuses.

Urgency	Status	Posted
...	In PCL review	No
ity	Open	No
	Open	No
...	Open	No
a...	Open	No

Exclusively in the Ball in Court view, there are three new columns in the RFI log:

1. 'Ball in court of'.
2. 'Company contact'.
3. 'Sub-consultant routing'.

The **Ball in court of** column displays what company is currently responsible for the RFI based on the current status of the RFI.

Ball in court of	Company contact
PCL Construction Resources Inc.	Employee 1
Prime Architecture	Consultant 3
Prime Architecture	Consultant 3
Prime Architecture	Consultant 3
Prime Architecture	Consultant 3

For 'In PCL review' status, the ball is in the court of the PCL company.

For 'Open' status, the ball is in the court of the company named in the 'Assigned to company' field (usually the primary Consultant).

For 'In owner review' status, the ball is in the court of the company named in the 'Owner company' field (when this status option is in use).

The **Company contact** column displays the contact from the company who is named in the 'header' of the RFI.

For 'In PCL review' status, the company contact is in the 'PCL reviewer' field.

For 'Open' status, the company contact is in the 'Assigned to' field.

For 'In owner review' status, the company contact is in the 'Owner' field.

Part of	Company contact	Sub-consultant rou
struction Resources Inc.	Employee 1	
chitecture	Consultant 3	None
chitecture	Consultant 3	None
chitecture	Consultant 3	None
chitecture	Consultant 3	None
chitecture	Consultant 3	None

The **Sub-consultant routing** column indicates what is in the Sub-consultant routing tab details while the RFI record is in 'Open' status.

This column will always be blank for any other status than 'Open'.

This column has three values while in 'Open' status:

1. 'None' if there is no Sub-consultant routing.
2. The next Sub-consultant company name(s) if there is an incomplete Subconsultant routing.
3. 'Complete', if all Sub-consultants have reviewed the RFI.

Note: Completion of a routing is indicated when the 'Review date' field for every row in the 'Sub-consultant routing' tab is filled in. This field is populated, either when the Sub-consultant clicks the 'Review complete' button, or if the primary Consultant, or PCL coordinator marks the review complete on behalf of the Sub-consultant.

Company contact	Sub-consultant routing
Employee 1	
Consultant 3	None
Consultant 3	None
Consultant 3	None
Consultant 3	None

### 3.2.3. Conclusion

Now that you have an understanding of the RFI ball in court view, proceed to the next work instruction.

## 3.3. Review and Respond to an RFI as a Primary Consultant

### 3.3.1. Introduction

#### 3.3.1.1. Objective

This work instruction covers how to review and respond to RFIs as the Primary Consultant.

### 3.3.1.2. Background Information

When an RFI is in 'Open' status, the Primary Consultant and optional Sub-consultants are required to review and respond. The Primary Consultant then returns the RFI back to PCL's court for a final review and distribution.

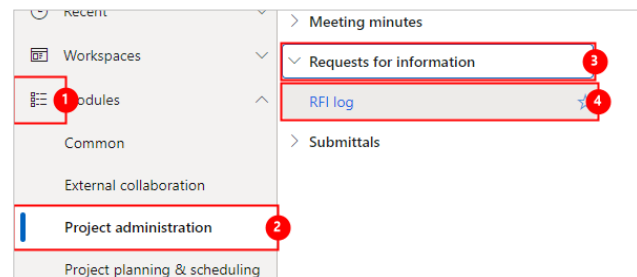
## 3.3.2. Work Instructions

### 3.3.2.1. Navigation

You may choose to navigate directly to the 'RFI log', to view all RFIs, or you may choose to navigate to your 'RFI Management' workspace to view just the RFIs in your company's court. Both navigation options are shown in this section.

#### 3.3.2.2. Navigate to the RFI Log

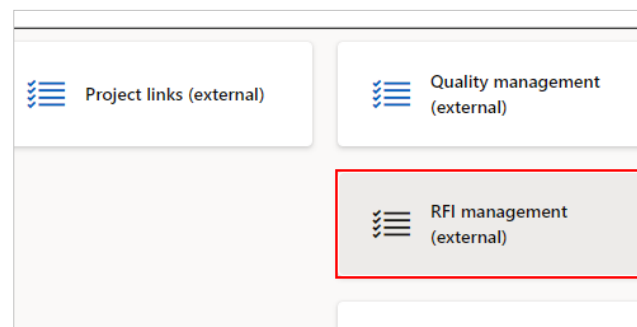
1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Requests for information** menu section.
4. Click on the **RFI log** menu item.



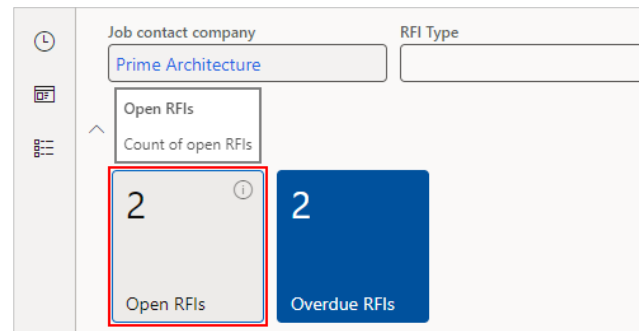
The RFI log is displayed.

#### 3.3.2.3. Navigating with the RFI Workspace

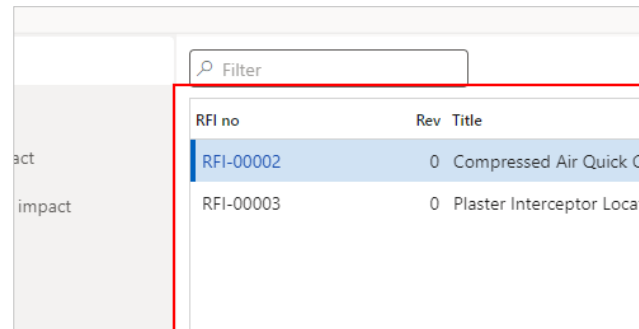
Click on **RFI management (external)** workspace.



The **Open RFIs** count tile displays a count of the RFIs that are open and currently assigned to you or your company.



The **Open RFIs** tabbed lists also offer filter lists of RFIs assigned to your company.

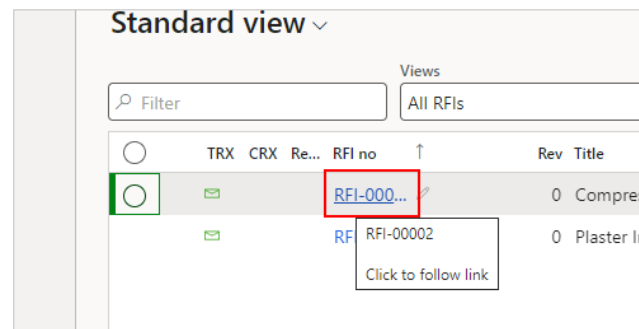


### 3.3.2.4. Respond to an RFI

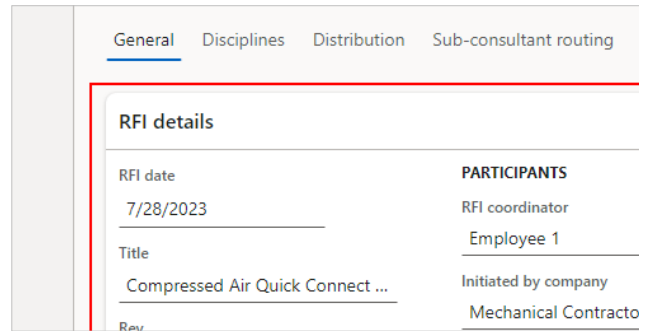
If you received an automated email about this RFI, it may also have contained an attached 'Open package'. This is a PDF file generated by the system when the status of the RFI is moved to 'Open'.

The same information in the package, is presented in the RFI record. If your project is using the 'Open package' generation feature, you can download a copy of it, from the RFI record.

Click on the **RFI no** hyperlink of the RFI you want to access.



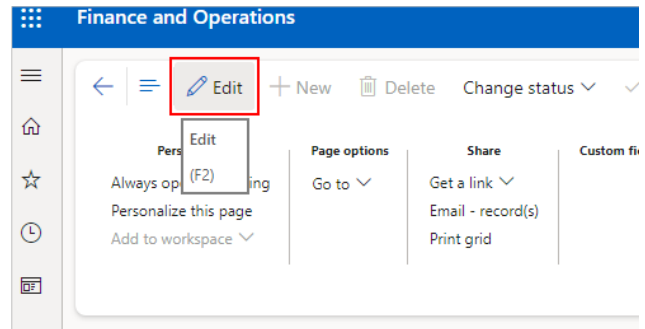
Review the **RFI details** fast tab.



The screenshot shows the 'RFI details' fast tab in a software interface. It has a tabbed header with 'General', 'Disciplines', 'Distribution', and 'Sub-consultant routing'. The 'General' tab is active. The 'RFI details' section contains the following information:

RFI date	7/28/2023	<b>PARTICIPANTS</b>
Title	Compressed Air Quick Connect ...	RFI coordinator
Rev.		Employee 1
		Initiated by company
		Mechanical Contracto

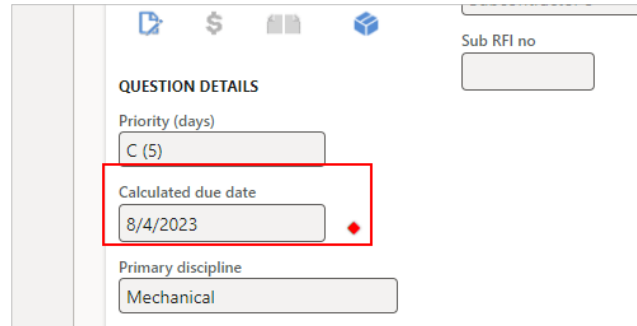
Click on the **Edit** button.



The screenshot shows the 'Finance and Operations' header in a software interface. The 'Edit' button, represented by a pencil icon, is highlighted with a red box. Below the header, there are various options like 'Always open', 'Personalize this page', 'Page options', 'Share', and 'Custom fi'.

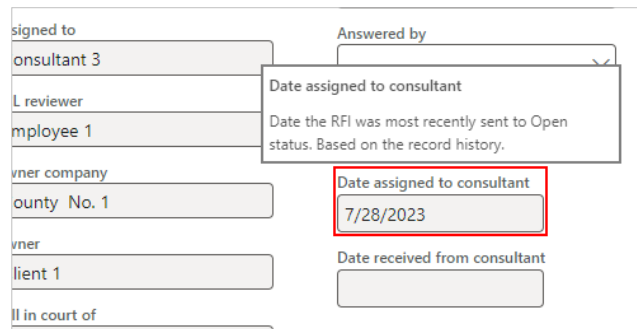
Note the **Calculated due date** field, which indicates the date your response is due to be returned to PCL.

The indicator to the right of this field displays a red icon when overdue, a green icon when it is not yet due, and a yellow icon if it is due today.



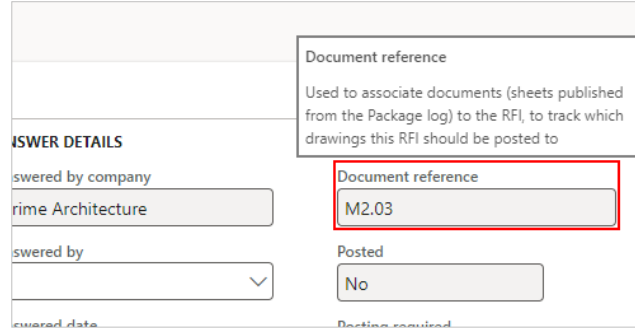
The screenshot shows the 'QUESTION DETAILS' section in a software interface. The 'Calculated due date' field is highlighted with a red box and contains the date '8/4/2023'. To the right of the date is a small red diamond icon. Other fields include 'Priority (days)' with 'C (5)', 'Primary discipline' with 'Mechanical', and 'Sub RFI no'.

The **Date assigned to consultant** field displays the date when the RFI was moved to 'Open'.



The screenshot shows a form with various fields. The 'Date assigned to consultant' field is highlighted with a red box and contains the date '7/28/2023'. A tooltip is visible over this field, containing the text: 'Date assigned to consultant', 'Date the RFI was most recently sent to Open status. Based on the record history.' Other fields include 'Signed to', 'Answered by', 'L reviewer', 'Employee 1', 'Owner company', 'County No. 1', 'Owner', 'Client 1', and 'Bill in court of'.

In the **Document reference** field, note any drawings impacted by the RFI.



Document reference  
Used to associate documents (sheets published from the Package log) to the RFI, to track which drawings this RFI should be posted to

**ANSWER DETAILS**

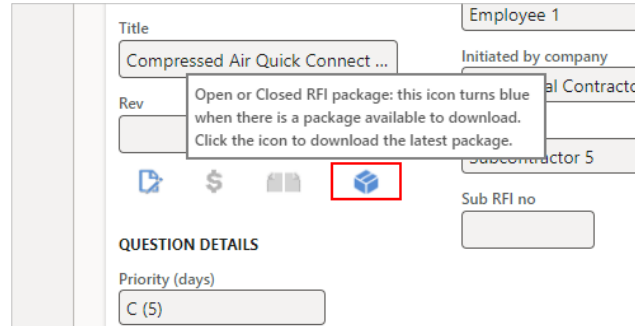
Answered by company  
Prime Architecture

Answered by  
[Dropdown]

Document reference  
M2.03

Posted  
No

Click on the **Package** icon to download and review the 'Open package' PDF file.



Title  
Compressed Air Quick Connect ...

Employee 1

Initiated by company  
[Dropdown]

Rev  
[Dropdown]

Open or Closed RFI package: this icon turns blue when there is a package available to download. Click the icon to download the latest package.

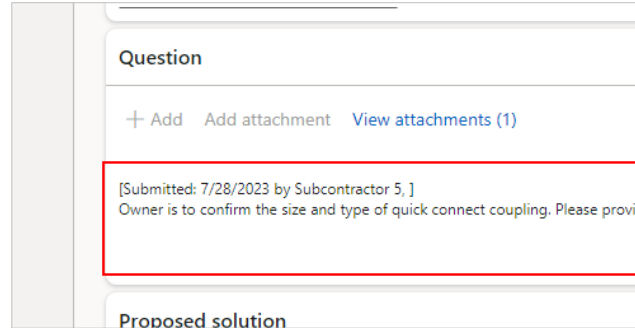
Subcontractor 5

Sub RFI no  
[Text]

**QUESTION DETAILS**

Priority (days)  
C (5)

You also have the option to review the information in the **Question** fast tab instead of viewing it in PDF format.



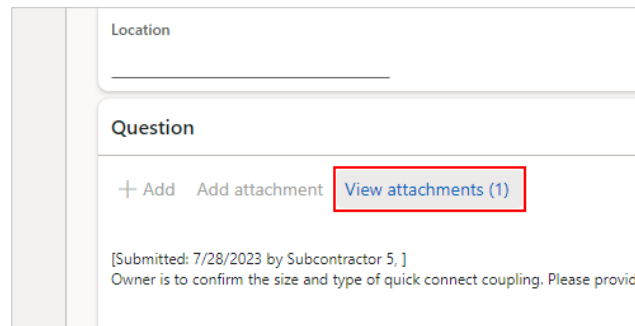
**Question**

+ Add Add attachment View attachments (1)

[Submitted: 7/28/2023 by Subcontractor 5, ]  
Owner is to confirm the size and type of quick connect coupling. Please provide

**Proposed solution**

If the **View attachments** button contains a number higher than (0), review the documents related to the 'Question':

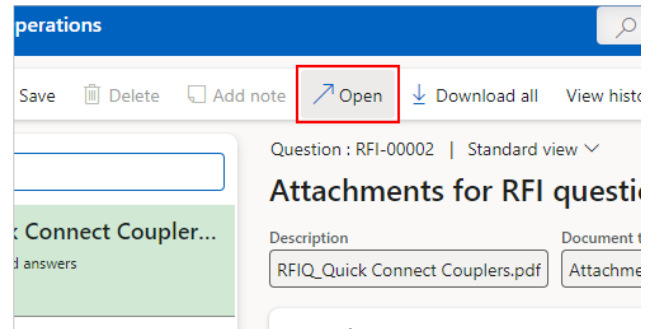


**Question**

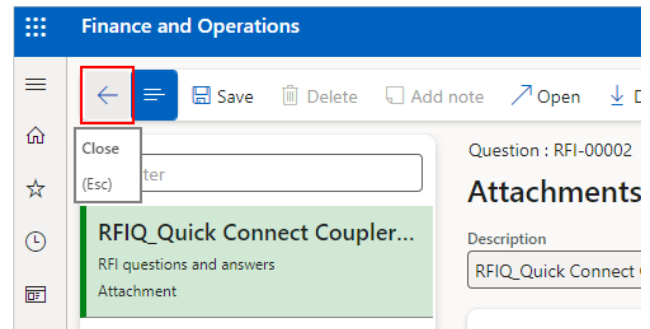
+ Add Add attachment View attachments (1)

[Submitted: 7/28/2023 by Subcontractor 5, ]  
Owner is to confirm the size and type of quick connect coupling. Please provide

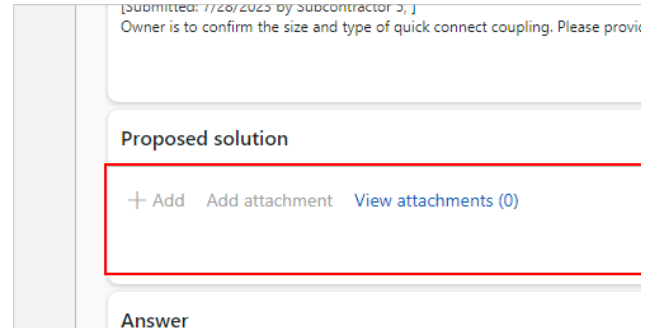
Click on the **Open** button to download the file.



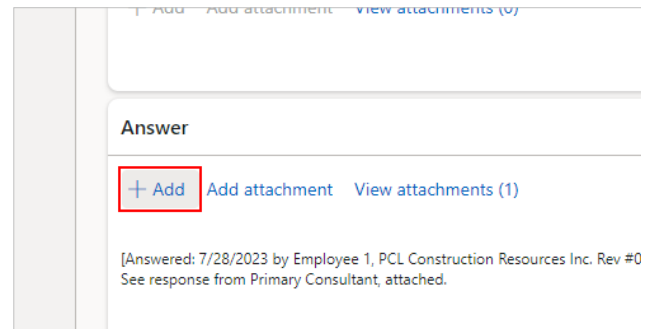
Click on the **Close** button to close the attachments screen.



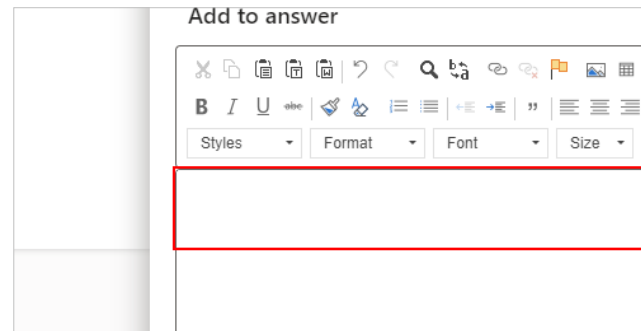
Expand the **Proposed solution** fast tab and check to see if this field was populated. Check the count on the 'Attachments' button to see if any attachments were added.



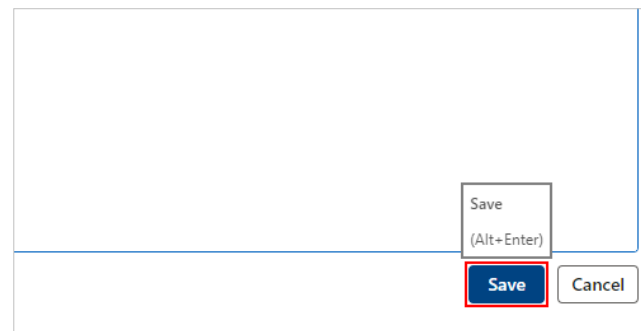
To input your answer to the RFI, click on the **Add** button.



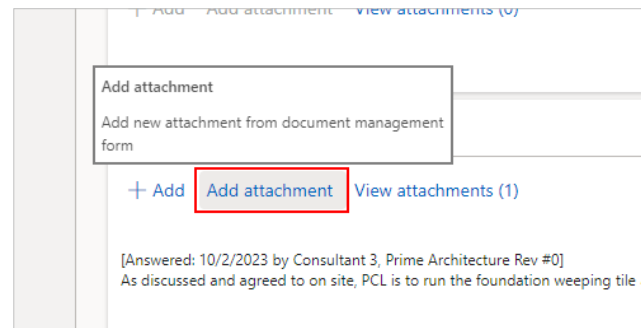
Enter the **Answer** text.



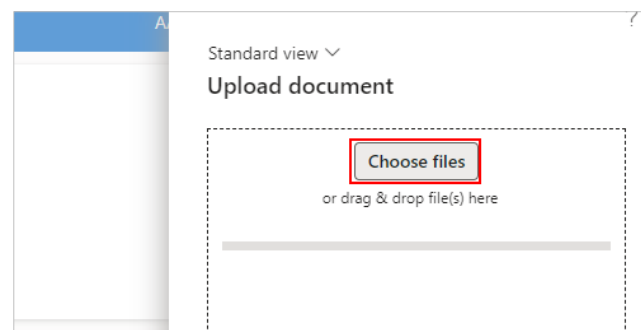
Click on the **Save** button.



If you want to add a document to your answer, click on the **Add attachment** button.



Click on the **Choose files** button to browse for the file. You may also use the drag and drop feature.





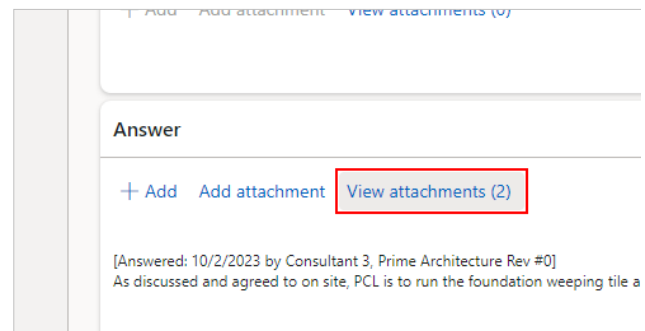
Click on the **Close** button when the attachment upload is complete.



### 3.3.2.5. Remove an Attachment from the 'Answer' Fast Tab

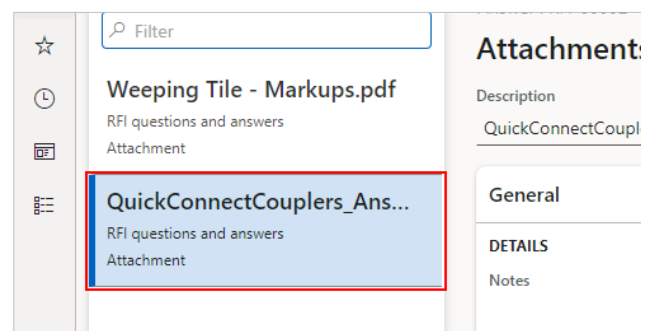
The attachments added to the different sections of an RFI can be added and removed so they accurately reflect the conversation facilitated by the RFI. You may want to remove an attachment if it was added in error or contained inaccurate information.

Click on the **View attachments** button.

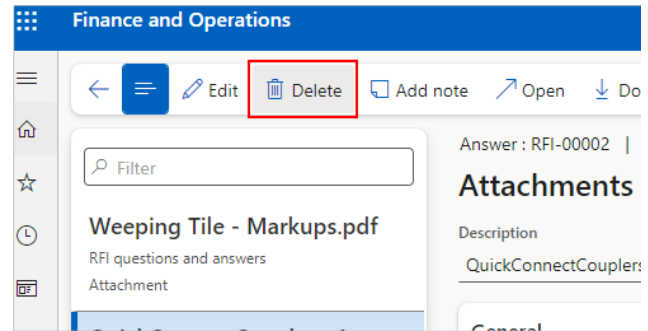


The list of **Attachment(s)** displays.

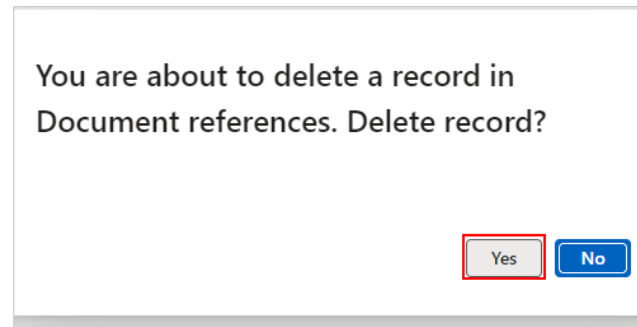
Click on the **Attachment(s)** to remove.



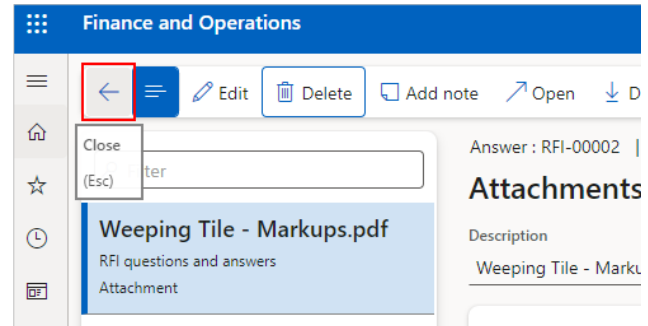
Click on the **Delete** button in the action pane.



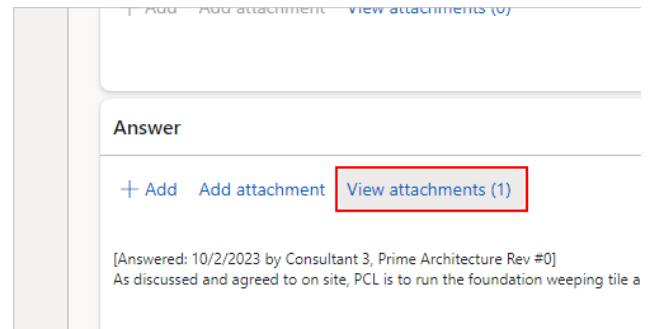
A confirmation message displays, click on the **Yes** button.



Click on the **Close** button to return back to the RFI details.



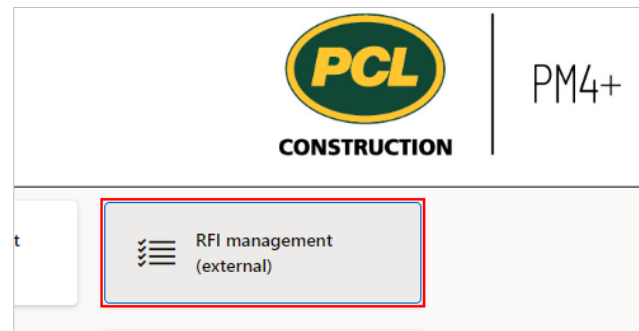
The count for the **Attachments** is decreased by the number of attachments you deleted.



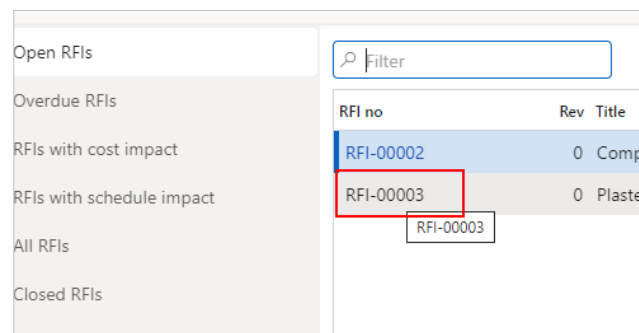
### 3.3.2.6. Return an RFI to PCL

When all Sub-consultant responses or reviews are complete, it is the responsibility of the Primary Consultant (named in the 'Assigned to' fields of the RFI details) to return the RFI to PCL.

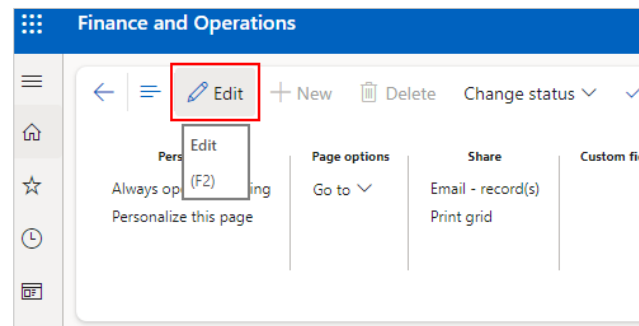
Click on the **RFI management (external)** workspace.



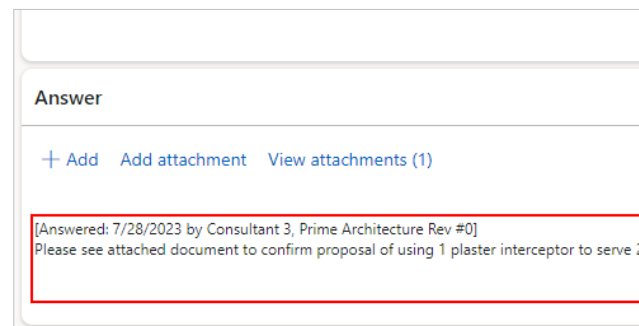
Click on the **RFI** hyperlink of the RFI record.



Click on the **Edit** button.



Review the **Answer** field.



Check for any additional **Attachments**.

+ Add Add attachment View attachments (0)

---

**Answer**

+ Add Add attachment **View attachments (1)**

[Answered: 7/28/2023 by Consultant 3, Prime Architecture Rev #0]  
Please see attached document to confirm proposal of using 1 plaster interceptor to serve 2

Click on the **Sub-consultant routing** tab.

RFI log | Standard view

### RFI-00003 Rev 0: Plaster Interceptor Location

General Disciplines Distribution **Sub-consultant routing** History

QUESTION

Question

The **Review date** will be automatically populated for each sub-consultant. You will not be able to change the status of the RFI until all sub-consultants have completed their review. Checking here is an easy way to see if it's been completed by everyone.

	Email	Review date	Days spent fo
▼	pclconsultant3@gmail.com		

In the **General** tab...

RFI log | Standard view

### RFI-00003 Rev 0: Plaster Interceptor Lo

**General** Disciplines Distribution Sub-consultant routing

**Sub-consultant routing**

+ Add Remove Send email Mark review complete

Before you can change the status of the RFI and send the response back to PCL, the 'Answered by' field needs to be filled in.

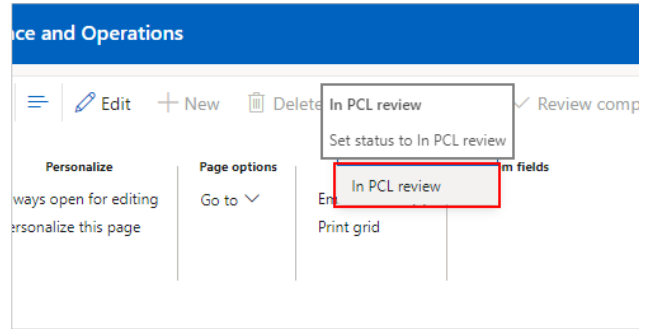
1. Click on the **Answered by** drop-down.
2. Select the name of the **Contact** from your company who provided the response. This is particularly relevant if the answer was entered on behalf of the responsible party.

The **Answered date** field will auto-fill when the status is changed back to 'In PCL review'.

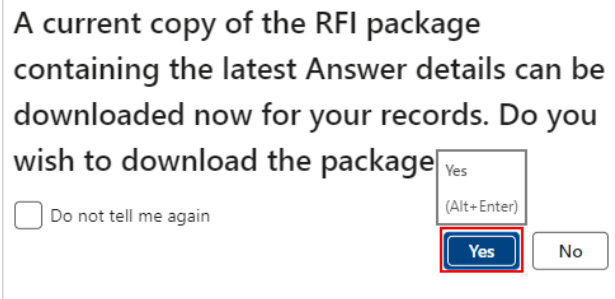
The **Date received from consultant** will also auto-fill when the status is changed back to 'In PCL Review'.

Click on the **Change status** drop-down in the action pane.

Click on **In PCL review**. Note: If your project has turned on the Owner review feature, your status change option is different. See the work instruction called 'Send an RFI for Owner Review' for more information.

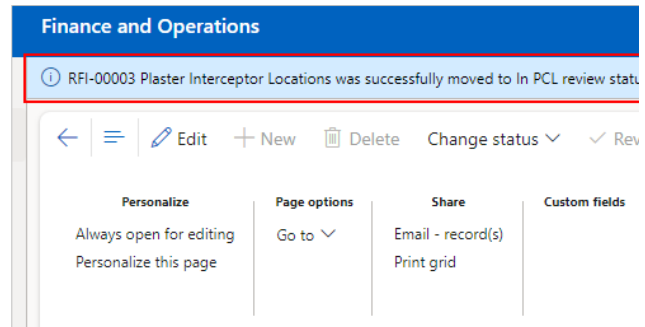


Before you send it to PCL for review, you have the option to download a PDF copy of the current RFI, as submitted to PCL. Click on the **Yes** button to save a copy. This is your only opportunity to retrieve this package.

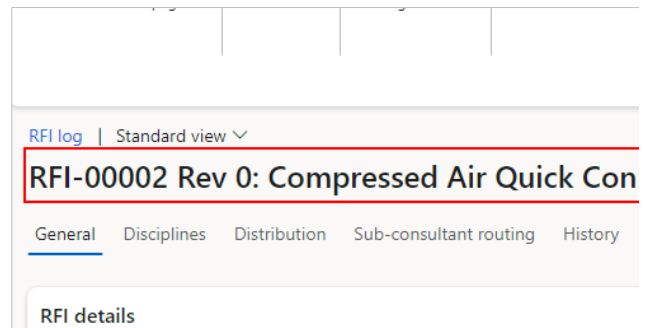


An automated email is sent to the person named in the 'RFI reviewer' field, and a copy of it is saved in the 'Transmission log'.

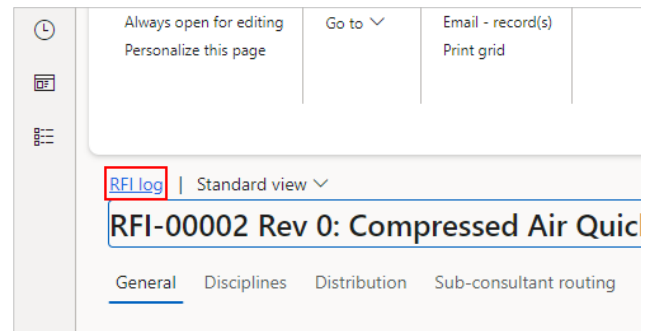
A message displays when the transmission was sent successfully.



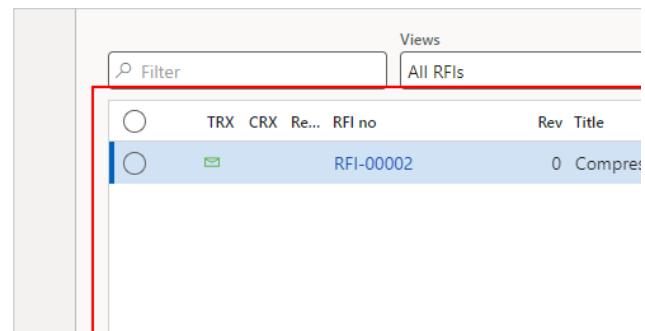
If you accessed this RFI from your workspace, after changing the status, the next 'Open' RFI in the list is displayed. If you see a blank RFI, this means all RFIs in your court, which were listed in the workspace count, are now out of your court.



Click on the **RFI log** hyperlink at the top of the record to return to 'log view'.



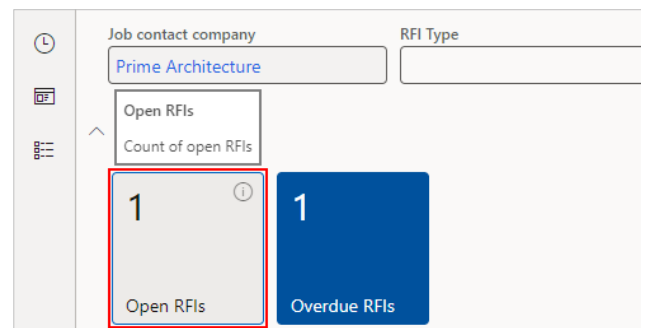
The **RFI log** is currently filtered to what is assigned to your company.



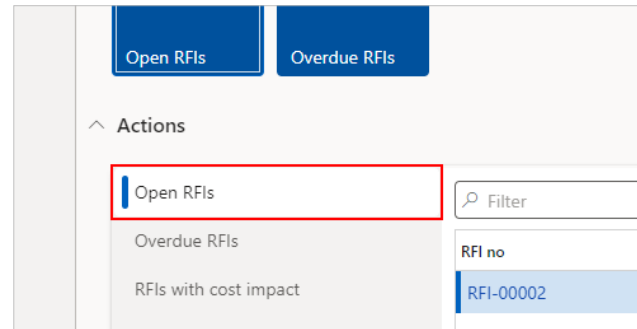
Alternatively, you can return to the main dashboard and then return to the **RFI management (external)** workspace to view any additional work assigned to you.



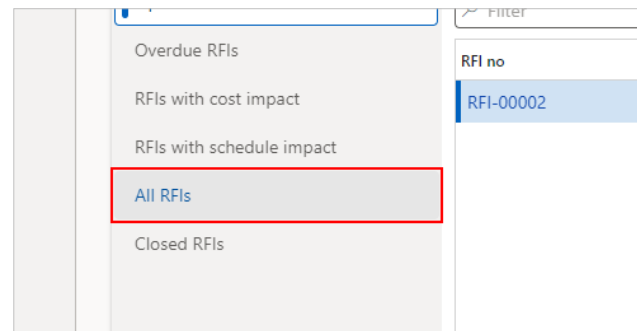
The **Open RFIs** count tile no longer includes the RFI you just replied to and returned back to PCL's court via status change.



The RFI is also no longer in the **Open RFIs** tabbed list.



But can be found in the **All RFIs** tabbed list.



The RFI you just returned to PCL is now in a status of **In PCL Review**.

Rev	Title	Status	Dt
0	Water Stop Omission	In owner review	8/
0	Compressed Air Quick Connect ...	Open	8/
0	Plaster Interceptor Locations	In PCL review	8/
0	Cove Lighting Fixtures	In owner re	8/

### 3.3.3. Conclusion

Now that you have an understanding of how to review and respond to RFIs as the Primary Consultant, proceed to the next work instruction.

## 3.4. Manage Sub-consultant Collaboration (Primary Consultant)

### 3.4.1. Introduction

#### 3.4.1.1. Objective

This work instruction covers how to manage Sub-consultant collaboration when responding to an RFI.

#### 3.4.1.2. Background Information



Engaging additional reviews of an RFI is optional and will depend on what workflows are established by the project team. Either the PCL Coordinator or the Primary Consultant is able to add Sub-consultants to an RFI that is in 'Open' status.

There are two ways to engage Sub-consultants:

1. Sub-consultant routings can be set up at the start of the project by a PCL Project Manager or Coordinator. If this was done, then routings will be available, as shown.

2. If no routings were set-up, use the 'Add' button in the Sub-consultant routing tab to manually add people from the project's contact list.

Note: Even if a Sub-consultant does not collaborate directly in PM4+, you can use the 'Sub-consultant routing' feature to send an email notification about their required input. Both the PCL Coordinator and the Primary Consultant's company may input an RFI response on the Sub-consultant's behalf.

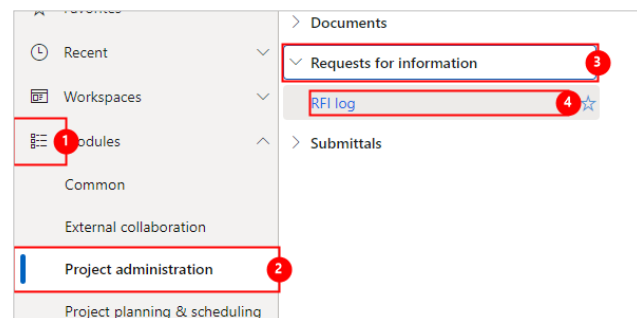
### 3.4.2. Work Instructions

#### 3.4.2.1. Navigation

You may choose to navigate directly to the 'RFI log', to view all RFIs, or you may choose to navigate to your 'RFI Management' workspace to view just the RFIs in your company's court. Both navigation options are shown in this section.

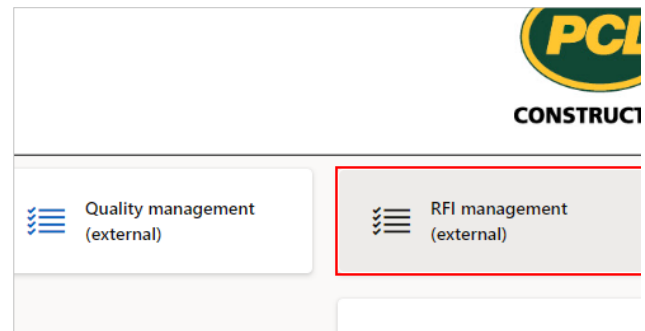
##### 3.4.2.1.1. *Navigate to the RFI Log*

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Requests for information** menu section.
4. Click on the **RFI log** menu item.

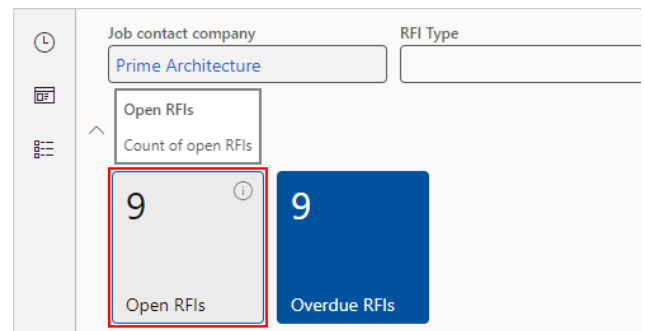


##### 3.4.2.2. Navigate with the RFI Workspace

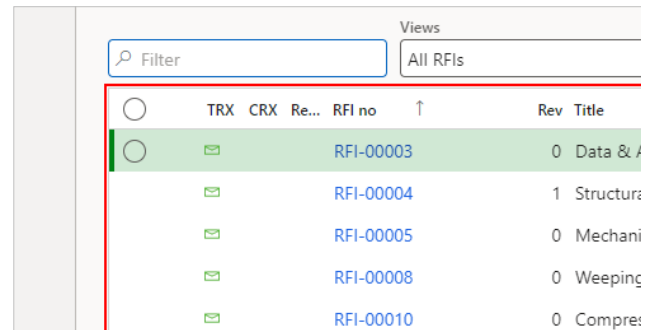
Click on the **RFI management (external)** workspace.



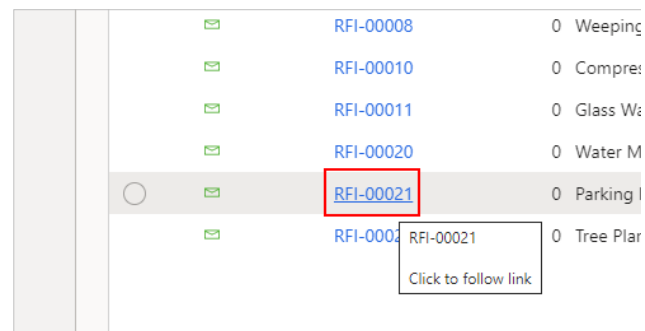
The **Open RFIs** count tile displays a count of the RFIs that are open and currently assigned to your company.



The **Open RFIs** tabbed lists also display RFIs assigned to your company.

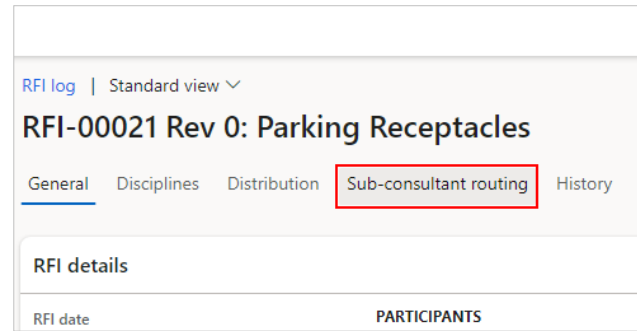


Click on the **RFI** hyperlink to open the RFI record.

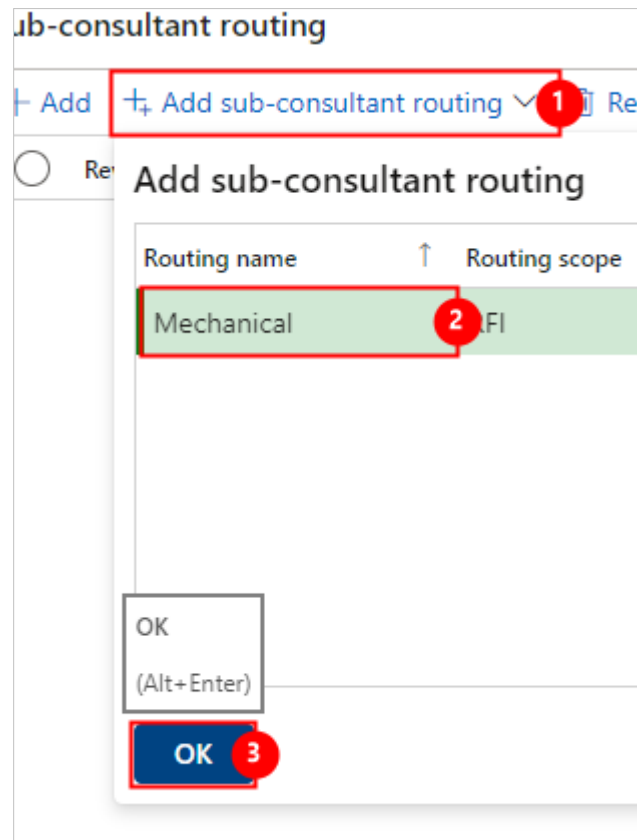


### 3.4.2.3. Engage Additional Sub-Consultants for Review/Response

Click on the **Sub-consultant routing** tab.

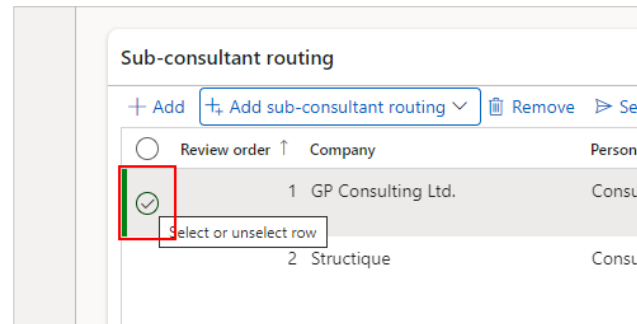


1. Click on the **Select sub-consultant routing** drop down.
2. Select the **sub-consultant routing**.
3. Click on the **OK** button.

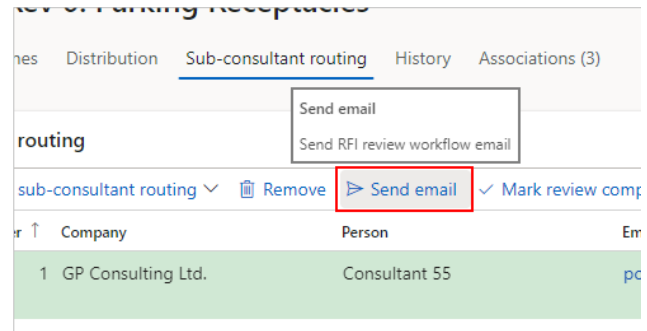


Good to know: Any sub-consultants with the **Review order** of '1' immediately have access to edit the RFI response when the record is in 'Open' status, without further action on your part.

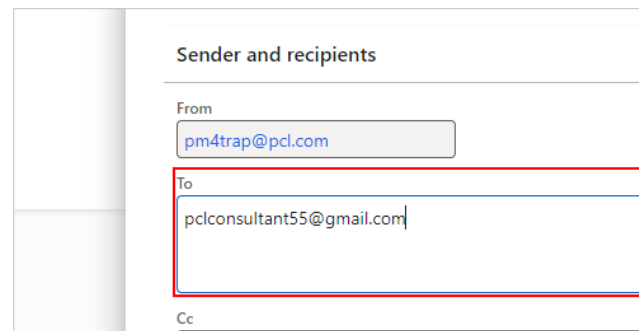
Click on the Row Checkbox beside the sub-consultants to send for review. Be sure to select all rows with **Review order** of '1' if there are multiple.



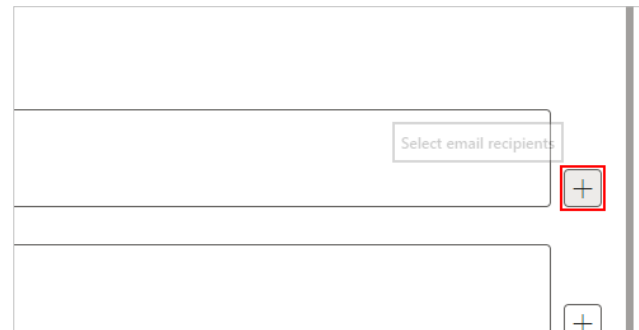
Click on the **Send email** button.



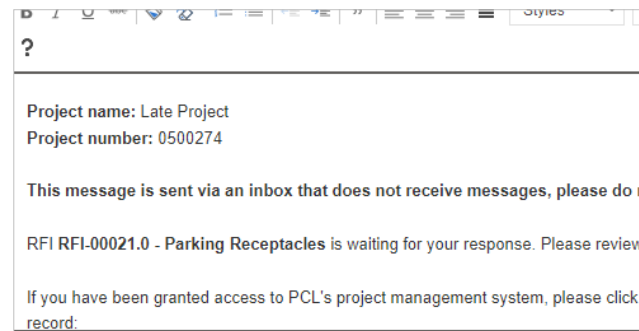
You can free-type additional email addresses in the **TO**, **CC** and **BCC** fields.



Or click the **(+)** icon beside each of these fields to choose from your job contacts and distribution groups.



Confirm the information contained in the email is correct. You can edit the text before sending it.

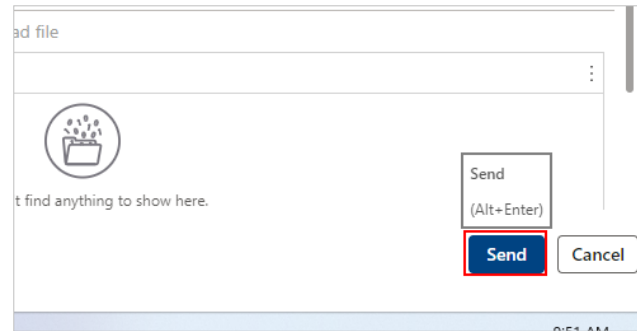


In the 'Attachments' fast tab, you have the option to attach a file from your computer by clicking the 'Add' button. Or, click the 'Add from record' button to brows for any attachments associated to the RFI record.

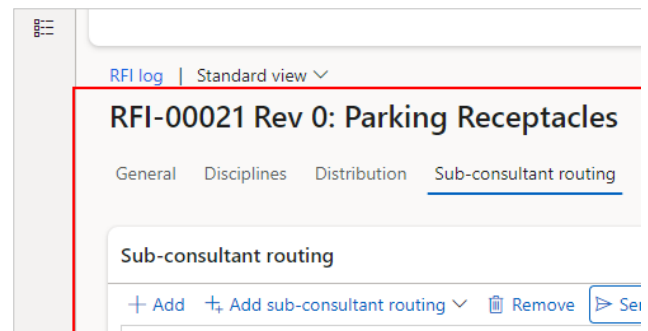
It is not recommended to send the 'Open RFI' PDF package because the contents of the RFI may change while it is in 'Open' status, but in the court of another Sub-consultant. The PDF package does not regenerate each time another Sub-consultant adds to the 'Answer' fast tab.

It is preferable to have the Sub-consultant view the record directly in PM4+ to ensure they are seeing the complete response provided so far.

Click on the **Send** button.

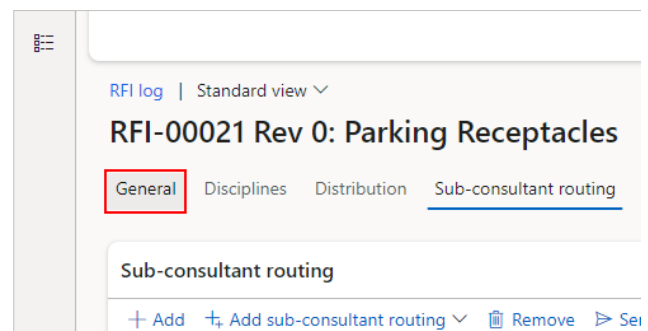


The RFI item is now in the court of the selected Sub-consultant(s). You still have access to edit the RFI answer and/or take action on behalf of a Sub-consultant who is not collaborating directly in PM4+.

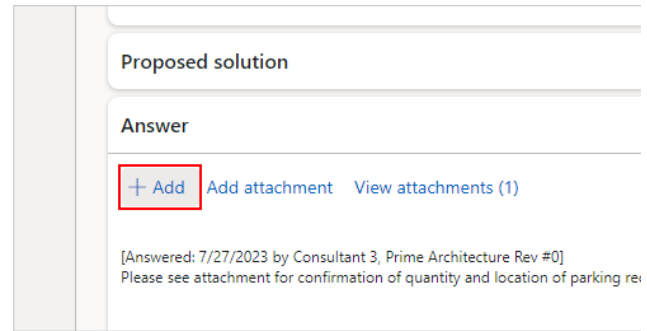


#### 3.4.2.4. Mark a Review Complete on the Sub-consultant's Behalf

In the **General** tab...

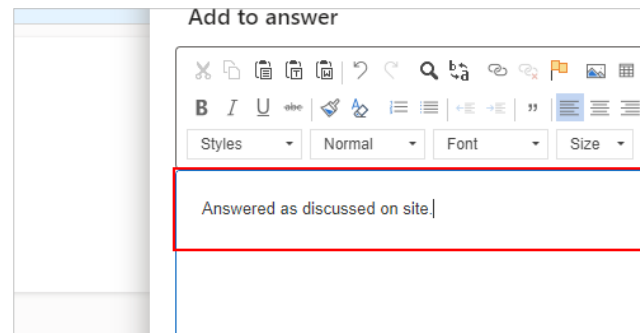


If you would like to paste the Sub-consultant's contribution to the response, directly in the 'Answer' field, click on the **Add** button in the 'Answer' fast tab.

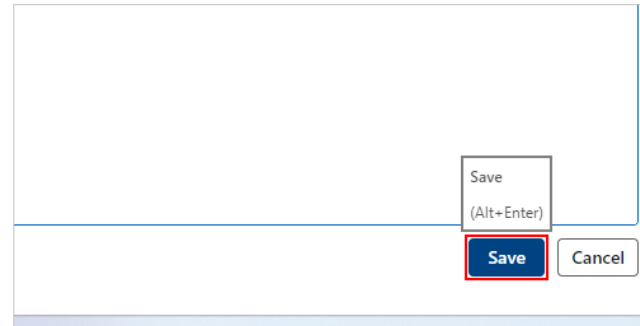


You may have previously made your own comments to the RFI.

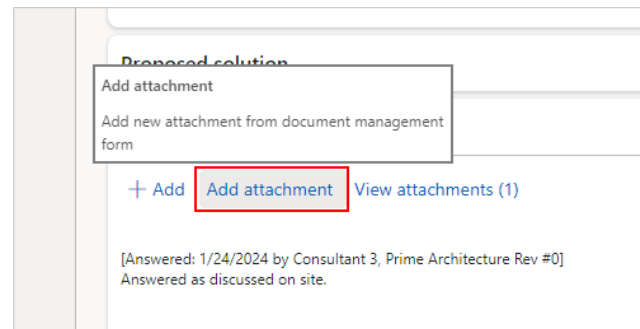
On the Sub-consultants behalf, enter their **Answer**.



Click on the **Save** button.



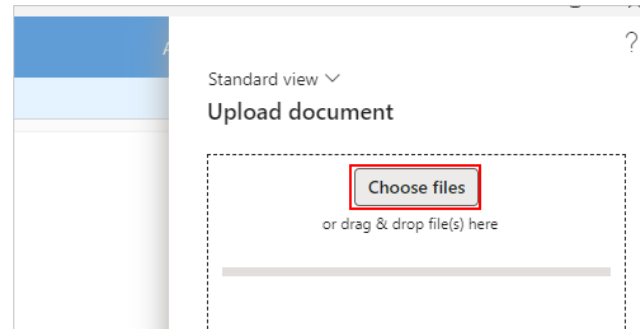
Add any attachments from the Sub-consultant, if provided. Click on the **Add attachment** button.



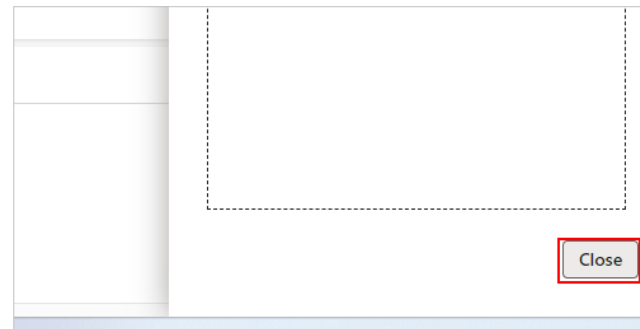
The 'Upload document' dialog opens.

Click on the **Choose files** button.

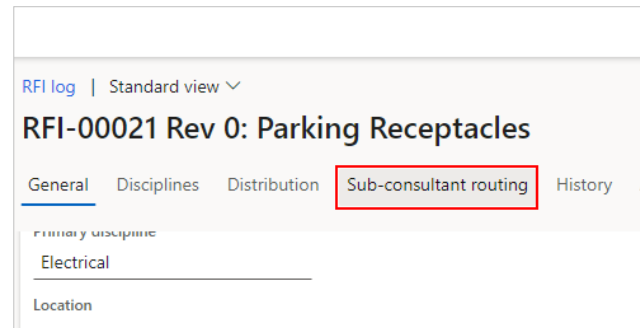
Or drag and drop the file.



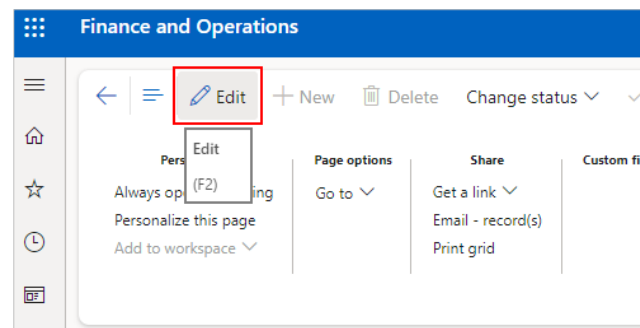
Click on the **Close** button once the file is uploaded.



Click on the **Sub-consultant routing** tab.



Click on the **Edit** button in the action pane if not already selected.



Enter any useful commentary about the Sub-consultant's response in the **Comments** field.

Modified by	Offline review ...	Comments	
	<input type="checkbox"/>		

Click on the **Mark review complete** button.

Sub-consultant routing History Associations (3)

outing  Remove  Send email  **Mark review complete**

	Person	Email
ting Ltd.	Consultant 55	pclconsultant55@...

Click on the **Yes** button to confirm this action.

review as complete will complete the review process for the selected sub-consultant routing line(s). The sub-consultant company will no longer be able to review this RFI. Do you wish to proceed?

Yes  
(Alt+Enter)

The **Modified by** column shows the user ID of the person who took the action on behalf of the Sub-consultant.

Review date	Days spent for ...	Modified by	Offline review
/24/2024	181	Consultant3	<input checked="" type="checkbox"/>



The **Offline review** checkmark indicates that this Sub-consultant's response was provided outside of PM4+.

Days spent for ...	Modified by	Offline review ...	Comments
81	Consultant3	✓	

If another Sub-consultant is listed next in the 'Review order' column, an automated email notification is sent to indicate their input is now required.

### 3.4.3. Conclusion

Now that you have an understanding of how to manage Sub-consultant collaboration, proceed to the next work instruction.

## 3.5. Review and Respond to an RFI (Sub-consultant)

### 3.5.1. Introduction

#### 3.5.1.1. Objective

This work instruction covers how to review and respond to RFIs as a Sub-consultant.

#### 3.5.1.2. Background Information

If you received an automated email about this RFI, it may also have contained an attached 'Open package'. This is a PDF file generated by the system when the status of the RFI is moved to 'Open'.

It is highly recommended that you review and enter the RFI response directly in PM4+, whenever possible. In the event that another Sub-consultant has already contributed to the response, the PDF package you received via email, may not contain all details.

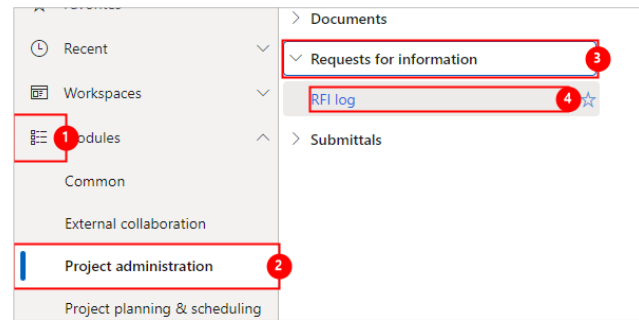
### 3.5.2. Work Instructions

#### 3.5.2.1. Navigation

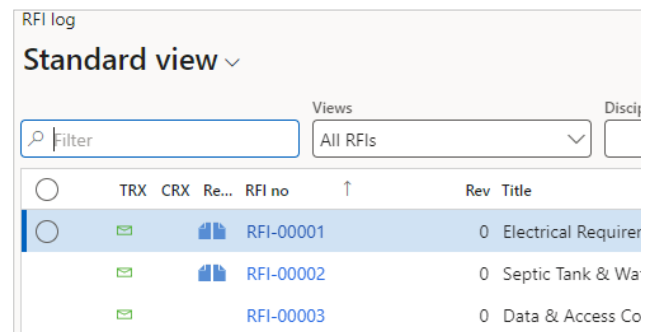
You may choose to navigate directly to the 'RFI log', to view all RFIs, or you may choose to navigate to your 'RFI Management' workspace to view just the RFIs in your company's court. Both navigation options are shown in this section.

##### 3.5.2.1.1. *Navigate to the RFI Log*

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Requests for information** menu section.
4. Click on the **RFI log** menu item.

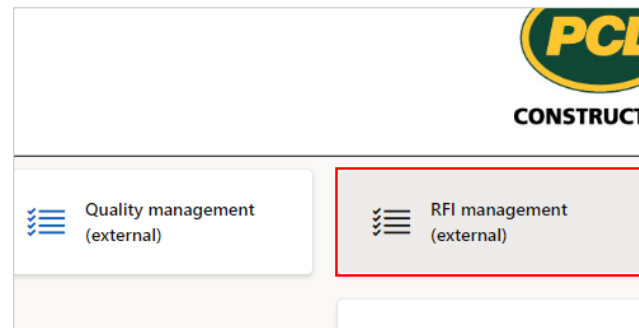


The RFI log is displayed.

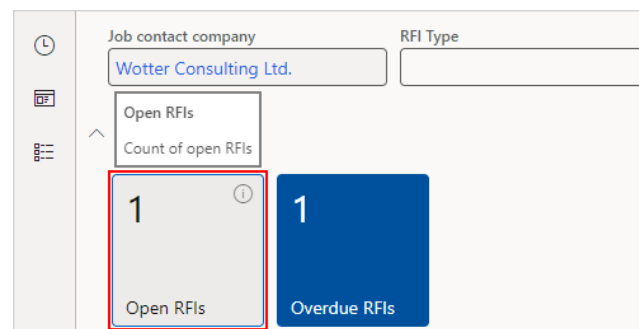


### 3.5.2.2. Navigate Using the RFI Workspace

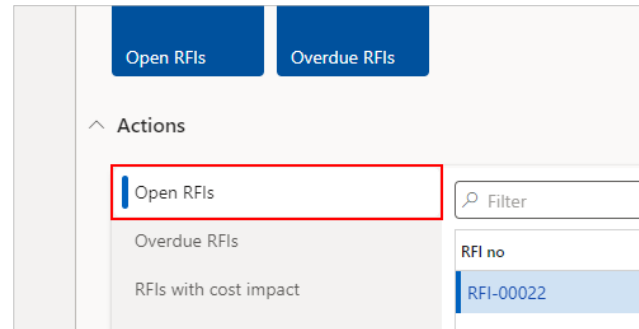
Click on **RFI management (external)** workspace.



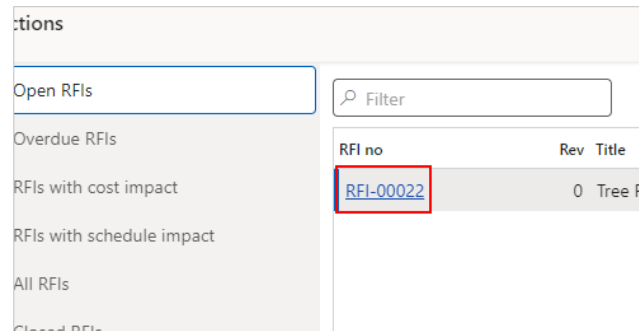
The **Open RFIs** count tile displays a count of the RFIs that are open and currently assigned to your company.



The **Open RFIs** tabbed lists also displays RFIs assigned to your company.

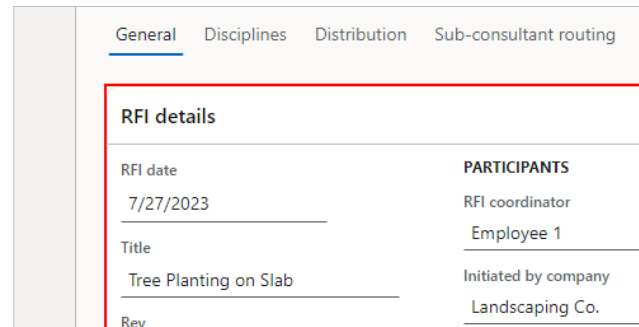


Click on the **RFI number** hyperlink to open the RFI record.

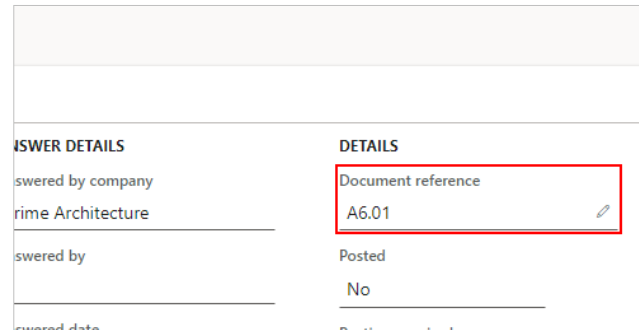


### 3.5.2.3. Respond to an RFI

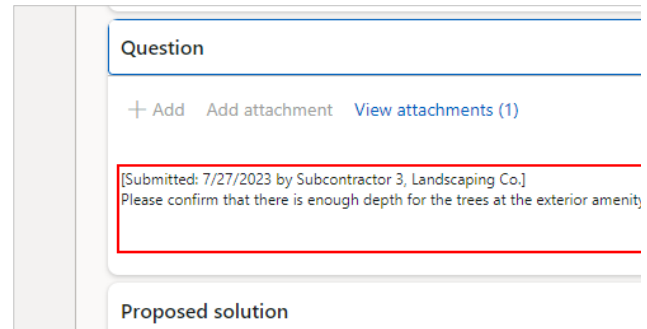
Review the **RFI details** fast tab.



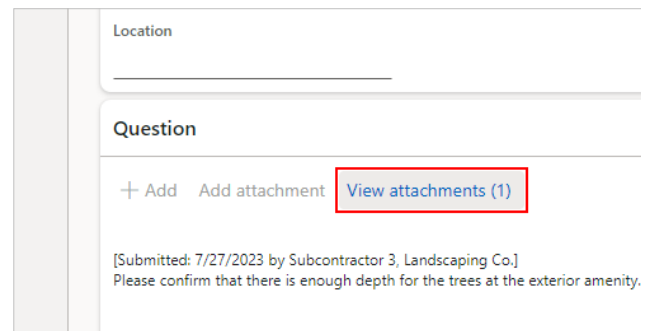
In the **Document reference** field, note any drawings impacted by the RFI.



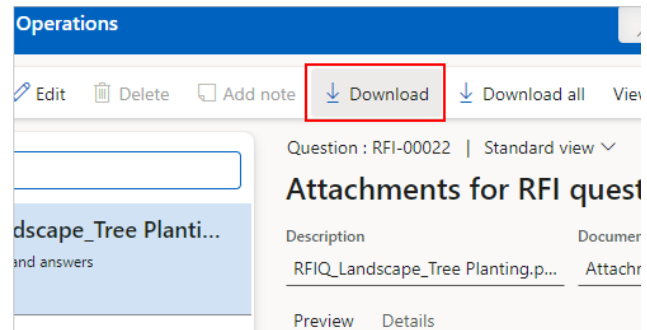
Review the **Question** field.



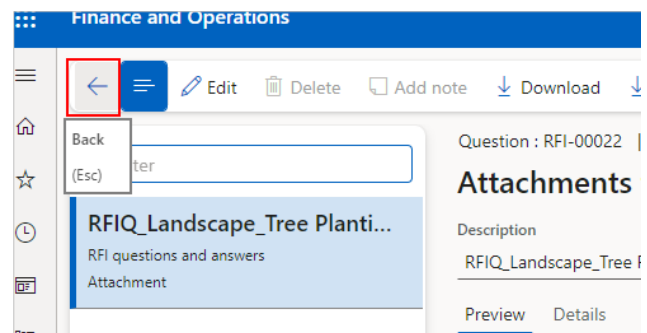
If the **View attachments** button contains a number higher than (0), review the documents related to the 'Question'.



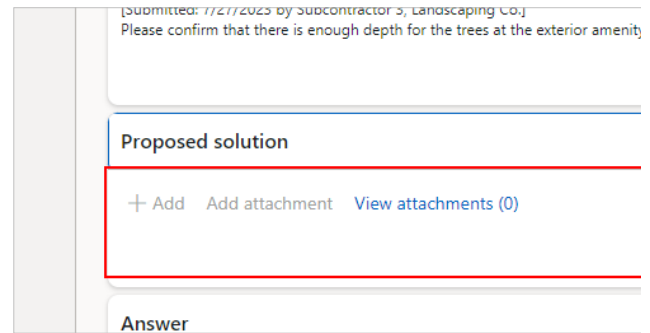
Click on the **Download** button to download the file.



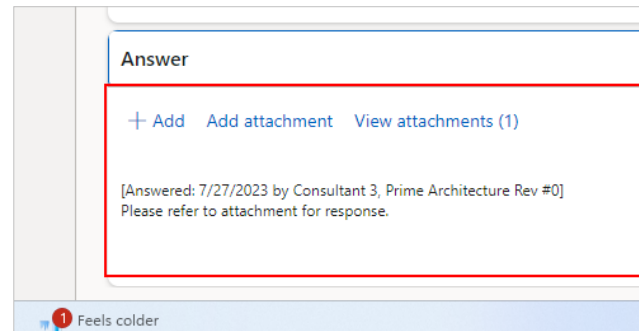
Click on the **Back** button to close the attachments screen.



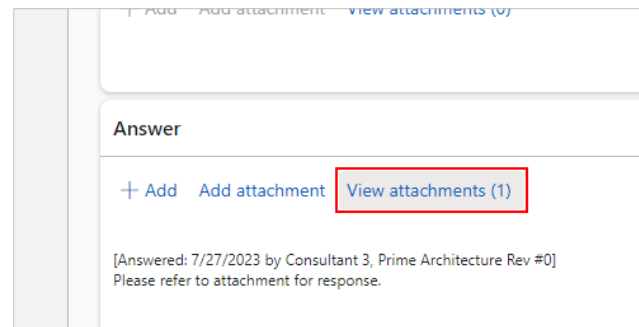
Check the **Proposed solution** fast tab to see if it contains a proposal. Note the count on the 'Attachments' button to see if any attachments are present.



Review the **Answer** field to see if any prior Consultants entered their portion of the response.

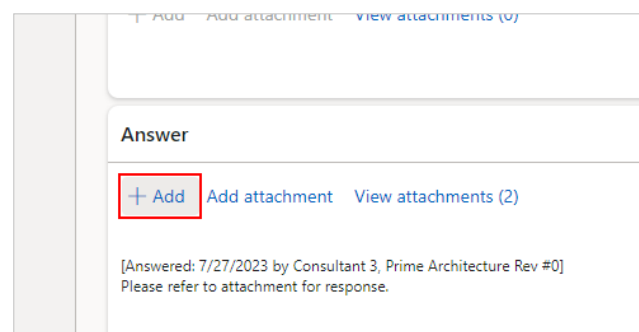


If the **View attachments** button contains a number higher than (0), review the documents related to the 'Answer':

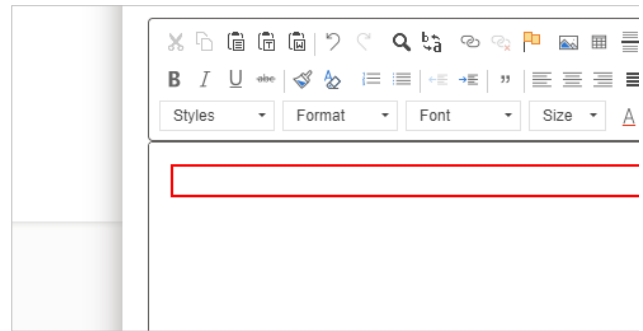


When you are ready to contribute to the response:

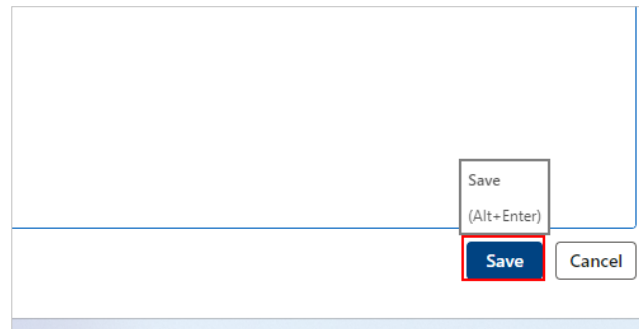
Click on the **Add** button.



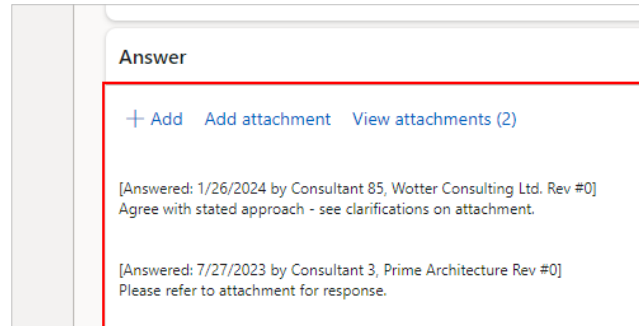
Enter the **Answer** text.



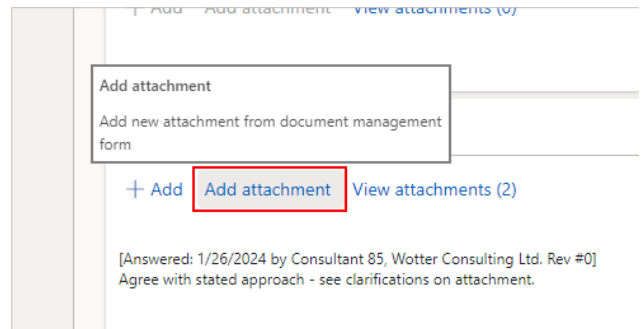
Click on the **Save** button.



The **Answer** field now displays your entry, with time-stamps showing who and when.

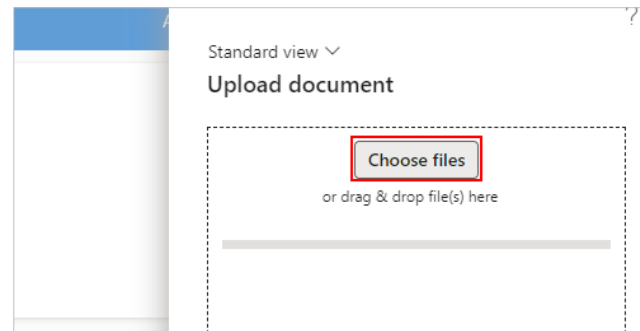


Attachments can be added to your response if needed. Click on the **Add attachment** button.

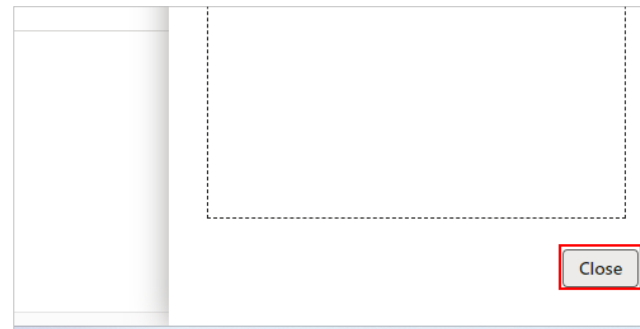


The 'Upload document' dialog opens.

Click on the **Choose files** button. You can also use the drag and drop feature.



When the attachment has loaded, click on the **Close** button.

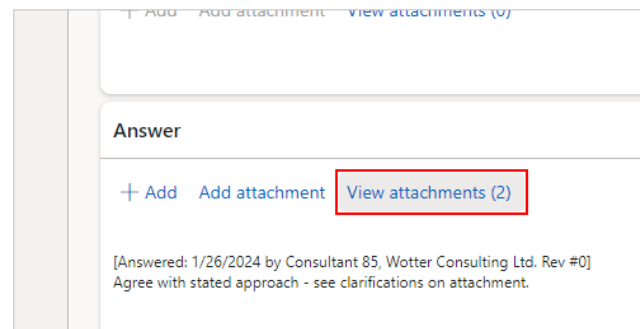


#### 3.5.2.4. Remove an Attachment From the 'Answer' Fast Tab

The attachments added to the different sections of an RFI can be added and removed so they accurately reflect the conversation facilitated by the RFI. You may want to remove an attachment if it was added in error or contained inaccurate information.

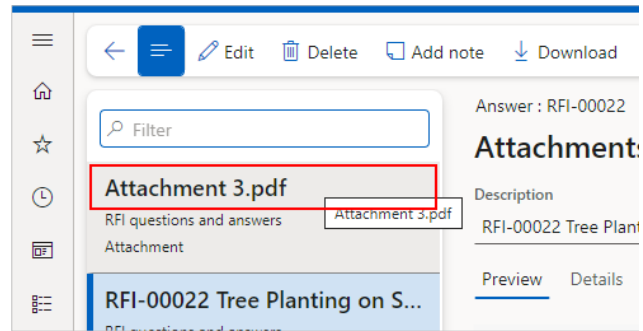
Note: You can only remove attachments that you added.

Click on the **View attachments** button.

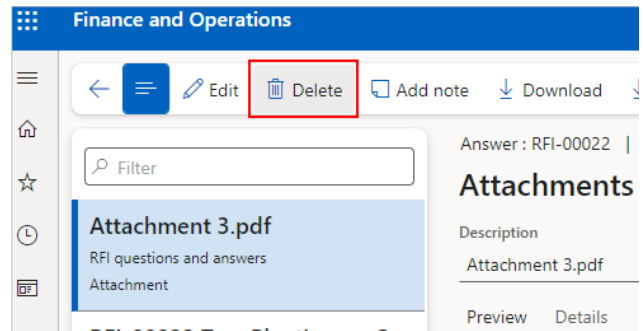


The list of **Attachment(s)** displays.

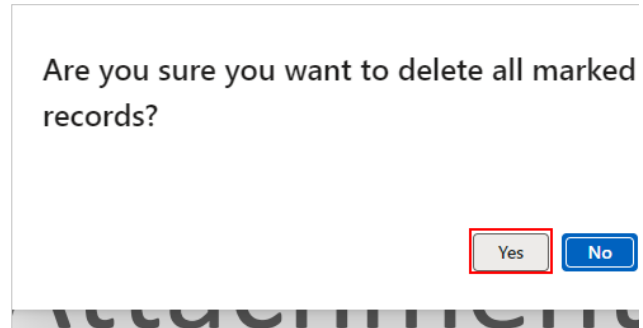
Click on the **Attachment(s)** to remove.



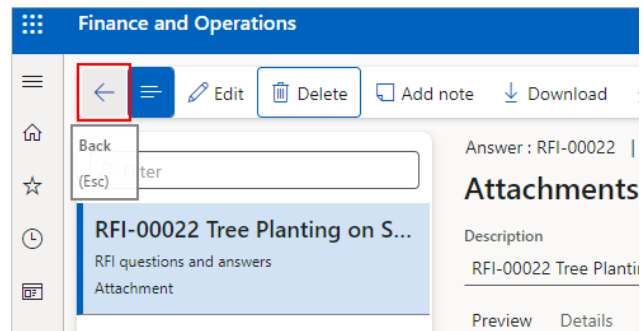
Click on the **Delete** button in the action pane.



A confirmation message displays, click on the **Yes** button.



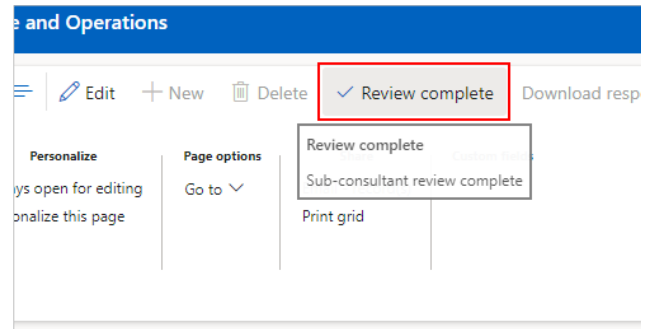
Click on the **Back** button to return back to the RFI details.



### 3.5.2.5. Mark Review as Complete

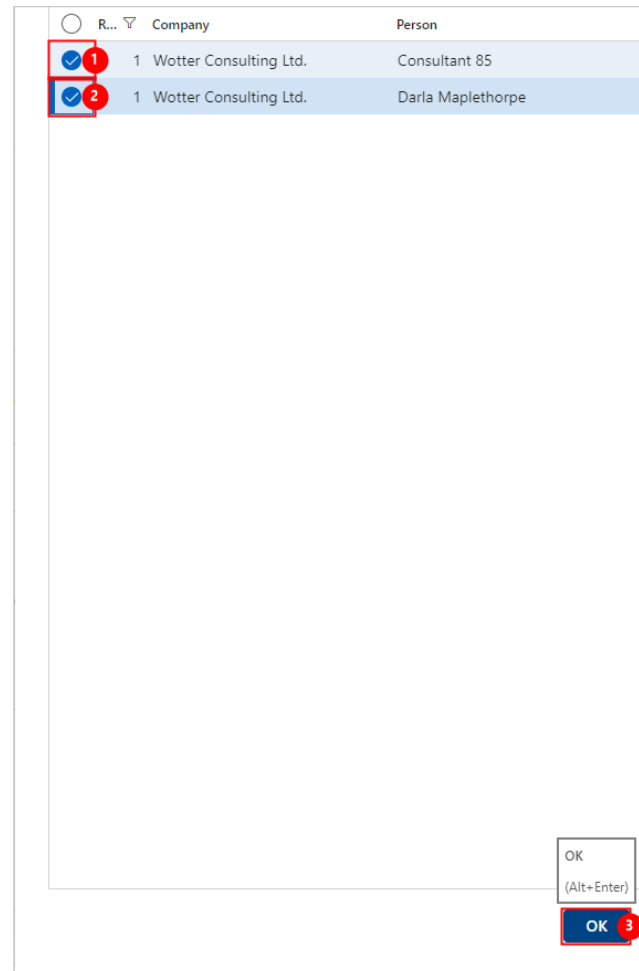


Once you are satisfied with your provided answer, click on the **Review complete** button.

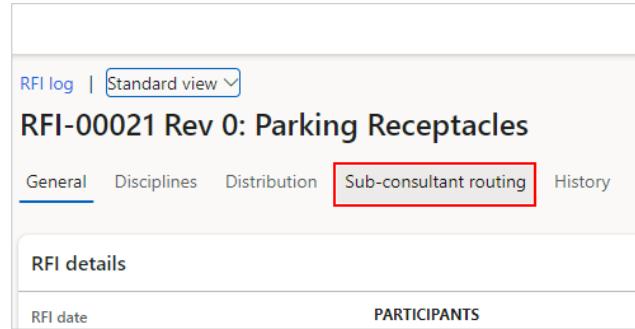


If you have answered the RFI and the alternate Sub-consultant(s) named aren't required to answer as well, you can mark the RFI as Review complete for all Sub-consultants at your company at the same time.

1. Select the **Row checkbox** of the other Sub-consultant from your company.
2. Select the **Row checkbox** adjacent to your name.
3. Click on the **OK** button.



Click on the **Sub-consultant routing** tab.



RFI log | Standard view ▾

### RFI-00021 Rev 0: Parking Receptacles

General | Disciplines | Distribution | **Sub-consultant routing** | History

RFI details

RFI date PARTICIPANTS

The **Review date** fields on the lines with your company's name are now filled in. The RFI is now out of your company's court.

	Reviewer due date	U	Review date	Days spent fo
il.com	8/1/2023	◆	1/26/2024	183
rconsultin...	8/1/2023	◆	1/26/2024	183

The system checks for any additional Sub-consultants in the list and sends an email to the person next in the 'review order', to alert them that the RFI is now in their company's court.

	Reviewer due date	U	Review date	Days spent fo
il.com	8/1/2023	◆	1/26/2024	183
rconsultin...	8/1/2023	◆	1/26/2024	183

### 3.5.3. Conclusion

Now that you have an understanding of how to review and respond to RFIs as a Sub-consultant, proceed to the next work instruction.

## 3.6. Send an RFI for Owner Review (Primary Consultant)

### 3.6.1. Introduction

#### 3.6.1.1. Objective

This work instruction covers how to send an RFI for Owner review as a Primary Consultant.

#### 3.6.1.2. Background Information

When a project team determines that the 'Owner review' feature is appropriate, an additional status called, 'In Owner Review' is used to indicate this step in the workflow. During this status, the Owner or their representative is required to review the RFI.

It is the responsibility of the Primary Consultant, or the PCL Coordinator to move the RFI to 'In Owner review' status. This will depend on what workflow was agreed to by the project team.

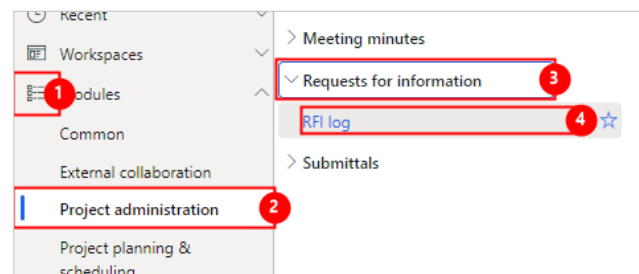
### 3.6.2. Work Instructions

#### 3.6.2.1. Navigation

You may choose to navigate directly to the 'RFI log', to view all RFIs, or you may choose to navigate to your 'RFI Management' workspace to view just the RFIs in your company's court. Both navigation options are shown in this section.

##### 3.6.2.1.1. Navigate to the RFI Log

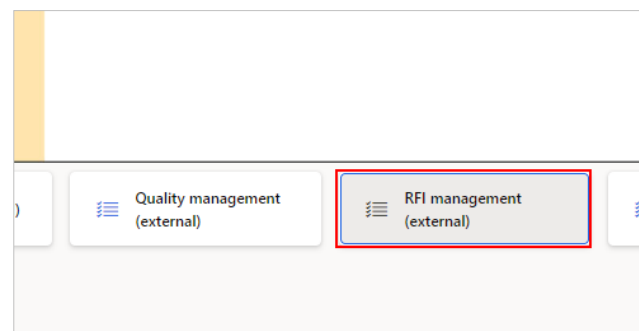
1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Requests for information** menu section.
4. Click on the **RFI log** menu item.



The RFI log is displayed.

##### 3.6.2.2. Use the RFI Workspace to Navigate

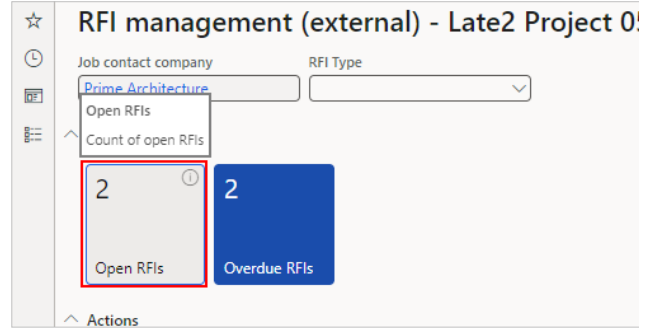
Click on the **RFI management (external)** workspace.



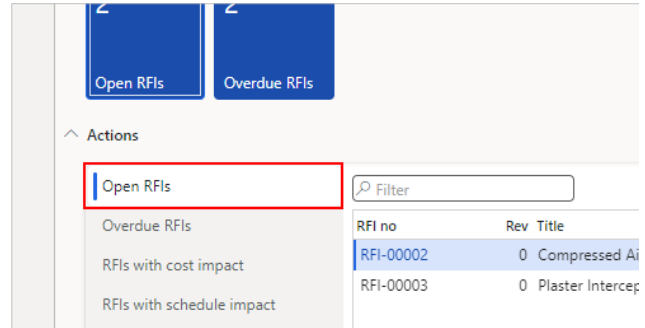
Review the count tiles and tabbed lists to determine what is in your company's court.

##### 3.6.2.3. Send the RFI for Owner Review

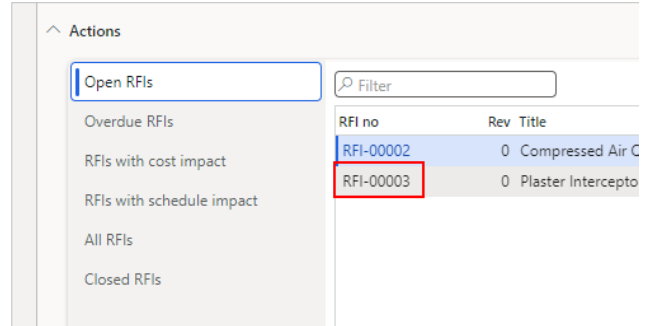
The **Open RFIs** count tile displays a count of the RFIs that are open and currently assigned to your company.



The **Open RFIs** tabbed lists also offer filter lists of RFIs assigned to you or your company.

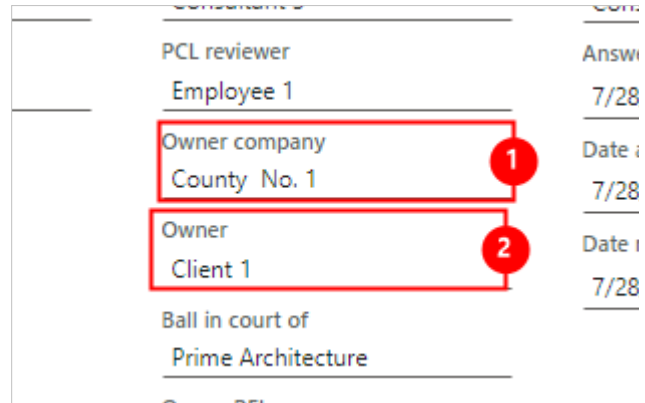


Click on the **RFI** hyperlink to see more details for the RFI that will be sent to the Owner for review.



Confirm the information in the Owner related fields in the 'Assigned' field group are correct. They contain the company and person who will be notified when the status of the RFI is moved to 'In owner review'.

1. **Owner Company.**
2. **Owner.**



The **Owner RFI** number field indicates the Owner's RFI number if they have additional tracking for their records. This is maintained by PCL.

Note: This is an optional field and may not be used in your project.

Ensure that fields in the **Answer details** group are complete and accurate.

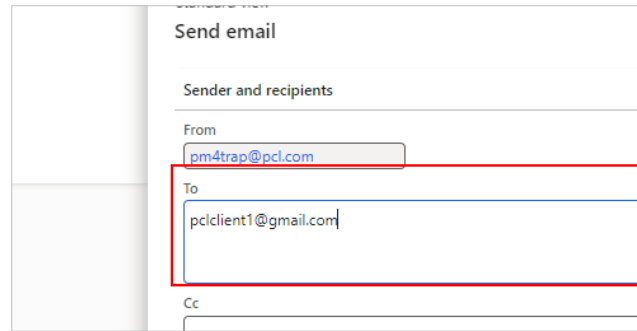
In the **Answer** fast tab, ensure that you have responded to the RFI before sending it to the Owner for review. For more information on how to respond to an RFI refer to the 'Review and Respond to an RFI as a Primary Consultant' work instruction.

1. Click on the **Change status** drop-down in the action pane.
2. Click on **In owner review**.

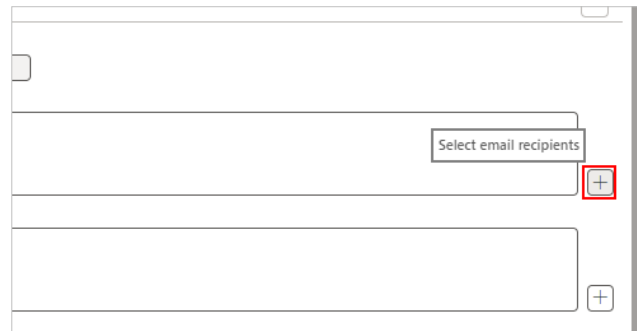
The 'Send email' dialog opens.

Confirm the Owner's email in the **To** field is correct.

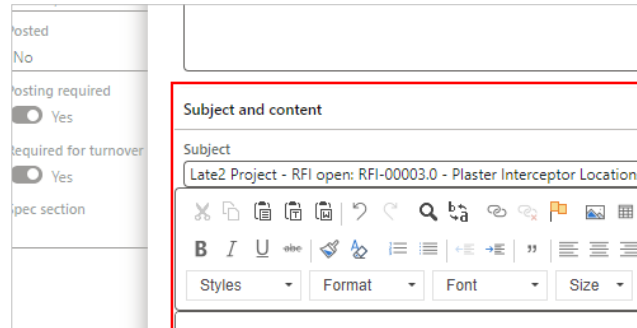
You may BCC or CC others if needed.



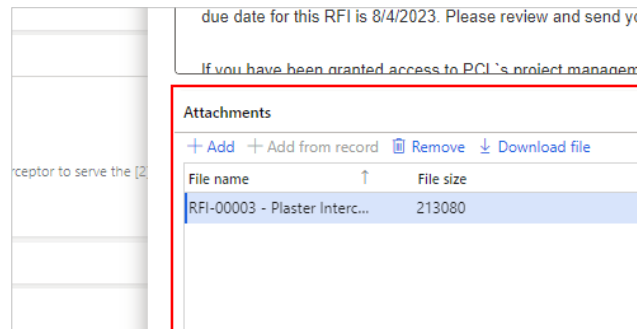
Or click the **(+)** icon beside each of these fields to choose from your job contacts and distribution groups.



Confirm the information contained in the email is correct. You can edit the text before sending it.

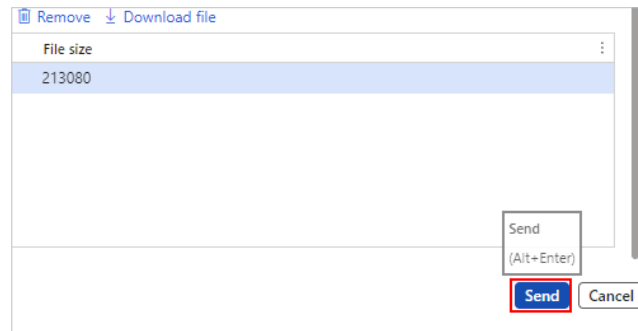


The RFI 'Open' package appears in the **Attachments** fast tab. It has been regenerated to include all responses and attachments entered to the 'Answer' fast tab.

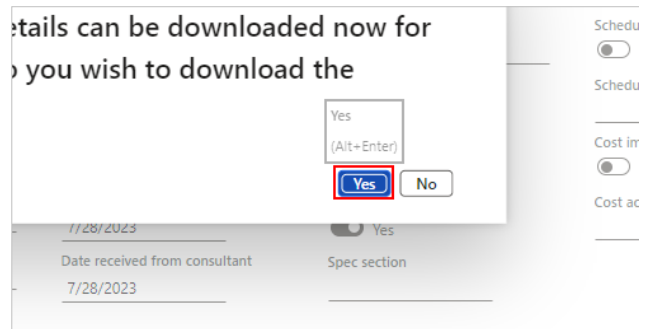


File name	File size
RFI-00003 - Plaster Interc...	213080

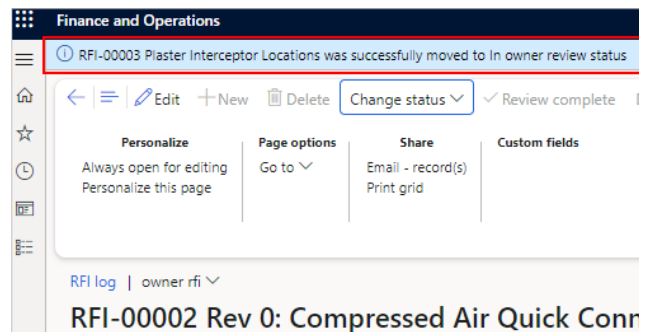
Click on the **Send** button.



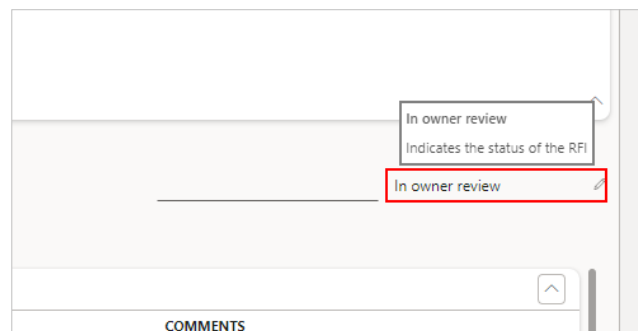
Before you send it to the Owner, you have the option of downloading the current RFI package for your records, click on the **Yes** button to save a copy.



A message displays when the transmission was sent successfully.



The RFI you just sent to the Owner is now in the status of **In owner review**.



When the Owner or their representative handles the RFI, they will have the option to send it on to PCL for final distribution and closure, or they may return it to the Primary Consultant for further work on the response.

### 3.6.3. Conclusion

Now that you have an understanding of how to send an RFI for Owner review, proceed to the next work instruction.

## 3.7. Review an RFI as an Owner

### 3.7.1. Introduction

#### 3.7.1.1. Objective

This work instruction covers how to review an RFI.

#### 3.7.1.2. Background Information

When a project team determines that the 'Owner review' feature is appropriate, an additional status called, 'In Owner Review' is used to indicate this step in the workflow. During this status, the Owner or their representative is required to review the RFI.

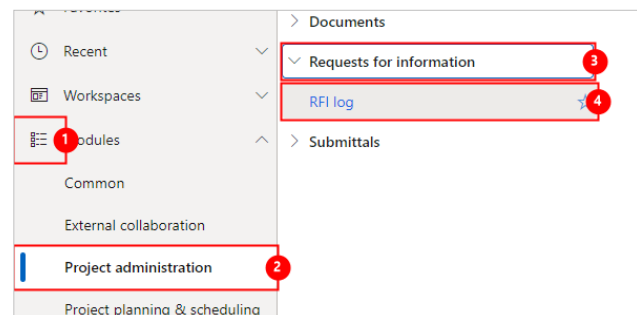
### 3.7.2. Work Instructions

#### 3.7.2.1. Navigation

You may choose to navigate to the 'RFI log', and filter for RFIs 'In Owner Review', or you may choose to navigate to the 'RFI Management' workspace to view just the RFIs in your company's court. Both navigation options are shown in this section.

#### 3.7.2.2. Navigate from the RFI Log

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Requests for information** menu section.
4. Click on **RFI log** menu item.

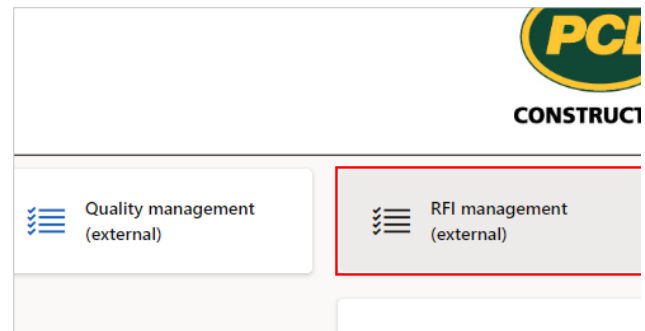


The RFI log is displayed. Use the filter at the top of the log to filter for RFIs 'In Owner Review'.

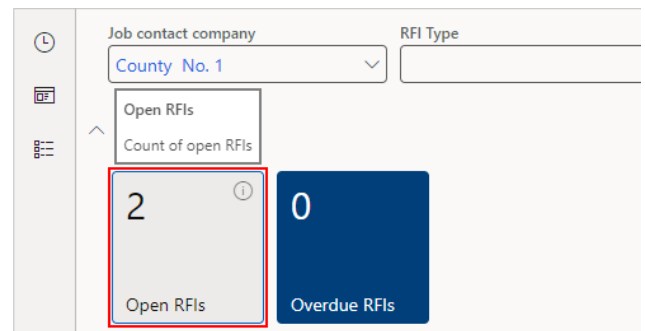
#### 3.7.2.3. Navigate with the RFI Workspace



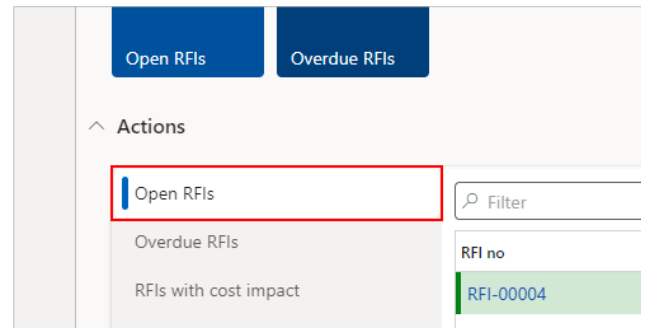
Click on the **RFI management (external)** workspace.



The **Open RFIs** count tile displays a count of the RFIs that are 'In Owner Review' and currently assigned to you or your company.

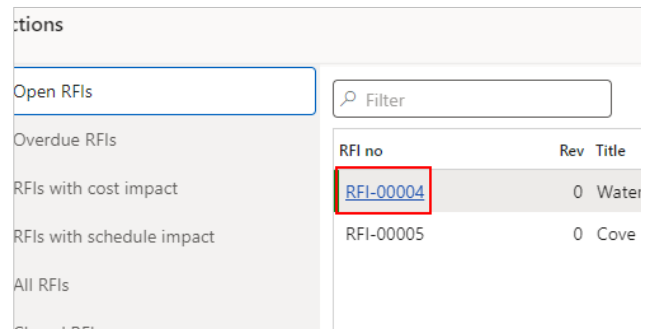


The **Open RFIs** tabbed lists also offer filter lists of RFIs assigned to your company.

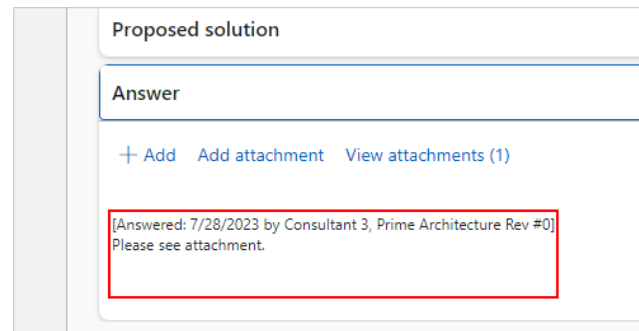


### 3.7.2.4. Review and Return an RFI to PCL

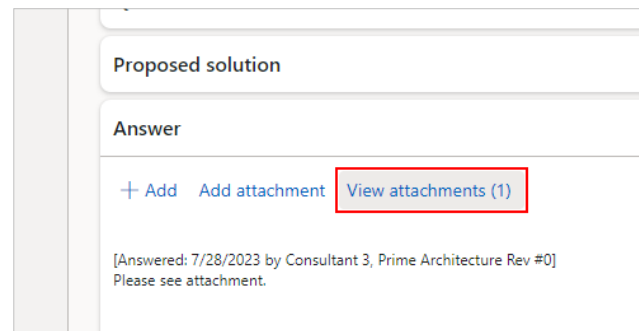
Click on the **RFI** number hyperlink to open the RFI record.



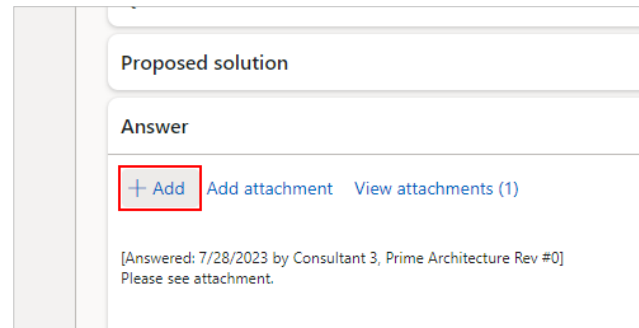
In the **Answer** fast tab, review the provided answer.



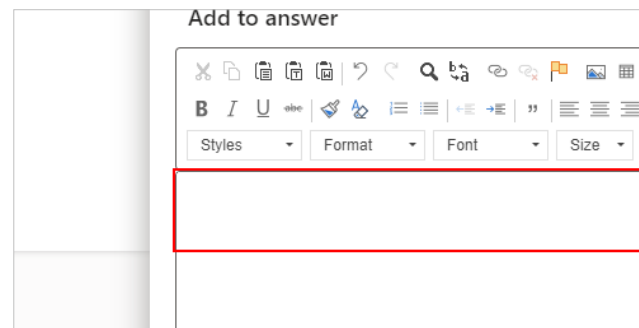
To view attachments, click on the **View attachments** button.



To add to the answer field, click on the **Add** button.



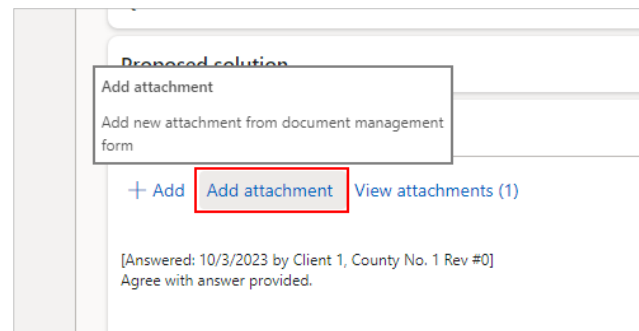
Enter an additional **Answer text**.



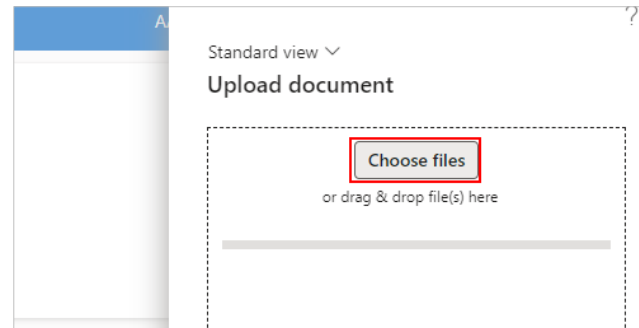
Click on the **Save** button.



To add a supporting attachment, click on the **Add attachment** button.



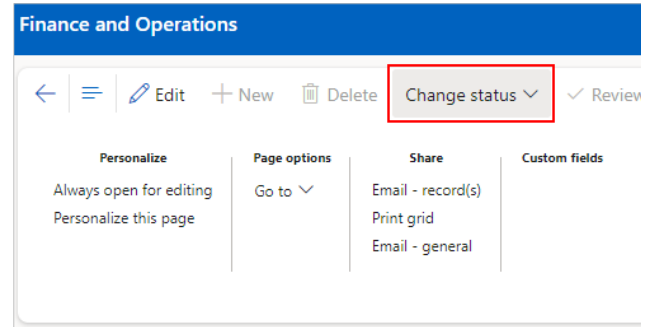
Click on the **Choose files** button to browse for the file you want to attach. You may also use the drag and drop feature.



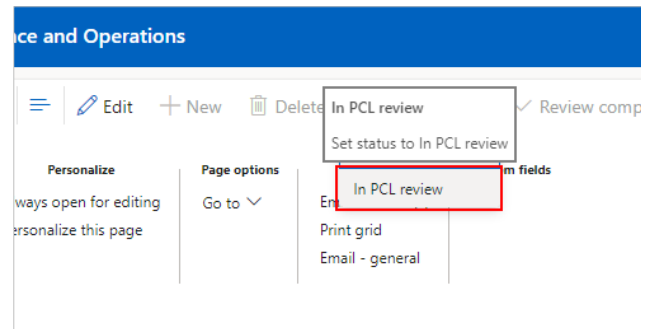
Click on the **Close** button once the upload is complete.



Click on the **Change status** drop-down in the action pane.

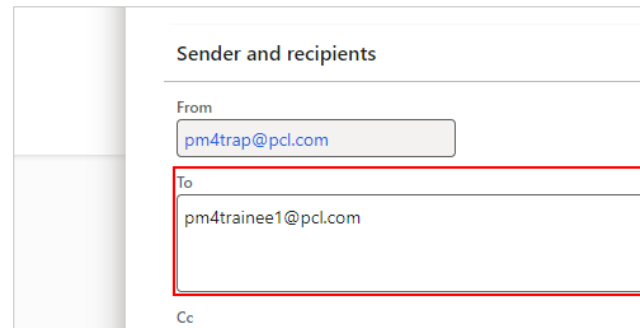


Click on **In PCL review**.



The 'send email' dialog opens.

You can free-type additional email addresses in the TO, CC and BCC fields.



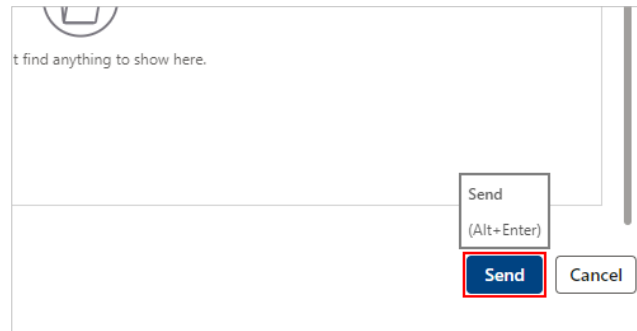
Or click the (+) icon beside each of these fields to choose from your job contacts and distribution groups.



Confirm the information contained in the email is correct. You can edit the text before sending it. The email text includes the reason for the status change.



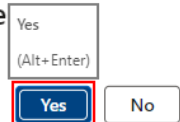
Click on the **Send** button.



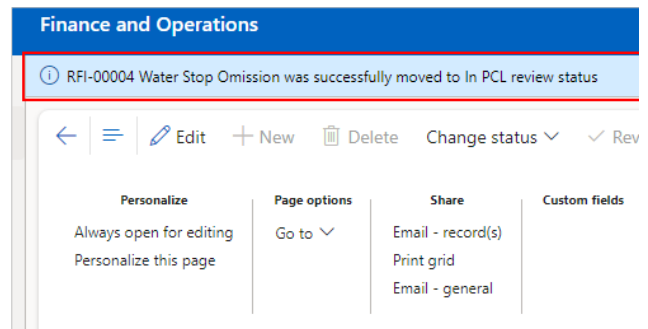
Before you send it to PCL for review, you have the option to download a PDF copy of the current RFI, as submitted to PCL. Click on the **Yes** button to save a copy. This is your only opportunity to retrieve this package.

A current copy of the RFI package containing the latest Answer details can be downloaded now for your records. Do you wish to download the package?

Do not tell me again



A message displays when the status change is successful and an email indicating the status change has been sent.



The status of the RFI is now **In PCL review**.

Ur...	RFI type	Status	Pos
	Construction	Draft	N
♦	Construction	Open	N
	Construction	In PCL review	N
	Construction	In PCL review	N
	Construction	In owner review	N

### 3.7.2.5. Review and Return an RFI to the Primary Consultant

Click on the **RFI** number hyperlink of the RFI in 'In owner review' status.

	<a href="#">RFI-00001</a>	0	Heat P
✉	<a href="#">RFI-00002</a>	0	Compr
✉	<a href="#">RFI-00003</a>	0	Plaster
✓	<a href="#">RFI-00004</a>	0	Water
○	<a href="#">RFI-00005</a>	0	Cove L

RFI-00005  
Click to follow link

In the **Answer fast** tab, review the provided answer.

Proposed solution

---

Answer

+ Add Add attachment View attachments (1)

[Answered: 7/28/2023 by Consultant 3, Prime Architecture Rev #0]  
Please see attached.

To view attachments, click on the **View attachments** button.

Proposed solution

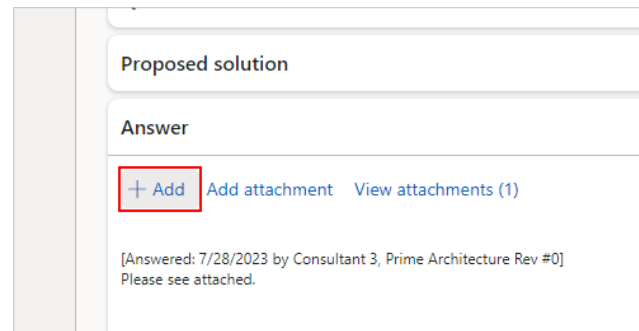
---

Answer

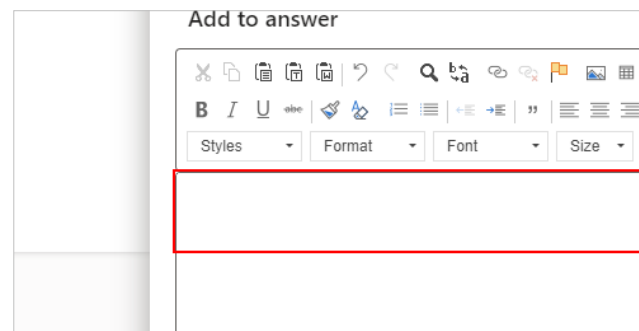
+ Add Add attachment **View attachments (1)**

[Answered: 7/28/2023 by Consultant 3, Prime Architecture Rev #0]  
Please see attached.

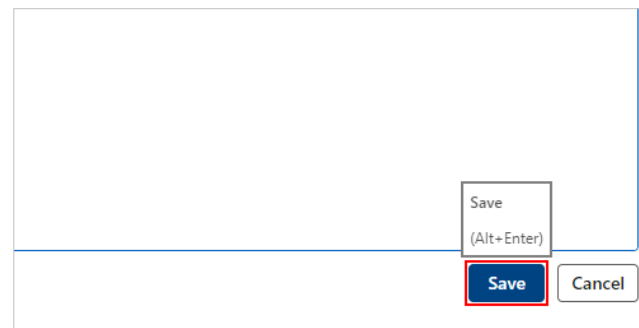
To add to the answer field, click on the **Add** button.



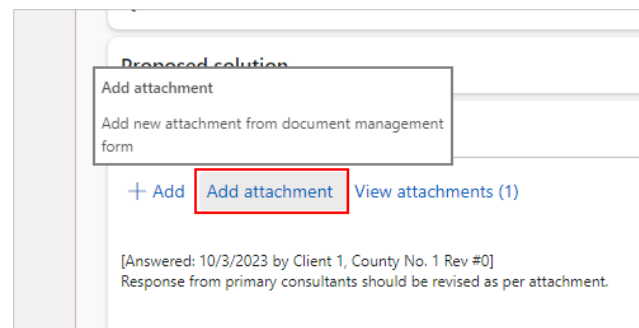
Enter an additional **Answer** text.



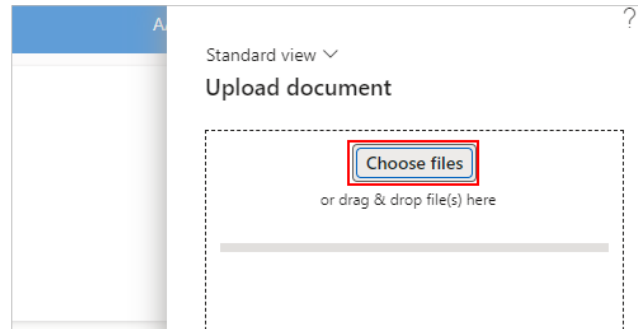
Click on the **Save** button.



To add a supporting attachment, click on the **Add attachment** button.



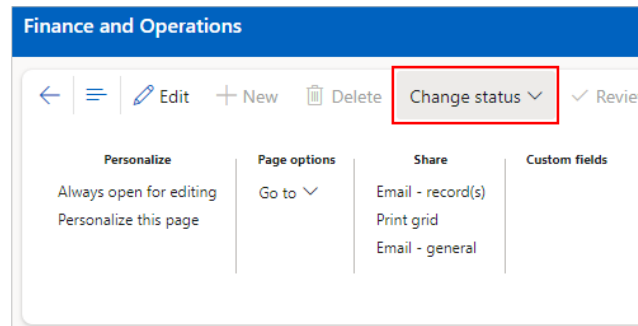
Click on the **Choose files** button to browse for the file you want to attach. You may also use the drag and drop feature.



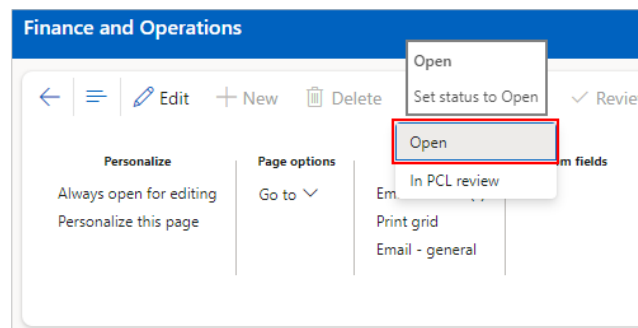
Click on the **Close** button once upload is complete.



Click on the **Change status** drop-down.

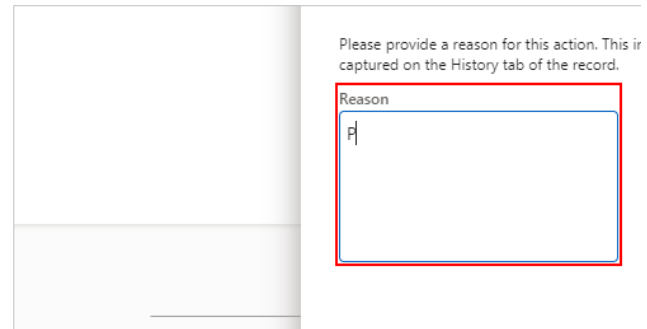


Click on **Open**.





Enter the **Reason** for re-opening the RFI.



Please provide a reason for this action. This is captured on the History tab of the record.

Reason

RFI

Click on the **OK** button.



Internal comment

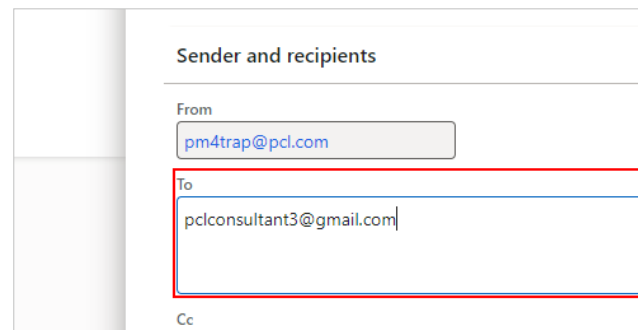
External comment

OK  
(Alt+Enter)

**OK** Cancel

The 'Send email' dialog opens.

You can free-type additional email addresses in the TO, CC and BCC fields.



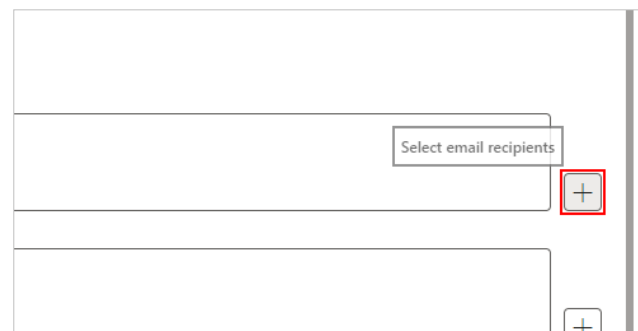
Sender and recipients

From  
pm4trap@pcl.com

To  
pclconsultant3@gmail.com

Cc

Or click the **(+)** icon beside each of these fields to choose from your job contacts and distribution groups.

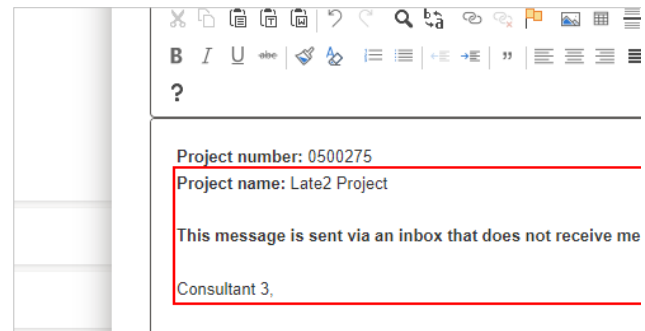


Select email recipients

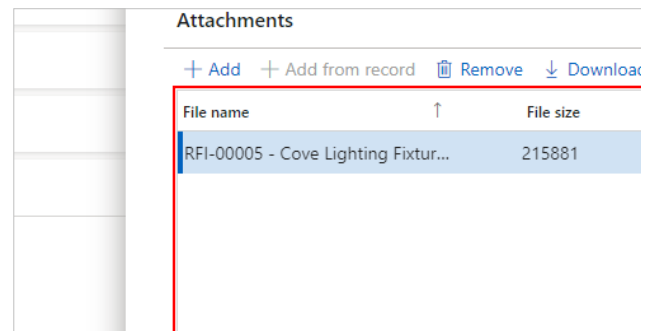
+

+

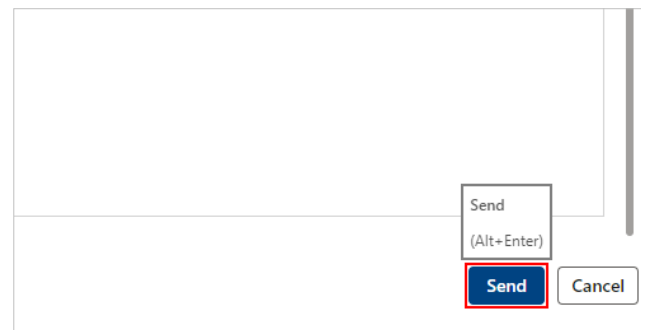
Confirm the information contained in the email is correct. You can edit the text before sending it. The email text includes the reason for the status change.



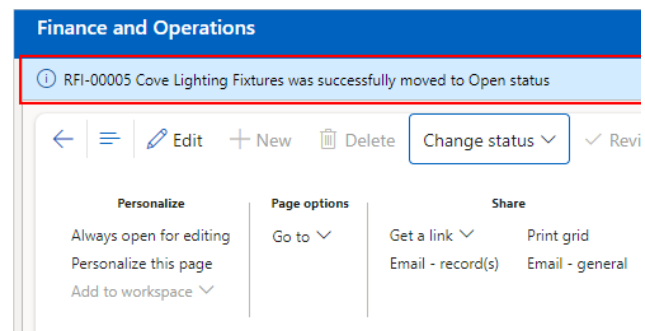
Scroll to the **Attachments** fast tab. The Open RFI package is automatically attached.



Click on the **Send** button.



A message displays when the email is sent successfully.



Once the email is transmitted successfully, the status of the RFI changes to open.

Construction	Draft	N
Construction	Open	N
Construction	In PCL review	N
Construction	In PCL review	N
Construction	Open	N

### 3.7.2.6. View a History of Actions Taken in the RFI

Click on the **History** tab.

0: Cove Lighting Fixtures

Distribution   Sub-consultant routing   **History**   Associations (6)

---

PARTICIPANTS   ASSIGNED

The History fast tab contains the status change actions taken on the RFI.

The **Number** column indicates the order of the actions taken in the RFI.

General   Disciplines   Distribution   Sub-consultant routing

RFI history

No ↓	From status	To status
4	In owner review	Open
3	Open	In owne
2	Draft	Open
1		Draft

The **From status** column displays which status the record was in before the status change was performed.

General   Disciplines   Distribution   Sub-consultant routing

RFI history

No ↓	From status	To status
4	In owner review	Open
3	Open	In owner review owne
2	Draft	Open
1		Draft

The **To status**, column displays which status the record was moved to.

Lines	Distribution	Sub-consultant routing	History	Associations (6)
4	In owner review	Open		Client1
3	Open	In owner review	Open	Client1
2	Draft	Open		Employee1
1	Draft	Draft		Employee1

The **By**, column displays the person who executed the status change.

To status	By	Date and time
Open	Client1	10/3/2023 9:20:25 PM
In owner review	Consultant3	7/28/2023 2:38:10 PM
Open	Employee1	7/28/2023 2:32:30 PM
Draft	Employee1	7/28/2023 2:30:58 PM

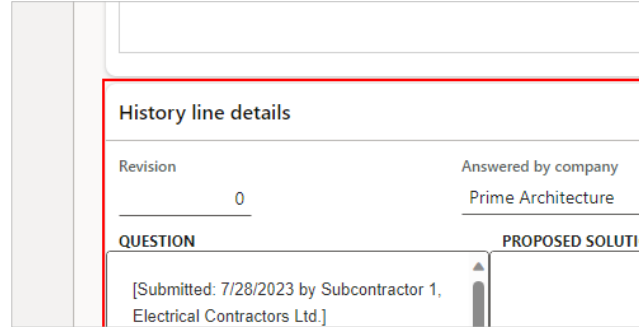
The **Date and time** column displays when the status change action was completed.

By	Date and time	Reason
Client1	10/3/2023 9:20:25 PM	Primary consultants respons...
Consultant3	7/28/2023 2:38:10 PM	Primary consultants respons...
Employee1	7/28/2023 2:32:30 PM	
Employee1	7/28/2023 2:30:58 PM	

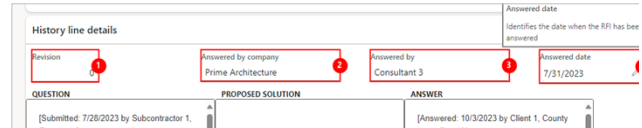
The **Reason** column captures the reason for a status change in specific scenarios, such as when an RFI is re-opened.

Date and time	Reason
10/3/2023 9:20:25 PM	Primary consultants respons...
7/28/2023 2:38:10 PM	Primary consultants respons...
7/28/2023 2:32:30 PM	
7/28/2023 2:30:58 PM	

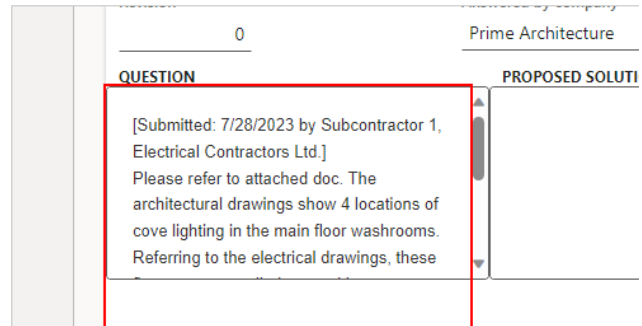
Select any row and view the **History line details** fast tab.



1. The **Revision** field displays what the revision number was when the status change was executed.
2. The **Answered by company** field contains the name of the company responsible for answering the RFI when the status change was executed. In some cases, this could change when the RFI is revised.
3. The **Answered by** field contains the name of the person responsible for answering the RFI. In some cases, this could change when the RFI is revised.
4. The **Answered date** field displays the date the RFI was answered, if it was populated at the time the status change was executed. This could change each time the RFI is revised.



The **Question** field displays what this fast tab contained at the time of the selected status change. This is relevant in cases where the RFI has been revised.



The **Proposed solution** field displays what this fast tab contained at the time of the selected status change. This is relevant in cases where the RFI has been revised.

	Answered by company Prime Architecture	Answered by Consultant 3
	<b>PROPOSED SOLUTION</b>	<b>ANSWER</b>
Subcontractor 1, c. The w 4 locations of por washrooms. rawings, these		[Answ No. 1 R Respon should

The **Answer** field displays what this fast tab contained at the time of the selected status change. This is relevant in cases where the RFI has been revised.

	Answered by Consultant 3	Answered date 7/31/2023
	<b>ANSWER</b>	
	[Answered: 10/3/2023 by Client 1, County No. 1 Rev #0] Response from primary consultants should be revised as per attachment.	

### 3.7.3. Conclusion

Now that you have an understanding of how to review an RFI, proceed to the next work instruction.

## 3.8. RFI Management Workspace

### 3.8.1. Introduction

#### 3.8.1.1. Objective

This work instruction covers the RFI Management workspace for Subcontractors.

#### 3.8.1.2. Background Information

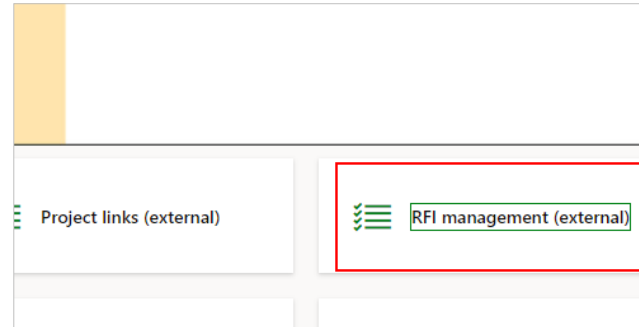
You can track and monitor the progress of your company's RFI requests through your company's specific collaborative workspace.

Once you have submitted a request, PCL can create an RFI from it and move it along to the Consultants for answers. PCL can also answer your request directly or request more information from you. PCL does not have the ability to change any information you provide in your request, thusly ensuring that you own the information you provide. Once the RFI Request becomes an RFI, you will be able to access it and have all the information available to you.

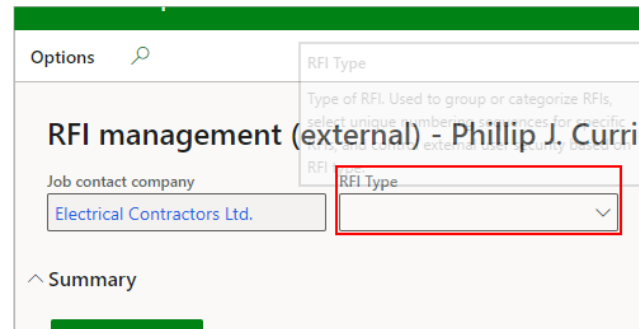
### 3.8.2. Work Instructions

Click on the **RFI management (external)** tile in the PM4+ dashboard.

This workspace provides a single location where you can track and monitor your company's RFIs, as well as create RFI requests.

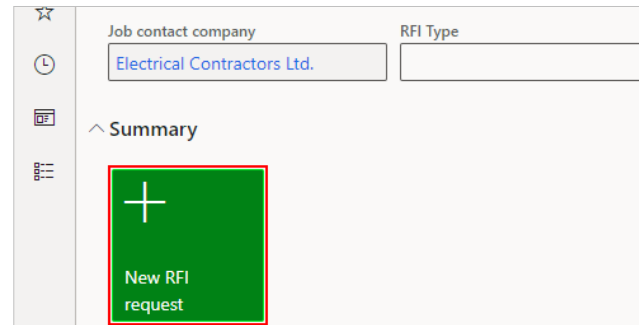


The **RFI Type** field filters the workspace according to the selected RFI type. By default all RFI types are included.



### 3.8.2.1. Tiles

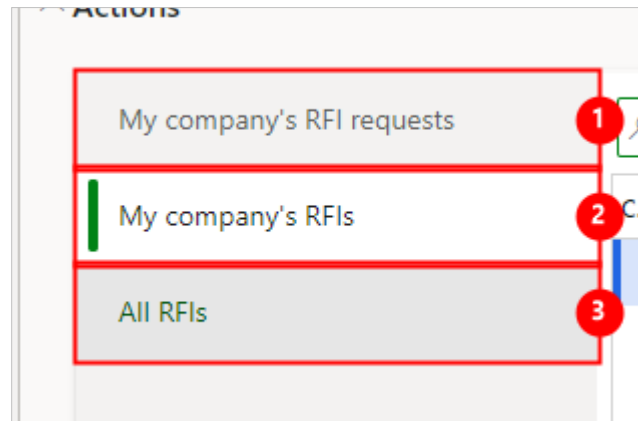
The **New RFI request** action tile creates a new RFI request.



### 3.8.2.2. Tabbed Lists

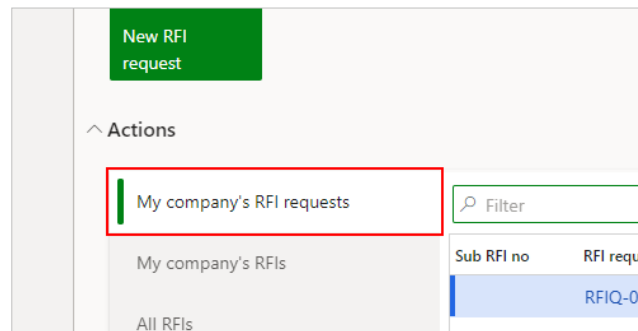
There are three tabbed lists in the workspace.

1. The **My company's RFI requests** tabbed list displays all RFI requests submitted by your company.
2. The **My company's RFIs** tabbed list displays any RFIs that were generated in response to RFI requests submitted by your company.
3. The **All RFIs** tabbed list displays all RFIs created for the project. This list can assist you in determining if questions you might want to raise exist and have been answered.

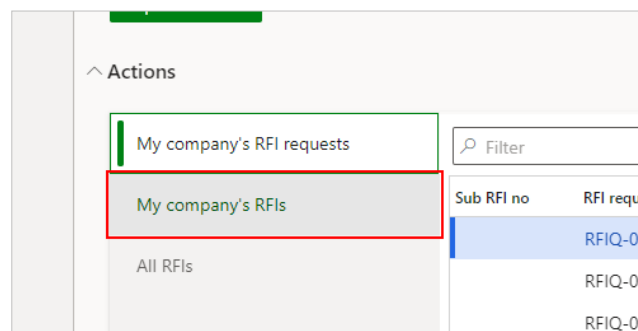


There are three tabbed lists in the workspace.

The **My company's RFI requests** tabbed list displays all RFI requests submitted by your company.

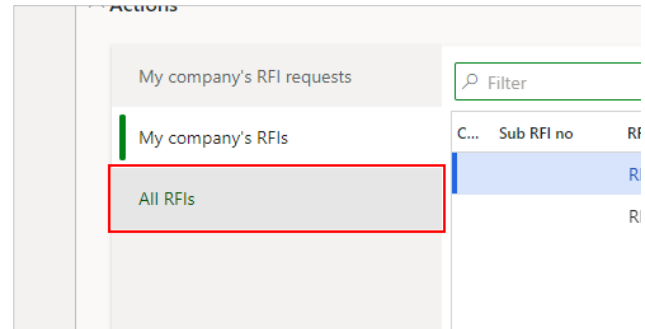


The **My company's RFIs** tabbed list displays any RFIs that were generated in response to RFI requests submitted by your company.





The **All RFIs** tabbed list displays all RFIs created for the project. This list can assist you in determining if questions you might want to raise exist and have been answered.



### 3.8.3. Conclusion

Now that you have an understanding of the RFI Management workspace, proceed to the next work instruction.

## 3.9. Use RFI Ball in Court View

### 3.9.1. Introduction

#### 3.9.1.1. Objective

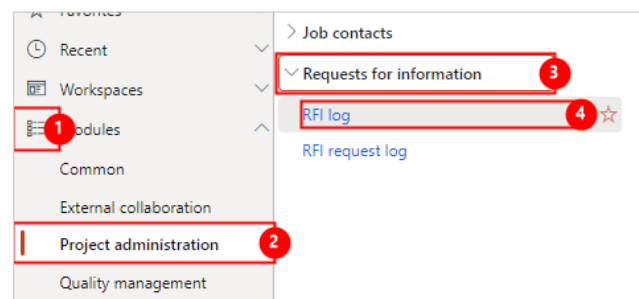
This work instruction covers the RFI Ball in Court view.

#### 3.9.1.2. Background Information

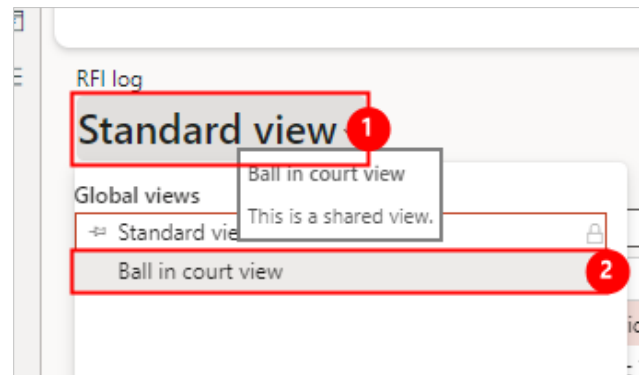
The RFI ball in court view helps you quickly determine who is currently responsible for an RFI review or response.

### 3.9.2. Work Instructions

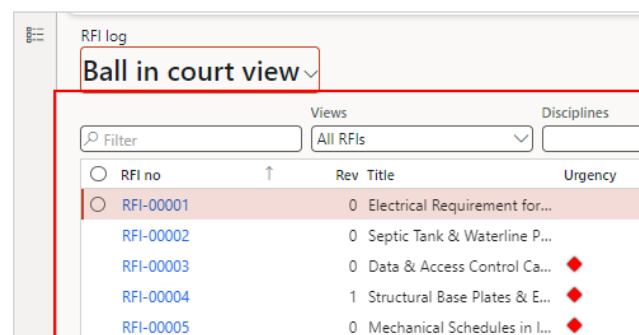
1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Requests for information** menu section.
4. Click on the **RFI log** menu item.



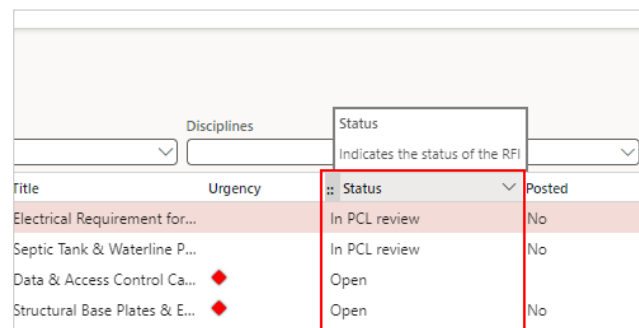
1. Click on the drop down next to the named view to show the list of available views for this log.
2. Select the **Ball in court view**.



The **Ball in court view** is applied to the RFI log.



The RFI log is filtered to only display records in 'Open', 'In owner review', and 'In PCL review' statuses.



Exclusively in the Ball in Court view, there are three new columns in the RFI log:

1. 'Ball in court of'.
2. 'Company contact'.
3. 'Sub-consultant routing'.

The **Ball in court of** column displays what company is currently responsible for the RFI based on the current status of the RFI.

For 'In PCL review' status, the ball is in the court of the PCL company.

For 'Open' status, the ball is in the court of the company named in the 'Assigned to company' field (usually the primary Consultant).

For 'In owner review' status, the ball is in the court of the company named in the 'Owner company' field (when this status option is in use).

Primary discipline	Ball in court of	Company contact
Electrical	PCL Construction Resourc...	Employee 1
Civil	PCL Construction Resourc...	Employee 1
Electrical	Prime Architecture	Consultant 3
Structural	Prime Architecture	Consultant 3

The **Company contact** column displays the contact from the company who is named in the 'header' of the RFI.

For 'In PCL review' status, the company contact is in the 'PCL reviewer' field.

For 'Open' status, the company contact is in the 'Assigned to' field.

For 'In owner review' status, the company contact is in the 'Owner' field.

Ball in court of	Company contact	Sub-consultant routing
PCL Construction Resourc...	Employee 1	
PCL Construction Resourc...	Employee 1	
Prime Architecture	Consultant 3	None
Prime Architecture	Consultant 3	None

The **Sub-consultant routing** column indicates what is in the Sub-consultant routing tab details while the RFI record is in 'Open' status.

This column will always be blank for any other status than 'Open'.

This column has three values while in 'Open' status:

1. 'None' if there is no Sub-consultant routing.
2. The next Sub-consultant company name(s) if there is an incomplete Subconsultant routing.

Ball in court of	Company contact	Sub-consultant routing
PCL Construction Resourc...	Employee 1	
PCL Construction Resourc...	Employee 1	
Prime Architecture	Consultant 3	None
Prime Architecture	Consultant 3	None

3. 'Complete', if all Sub-consultants have reviewed the RFI.

Note: Completion of a routing is indicated when the 'Review date' field for every row in the 'Sub-consultant routing' tab is filled in. This field is populated, either when the Sub-consultant clicks the 'Review complete' button, or if the primary Consultant, or PCL coordinator marks the review complete on behalf of the Sub-consultant.

### **3.9.3. Conclusion**

Now that you have an understanding of the RFI ball in court view, proceed to the next work instruction.

## **3.10. Create and Submit an RFI Request**

### **3.10.1.1. Objective**

This work instruction covers how to create and submit an RFI Request, and how to resubmit an RFI request requiring clarification.

### **3.10.1.2. Background Information**

To allow the project team to maintain a well organized RFI log, the process to initiate a new RFI involves creating and submitting an RFI request. Once the request is reviewed and no duplicate question is found, your request is converted to an RFI in the RFI log by the Project Manager or Coordinator.

If the request is returned for clarification, a reason is provided. You may re-submit the request if relevant.

### **3.10.2. Work Instructions**

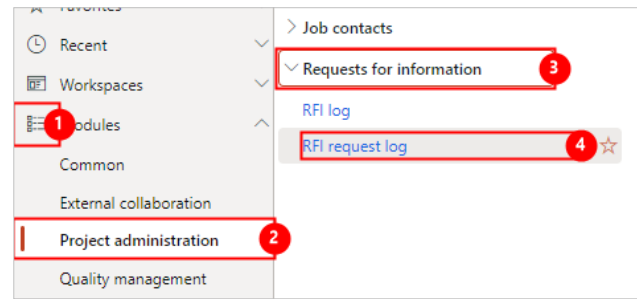
#### **3.10.2.1. Navigation**

There are two ways to navigate if you want to initiate a new RFI via the RFI Request log:

1. Navigate to the 'RFI Request' log.
2. Navigate to the 'RFI Management' workspace.

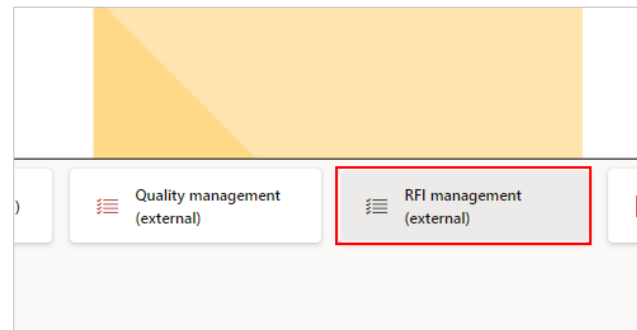
#### **3.10.2.1.1. *Navigate to the RFI Request Log***

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Requests for information** menu section.
4. Click on the **RFI request log** menu item.



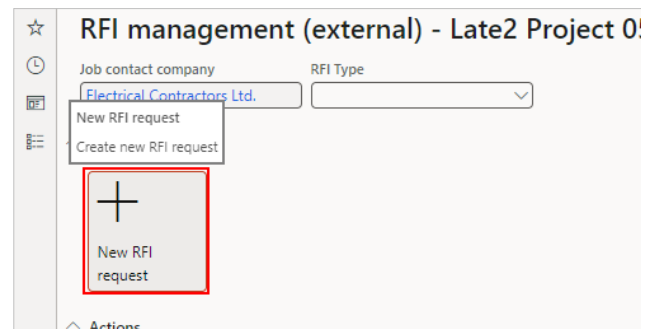
### 3.10.2.1.2. *Navigate with the RFI Workspace*

Click on the **RFI management (external)** workspace.



### 3.10.2.1.3. *Create and Submit an RFI Request*

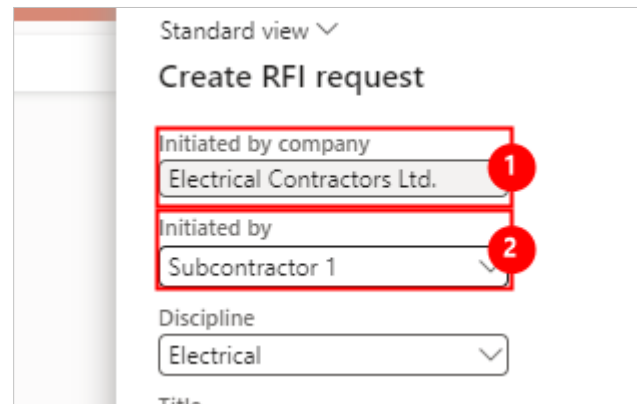
Click on the **New RFI request** action tile.



The 'Create RFI request' dialog opens.

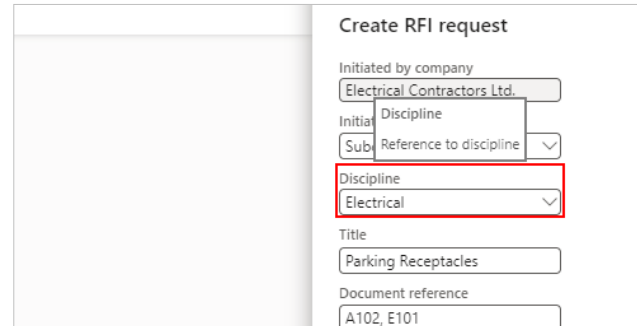
The following fields auto-populate based on the person creating the request.

1. **Initiated by company.**
2. **Initiated by** - This is the person who will receive all communications about the RFI. Change the name of the person from your company, if you are entering the request on



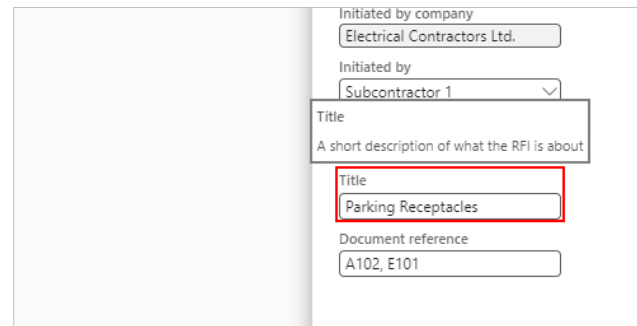
someone's behalf.

The **Discipline** field is filled in if one is associated with your company's record in PM4+. Ensure the discipline is related to the question you will be entering.



The screenshot shows the 'Create RFI request' form. The 'Discipline' dropdown menu is open, showing 'Electrical' as the selected option, which is highlighted with a red box. Other fields include 'Initiated by company' (Electrical Contractors Ltd.), 'Sub' (Reference to discipline), 'Title' (Parking Receptacles), and 'Document reference' (A102, E101).

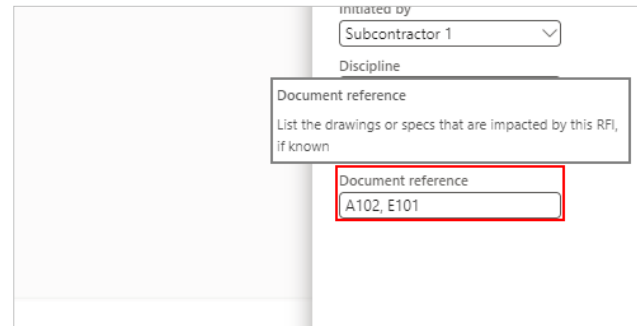
Enter a **Title** or short description for the request.



The screenshot shows the 'Create RFI request' form. The 'Title' field is highlighted with a red box and contains the text 'Parking Receptacles'. The 'Document reference' field contains 'A102, E101'.

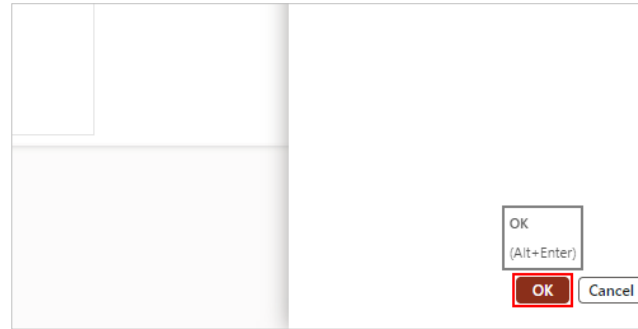
If you know the documents that may be affected by your question, input their number into the **Document reference** field.

This is a required field. Enter N/A, if not applicable, or some other indication if you are not certain which drawings are affected by your question.



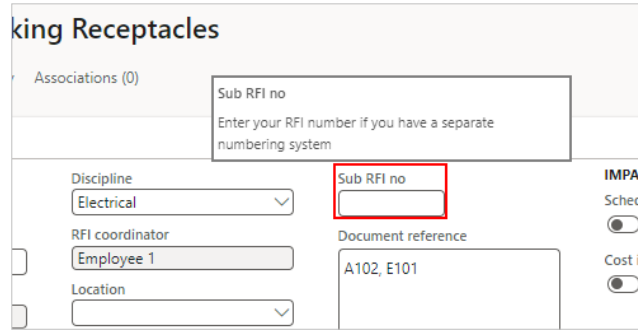
The screenshot shows the 'Create RFI request' form. The 'Document reference' field is highlighted with a red box and contains the text 'A102, E101'. The 'Discipline' dropdown menu is also visible, showing 'Subcontractor 1' as the selected option.

Click on the **OK** button to create the RFI request.

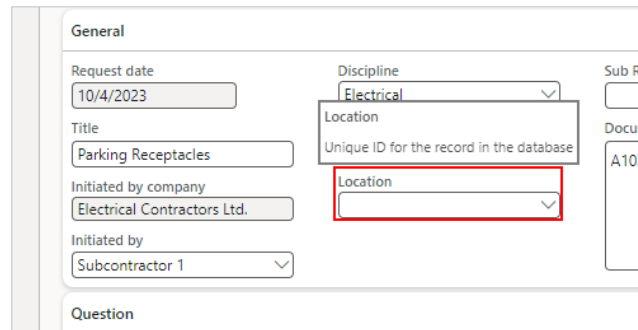


A new record is created in the 'RFI Request log' with a unique ID. You will submit this request to PCL.

If your company uses a separate numbering system for tracking RFIs, enter your company number in the **Sub RFI** number field.

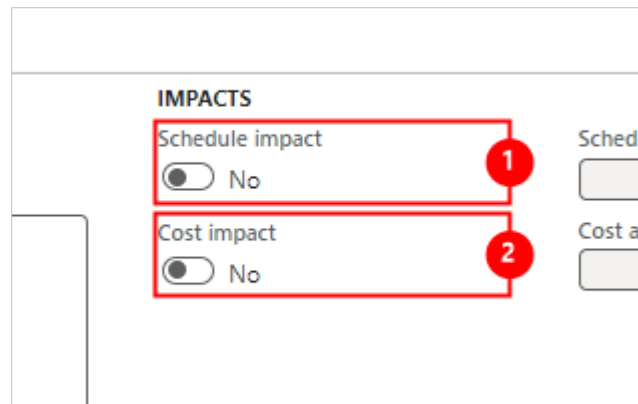


The **Location** is an optional field to help segregate RFIs by site location. Speak to the PCL Project Manager if this is used.



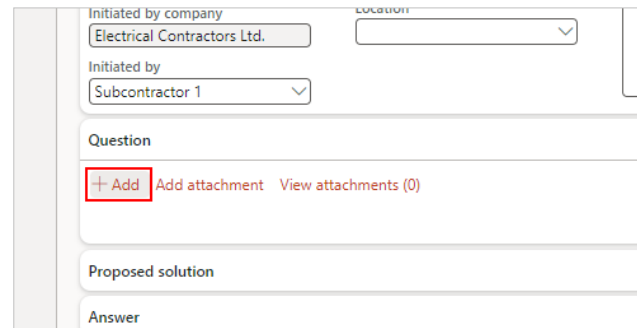
Switching either of these toggles to 'Yes' makes the corresponding 'activity' field mandatory. Talk to the Project Manager or Coordinator if you are not sure what to enter in these fields.

1. If the question you are raising has a potential schedule impact, set the **Schedule impact** toggle to 'Yes', and then enter details in the field.
2. If the question you are raising has a



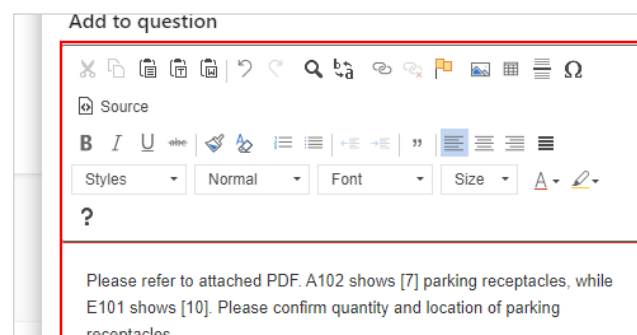
potential cost impact, set the **Cost impact** toggle to 'Yes', and then enter details in the field.

In the 'Question' fast tab, click on the **Add** button.

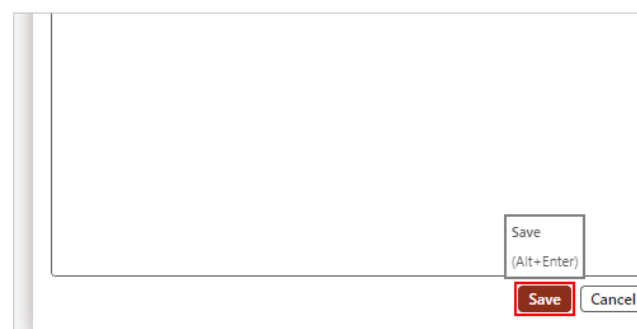


The 'Add to question' dialog opens.

Enter your **Question**.

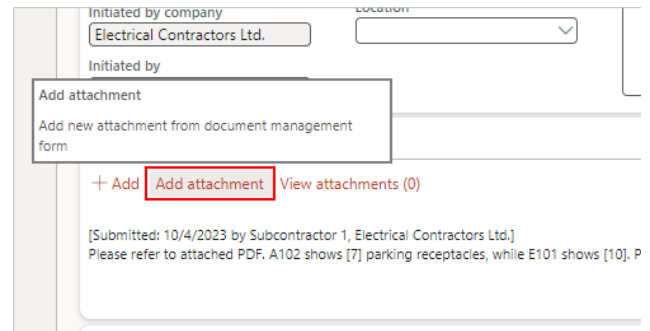


Click on the **Save** button.





To add any supporting documents or sketches, click on the **Add attachment** button.



Initiated by company  
Electrical Contractors Ltd.

Initiated by

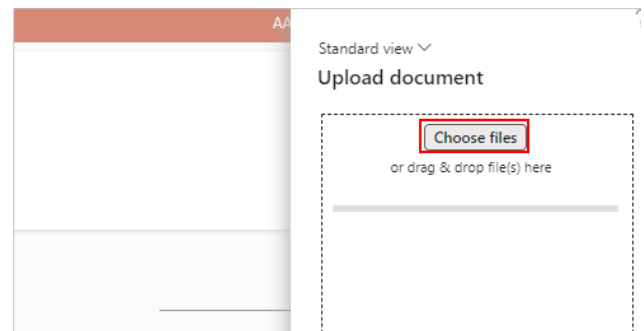
Add attachment  
Add new attachment from document management form

+ Add **Add attachment** View attachments (0)

[Submitted: 10/4/2023 by Subcontractor 1, Electrical Contractors Ltd.]  
Please refer to attached PDF. A102 shows [7] parking receptacles, while E101 shows [10]. P

The 'Upload document' dialog opens.

Click on the **Choose files** button and navigate to the document you want to attach.



Standard view

**Upload document**

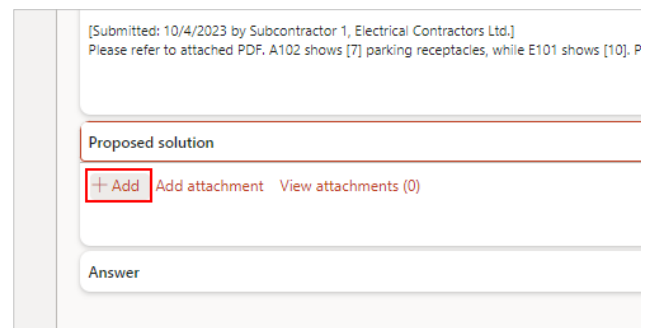
**Choose files**  
or drag & drop file(s) here

Click on the **Close** button when the upload is complete.



**Close**

In the 'Proposed solution' fast tab, click on the **Add** button.



[Submitted: 10/4/2023 by Subcontractor 1, Electrical Contractors Ltd.]  
Please refer to attached PDF. A102 shows [7] parking receptacles, while E101 shows [10]. P

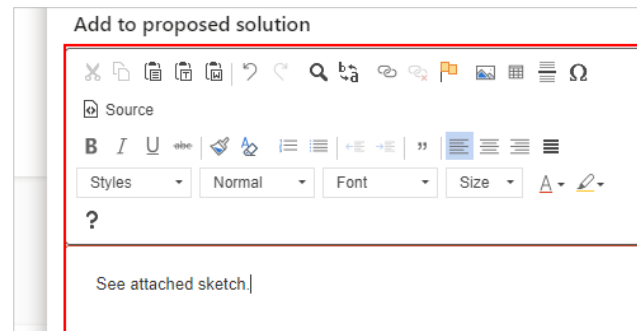
**Proposed solution**

+ Add **Add attachment** View attachments (0)

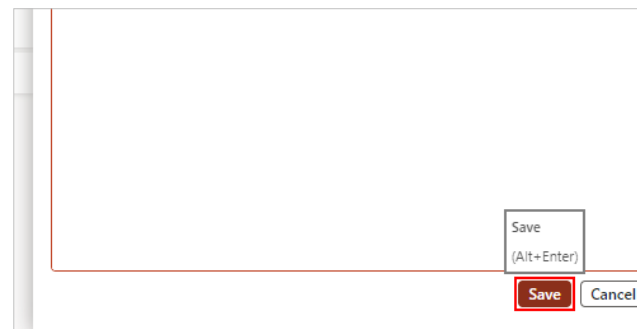
**Answer**

The 'Add to proposed solution' dialog opens.

Enter the **Proposed solution**.



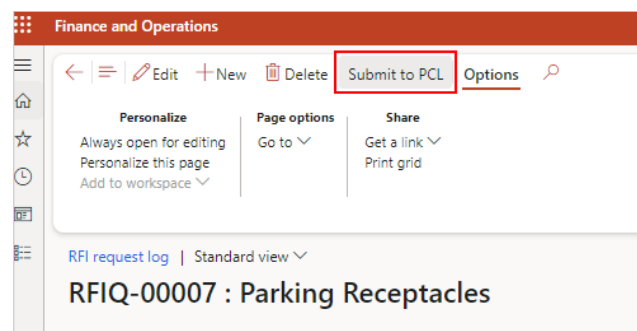
Click on the **Save** button.



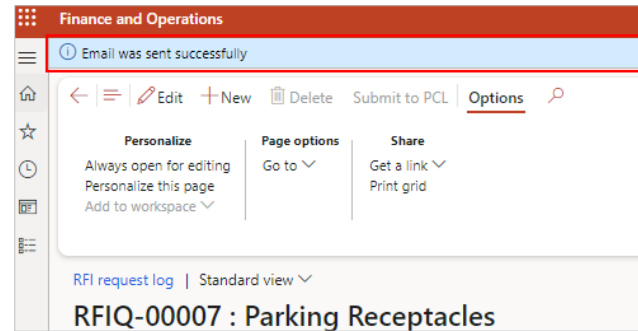
You may also choose to attach relevant documentation to support your proposed solution.

Do a final review of your RFI request to ensure it is complete and accurate. After you submit it, it will be moved from 'Draft' to 'Submitted to PCL' status, and you will no longer be able to edit the request. If you need the request back in your court for any reason, contact the RFI coordinator named in the request and ask them to return it to you for editing.

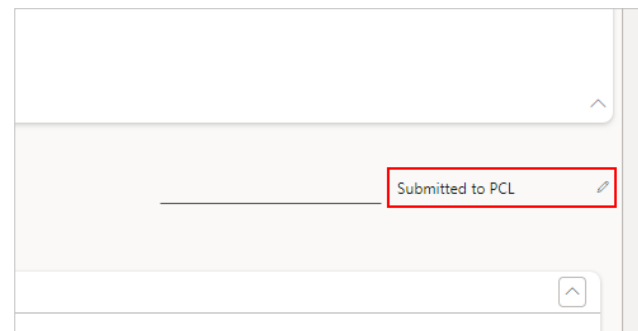
Click on the **Submit to PCL** button in the action pane. This triggers an automated email to the person named in the field.



A message displays confirming the email was sent. The person named in the field receives this email about the new RFI request.



The status is now **Submitted to PCL**.



You can track the status of the RFI request in your 'RFI Management (external)' workspace. The two end states for a request are:

'RFI Created' status: This means a corresponding RFI was created in the RFI log. The request and the RFI are linked in the 'Associations' tabs of each record. The wording and attachments you entered to the request are copied to the RFI. Wording and attachments may be edited by the RFI Coordinator, but your original statements and attachments remain preserved in the RFI request.

'PCL Answered' status: This status indicates that no new RFI was created. This could be because the question was previously asked. In this case, the 'Answer' field in the RFI request will be filled in by the Project Manager or Coordinator.

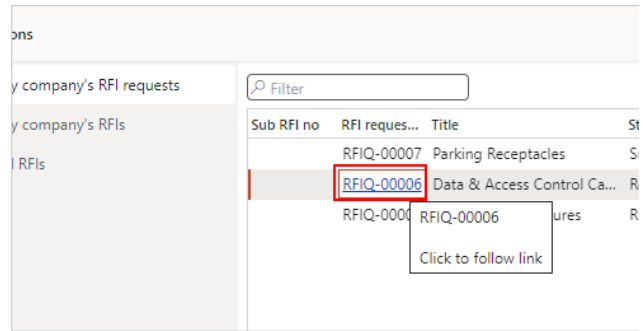
#### **3.10.2.1.4. Submit changes to an RFI Request**

The PCL RFI Coordinator may ask that you provide more details about the RFI request your company submitted. In that case, the person in the 'Initiated by' field receives an email with details about what information is needed.

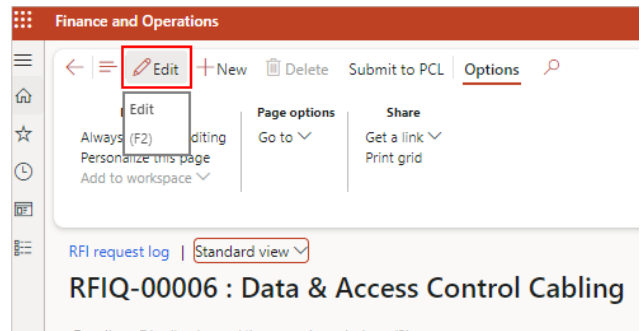
To send this email, PCL moves the RFI request to 'Request change' status. This status means the request is back in your court until someone from your company re-submits.

Click on the record you need to re-submit.

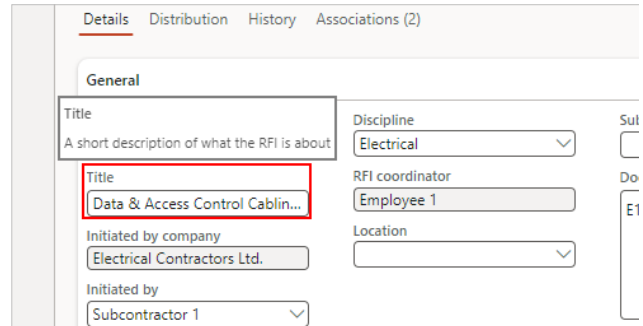
Alternatively, you may skip this step if you navigated directly from an email message.



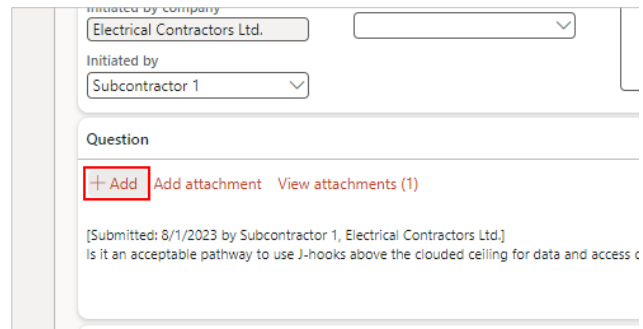
Click on the **Edit** button.



In the 'General' fast tab, the **Title** field can be updated.

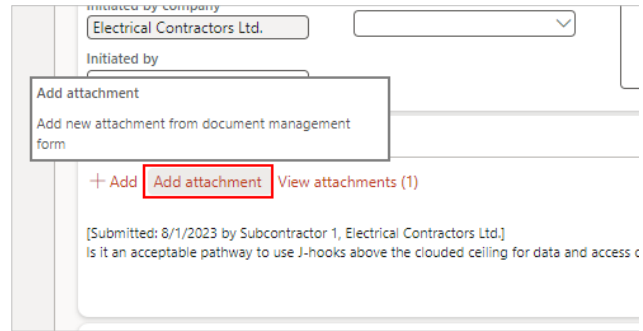


To edit the wording of the original question, click on the **Add** button in the fast tab.



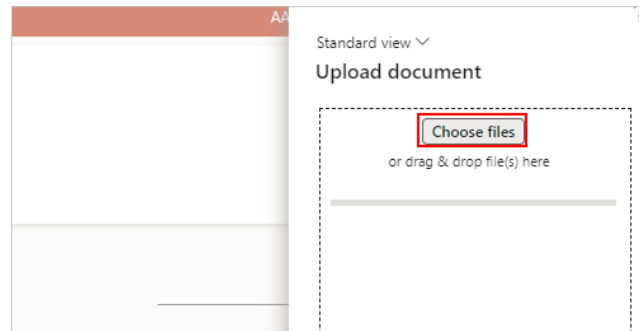
Attachments can also be added. In this example, the Subcontractor forgot to upload the attachment.

Click on the **Add attachment** button to upload.

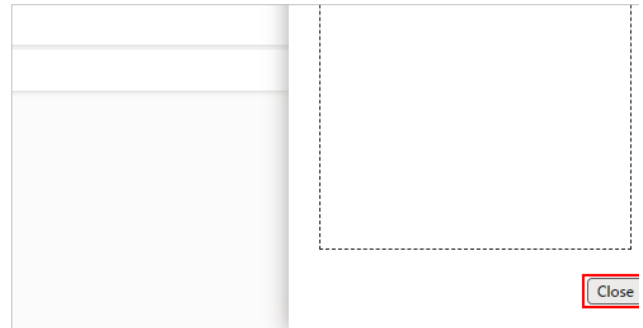


The 'Upload document' dialog opens.

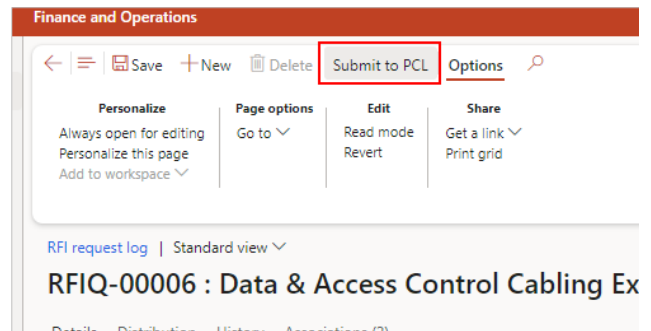
Click on the **Choose files** button to upload your document.



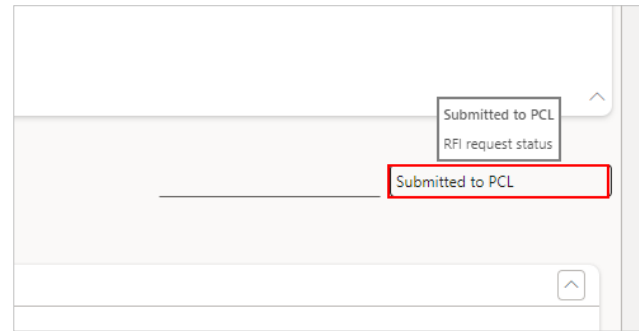
Click on the **Close** button once uploaded.



In the action pane, click on the **Submit to PCL** button, to re-submit the RFI request to PCL for review.



The status is now **Submitted to PCL**.



### 3.10.3. Conclusion

Now that you have an understanding of how to create and update a RFI request, proceed to the next work instruction.

## 4. Submittals

### 4.1. Submittal Management Workspace

#### 4.1.1. Introduction

##### 4.1.1.1. Objective

This work instruction covers the submittal management workspace for Consultants and PCL Led Consultants on design-build projects.

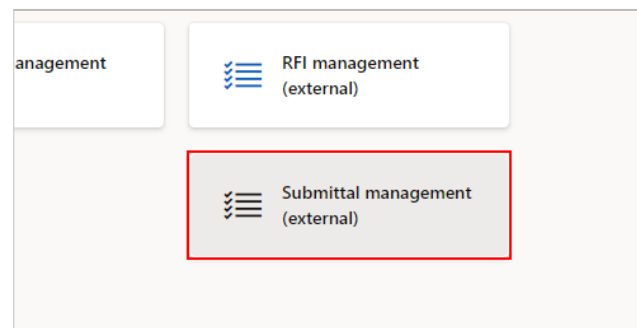
##### 4.1.1.2. Background Information

You can track and monitor the submittals assigned to you for review in your company's specific collaborative workspace.

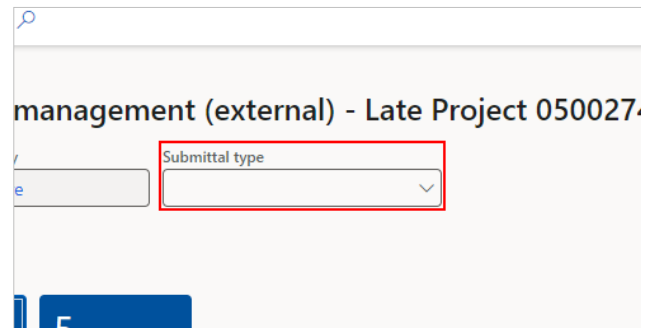
#### 4.1.2. Work Instructions

Click on the **Submittal management (external)** tile in the PM4+ dashboard.

This workspace provides a single location where you can track and monitor the submittals that you need to review.



The **Submittal type** field filters the workspace according to the selected Submittal type. By default all Submittal types you have access to, are included when this field is blank. Multiple submittal types are optional and may not be in use on your project. Talk to the PCL Project Manager for clarification on what types you should see.



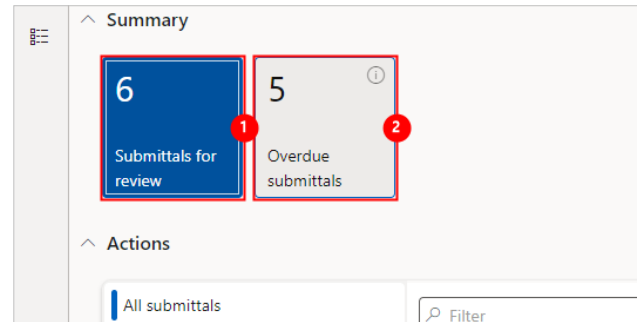
##### 4.1.2.1. Consultant View

The following fields are standard to the workspace and visible to Consultants and PCL Led Consultants.

###### 4.1.2.1.1. Tiles

Click on a count tile to navigate you to the Submittal log, filtered to only display the records from the selected count:

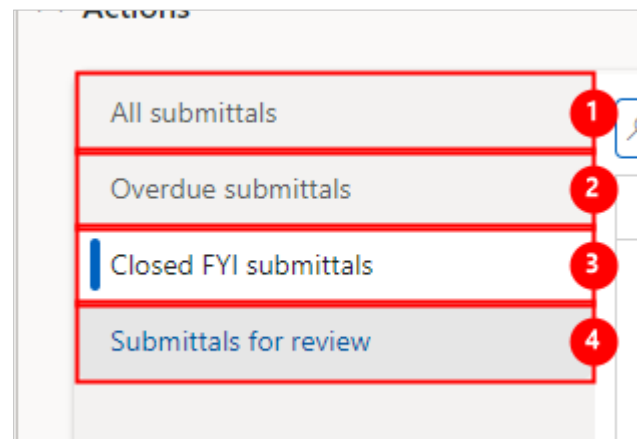
1. The **Submittals for review** count tile displays all submittals with a status of 'In Consultant Review' and where your company has been identified as needing to provide a review. When a project team determines that the 'Owner review' feature is appropriate, an additional status called, 'In Owner Review' will also be included in the count.
2. The **Overdue submittals** count tile displays all overdue submittals with a status of 'In Consultant Review' and where your company has been identified as needing to provide a review.



#### 4.1.2.1.2. **Tabbed Lists**

There are four tabbed lists in the workspace:

1. The **All submittals** tabbed list displays all project submittals regardless of status.
2. The **Overdue submittals** tabbed list displays the same number of records as the count tile, but more details are visible.
3. The **Closed FYI submittals** tabbed list displays all project submittals with a status of 'Closed' where no Consultant or Design team review was required.
4. The **Submittals for review** tabbed list displays the same number of records as the count tile, but more details are visible.



#### 4.1.2.1.3. **PCL Led Consultant View**

PCL led Consultants will have additional fields available on their workspace as they are involved in design-build projects with PCL. As such, they act also like Subcontractors and will need to be able to view and submit submittals to PCL on behalf of their company.

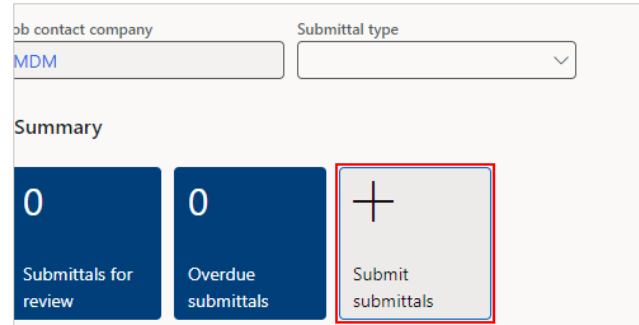
The following fields are only visible to PCL Led Consultants and are in addition to the standard Consultant view:



#### 4.1.2.1.3.1. Tiles

The **Submit submittals** action tile provides a way of attaching a document to the submittal being requested of you.

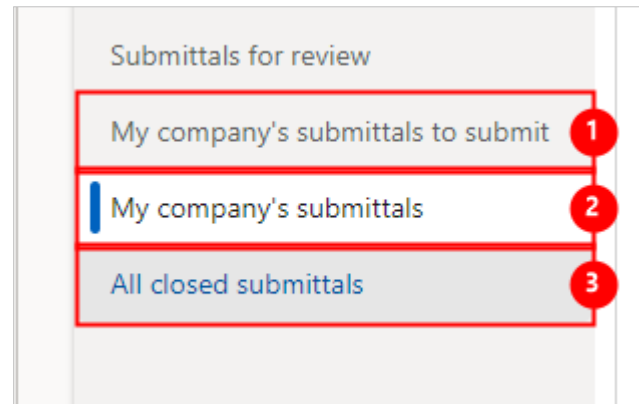
View the work instruction called, ['Submit a Submittal to PCL' for more details.](#)



#### 4.1.2.1.3.2. Tabbed Lists

There are three additional tabbed lists in the workspace:

1. The **My company's submittals to submit** tabbed list displays your company's submittals filtered by the 'Requested' or 'Revise and resubmit' status.
2. The **My company's submittals** tabbed list displays all records in the submittal log where your company is named as the party responsible for providing the submittal. Submittal records of any status are listed in this tab.
3. The **All closed submittals** tabbed list displays all the closed submittals for the project.



### 4.1.3. Conclusion

Now that you have an understanding of the submittal management workspace, proceed to the next work instruction.

## 4.2. Use the Submittal Ball in Court View

### 4.2.1. Introduction

#### 4.2.1.1. Objective

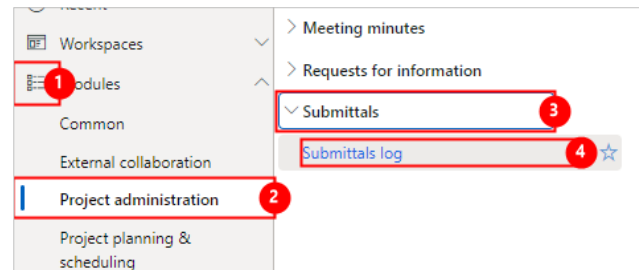
This work instruction covers the Submittal Ball in Court view.

#### 4.2.1.2. Background Information

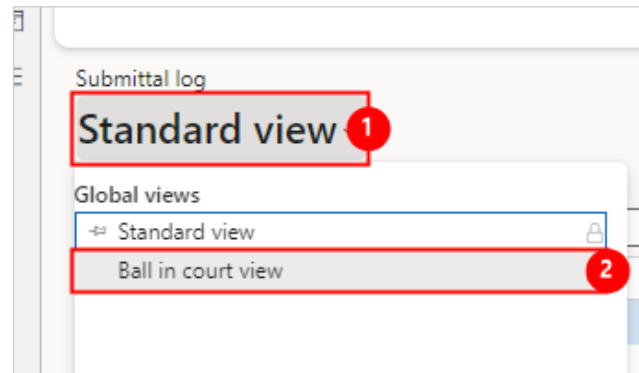
The Submittal ball in court view helps you quickly determine who is currently responsible for a submittal review or response.

#### 4.2.2. Work Instructions

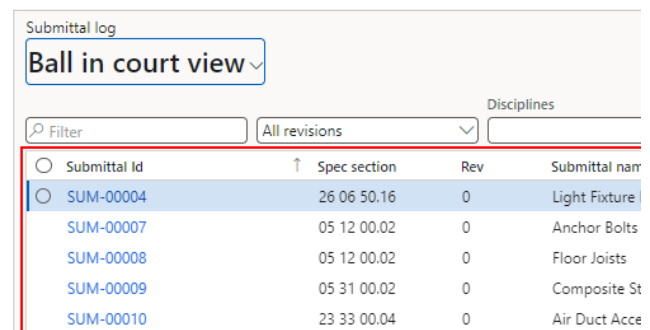
1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.



1. Click on the drop down next to the named view to show the list of available views for this log.
2. Select the **Ball in court view**.

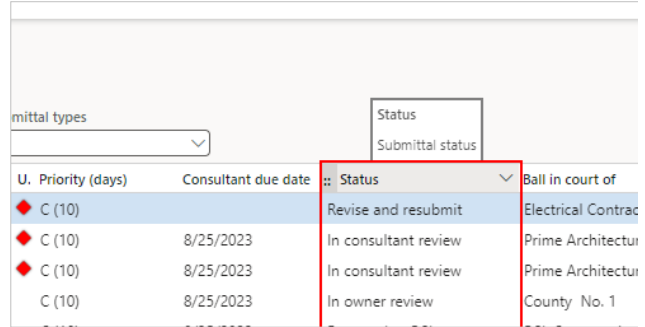


The **Ball in court view** for the Submittal log displays.



Submittal Id	Spec section	Rev	Submittal name
SUM-00004	26 06 50.16	0	Light Fixture
SUM-00007	05 12 00.02	0	Anchor Bolts
SUM-00008	05 12 00.02	0	Floor Joists
SUM-00009	05 31 00.02	0	Composite St
SUM-00010	23 33 00.04	0	Air Duct Ace

The submittal log is filtered to only display records in 'In PCL review', 'Returned to PCL', 'Revise and resubmit', 'In consultant review', and 'In owner review' statuses.



U. Priority (days)	Consultant due date	Status	Ball in court of
◆ C (10)		Revise and resubmit	Electrical Contract
◆ C (10)	8/25/2023	In consultant review	Prime Architecture
◆ C (10)	8/25/2023	In consultant review	Prime Architecture
C (10)	8/25/2023	In owner review	County No. 1

Exclusively in the Ball in Court view, there are three new columns in the Submittal log:

1. 'Ball in court of'.
2. 'Company contact'.
3. 'Sub-consultant routing'.

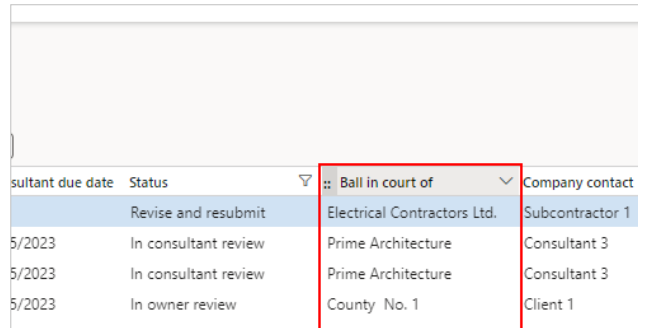
The **Ball in court of** column displays what company is currently responsible for the Submittal based on the current status of the Submittal.

For 'In PCL review' and 'Returned to PCL' statuses, the ball is in the court of the PCL company.

For 'Revise and resubmit' status, the ball is in the court of the company named in the 'Subcontractor' field.

For 'In consultant review' status, the ball is in the court of the company named in the 'Consultant reviewer company' field (usually the primary Consultant).

For 'In owner review' status, the ball is in the court of the company named in the 'Owner' field (when this status option is in use).



Consultant due date	Status	Ball in court of	Company contact
	Revise and resubmit	Electrical Contractors Ltd.	Subcontractor 1
5/2023	In consultant review	Prime Architecture	Consultant 3
5/2023	In consultant review	Prime Architecture	Consultant 3
5/2023	In owner review	County No. 1	Client 1

The **Company contact** column displays the contact from the company who is named in the 'header' of the submittal.

For 'In PCL review' status, the company contact is in the 'PCL reviewer' field.

For 'Revise and resubmit' status, the company contact is in the 'Subcontractor contact' field.

For 'In consultant review' status, the company contact is in the 'Consultant reviewer' field.

For 'In owner review' status, the company contact is in the 'Owner contact' field.

	Ball in court of	Company contact	Sub-consultant routing
resubmit	Electrical Contractors Ltd.	Subcontractor 1	
in review	Prime Architecture	Consultant 3	Complete
in review	Prime Architecture	Consultant 3	None
in review	County No. 1	Client 1	

The **Sub-consultant routing** column indicates what is in the Sub-consultant routing tab details while the submittal record is in 'In consultant review' status.

of	Company contact	Sub-consultant routing	Days over...	Star
Electrical Contractors Ltd.	Subcontractor 1		0	
Prime Architecture	Consultant 3	Complete	37	Rev
Prime Architecture	Consultant 3	None	37	Rev
County No. 1	Client 1		0	Rev

This column will always be blank for any other status than 'In consultant review'.

This column has three values while in 'In consultant review' status:

1. 'None' if there is no Sub-consultant routing.
2. The next Sub-consultant company name(s) if there is an incomplete Sub-consultant routing.
3. 'Complete', if all Sub-consultants have reviewed the submittal.

Note: Completion of a routing is indicated when the 'Review date' field for every row in the 'Sub-consultant routing' tab is filled in. This field is populated, either when the Sub-consultant clicks the 'Review complete' button, or if the primary Consultant, or PCL coordinator marks the review complete on behalf of the Sub-consultant.

### 4.2.3. Conclusion

Now that you have an understanding of the Submittal ball in court view, proceed to the next work instruction.

### **4.3. Manage Sub-consultant Collaboration**

#### **4.3.1. Introduction**

##### **4.3.1.1. Objective**

This work instruction covers how to manage Sub-consultant collaboration as a Primary Consultant.

##### **4.3.1.2. Background Information**

Engaging additional reviews of a submittal is optional and will depend on what workflows are established by the project team. Either the PCL Coordinator or the Primary Consultant is able to add Sub-consultants to a submittal that is in 'In Consultant review' status.

There are two ways to engage Sub-consultants:

1. Sub-consultant routings can be set up at the start of the project by a PCL Project Manager or Coordinator. If this was done, then routings will be available, as shown.
2. If no routings were set-up, use the 'Add' button in the Sub-consultant routing tab to manually add people from the project's contact list.

Note: Even if a Sub-consultant does not collaborate directly in PM4+, you can use the 'Sub-consultant routing' feature to send an email notification about their required input. Both the PCL Coordinator and the Primary Consultant's company may add a reviewed submittal on the Sub-consultant's behalf.

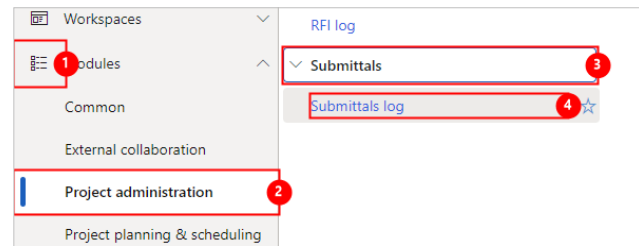
#### **4.3.2. Work Instructions**

##### **4.3.2.1. Navigation**

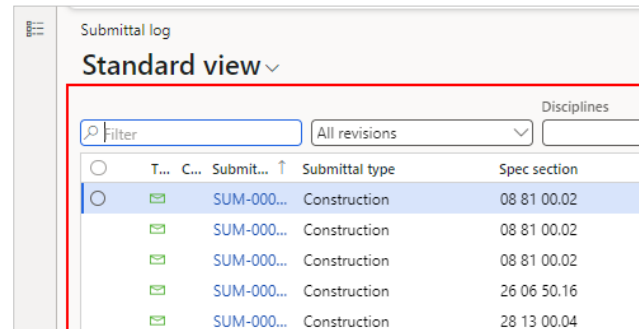
You may choose to navigate directly to the 'Submittal log', to view all submittals, or you may choose to navigate to your 'Submittals Management' workspace to view just the submittals in your company's court. Both navigation options are shown in this section.

##### **4.3.2.1.1. *Navigate to the Submittal Log***

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.

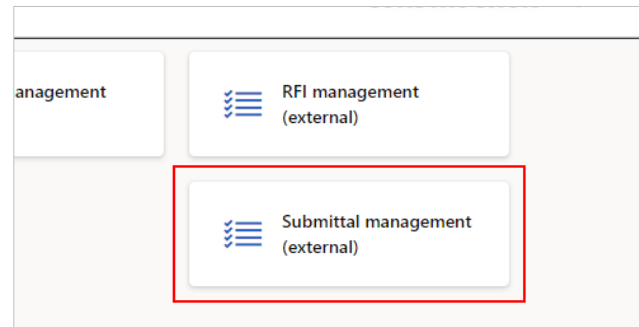


The full Submittal log is displayed.

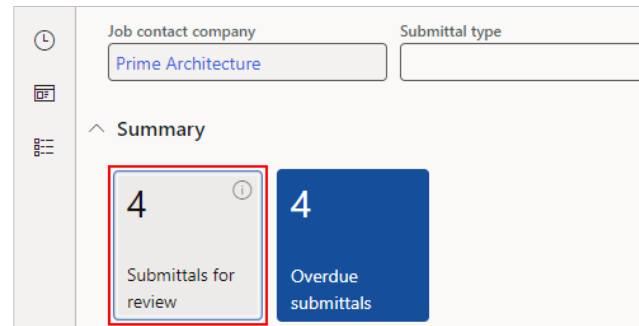


#### 4.3.2.1.2. *Navigate from the Submittal Management Workspace*

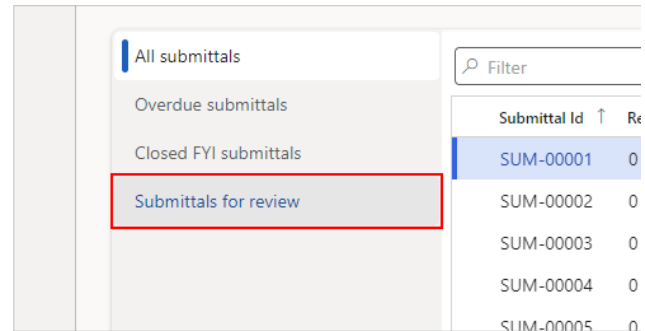
Click on the **Submittal management (external)** workspace.



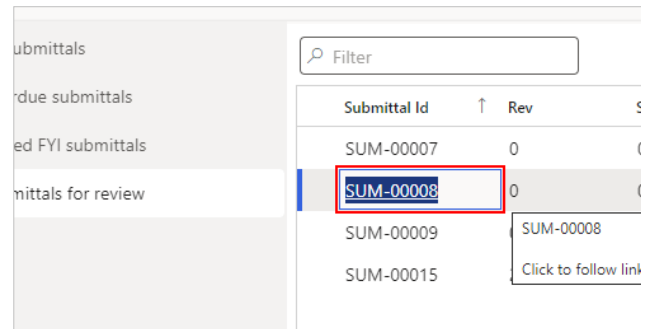
The **Submittals for review** count tile displays the submittals that are in your company's court.



Alternatively, you can also click the **Submittals for review** tabbed list...

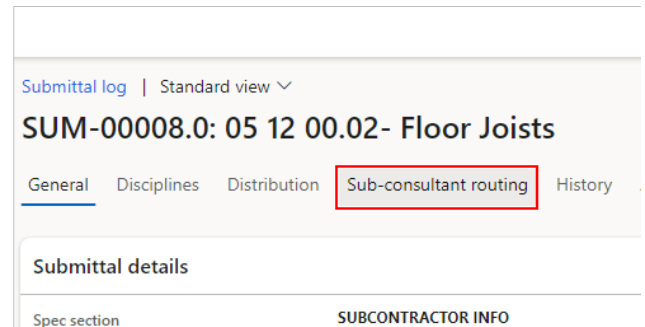


Clicking on the **Submittal** hyperlink field of a submittal record takes you to the 'details view' of the record.

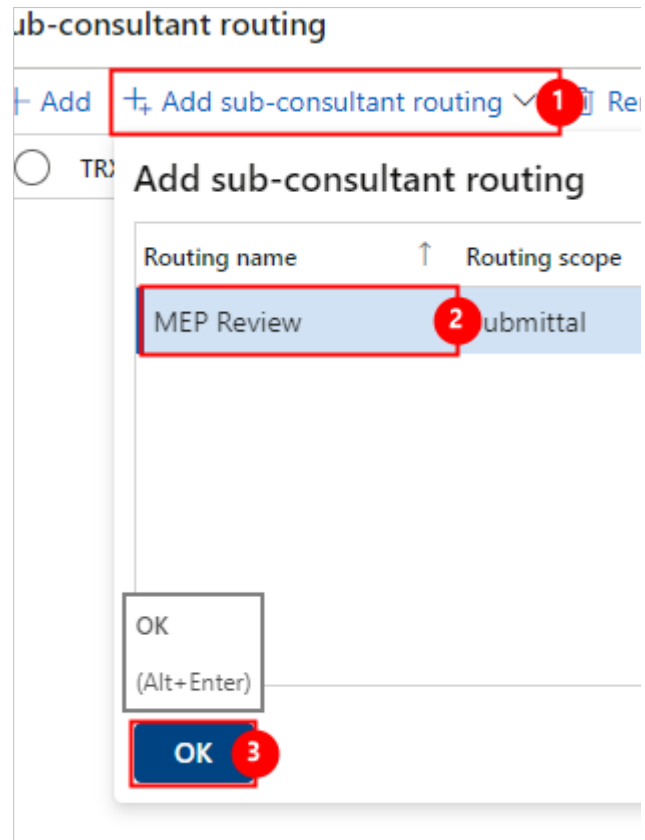


#### 4.3.2.2. Engage Additional Sub-Consultants for Review (Primary Consultant)

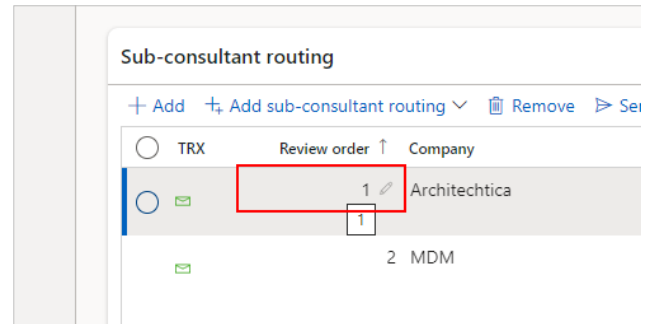
Click on the **Sub-consultant routing** tab.



1. Click on the **Add sub-consultant routing** drop down.
2. Select the **sub-consultant routing**.
3. Click on the **OK** button.



Note: the 'Review order' column indicates the planned order for the review. The numbers can be adjusted as required to reflect the order for the specific submittal. If relevant, you may also put the same 'Review order' number for multiple Sub-consultants, if concurrent reviews are appropriate.




Good to know: Any sub-consultants with the Review order of '1' immediately have access to edit the submittal record when the record is in 'In consultant review' status, without further action on your part.




The **Reviewer due date** field can be manually filled in order to assign a due date to the sub-consultant.



The date cannot be the same or later than the Consultant due date.

Email	Reviewer due date	Urgency
pclconsultant2@gmail.com	<input type="text"/>	
pclconsultant4@gmail.com		

The Consultant due date can be found on the General tab under the Consultant Info section.

SUBCONTRACTOR INFO	CONSULTANT INFO
Sub due date 8/16/2023	Calculated consultant due date 8/24/2023 
Subcontractor Steel Structure Builders Inc.	Date assigned to consultant 8/10/2023
Subcontractor contact	Date received from consultant

Click in the **Reviewer due date** field and either use the calendar function by clicking the 'Calendar' icon or manually type in the required due date.



	Reviewer due date	Urgency	Review date
@gmail.com	<input type="text"/> 		
@gmail.com			

The urgency indicator in the **Urgency** field will activate and change color when the due date is reached.

Green for 'not yet due'.

Yellow for 'due today'.

Red for 'overdue'.

	Reviewer due date	Urgency	Review date
ail.com	1/19/2023		
ail.com	<input type="text"/> 		

Fill in the **Reviewer due date** field for all subconsultants as required.

Email	Reviewer due date	Urgency
pciconsultant2@gmail.com	1/19/2023	<span style="color: red;">◆</span>
pciconsultant4@gmail.com		

Click on the **Row Checkbox** beside the subconsultants to notify for their review. Be sure to select all rows with Review order of '1' if there are multiple.

Sub-consultant routing

+ Add + Add sub-consultant routing Remove Send

<input type="checkbox"/>	TRX	Review order ↑	Company
<input checked="" type="checkbox"/>		1	Architectica
<input type="checkbox"/>		2	MDM

Select or unselect row

Click on the **Send email** button.

Send email

Send submittal review workflow email

sub-consultant routing Remove **Send email** Mark review complete

Review order ↑	Company	Person
1	Architectica	Consultant 2

You can free-type additional email addresses in the TO, CC and BCC fields.

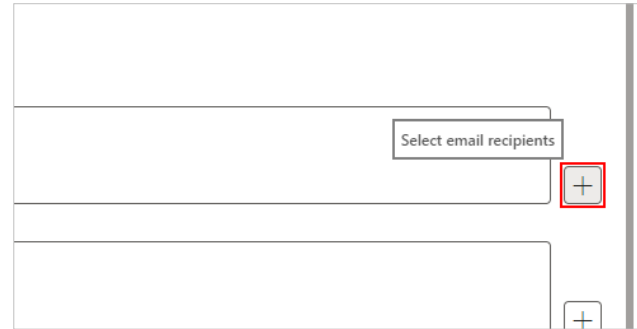
Sender and recipients

From: pm4trap@pcl.com

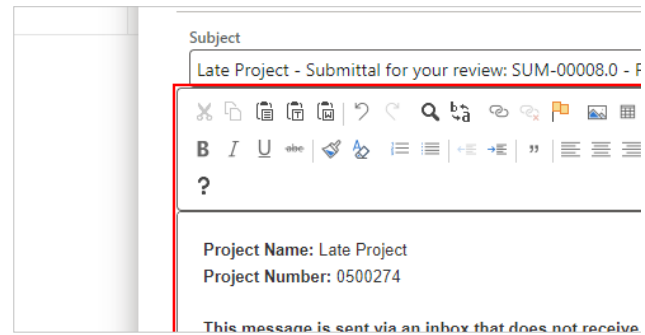
To: pciconsultant2@gmail.com

Cc:

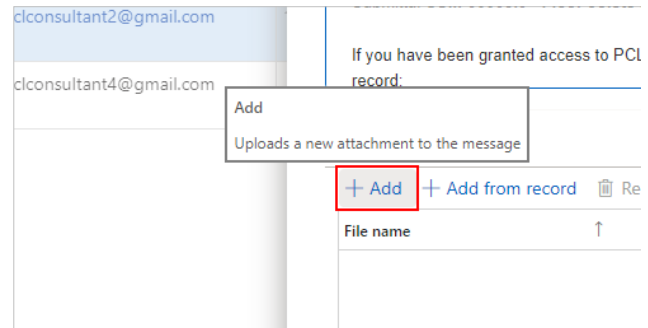
Or click the **(+)** icon beside each of these fields to choose from the project's job contacts and distribution groups.



The text in the Subject line and email body are based on a pre-configured template. Confirm the information is correct. You can edit the text before sending it.

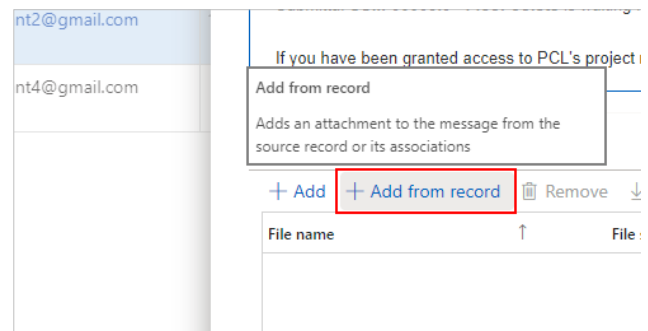


In the 'Attachments' fast tab, you have the option to include a document from your computer or from the PM4+ submittal record.



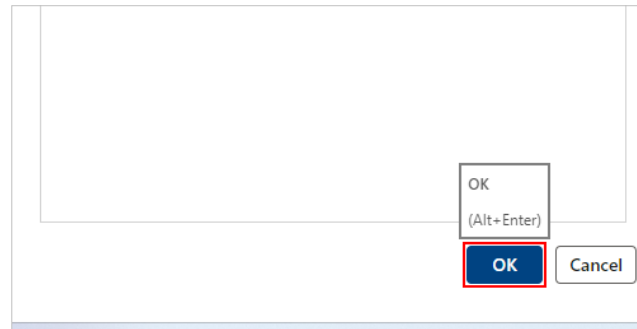
To upload your own document, click the **Add** button and browse for the file.

In the 'Select attachments' dialog, you will most likely want to include the attachment flagged as current. It is selected by default and visible in the Available attachments pane.

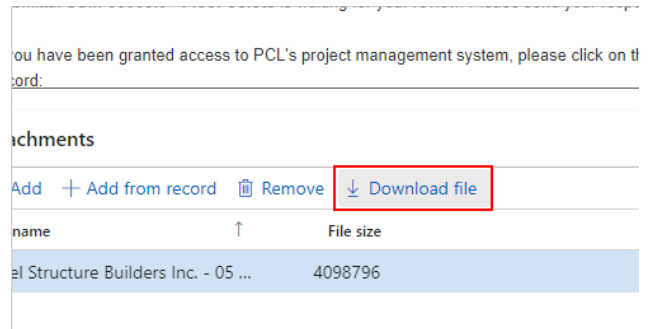


Click the checkboxes in the **Available attachments** pane, you can control what appears on the **Selected attachments** pane.

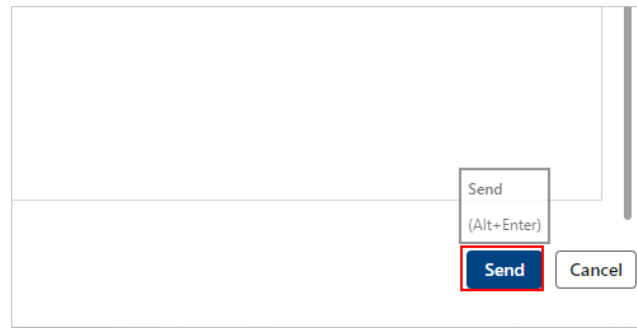
Click the **OK** button when your selection is made.



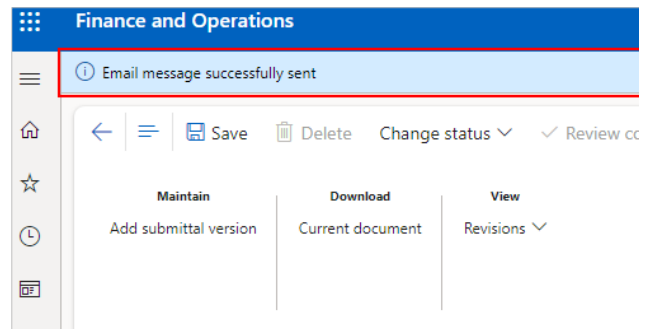
Optionally, click the **Download file** button to confirm which document is included in the outgoing email.



Click on the **Send** button.



A message displays when the transmission was sent successfully.

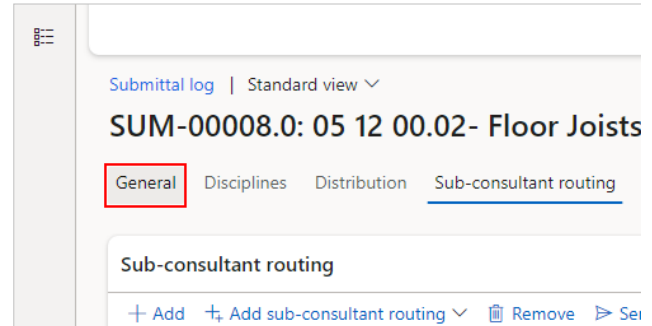


A copy of the email is saved in the project's 'Transmission log'. This log stores the date the transmission record was created, who the email went to, and what it contained.

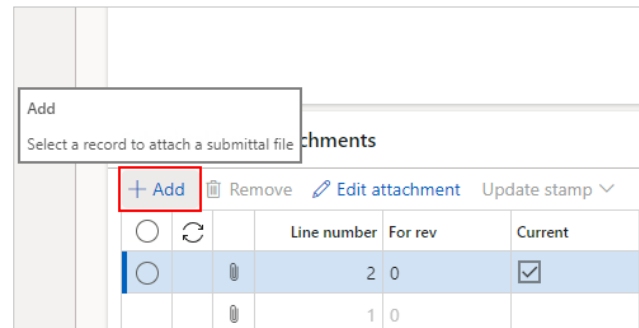
The submittal is now in the court of the selected sub-consultant(s). You still have access to edit the submittal and/or take action on behalf of a sub-consultant who is not collaborating directly in PM4+.

#### 4.3.2.3. Mark a Review Complete on the Sub-consultant's Behalf

Click to return to the **General** tab.

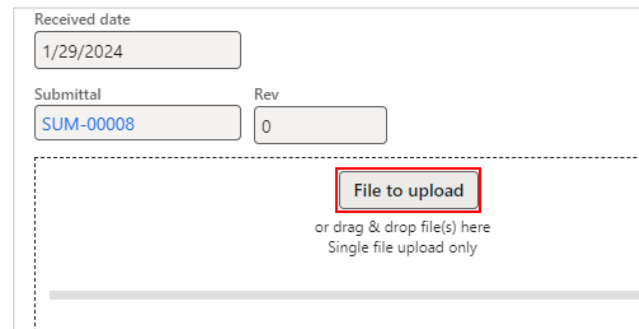


Open the Submittal item attachments fast tab and click on the **Add** button.

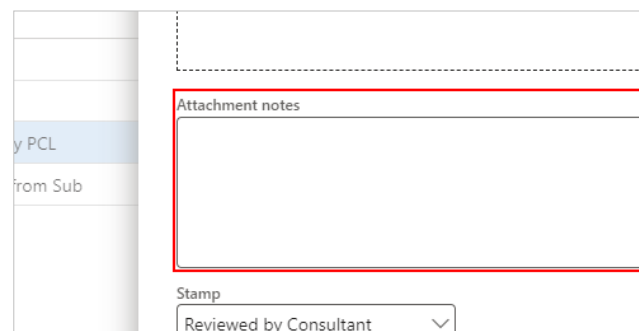


Click on the **File to upload** button to attach the file provided by the Sub-consultant.

You may also drag and drop the file.



Enter a comment about the attachment or its source in the **Attachment notes** field.



If the document contains an updated stamp, select the corresponding value in the **Stamp** field. PM4+ does not apply any stamps. This field is for recording what is already present on the document you are uploading.

Reviewed by PCL	
Submitted from Sub	
	Stamp Reference to PCLSubmittalStampTable
	Stamp Reviewed by Consultant

1. Click on the **Stamp name** drop-down.
2. Select the Stamp from the list.

Reviewed

- Reviewed as noted
- Reviewed by Consultant
- Revise & Resubmit
- Submitted from Sub
- Reviewed by Consultant

Click on the **OK** button.

ed

OK  
(Alt+Enter)

**OK** Cancel

Click on the **Sub-consultant routing** tab.

Submittal log | Standard view

**SUM-00008.0: 05 12 00.02- Floor Joists**

General Disciplines Distribution **Sub-consultant routing** History

Sub-consultant routing

+ Add + Add sub-consultant routing Remove Send email

Enter any useful commentary about the Sub-consultant's review, in the **Comments** field.

Modified by	Offline review ...	Comments	

Click on the **Mark review complete** button when you are ready to move the submittal out of this Sub-consultant's court.

Sub-consultant routing History Associations (3)

[Routing](#)
[Remove](#)
[Send email](#)
[Mark review complete](#)

Person	Email
Consultant 2	pclconsultant2@gn

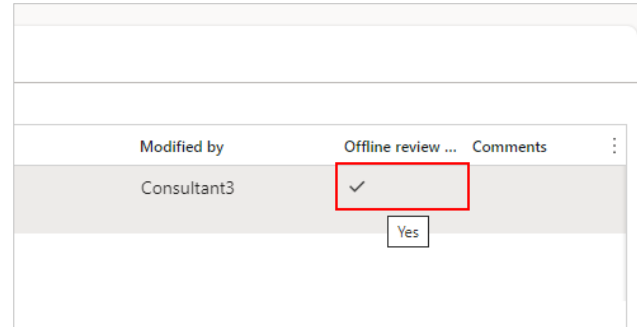
Click on the **Yes** button to confirm this action.

and routing line(s). The sub-consultant company will no longer be able to view this Submittal. Do you want to proceed?

The **Modified by** column indicates who made this change.

Days spent for review	Modified by	Offline review
195	Consultant3	<input checked="" type="checkbox"/>

The checkbox under the **Offline review complete** column is checked to show that this was done on the Sub-consultant's behalf.



Modified by	Offline review ...	Comments	
Consultant3	<input checked="" type="checkbox"/>		<input type="button" value="Yes"/>

If another Sub-consultant is listed next in the 'Review order' column, an automated email notification is sent to indicate their input is now required.

### 4.3.3. Conclusion

Now that you have an understanding of how to manage Sub-consultant collaboration, proceed to the next work instruction.

## 4.4. Review a Submittal as a Primary Consultant

### 4.4.1.1. Objective

This work instruction covers how to manage the review of a submittal in PM4+, as a Primary Consultant.

### 4.4.1.2. Background Information

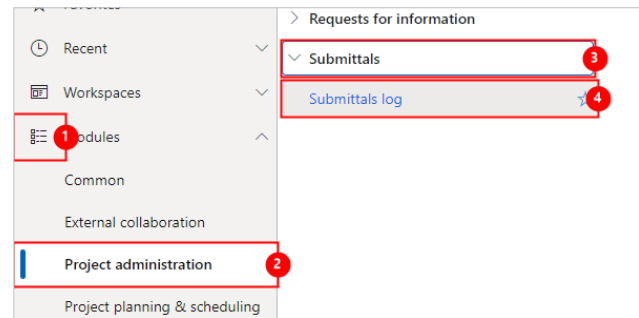
When a submittal is in: 'In Consultant Review' status, the Primary Consultant is required to review it. Sub-consultants may also be engaged by the Primary Consultant so that additional input can be obtained. Once all reviews are complete, the submittal is returned back to PCL and the status is changed to: 'In PCL Review'.

### 4.4.2. Work Instructions

You may choose to navigate directly to the 'Submittal log', to view all submittals, or you may choose to navigate to your 'Submittals Management' workspace to view just the submittals in your company's court. Both navigation options are shown in this section.



1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.

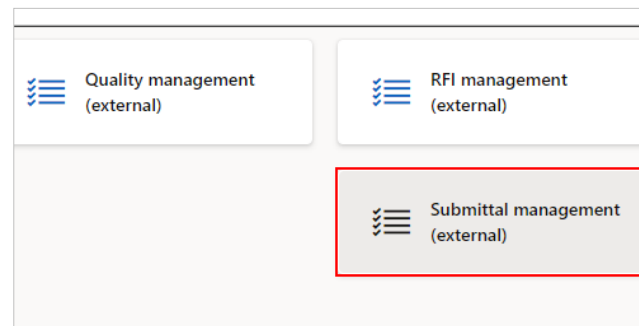


The full **Submittals log** displays.

TRX	CRX	Submittal Id	Submittal type
		SUM-00001	Construction
		SUM-00002	Construction
		SUM-00003	Construction
		SUM-00004	Construction
		SUM-00005	Construction

#### 4.4.2.1. Navigate from the Submittal Management Workspace

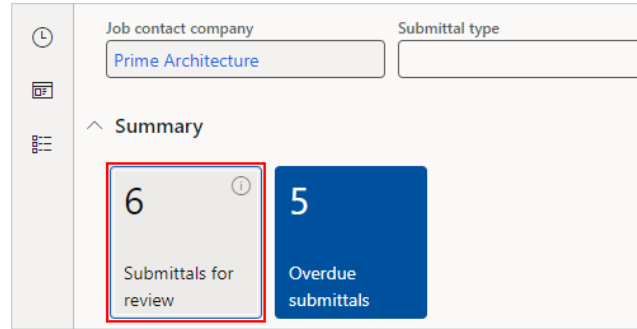
Click on **Submittal management (external)** workspace.



#### 4.4.2.2. Review a Submittal (Primary Consultant)

Review the count tiles and tabbed lists to determine what is in your company's court.

Click on the **Submittals for review** count tile to view a list of the submittals requiring your review.



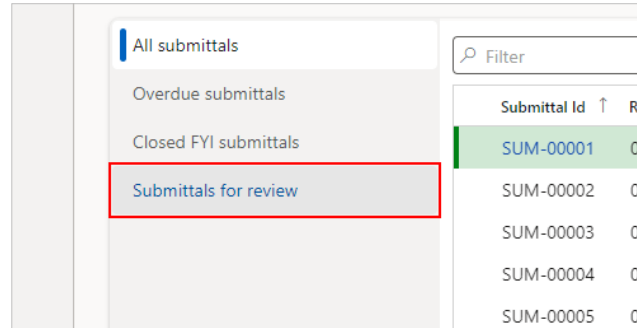
Job contact company: Prime Architecture

Submittal type: [Empty]

Summary

- 6 Submittals for review
- 5 Overdue submittals

Alternatively, click on the **Submittals for review** tabbed list.



All submittals

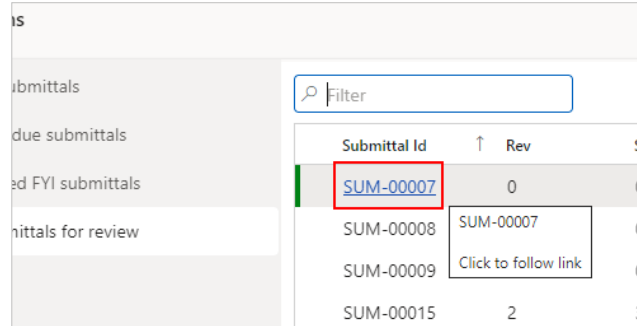
Overdue submittals

Closed FYI submittals

Submittals for review

Submittal Id	Rev
SUM-00001	0
SUM-00002	0
SUM-00003	0
SUM-00004	0
SUM-00005	0

Click on the **Submittal ID** hyperlink to see more details for the submittal that requires your review.



Submittals

Overdue submittals

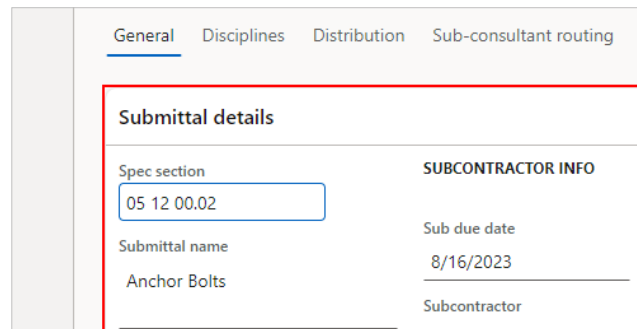
Closed FYI submittals

Submittals for review

Submittal Id	Rev
SUM-00007	0
SUM-00008	0
SUM-00009	0
SUM-00015	2

Click to follow link

Review the **Submittal details** fast tab.



General | Disciplines | Distribution | Sub-consultant routing

**Submittal details**

Spec section: 05 12 00.02


Submittal name: Anchor Bolts

SUBCONTRACTOR INFO



Sub due date: 8/16/2023

Subcontractor: [Empty]

Note the **Calculated consultant due date** field, which indicates the date your review is due to be returned to PCL. The indicator to the right of this field displays a red icon when overdue, a green icon when it is not yet due, and a yellow icon if it is due today.

SUBCONTRACTOR INFO	CONSULTANT INFO
Sub due date 8/16/2023	Calculated consultant due date 8/24/2023 
Subcontractor Steel Structure Builders Inc.	Date assigned to consultant 8/10/2023


The **Date assigned to consultant** field displays the date when the submittal was moved to 'In Consultant Review'.

SUBCONTRACTOR INFO	CONSULTANT INFO
Sub due date 8/16/2023	Calculated consultant due date 8/24/2023 
Subcontractor Steel Structure Builders Inc.	Date assigned to consultant 8/10/2023 
Subcontractor contact Subcontractor 2	Date received from consultant
Sub submittal no.	

The **Ball in court** field shows who's court the submittal is currently in.

Consultant reviewer company Prime Architecture	Required for turnover <input checked="" type="checkbox"/> Yes
Consultant reviewer Consultant 3	Ball in court of The job contact company that is responsible for the Submittal record at the current time
Consultant review duration	Ball in court of Prime Architecture
Consultant review required <input checked="" type="checkbox"/> Yes	Sub-consultant routing Complete

The **Sub-consultant routing** field shows which (if any) sub-consultant is required to review the submittal. This field will show the company name of the sub-consultant next in line, 'None' if there is no sub-consultant routing set up, or 'Complete' if all sub-consultants have reviewed the submittal.

Consultant reviewer Consultant 3	Displays the current responsible company in the review order of the Sub-consultant routing when the Submittal is in 'In consultant review' status. Displays 'None' if there is no sub-consultant routing and 'Complete' if all sub-consultants have marked their review complete.
Consultant review duration	
Consultant review required <input checked="" type="checkbox"/> Yes	Sub-consultant routing Complete 

The 'Submittal item attachments' fast tab contains the review package, and earlier versions of the submittal.

The 'Review package' is generated and attached in this fast tab by PCL, prior to moving the submittal to 'In consultant review' status.

This PDF package contains the submittal, plus cover page and other relevant documents. You have two options for completing your review of the 'Review package':

1. Review and mark-up the package using Egnyte's 'edit-in-place' feature (sometimes called 'WebEdit'). You must have completed your Egnyte onboarding for this feature to work.
2. Download a copy of the review package, save it to a location on your computer, edit, return to the Submittal record and upload the marked up review package.

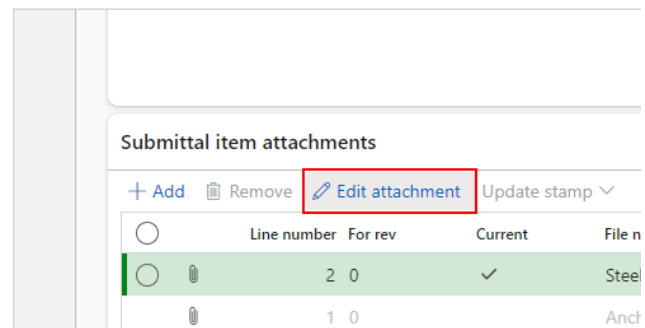
These options are explained in more detail in the next sections.

#### 4.4.2.3. Edit the Review Package Using 'Edit-in-Place'

With the 'edit-in-place' feature, the document is opened in your default PDF editor. When the review is complete, your edits are saved back to Egnyte, and a new attachment line is created in the 'Submittal item attachments' fast tab for each completed review.

Jump to the section called 'Download, Mark-up Offline, and Upload the Reviewed Package', if you do not want to use the 'edit-in-place' feature.

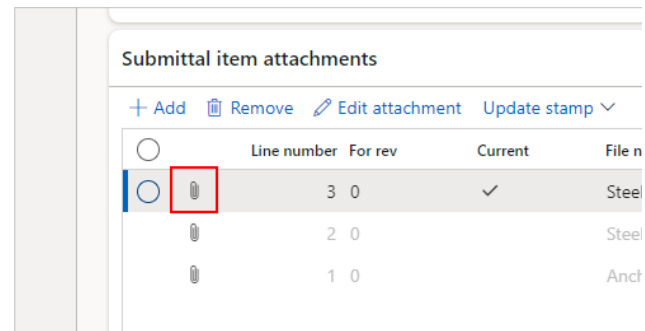
In the 'Submittal item attachments' fast tab, select or highlight the line with the checkmark. Then click the **Edit attachment** button.



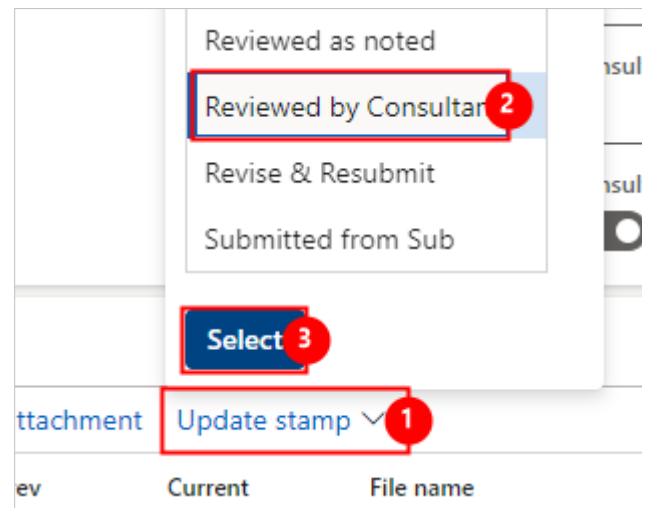
To allow 'edit-in-place', the document opens in WebEdit using the application you specified as your default PDF editor. Review and markup, as required.

Once edits and mark ups are made, save and close the document. WebEdit saves your edits to Egnyte and creates a new version for the document in Egnyte.

To confirm your edits were saved to the document, click on the **Paperclip** icon of the newly created line, now marked as **Current**. This downloads the edited submittal item attachment.



You may need to change the 'Stamp' field, depending on what your project team has agreed to. In some cases the stamp name 'Reviewed by Consultant' is sufficient. In other cases, you may choose the stamp that most closely matches the result of your review (e.g. Reviewed as noted, Revise & Resubmit). The list of stamp names is configurable so your view of the available stamp names may differ.



Note: this feature does not do any stamping on the document. It is used as an indicator in the Submittal log to display the most recently applied stamp name, or which party completed the most recent review.

1. Click on the **Update stamp** drop down.
2. Choose the appropriate **Stamp** selection.
3. Click on the **Select** button to apply the stamp.

This completes your 'edit-in-place' review of the submittal. If input is required from other parties before returning the submittal to PCL, view the instruction called 'Manage Sub-Consultant Collaboration'.

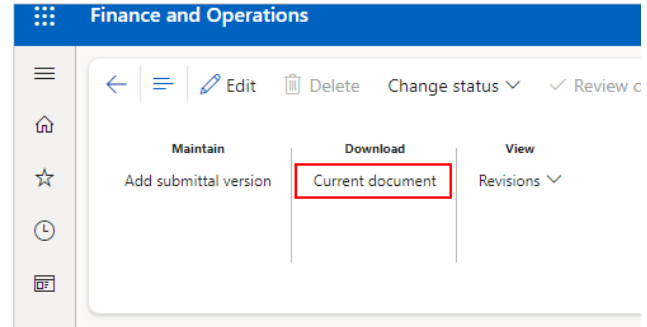
If you are ready to return the submittal to PCL, jump to the section in this work instruction called 'Return a Submittal to PCL (Primary Consultant)'.

If your project is using the 'Owner review' feature (talk to the PCL PM if not sure), view the instruction called 'Send a Submittal for Owner Review (Primary Consultant)'.

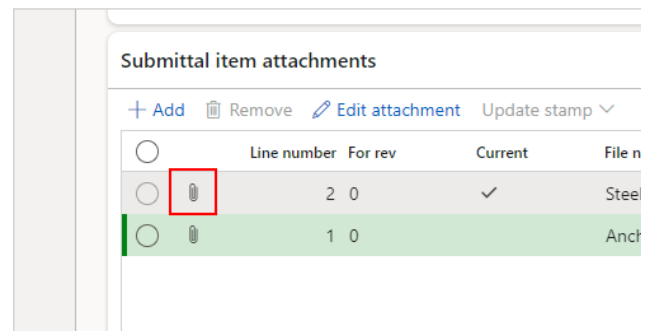
#### 4.4.2.4. Download, Mark-up Offline and Upload the Reviewed Package

If you want to complete your review offline, you can download the package and review the submittal in your own time.

In the action pane ribbon at the top of your screen, in the 'Download' group, click on the **Current document** button.



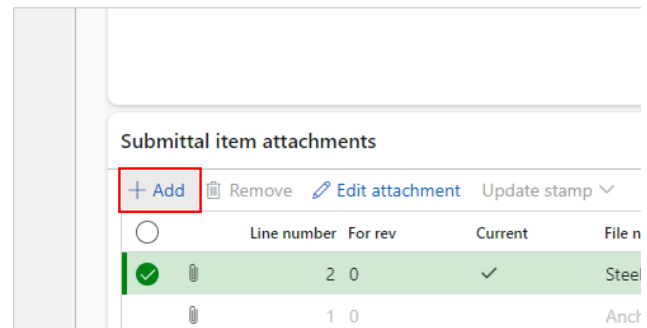
Alternatively, within the **Submittal item attachments** fast tab, click on the **Paperclip** icon next to the line marked as 'Current', to download the attached document.



Depending on the browser you are using, the submittal document will be downloaded to your Downloads folder with Chrome; or you will be prompted to open or save the file with Edge.

#### 4.4.2.5. Upload Reviewed Document

When you have completed your review of the submittal document, return to PM4+, access the relevant submittal record and within click the **Add** button to upload your reviewed document.



The 'Attach a submittal document' dialog opens.

Standard view ▾

### Attach a submittal document

Received date

Br Submittal received date you are submitting and add comments (optional). Click the Ok ste process for the selected record.

Received date

3/15/2024

Submittal

SUM-0007

Rev

0

The **Received date** field is the date that you finish uploading your reviewed document to PM4+.

Click on the **File to upload** button to locate the file you are uploading.

Received date

3/15/2024

Submittal

SUM-0007

Rev

0

**File to upload**

or drag & drop file(s) here

Single file upload only

You may also use the drag and drop feature.

When the upload is complete, click on the **Attachment notes** field - enter any pertinent notes about the submittal. These will be visible on the line in the 'Submittal item attachments' fast tab.

Sub

Attachment notes

Stamp

Reviewed by Consultant ▾

The **Stamp** field is auto-populated. Click the drop-down and select a different stamp, if relevant.

L

Sub

Attachment notes

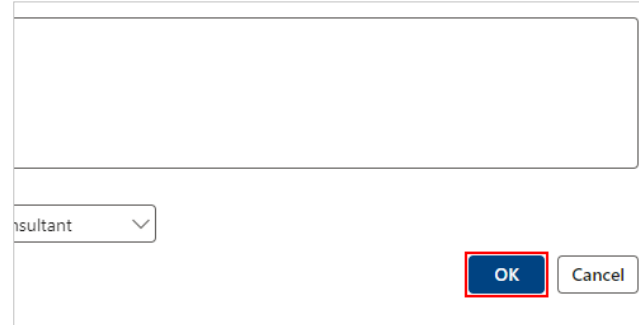
Stamp

Reviewed by Consultant ▾

Alternatively, choose the stamp that most closely matches the result of your review (e.g. Reviewed as noted, Revise & Resubmit). The list of stamp names is configurable so your view of the available stamp names may differ.

Note: this feature does not do any stamping on the document. It is used as an indicator in the Submittal log to display the most recently applied stamp name, or which party completed the most recent review.

Click on the **OK** button to add your reviewed document to the list of submittal line attachments. The row created for this version of the document will be marked as **Current**.



A screenshot of a submittal form. It features a large empty rectangular box at the top. Below it is a dropdown menu with the text 'Consultant' and a downward arrow. At the bottom right, there are two buttons: 'OK' (highlighted with a red border) and 'Cancel'.

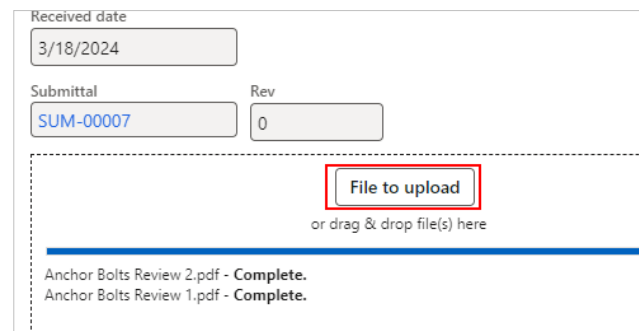
#### 4.4.2.6. Upload Multiple Files (Optional)

If required, you can upload multiple files to your submittal document.

Note: This can only be performed if the PCL Project team has turned on this function for the project.

Click on the **File to upload** button to attach the desired files.

You may also drag and drop the files.



A screenshot of a submittal form. It includes a 'Received date' field with '3/18/2024', a 'Submittal' field with 'SUM-00007', and a 'Rev' field with '0'. Below these is a dashed box containing a 'File to upload' button (highlighted with a red border) and the text 'or drag & drop file(s) here'. At the bottom, there is a list of files: 'Anchor Bolts Review 2.pdf - Complete.' and 'Anchor Bolts Review 1.pdf - Complete.'

Click on the **OK** button.



A screenshot of a submittal form, identical to the one above but without the file upload section. It features a large empty rectangular box at the top, a dropdown menu with 'Consultant', and 'OK' and 'Cancel' buttons at the bottom right.



A confirmation message displays. Ensure all attached documents are relevant to the selected submittal. The attachments may be rejected by the project team if unrelated documents are included.

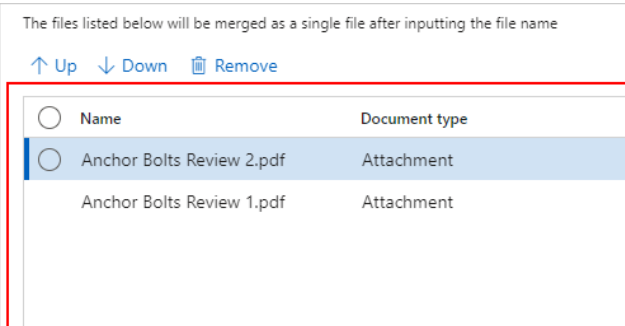
Click on the **OK** button.

**Confirm that all attachments uploaded are relevant to the submittal requirements/records in respond to the specific submittal line. Other attachments not relevant to this submittal line may be rejected by the project team.**



The **Arrange files** dialog displays.

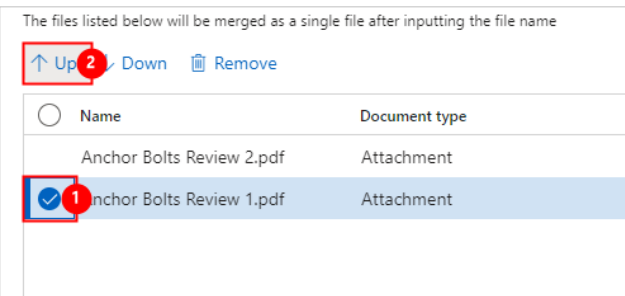
The files listed will be merged into a single file. Ensure that the documents are arranged in the correct order you would like them merged together.



To change the order of the files:

1. Select the file by clicking the **Row checkbox**.
2. Click on the **Up** or **Down** button to move the selected file.

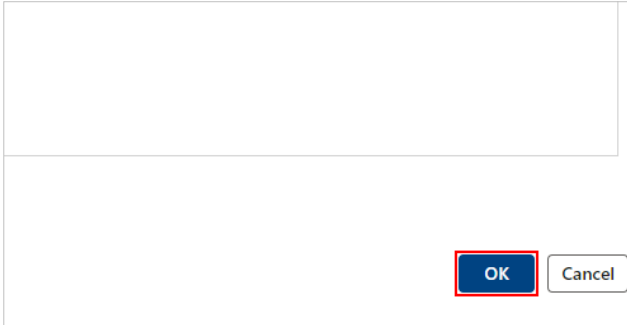
Note: You can also remove files that have been uploaded by clicking the 'Remove' button.



Enter a new **File name** to be applied to the merged file.



Click on the **OK** button to add your reviewed document to the list of submittal line attachments. The row created for this version of the document will be marked as **Current**.



A screenshot of a dialog box with a white background and a thin grey border. The dialog box is divided into two horizontal sections. The top section is empty. The bottom section contains two buttons: a blue button with white text labeled 'OK' and a white button with grey text labeled 'Cancel'. The 'OK' button is highlighted with a red rectangular border.

This completes your 'offline' review of the submittal. If input is required from other parties before returning the submittal to PCL, view the instruction called 'Manage Sub-Consultant Collaboration'.

If you are ready to return the submittal to PCL, jump to the section in this work instruction called 'Return a Submittal to PCL (Primary Consultant)'.

If your project is using the 'Owner review' feature (talk to the PCL PM if not sure), view the instruction called 'Send a Submittal for Owner Review (Primary Consultant)'.

If you need to start over, you can remove any lines that were created by you in the review process. If you used the 'Edit attachment' button, a new line was created in the 'Submittal item attachments' fast tab each time the button was clicked.

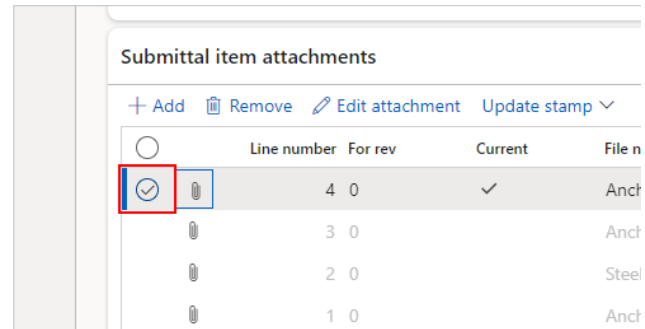
If you uploaded a document by clicking the 'Add' button, a new line was created each time this action was completed.

#### 4.4.2.7. Remove a Submittal line Attachment

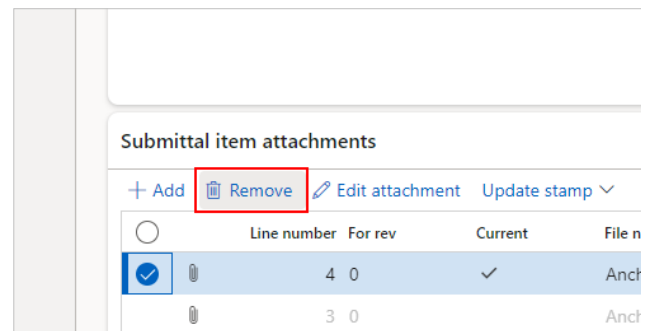
If you need to start over, you can remove any lines that were created by you in the review process. If you used the 'Edit attachment' button, a new line was created in the 'Submittal item attachments' fast tab each time the button was clicked.

If you uploaded a document by clicking the 'Add' button, a new line was created each time this action was completed.

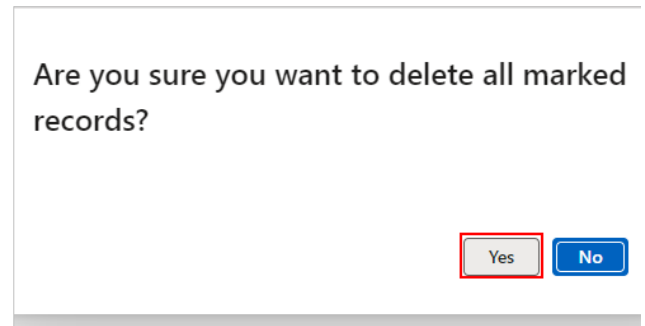
Click on the **Row Checkbox** of the submittal line attachment to remove.



Click on the **Remove** button.



Click on the **Yes** button to confirm removal.



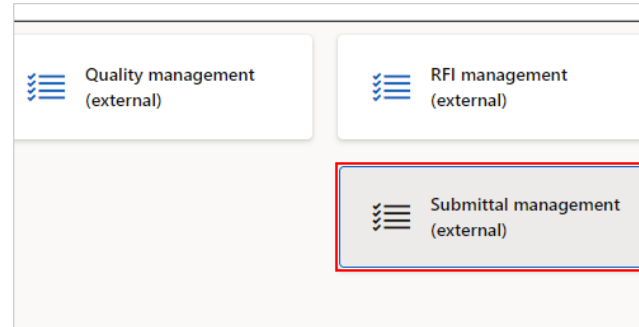
#### 4.4.2.8. Return the Submittal to PCL (Primary Consultant)

When review of the submittal item is complete, it is generally the responsibility of the Primary Consultant (named in the 'Consultant reviewer' fields of the submittal details) to return the submittal to PCL.

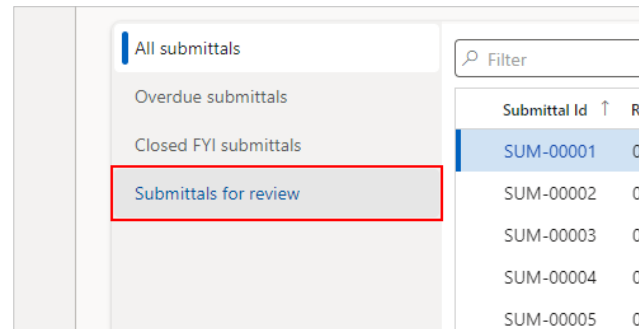
If you are named as the Primary Consultant on the submittal, and Sub-consultant reviews were required, you would have received an automated email when the final Sub-consultant clicked the 'Review complete' button. This is your indication to do a final check of the document flagged as 'Current', and then return the record to PCL's court via a status change.

If Owner review is included in your projects' workflow, view the work instruction called 'Send a Submittal for Owner Review (Primary Consultant)'.

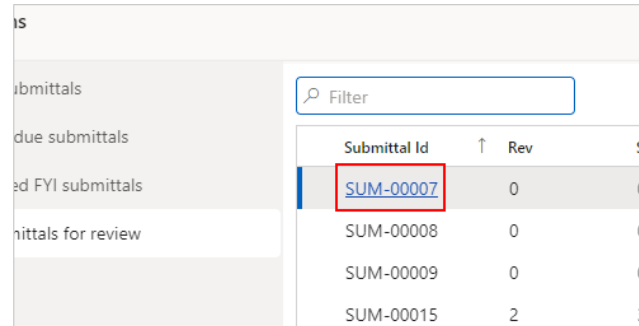
Click on the **Submittal management (external)** workspace.



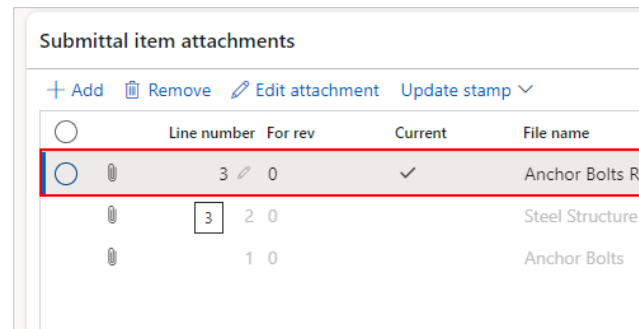
Click on the **Submittals for review** tabbed list.



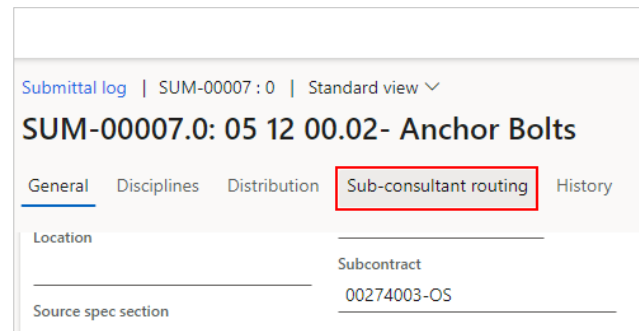
Click on the **Submittal ID** hyperlink to open the submittal details.



If reviews were provided by Sub-consultant(s) you may want to review them before sending the submittal back to PCL.



Click on the **Sub-consultant routing** tab.



If a reviewer in the list did not conduct a review and their input is no longer required, you may choose to remove the line with no 'Review complete' date.

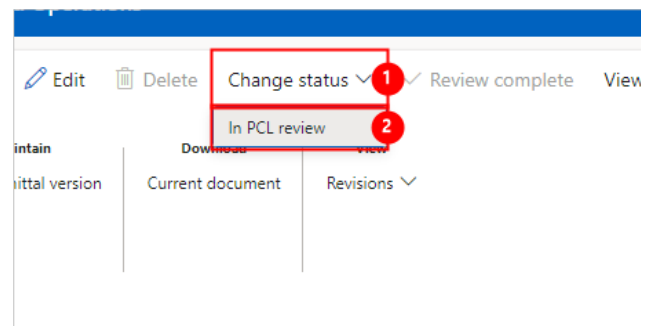
Alternatively, you can attach a marked up review package on behalf of any Sub-consultants, in the 'Submittal item attachments' fast tab. When that is done, select their name in the 'Sub-consultant routing' tab and click the 'Mark review complete' button, to indicate they did provide input, outside of PM4+.

The **Review date** is automatically populated as each Sub-consultant completed their review, or their review was completed on their behalf, either by a PCL Coordinator or by someone from the Primary Consultant's company.

Reviewer	Reviewer due date	U	Review date	Days spent fo
.com			8/10/2023	0

You will not be able to change the status of the Submittal back to 'In PCL review' until the 'Review date' field is filled in for every line in this tab.

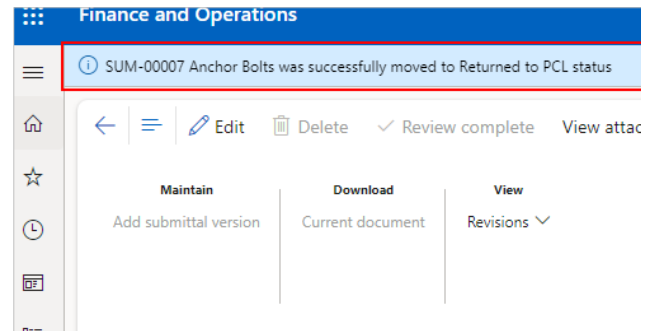
1. Click on the **Changestatus** drop-down in the action pane.
2. Click on **In PCL review**.



An automated email is sent to the person named in the 'PCL reviewer' field, plus anyone who was set up by the submittal Coordinator for automated status change notifications. A copy of the email is saved in the 'Transmission log'.

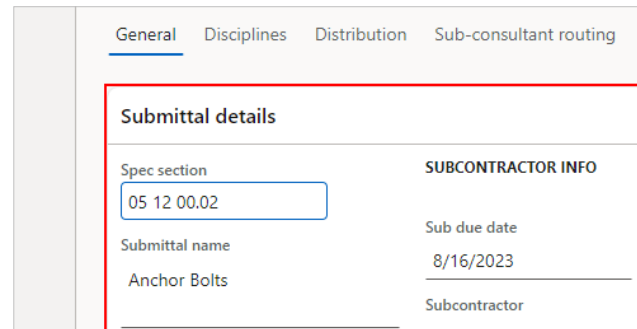
A message displays when the transmission was sent successfully.

The submittal you just sent to PCL is now in a status of Returned to PCL.



If you accessed this submittal by filtering on status, or from the count tile in your workspace, after changing the status, the next 'In consultant review' status submittal in the list is displayed.

If you see a blank submittal, this means all submittals in your court, which were listed in the workspace count tile, are now out of your court.



#### 4.4.3. Conclusion

Now that you have an understanding of how to review a submittal as a Primary Consultant, proceed to the next work instruction.

### 4.5. Review a Submittal as a Sub-consultant

#### 4.5.1. Introduction

##### 4.5.1.1. Objective

This work instruction covers how to manage the review of a submittal in PM4+ as a Sub-consultant.

##### 4.5.1.2. Background Information

When you receive an email that your input is required on the review of a submittal, and your company's name is not listed in the 'Consultant reviewer' fields of the submittal details, this means you are a secondary reviewer. In PM4+, this is called a 'Sub-consultant review'.

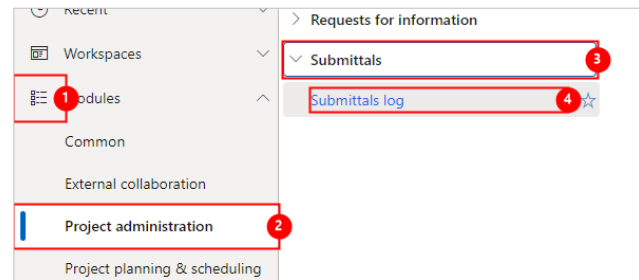
#### 4.5.2. Work Instructions

##### 4.5.2.1. Navigation

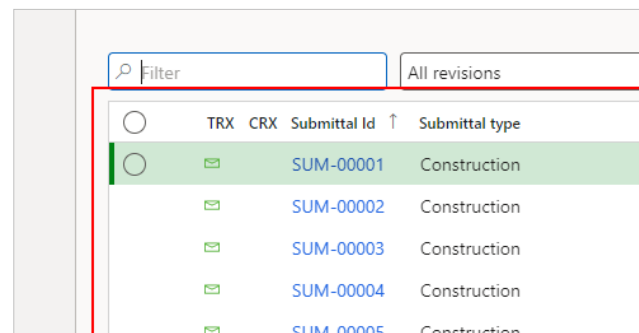
You may choose to navigate directly to the 'Submittal log', to view all submittals, or you may choose to navigate to your 'Submittals Management' workspace to view just the submittals in your company's court. Both navigation options are shown in this section.

#### 4.5.2.1.1. *Navigate to the Submittal Log*

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.



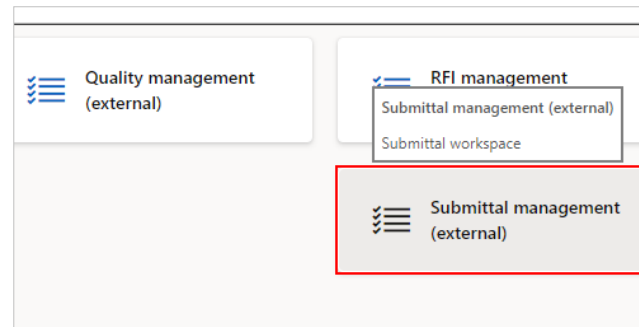
The full Submittals log is displayed.



#### 4.5.2.1.2. *Navigate from the Submittal Management Workspace*

Click on the **Submittal management (external)** workspace.

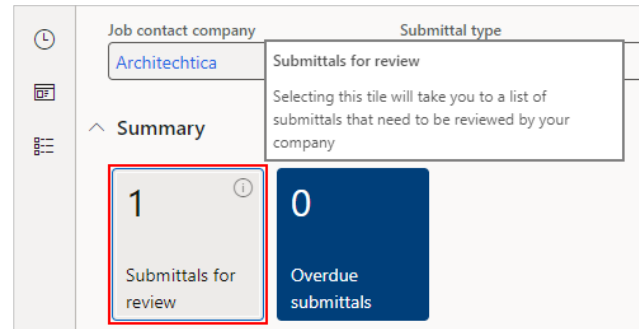
All submittals awaiting your input are listed in the 'Submittal management (external)' workspace.



Review the count tiles and tabbed lists to determine what is in your company's court.

#### 4.5.2.2. Review a Submittal (Sub-consultant)

Click on the **Submittals for review** count tile to view a list of the submittals requiring your review.



Job contact company: Architechtica

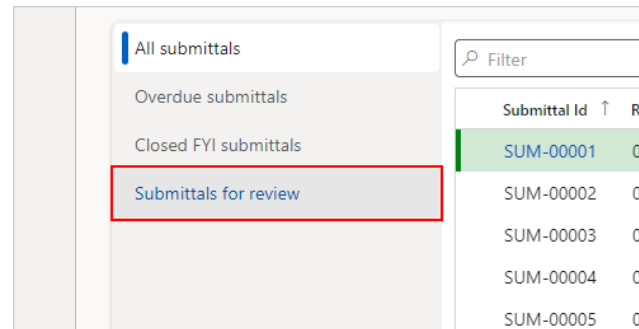
Submittal type: Submittals for review

Selecting this tile will take you to a list of submittals that need to be reviewed by your company

Summary:

- 1 Submittals for review
- 0 Overdue submittals

Alternatively, click on the **Submittals for review** tabbed list.



All submittals

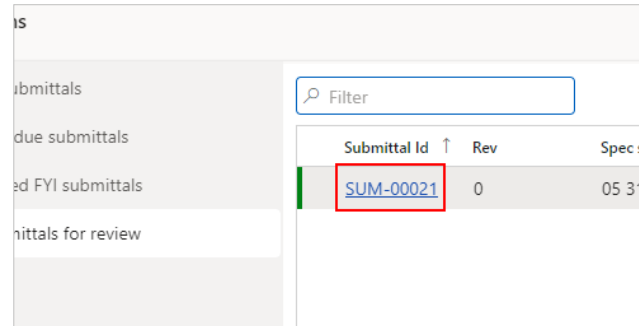
Overdue submittals

Closed FYI submittals

Submittals for review

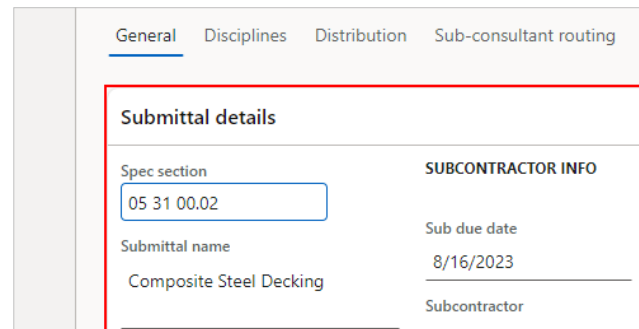
Submittal Id	Rev
SUM-00001	0
SUM-00002	0
SUM-00003	0
SUM-00004	0
SUM-00005	0

Click on the **Submittal** hyperlink to see more details for the submittal that requires your review.



Submittal Id	Rev	Spec s
SUM-00021	0	05 31

Review the **Submittal details** fast tab.



General | Disciplines | Distribution | Sub-consultant routing

**Submittal details**

Spec section: 05 31 00.02

Submittal name: Composite Steel Decking

SUBCONTRACTOR INFO


Sub due date: 8/16/2023

Subcontractor:



Note the **Calculated consultant due date** field, which indicates the date all reviews are due to be returned to PCL by the Primary Consultant (named in the 'Consultant reviewer' fields in the submittal details).


The indicator to the right of this field displays a red icon when overdue, a green icon when it is not yet due, and a yellow icon if it is due today.

SUBCONTRACTOR INFO	CONSULTANT INFO
Sub due date 8/16/2023	Calculated consultant due date 2/14/2024 
Subcontractor Steel Structure Builders Inc.	Date assigned to consultant 1/31/2024

The **Ball in court of** field shows who's court the submittal is currently in.

Consultant reviewer company Prime Architecture	Required for turnover <input type="radio"/> No
Consultant reviewer Consultant 3	Ball in court of The job contact company that is responsible for the Submittal record at the current time
Consultant review duration	Ball in court of Prime Architecture
Consultant review required <input checked="" type="checkbox"/> Yes	Sub-consultant routing Architectica, Architectica

The **Sub-consultant routing** field shows which (if any) sub-consultant is required to review the submittal. This field will show the company name of the sub-consultant next in line, 'None' if there is no sub-consultant routing set up, or 'Complete' if all sub-consultants have reviewed the submittal.

Consultant reviewer Consultant 3	Spec paragraph
Consultant review duration	Ball in court of Prime Architecture
Consultant review required <input checked="" type="checkbox"/> Yes	Sub-consultant routing Architectica, Architectica 

You can click on the 'Submittal details' fast tab header to collapse it, and bring the next fast tab below into view.

The 'Submittal item attachments' fast tab contains the review package, and earlier versions of the submittal.

The 'Review package' is generated and attached in this fast tab by PCL, prior to moving the submittal to 'In consultant review' status.

This PDF package contains the submittal, plus cover page and other relevant documents. You have two options for completing your review of the 'Review package':

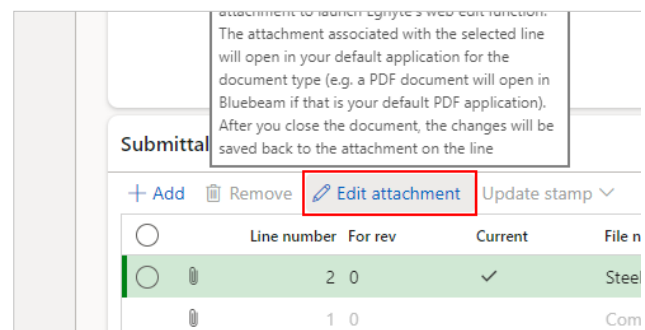
1. Review and mark-up the package using Egnyte's 'edit-in-place' feature (sometimes called 'WebEdit'). You must have completed your Egnyte onboarding for this feature to work.
2. Download a copy of the review package, save it to a location on your computer, edit, return to the Submittal record and upload the marked up review package.

#### 4.5.2.3. Edit the Review Package Using 'Edit-in-Place'

With the 'edit-in-place' feature, the document is opened in your default PDF editor. When the review is complete, your edits are saved back to Egnyte, and a new attachment line is created in the 'Submittal item attachments' fast tab for each completed review.

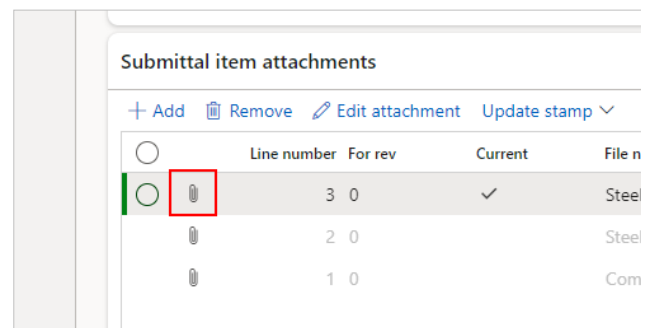
Jump to the section called 'Download, Mark-up Offline, and Upload the Reviewed Package', if you do not want to use the 'edit-in-place' feature.

In the 'Submittal item attachments' fast tab, select or highlight the line with the checkmark. Then click the **Edit attachment** button.



To allow 'edit-in-place', the document opens in WebEdit using the application you specified as your default PDF editor. Review and markup, as required.

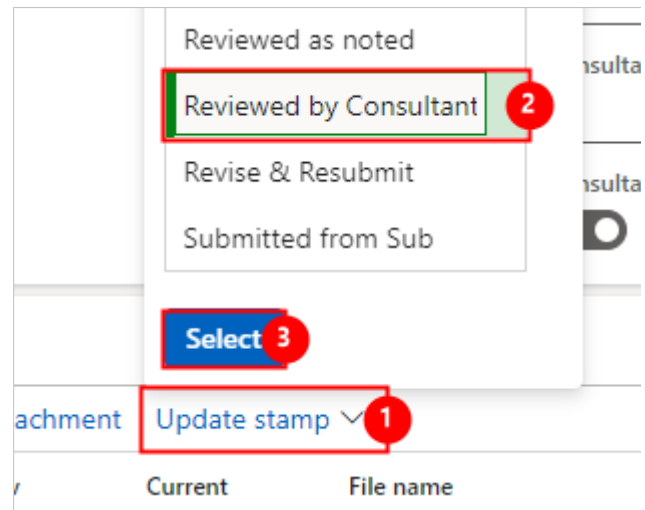
To confirm your edits were saved to the document, click on the **Paperclip** icon of the newly created line, now marked as **Current**. This downloads the edited submittal item attachment.



Once edits and mark ups are made, save and close the document. WebEdit saves your edits to Egnyte and creates a new version for the document in Egnyte.

You may need to change the 'Stamp' field, depending on what your project team has agreed to. In some cases the stamp name 'Reviewed by Consultant' is sufficient. In other cases, you may choose the stamp that most closely matches the result of your review (e.g. Reviewed as noted, Revise & Resubmit). The list of stamp names is configurable so your view of the available stamp names may differ.

Note: this feature does not do any stamping on the document. It is used as an indicator in the Submittal log to display the most recently applied stamp name, or which party completed the most recent review.

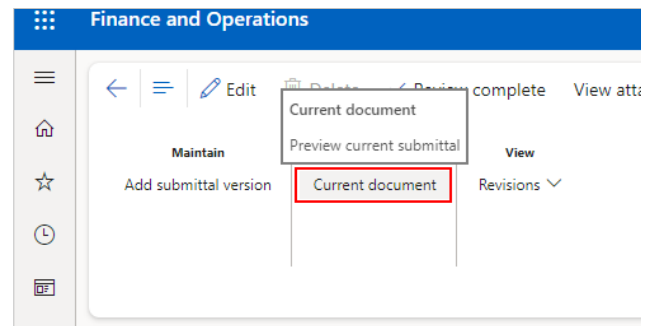


1. Click on the **Update stamp** drop down.
2. Click on the **Stamp name** field.
3. Click on **Select**.

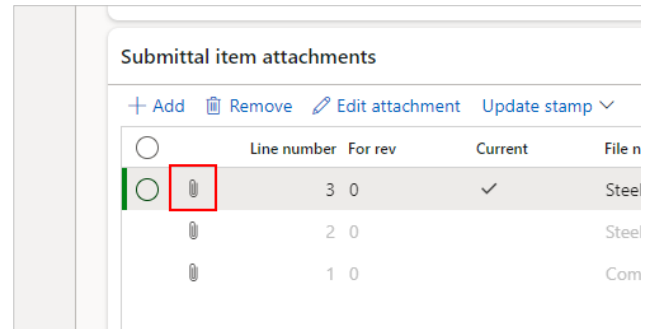
#### 4.5.2.4. Download, Mark-up Offline and Upload the Reviewed Package

If you want to complete your review offline, you can download the package and review the submittal in your own time.

In the **Submittals** action pane ribbon at the top of your screen, in the 'Download' group, click on the **Current document** button.



Alternatively, within the **Submittal item attachments** fast tab, click on the **Paperclip** icon next to the line marked as 'Current', to download the attached document.



Depending on the browser you are using, the submittal document will be downloaded to your Downloads folder (in Chrome); or you will be prompted to open or save the file (in Edge).

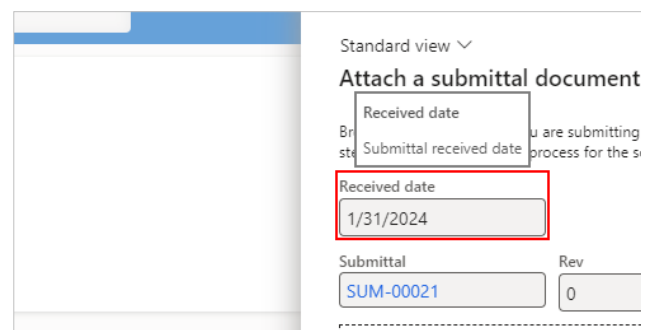
#### 4.5.2.5. Upload Reviewed Document

When you have completed your review of the submittal document, return to PM4+, access the relevant submittal record and within click the **Add** button to upload your reviewed document.



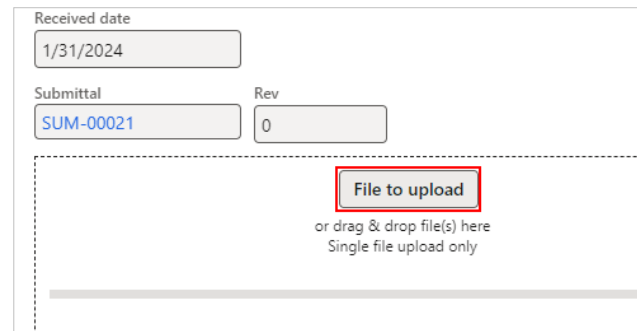
The 'Attach a submittal document' dialog opens.

The **Received date** field is the date that you finish uploading your reviewed document to PM4+.



Click on the **File to upload** button to locate the file you are uploading.

You may also use the drag and drop feature.



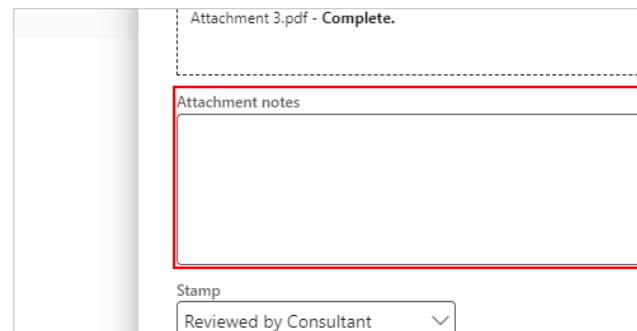
Received date  
1/31/2024

Submittal  
SUM-00021

Rev  
0

**File to upload**  
or drag & drop file(s) here  
Single file upload only

When the upload is complete, click on the **Attachment notes** field - enter any pertinent notes about the submittal. These will be visible on the line in the 'Submittal item attachments' fast tab.

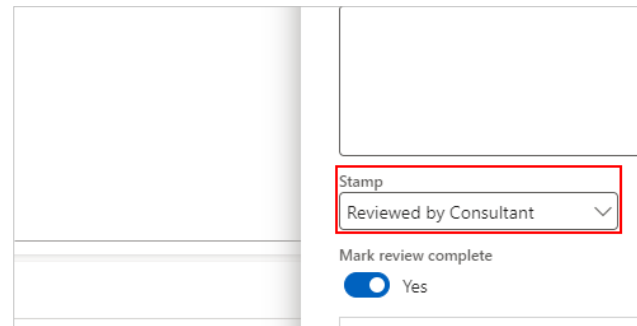


Attachment 3.pdf - Complete.

Attachment notes

Stamp  
Reviewed by Consultant

The **Stamp** field is auto-populated. Click the drop-down and select a different stamp, if relevant.



Stamp  
Reviewed by Consultant

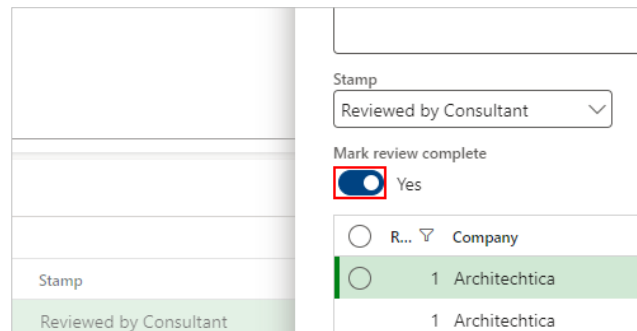
Mark review complete  
 Yes

Alternatively, choose the stamp that most closely matches the result of your review (e.g. Reviewed as noted, Revise & Resubmit). The list of stamp names is configurable so your view of the available stamp names may differ.

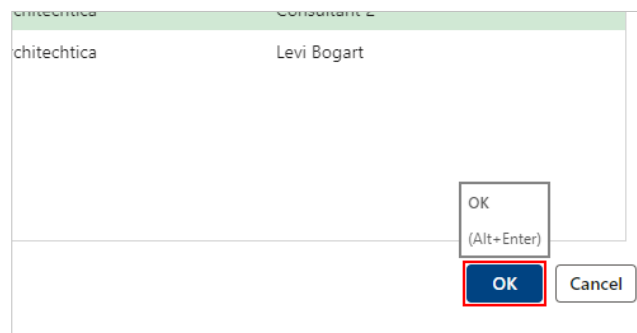
Note: this feature does not do any stamping on the document. It is used as an indicator in the Submittal log to display the most recently applied stamp name, or which party completed the most recent review.

Selecting the **Mark review complete** checkbox will mark the review complete and fill in all required dates on the Sub-consultant routing tab.

The system will check the 'Sub-consultant routing' tab to see if other reviewers have the same 'review order' number as your company. If you have completed the review and the alternate subconsultant named isn't required to review the Submittal as well, you can mark the Submittal as Review complete at the same time by selecting the appropriate radio buttons.



Click on the **OK** button to add your reviewed document to the list of submittal line attachments. This document will be marked as **Current**.



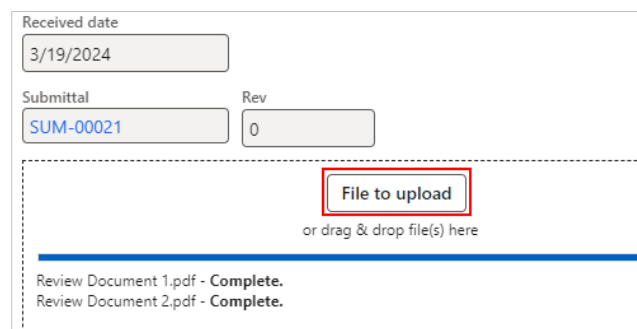
#### 4.5.2.5.1. Upload Multiple Files (Optional)

If required, you can upload multiple files to your submittal document.

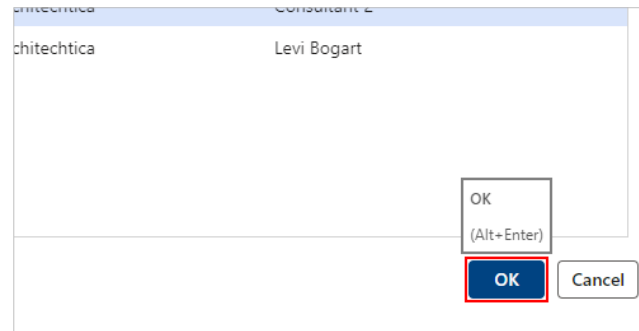
Note: This can only be performed if the PCL Project team has turned on this function for the project.

Click on the **File to upload** button to attach the desired files.

You may also use the drag and drop feature.



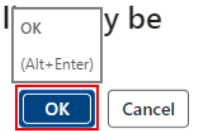
Click on the **OK** button.



A confirmation message displays. Ensure all attached documents are relevant to the selected submittal. The attachments may be rejected by the project team if unrelated documents are included.

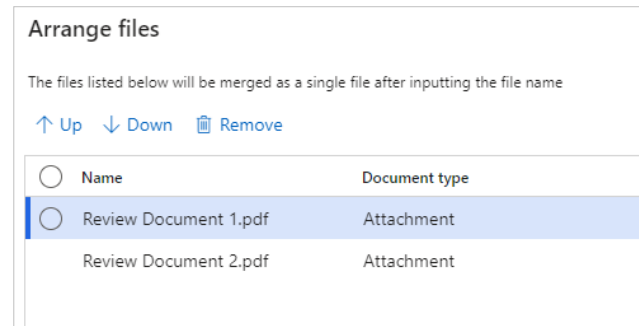
Click on the **OK** button.

**Confirm that all attachments uploaded are relevant to the submittal requirements/records in respond to the specific submittal line. Other attachments not relevant to this submittal may be rejected by the project team.**

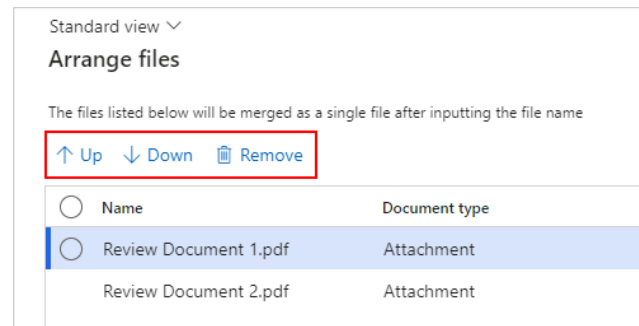


The **Arrange files** dialog displays.

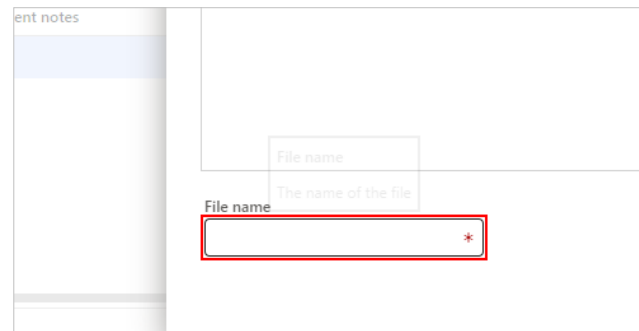
The files listed will be merged into a single file. Ensure that the documents are arranged in the correct order you would like them merged together.



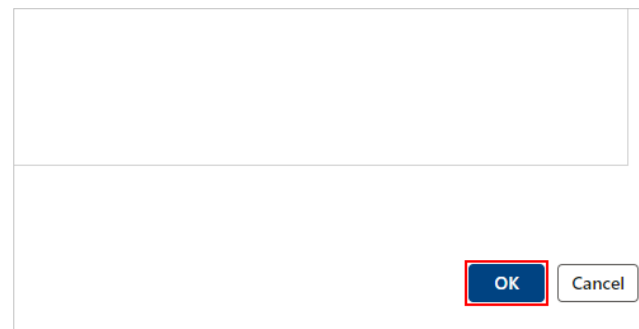
You can rearrange files by using the **Up** or **Down** buttons. To remove a file click on the **Remove** button.



Enter a new **File name** to be applied to the merged file.



Click on the **OK** button to add your reviewed document to the list of submittal line attachments. The row created for this version of the document will be marked as **Current**.

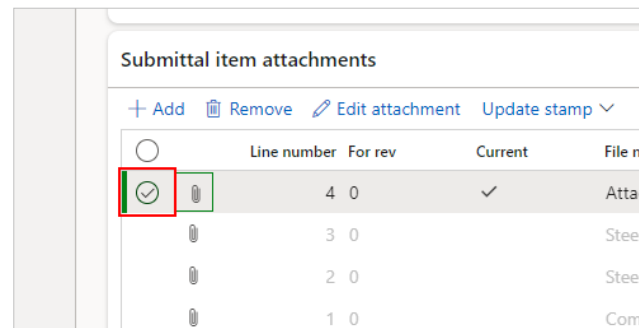


#### 4.5.2.5.2. Remove a Submittal Line Attachment

If you need to start over, you can remove any lines that were created by you in the review process. If you used the 'Edit attachment' button, a new line was created in the 'Submittal item attachments' fast tab each time the button was clicked.

If you uploaded a document by clicking the 'Add' button, a new line was created each time this action was completed.

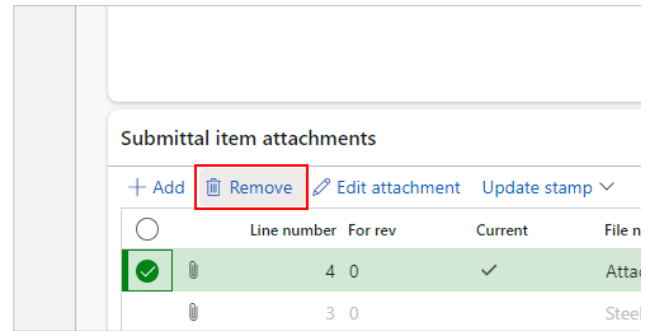
Click on the **Row Checkbox** of the submittal line attachment to remove.



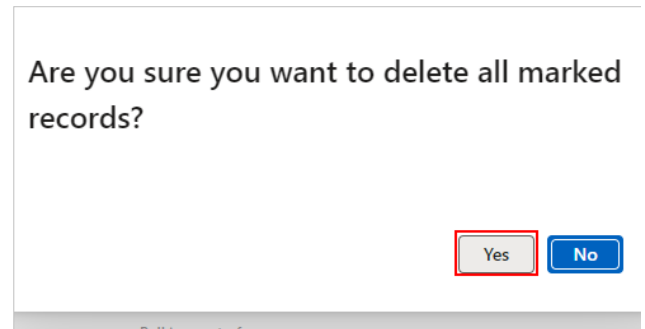
	Line number	For rev	Current	File n
<input checked="" type="checkbox"/>	4	0	✓	Atta
<input type="checkbox"/>	3	0		Steel
<input type="checkbox"/>	2	0		Steel
<input type="checkbox"/>	1	0		Com



Click on the **Remove** button.



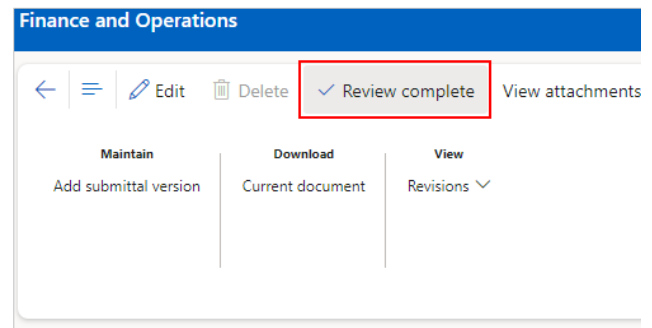
Click on the **Yes** button to confirm removal.



#### 4.5.2.5.3. **Mark Review as 'Complete'**

If the 'Mark review complete' was not selected when uploading the attachment, you will need to mark the review complete in the Sub-consultant routing tab.

When you have completed your review click on the **Review complete** button.



The system checks the 'Sub-consultant routing' tab to see if other reviewers have the same 'review order' number as your company. If there are, the **Complete sub-consultant review(s)** form will display.

If you have completed the review and the alternate subconsultant named isn't required to review the Submittal as well, you can mark the Submittal as Review complete at the same time.

1. Select the **Row checkbox** adjacent to your name.
2. Select the **Row Checkbox** on the row with the other subconsultant from your company.
3. Click on the **OK** button.

	R...	Company	Person
<input checked="" type="checkbox"/>	1	Architectica	Consultant 2
<input checked="" type="checkbox"/>	2	Architectica	Levi Bogart

(Alt+Enter)

Click on the **Sub-consultant routing** tab.

Submittal log | SUM-00021 : 0 | Standard view ▾

### SUM-00021.0: 05 31 00.02- Composite Steel E

General | Disciplines | Distribution | **Sub-consultant routing** | History



Location \_\_\_\_\_

Subcontract \_\_\_\_\_

Source spec section \_\_\_\_\_ 00274003-OS \_\_\_\_\_

The **Review date** fields on the lines with your company's name are now filled in.

Review complete

Email	Reviewer due date	Urgency
pclconsultant2@gmail.com	2/13/2024	
LBogart@Architectica.com	2/13/2024	

The system checks for any additional Sub-consultants in the list and sends an email to the next company in the 'review order', to alert them that the Submittal is now in their court.

Your action on the submittal is now complete.

### 4.5.3. Conclusion

Now that you have an understanding of how to review a submittal, proceed to the next work instruction.

## 4.6. Send a Submittal for Owner Review (Primary Consultant)

### 4.6.1. Introduction

#### 4.6.1.1. Objective

This work instruction covers how to send a submittal for Owner review as a Primary Consultant.

#### 4.6.1.2. Background Information

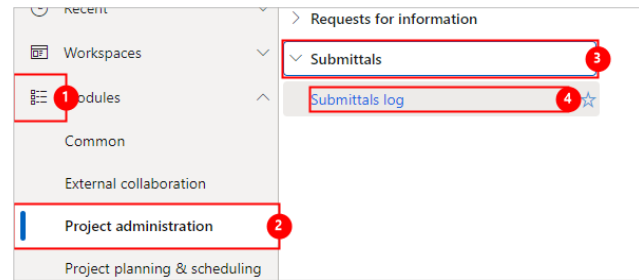
When a project team determines that the 'Owner review' feature is appropriate, an additional status called, 'In Owner Review' is used to indicate this step in the workflow. During this status, the Owner or their representative is required to review the submittal.

It is the responsibility of the Primary Consultant, or the PCL Coordinator to move the submittal to 'In Owner review' status. This will depend on what workflow was agreed to by the project team.

### 4.6.2. Work Instructions

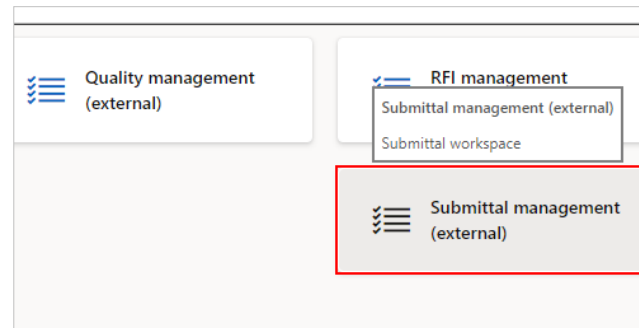
#### 4.6.2.1. Navigation

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.



#### 4.6.2.2. Navigate from the Submittal Management Workspace

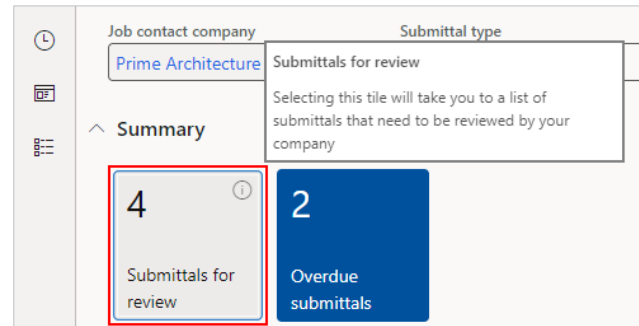
Click on the **Submittal management (external)** workspace.



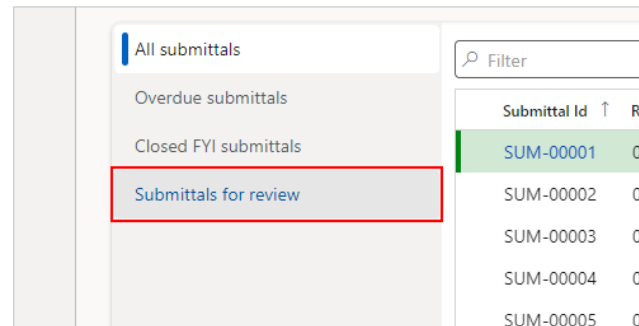
Review the count tiles and tabbed lists to determine what is in your company's court.

#### 4.6.2.3. Send the Submittal for Owner Review

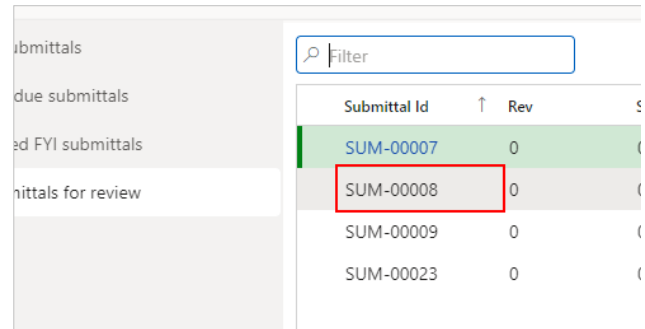
Click on the **Submittals for review** count tile to view a list of the submittals requiring your review.



Alternatively, click on the **Submittals for review** tabbed list.

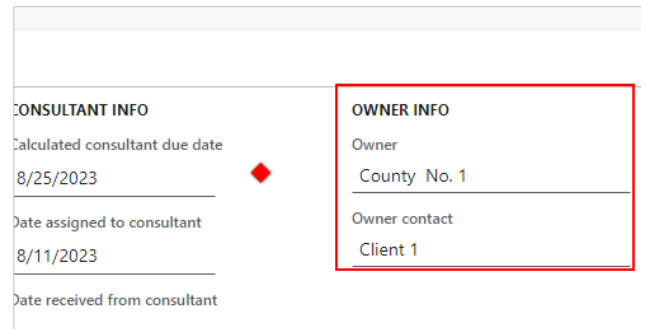


Click on the **Submittal ID** hyperlink to see more details for the submittal that will be sent to the Owner for review.



Submittal Id	Rev
SUM-00007	0
SUM-00008	0
SUM-00009	0
SUM-00023	0

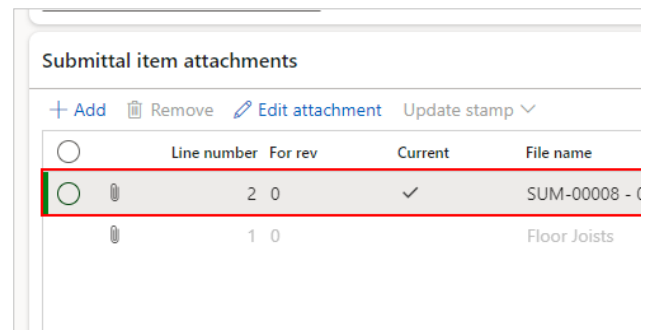
Confirm the information in the **Owner info** field group is correct. These fields contain the company and person who will be automatically notified that the submittal is in their court for review.



CONSULTANT INFO	OWNER INFO
Calculated consultant due date	Owner
8/25/2023	County No. 1
Date assigned to consultant	Owner contact
8/11/2023	Client 1
Date received from consultant	

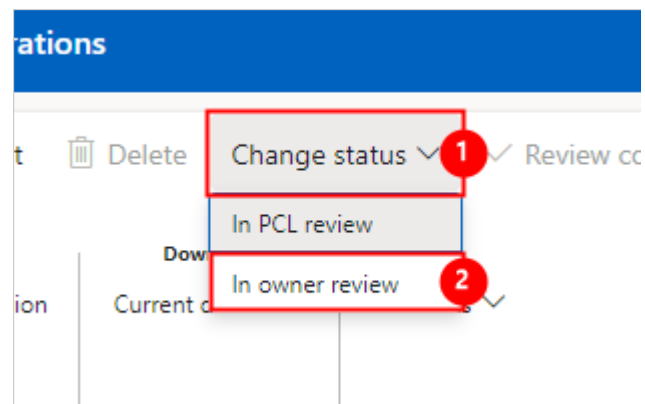
You may want to download and do a final check of the 'Current' document.

When you are satisfied with the contents of the 'Current' document in the **Submittal item attachments** fast tab, proceed with changing the status of the submittal record.



Line number	For rev	Current	File name
2	0	✓	SUM-00008 - (
1	0		Floor Joists

1. Click on the **Change status** drop-down in the action pane.
2. Click on **In owner review**.

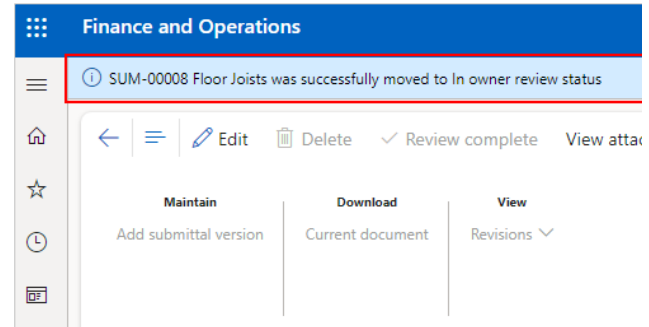


Change status

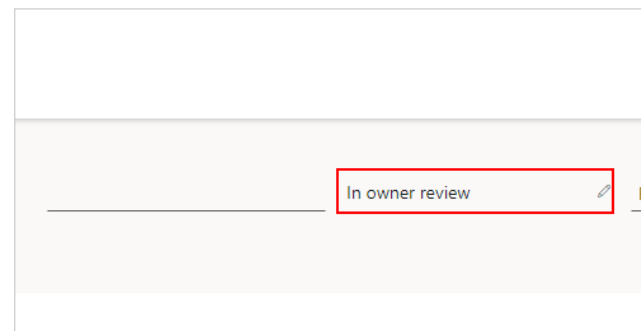
- In PCL review
- In owner review

An automated email is sent to the person named in the 'Owner contact' field, and a copy of the email is saved in the 'Transmission log'.

A message displays when the transmission was sent successfully.



The submittal you just sent to the Owner is now in the status of **In owner review**.



### 4.6.3. Conclusion

Now that you have an understanding of how to send a submittal for Owner review, proceed to the next work instruction.

## 4.7. Review a Submittal as an Owner

### 4.7.1. Introduction

#### 4.7.1.1. Objective

This work instruction covers how to review a submittal as an Owner or their representative.

#### 4.7.1.2. Background Information

When a Project Team determines that the 'Owner review' feature is appropriate, an additional status called: 'In Owner Review', is used to indicate this step in the workflow. During this status, the Owner or their representative is required to review the submittal.

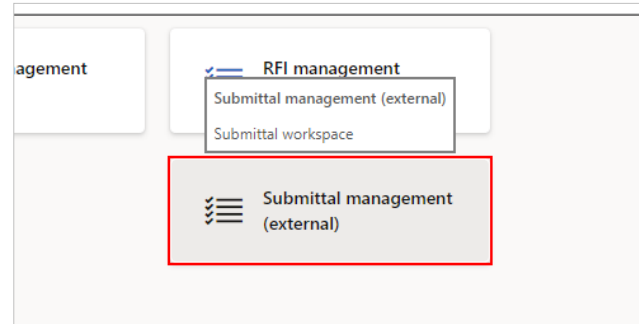
### 4.7.2. Work Instructions

#### 4.7.2.1. Navigation

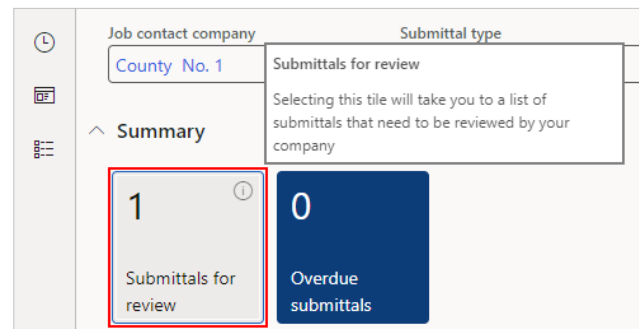
You may choose to navigate directly to the 'Submittals Management' workspace to view just the submittals in your company's court, or you may choose to navigate to the 'Submittal log', and filter for submittals 'In Owner Review'. Both navigation options are shown in this section.

#### 4.7.2.1.1. Navigate from the Submittal Management Workspace

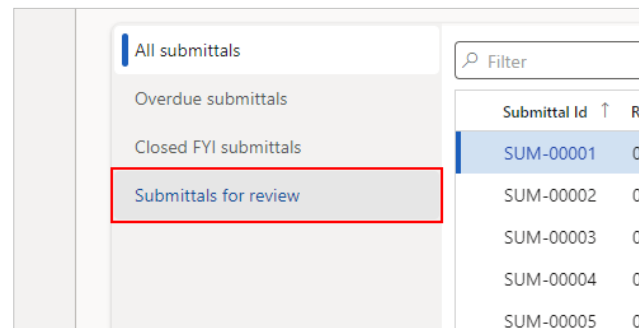
Click on **Submittal management (external)** workspace.



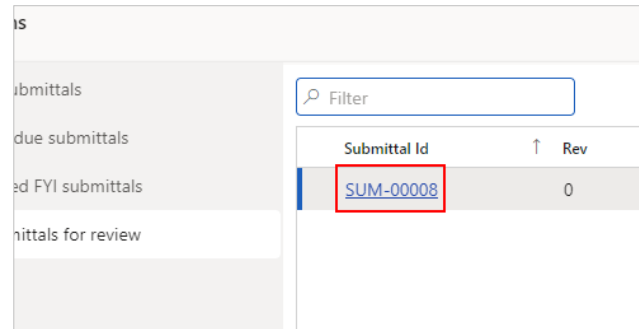
Click on the **Submittals for review** count tile to view a list of the submittals requiring your review.



Alternatively, click on the **Submittals for review** tabbed list.



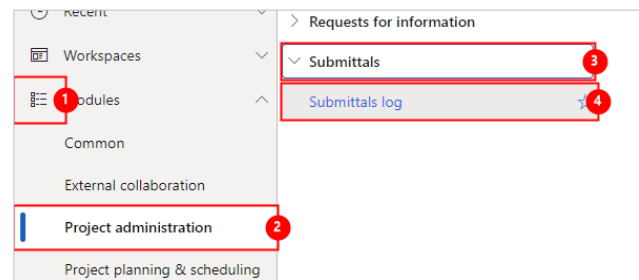
Click on the **Submittal ID** hyperlink to see more details for the submittal that requires your review.



Submittal Id	Rev
<a href="#">SUM-00008</a>	0

#### 4.7.2.1.2. *Navigate from the Submittal Log*

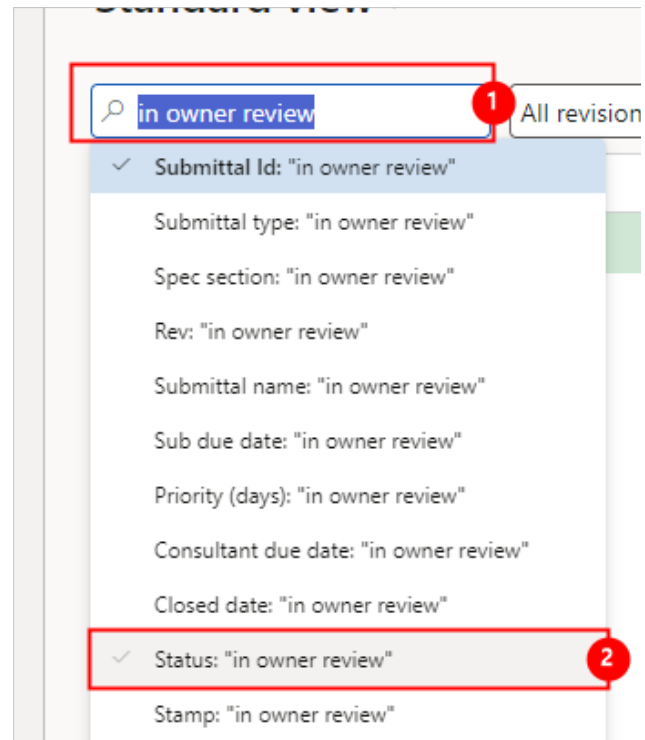
1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.



If viewing the full submittal log, use the following steps to filter and locate records in your court. Alternatively, start from the 'Submittals management (external)' workspace.

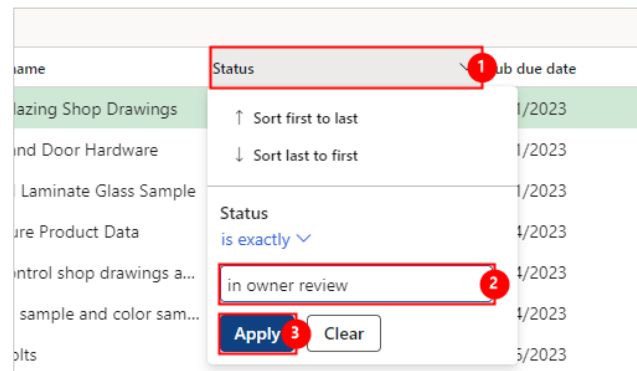


1. In the filter field at the top of the log, enter the status name, **In owner review**.
2. The filter drop down displays all the columns you can search on. Click on the **Status " In owner review "** filter option.



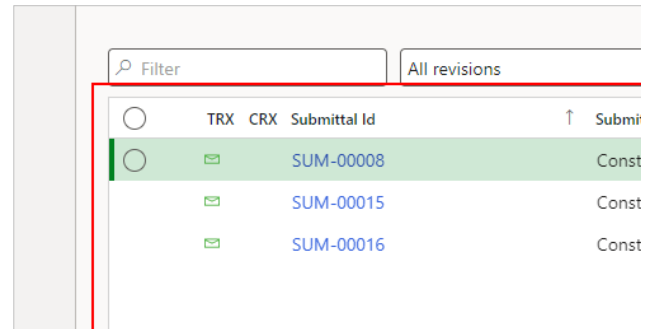
To re-set the full log, clear the text from the filter field and press the 'Enter' key. If the submittals log is large, this may take a few seconds.

1. Alternatively, filter the list directly in the **Status** column by clicking on the column header to reveal the filter dialog.
2. Enter the text **In owner review**.
3. Click on the **Apply** button.



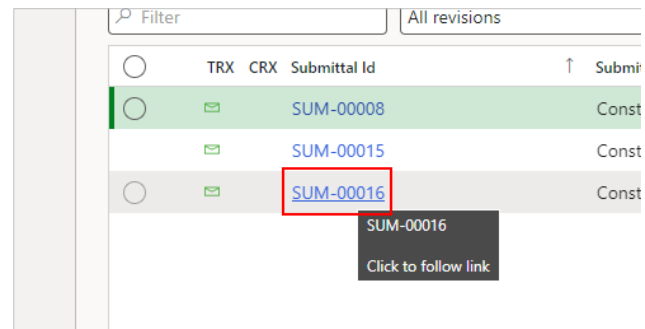
(To clear this filter, re-click on the column header and click the 'Clear' button in the filter dialog).

The Submittal log filters to display records in 'In Owner Review'.



	TRX	CRX	Submittal Id	↑	Submi
<input type="radio"/>			SUM-00008		Const
<input type="radio"/>			SUM-00015		Const
<input type="radio"/>			SUM-00016		Const

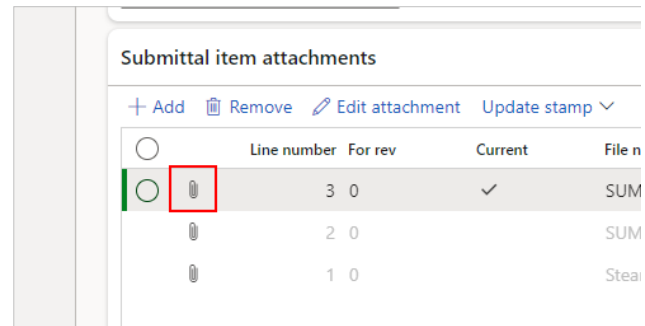
Click on the **Submittal ID** hyperlink to see more details for the submittal that requires your review.



	TRX	CRX	Submittal Id	↑	Submi
<input type="radio"/>			SUM-00008		Const
<input type="radio"/>			SUM-00015		Const
<input type="radio"/>			SUM-00016		Const

SUM-00016  
Click to follow link

Click on the **Paperclip** icon of the Submittal item attachment that is marked as 'Current' to download and review the PDF package.



Submittal item attachments

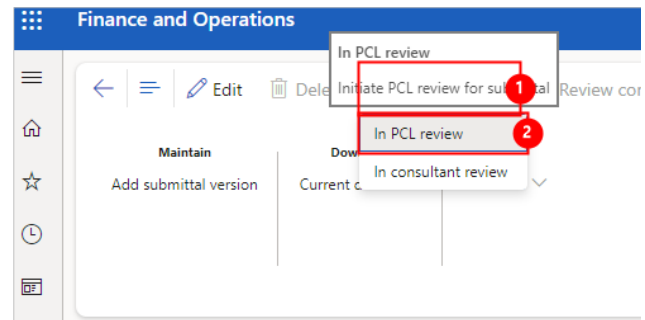
+ Add Remove Edit attachment Update stamp

	Line number	For rev	Current	File n
<input type="radio"/>	3	0	<input checked="" type="checkbox"/>	SUM
<input type="radio"/>	2	0	<input type="checkbox"/>	SUM
<input type="radio"/>	1	0	<input type="checkbox"/>	Steal

#### 4.7.2.2. Return a Submittal to PCL - No Document Edits

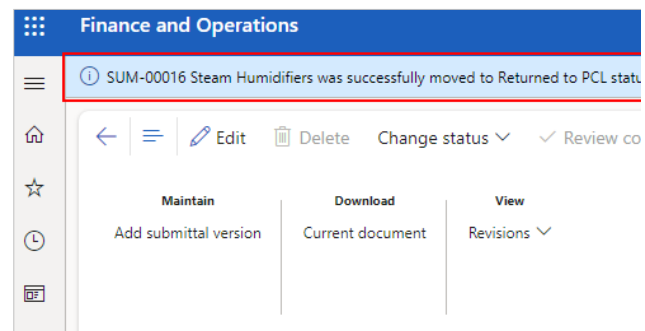
If no additional comments or markups are required on the submittal package, just return the submittal record back to PCL's court.

1. Click on the **Change status** drop-down in the action pane.
2. Click on **In PCL review**.

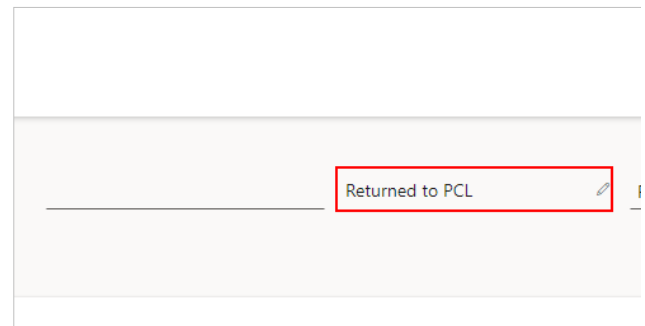


An automated email is sent to the person named in the 'PCL reviewer' field, and a copy of the email is saved in the 'Transmission log'.

A message displays when the transmission was sent successfully.



The Status of the submittal is updated to **'Returned to PCL'**.



This moves the submittal back to PCL's court for further handling and distribution. If you filtered the submittal log to records in: 'In Owner review' status, since you moved the submittal out of that status, it will disappear from your view and you will be presented with the next record of that status.

#### 4.7.2.3. Return a Submittal to PCL - with Document Edits

The 'Submittal item attachments' fast tab contains the review package, and earlier versions of the submittal.

The 'Review package' is generated and attached in this fast tab by PCL.

This PDF package contains the submittal, plus cover page and other relevant documents. You have two options for completing your review of the 'Review package':

1. Review and mark-up the package using Egnyte's 'edit-in-place' feature (sometimes called 'WebEdit'). You must have completed your Egnyte onboarding for this feature to work.

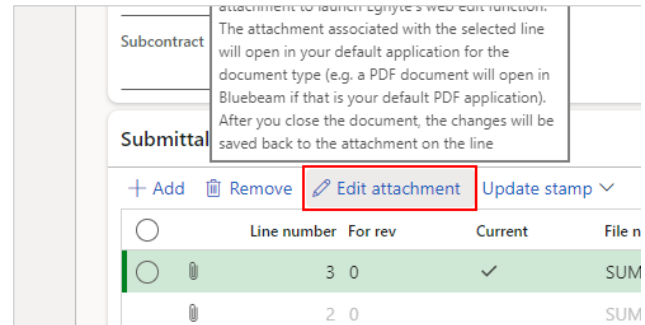
2. Download a copy of the review package, save it to a location on your computer, edit, return to the Submittal record and upload the marked up review package.

#### 4.7.2.3.1. *Edit the Review Package with 'Edit-in-Place'*

With the 'edit-in-place' feature, the document is opened in your default PDF editor. When the review is complete, your edits are saved back to Egnyte, and a new attachment line is created in the 'Submittal item attachments' fast tab for each completed review.

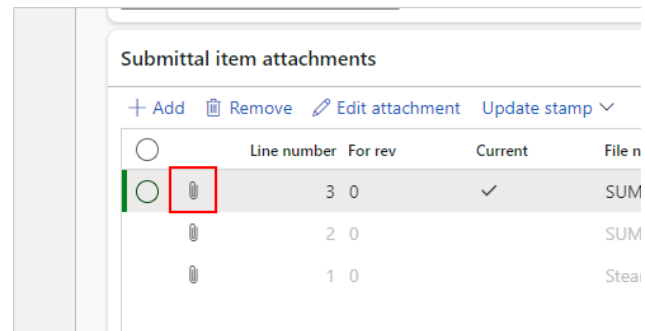
Jump to the section called 'Download, Mark-up Offline, and Upload the Reviewed Package', if you do not want to use the 'edit-in-place' feature.

In the 'Submittal item attachments' fast tab, select or highlight the line with the checkmark. Then click the **Edit attachment** button.

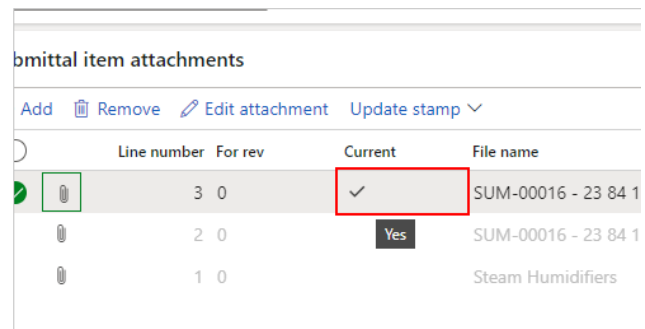


To allow 'edit-in-place', the document opens in WebEdit using the application you specified as your default PDF editor. Review and markup, as required.

To confirm your edits were saved to the document, click on the **Paperclip** icon of the newly created line. This downloads the edited submittal item attachment.



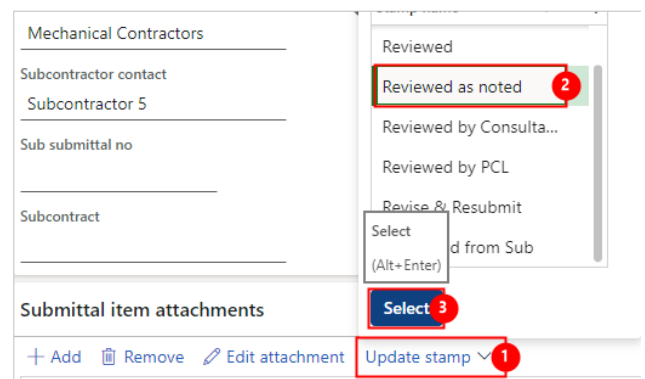
The item is also marked as **Current**.



You may need to change the 'Stamp' field, depending on what your project team has agreed to. In some cases the stamp name 'Reviewed by Consultant' is sufficient. In other cases, you may choose the stamp that most closely matches the result of your review (e.g. Reviewed as noted, Revise & Resubmit). The list of stamp names is configurable so your view of the available stamp names may differ.

Note: this feature does not do any stamping on the document. It is used as an indicator in the Submittal log to display the most recently applied stamp name, or which party completed the most recent review.

1. Click on the **Update stamp** drop-down.
2. Select the appropriate Stamp option.
3. Click on the **Select** button.

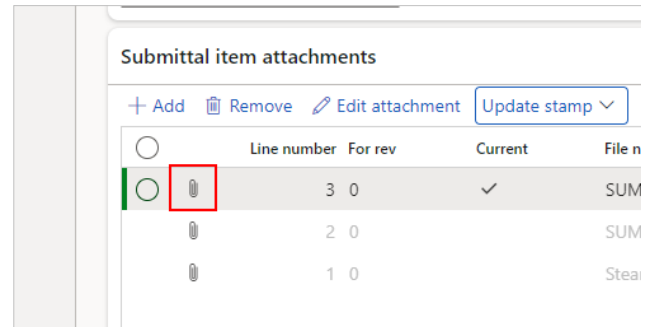


This completes your review of the submittal. If you are ready to return the submittal to PCL, jump to the section called 'Return a Submittal to PCL'.

#### 4.7.2.3.2. Download, Mark-up Offline, and Upload the Reviewed Package

If you want to complete your review offline, you can download the package and review the submittal in your own time.

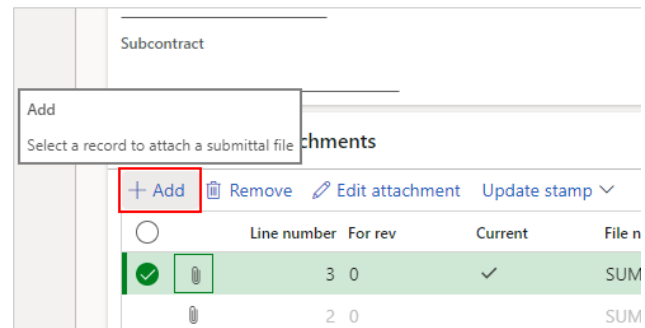
Within the **Submittal item attachments** fast tab, click on the **Paperclip** icon next to the line marked as 'Current', to download the attached document.



Depending on the browser you are using, the submittal document will be downloaded to your Downloads folder (in Chrome); or you will be prompted to open or save the file (in Edge).

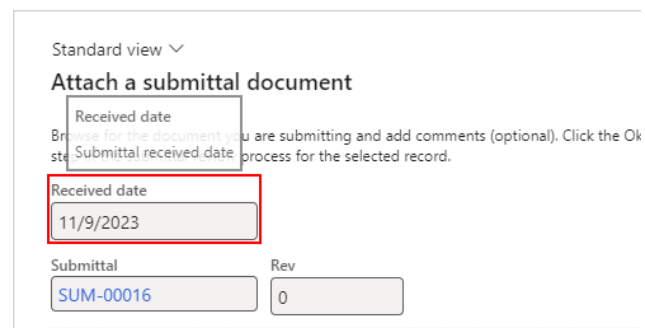
#### 4.7.2.3.2.1. Upload Reviewed Document

When you have completed your review of the submittal document, return to PM4+, access the relevant submittal record and within click the **Add** button to upload your reviewed document.



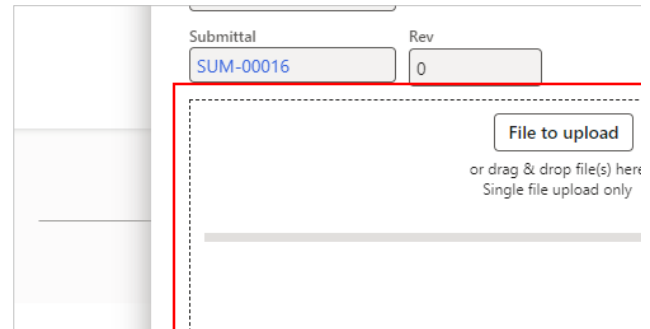
The 'Attach a submittal document' dialog opens.

The **Received date** field is the date that you finish uploading your reviewed document to PM4+.



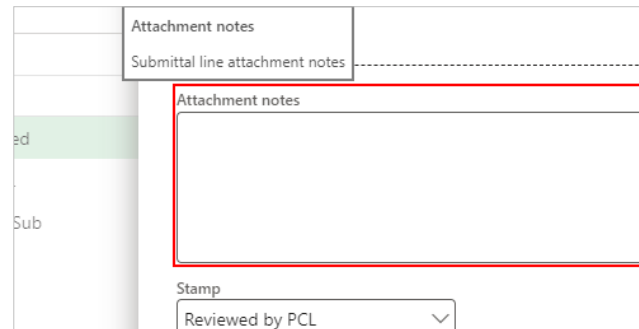
Click on the **File to upload** button to locate the file you are uploading.

You may also use the drag and drop feature.



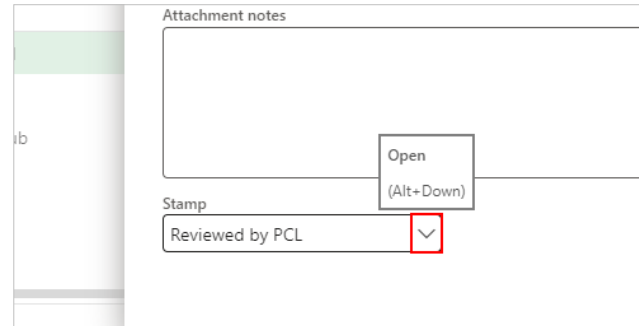
The screenshot shows a form with two input fields: 'Submittal' containing 'SUM-00016' and 'Rev' containing '0'. Below these is a dashed box containing a 'File to upload' button and the text 'or drag & drop file(s) here. Single file upload only.' A red box highlights the 'File to upload' button and the dashed box area.

When the upload is complete, click on the **Attachment notes** field and enter any pertinent notes about the submittal. These will be visible on the line in the 'Submittal item attachments' fast tab.



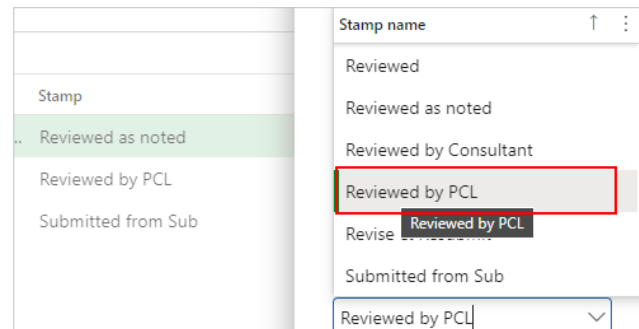
The screenshot shows a form with a 'Submittal line attachment notes' field. Below it is an 'Attachment notes' text area, which is highlighted with a red box. Below the text area is a 'Stamp' dropdown menu with 'Reviewed by PCL' selected.

The **Stamp** name field is auto-populated. Click the drop-down and select a different stamp, if relevant.



The screenshot shows a form with a 'Stamp' dropdown menu. The dropdown is open, showing a list of stamp names. The 'Reviewed by PCL' option is highlighted with a red box. A red box also highlights the dropdown arrow. A tooltip 'Open (Alt+Down)' is visible over the dropdown arrow.

Click on the **Stamp name** field.



The screenshot shows a form with a 'Stamp name' dropdown menu. The dropdown is open, showing a list of stamp names. The 'Reviewed by PCL' option is highlighted with a red box. The dropdown menu is titled 'Stamp name' and has an upward arrow and a three-dot menu icon.

Alternatively, choose the stamp that most closely matches the result of your review (e.g. Reviewed as noted, Revise & Resubmit). The list of stamp names is configurable so your view of the available stamp names may differ.

Note: this feature does not do any stamping on the document. It is used as an indicator in the Submittal log to display the most recently applied stamp name, or which party completed the most recent review.

Click on the **OK** button to add your reviewed document to the list of submittal line attachments. This document will be marked as **Current**.



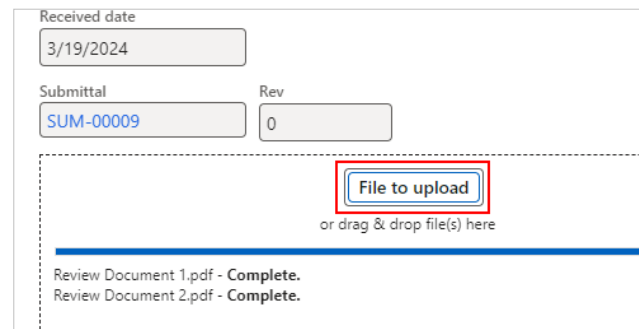
#### 4.7.2.3.2.2. Upload Multiple Files (Optional)

If required, you can upload multiple files to your submittal document.

Note: This can only be performed if the PCL Project team has turned on this function for the project.

Click on the **File to upload** button to attach the desired files.

You may also drag and drop the files.



Click on the **OK** button.

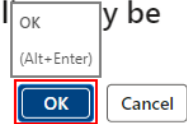




A confirmation message displays. Ensure all attached documents are relevant to the selected submittal. The attachments may be rejected by the Project team if unrelated documents are included.

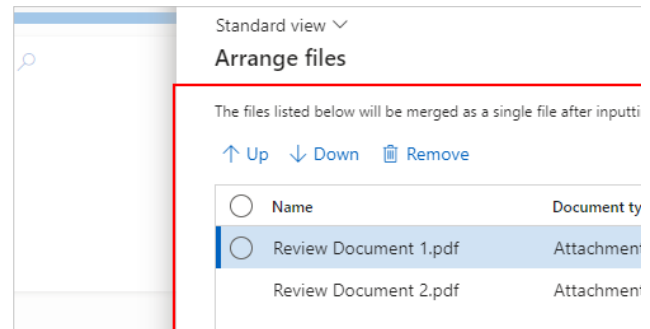
Click on the **OK** button.

Confirm that all attachments uploaded are relevant to the submittal requirements/records in respond to the specific submittal line. Other attachments not relevant to this submittal may be rejected by the project team.

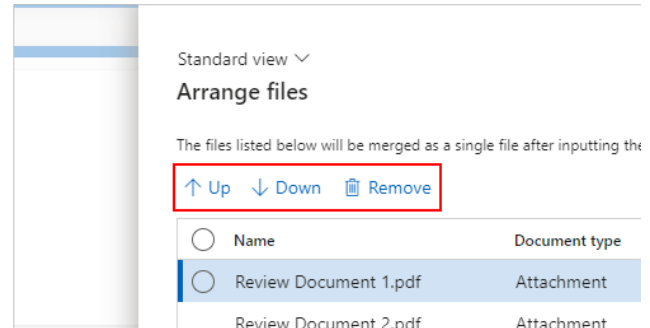


The **Arrange files** dialog displays.

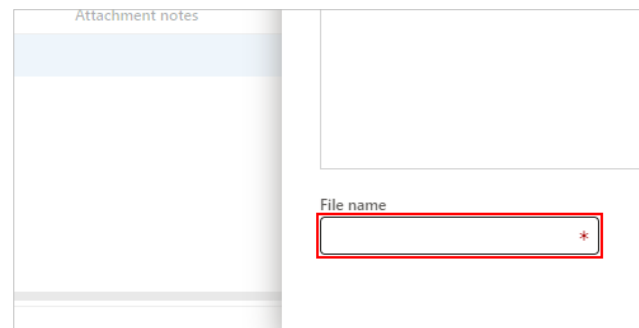
The files listed will be merged into a single file. Ensure that the documents are arranged in the correct order you would like them merged together.



You can rearrange the files by using the **Up** or **Down** buttons. To remove a file click on the **Remove** button.



Enter a new **File name** to be applied to the merged file.



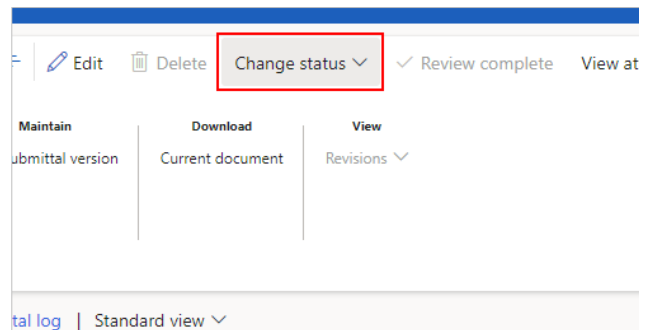
Click on the **OK** button to add your reviewed document to the list of submittal line attachments. The row created for this version of the document will be marked as **Current**.



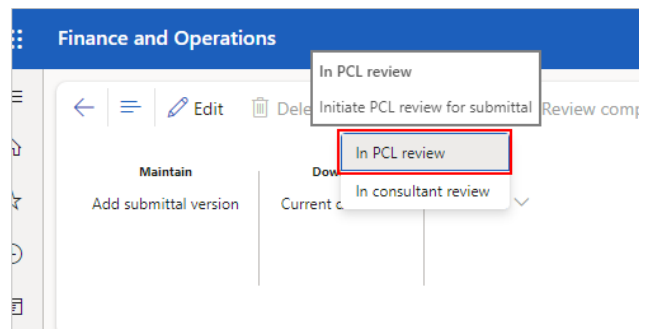
#### 4.7.2.3.2.3. Return a Submittal to PCL

When your Owner review is complete, return the submittal to PCL.

Click on the **Change status** drop-down in the action pane.

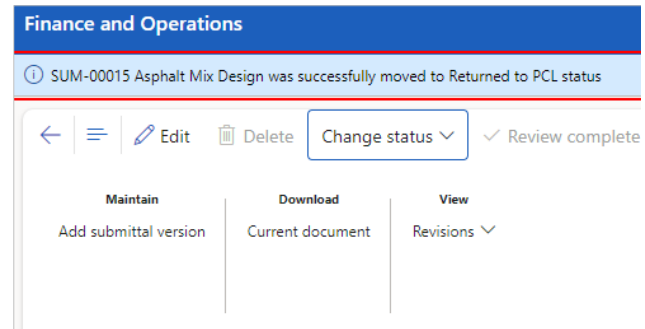


Click on **In PCL review**.



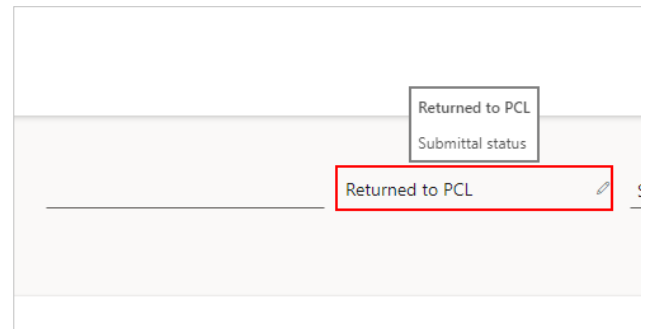
An automated email is sent to the person named in the 'PCL reviewer' field, and a copy of it is saved in the 'Transmission log'.

A message displays when the transmission was sent successfully.



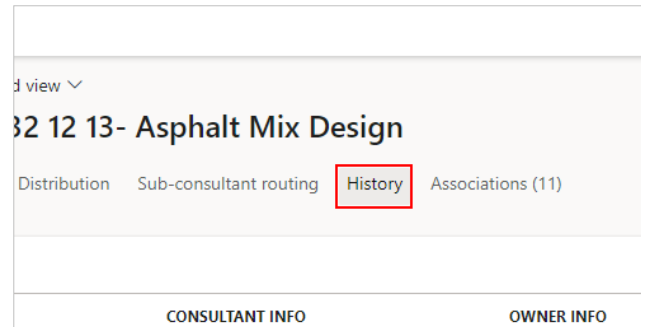
The status of the submittal is now 'Returned to PCL'.

This moves the submittal back to PCL's court for further handling and distribution.



#### 4.7.2.3.2.4. View Submittal History

Click on the **History** tab. This fast tab contains the status change actions taken on the submittal.



1. The **From status** column displays the previous status that the submittal was in. In this example, the submittal was in: 'In Owner Review' status.
2. The **To status** column displays the status the submittal was moved to. In this example, the submittal is in 'Returned to PCL'.
3. The **By** column displays the person who executed the status change.

	From status	To status	By	Date and time
10	In owner review	Returned to PCL	Client1	8/19/2023 9:30:39 PM
9	In consultant review	In owner review	Employee1	8/14/2023 9:35:03 PM
8	In PCL review	In consultant review	Employee1	8/11/2023 10:47:29 PM

4. The **Date and time** column displays when the status change action was completed.

### 4.7.3. Conclusion

Now that you have an understanding of how to review a submittal as an Owner, proceed to the next work instruction.

## 4.8. Submittal Management Workspace

### 4.8.1. Introduction

#### 4.8.1.1. Objective

This work instruction covers the Submittal Management workspace for Subcontractors.

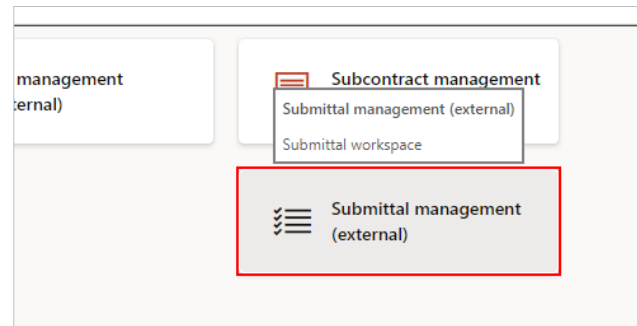
#### 4.8.1.2. Background Information

You can track and monitor the progress of your company's submittals through your company's specific collaborative workspace.

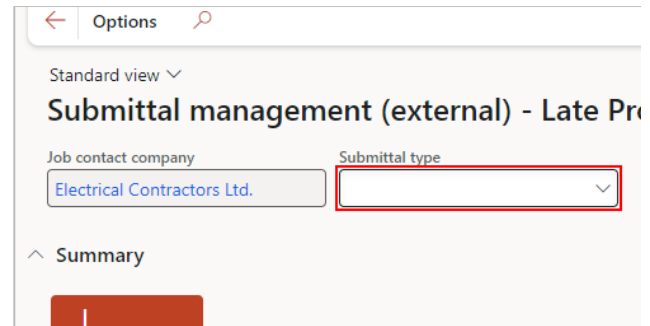
### 4.8.2. Work Instructions

Click on the **Submittal management (external)** tile in the PM4+ dashboard.

This workspace provides a single location where you can track and monitor your company's Submittals, as well as submit documents being requested.



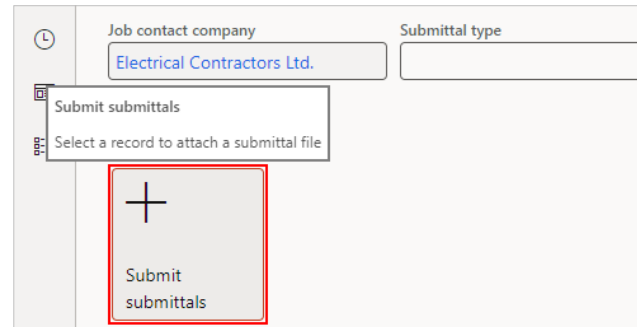
The **Submittal type** field filters the workspace according to the selected Submittal type. By default all Submittal types you have access to, are included when this field is blank. Multiple submittal types are optional and may not be in use on your project. Talk to the PCL Project Manager for clarification on what types you should see.



#### 4.8.2.1. Tiles

The **Submit submittals** action tile provides a way of attaching a document to the submittal being requested of you.

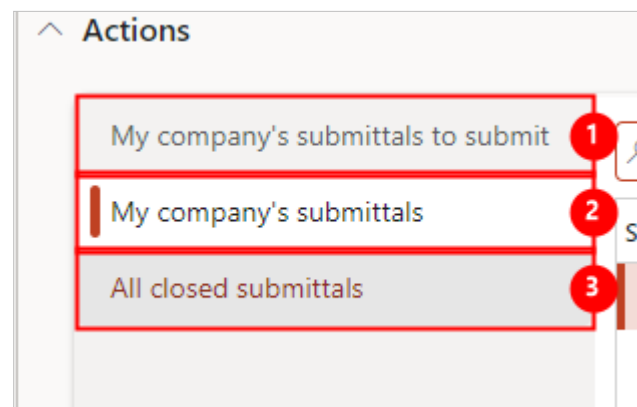
View the work instruction called, 'Submit a Submittal to PCL' for more details.



#### 4.8.2.2. Tabbed Lists

There are three tabbed lists in the workspace.

1. The **My company's submittals to submit** tabbed list displays your company's submittals filtered by the 'Requested' or 'Revise and resubmit' status.
2. The **My company's submittals** tabbed list displays all records in the submittal log where your company is named as the party responsible for providing the submittal. Submittal records of any status are listed in this tab.
3. The **All closed submittals** tabbed list displays all the closed submittals for the project.



#### 4.8.3. Conclusion

Now that you have an understanding of the Submittal Management workspace, proceed to the next work instruction.

### 4.9. Submit a Submittal to PCL

#### 4.9.1. Introduction

##### 4.9.1.1. Objective

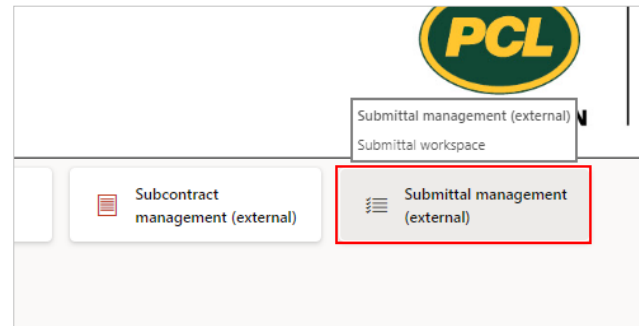
This work instruction covers how to submit a submittal.

##### 4.9.1.2. Background Information

To submit the documents being requested by PCL, a corresponding submittal record must exist in PM4+. These records are created by PCL. If you run into the situation where you have a submittal but no record to upload it to, contact the PCL Submittal Coordinator.

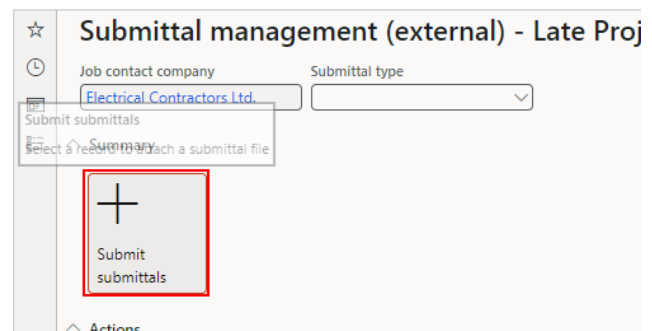
## 4.9.2. Work Instructions

Click on **Submittal management (external)** workspace.

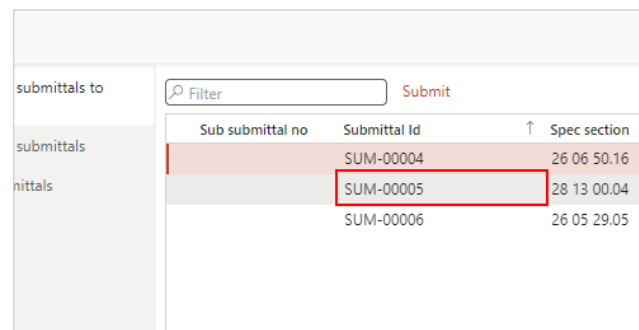


### 4.9.2.1. Upload Document for a Requested Submittal

You can upload a document to the submittal being requested. Click on the **Submit submittals** action file.

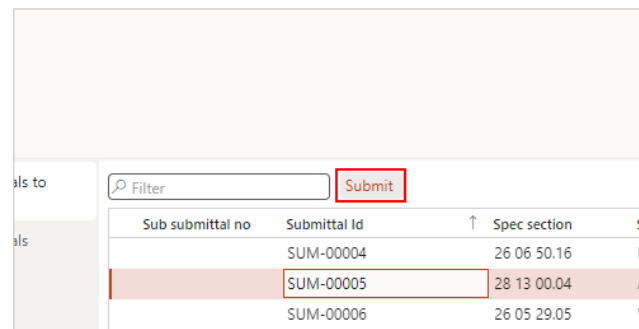


Alternatively, you can access the **My company's submittals to submit** tabbed list to see a listing of all submittals that are being requested from you.



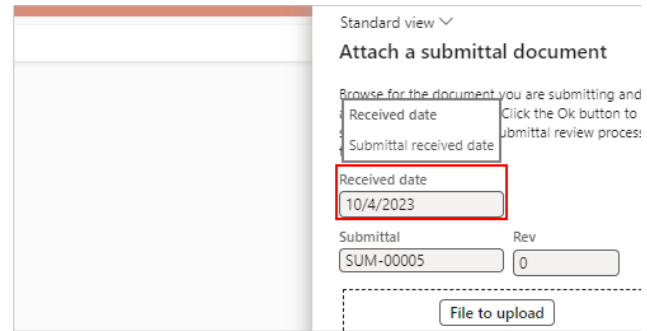
Click on a **Submittal** from the list.

Click on the **Submit** button to be able to upload your document.



The 'Attach a submittal document' dialog opens.

The **Received date** field is read-only and cannot be edited. This date is the date that you finish uploading your reviewed document to PM4+.



Standard view ▾  
**Attach a submittal document**

Browse for the document you are submitting and  
Received date Click the Ok button to  
Submittal received date submit the review process.

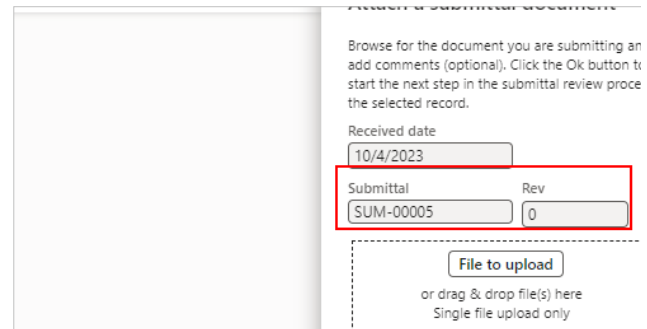
Received date  
10/4/2023

Submittal Rev  
SUM-00005 0

File to upload

The **Submittal** and **Rev** fields auto-populate if the submittal is selected from the the 'My company's submittals to submit' tabbed list.

If the 'Submit submittals' action tile is selected, you can choose which submittal you are uploading your document to via the **Submittal** drop-down. The **Rev** field will automatically populate based on the submittal selected, if you feel it is incorrect, you should contact the PCL Submittal Coordinator.



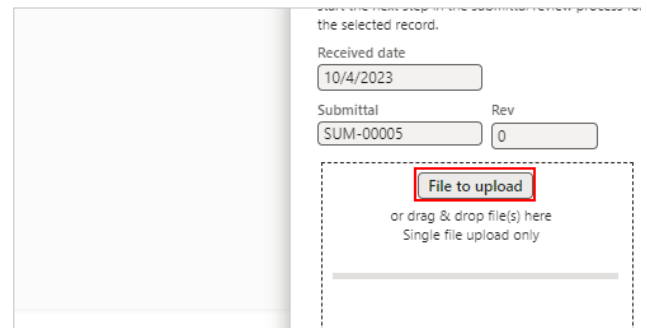
Browse for the document you are submitting and  
add comments (optional). Click the Ok button to  
start the next step in the submittal review process  
the selected record.

Received date  
10/4/2023

Submittal Rev  
SUM-00005 0

File to upload  
or drag & drop file(s) here  
Single file upload only

Click on the **File to upload** button to upload the submittal document or use the drag and drop feature.



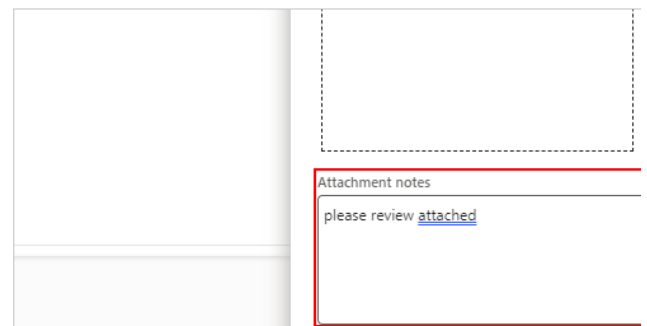
the selected record.

Received date  
10/4/2023

Submittal Rev  
SUM-00005 0

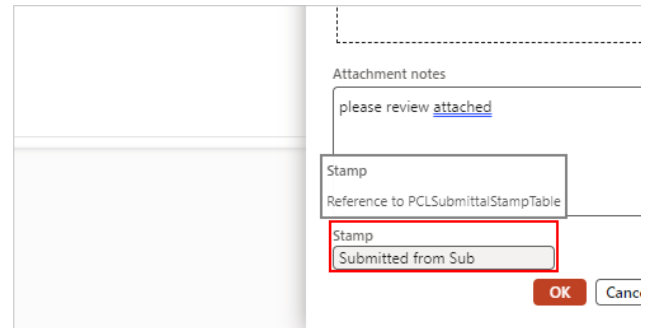
File to upload  
or drag & drop file(s) here  
Single file upload only

Click on the **Attachment notes** field - Enter any pertinent notes about the document you are uploading.



Attachment notes  
please review [attached](#)

The **Stamp** field is read-only and cannot be edited.



Click on the **OK** button to upload your document.

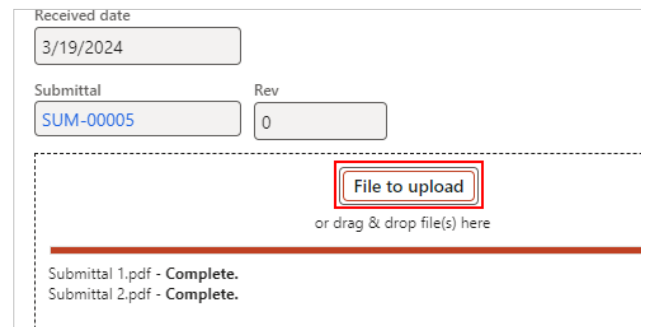


#### 4.9.2.2. Upload Multiple Files (Optional)

If required, you can upload multiple files to your submittal document.

Note: This can only be performed if the PCL Project team has turned on this function for the project.

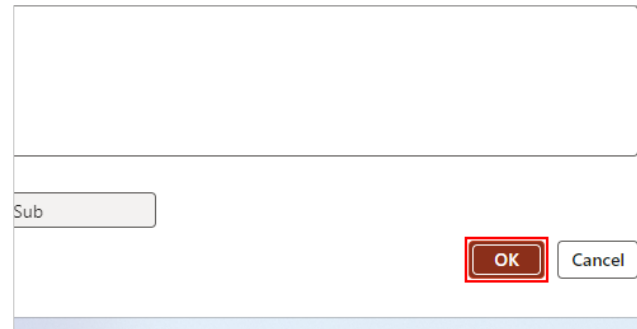
Click on the **File to upload** button to attach the desired files.



You may also use the drag and drop feature.



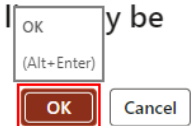
Click on the **OK** button.



A confirmation message displays. Ensure all attached documents are relevant to the selected submittal. The attachments may be rejected by the project team if unrelated documents are included.

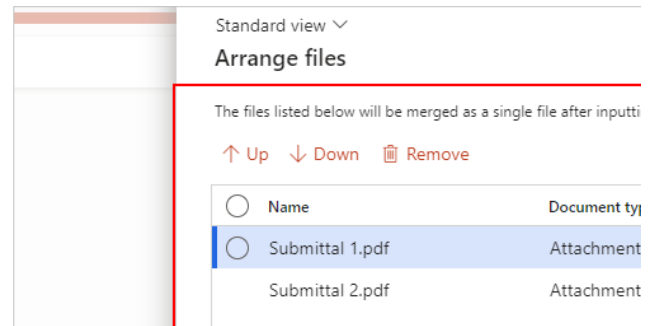
Click on the **OK** button.

**Confirm that all attachments uploaded are relevant to the submittal requirements/records in respond to the specific submittal line. Other attachments not relevant to this submittal may be rejected by the project team.**

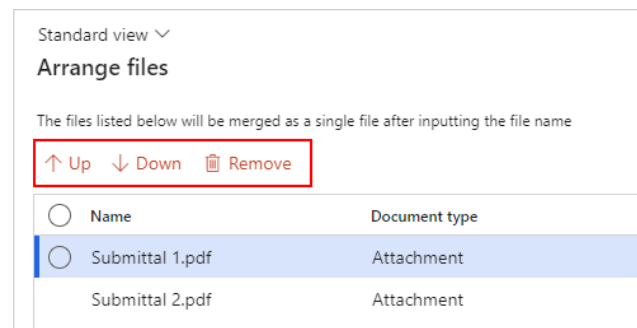


The **Arrange files** dialog displays.

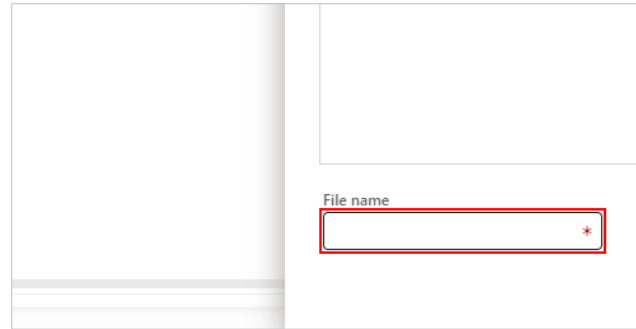
The files listed will be merged into a single file. Ensure that the documents are arranged in the correct order you would like them merged together.



You can rearrange the files by using the **Up** or **Down** buttons. To remove a file click on the **Remove** button.

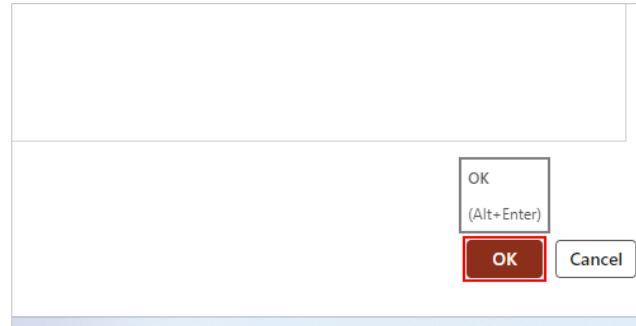


Enter a new **File name** to be applied to the merged file.



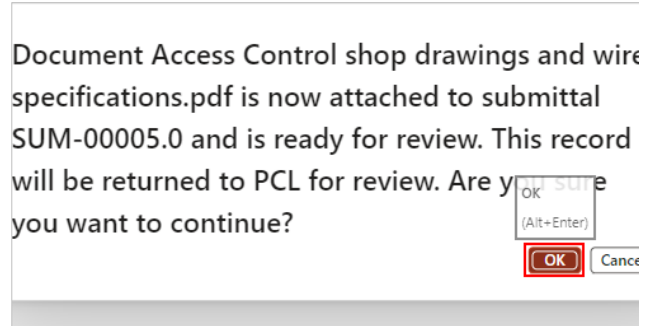
A screenshot of a software dialog box. On the right side, there is a text input field labeled "File name" with a red asterisk to its right. The input field is highlighted with a red rectangular border.

Click on the **OK** button.



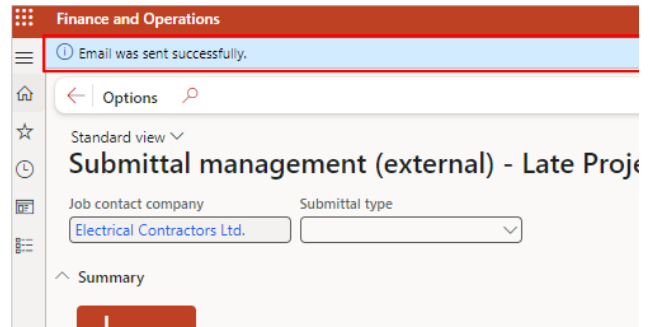
A screenshot of a software dialog box. At the bottom right, there are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red rectangular border.

A confirmation dialog displays, click on the **OK** button to proceed.



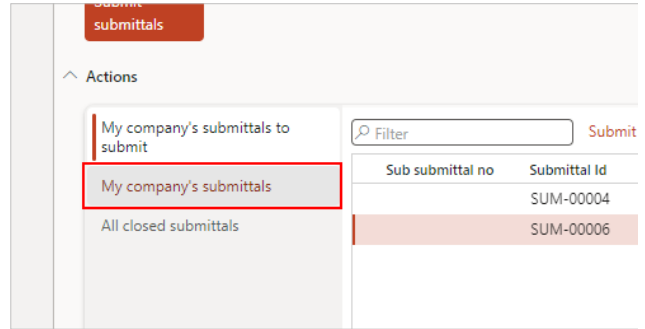
A screenshot of a confirmation dialog box. The text inside reads: "Document Access Control shop drawings and wire specifications.pdf is now attached to submittal SUM-00005.0 and is ready for review. This record will be returned to PCL for review. Are you sure you want to continue?". At the bottom right, there are "OK" and "Cancel" buttons. The "OK" button is highlighted with a red rectangular border.

A confirmation message displays a successful email transaction.



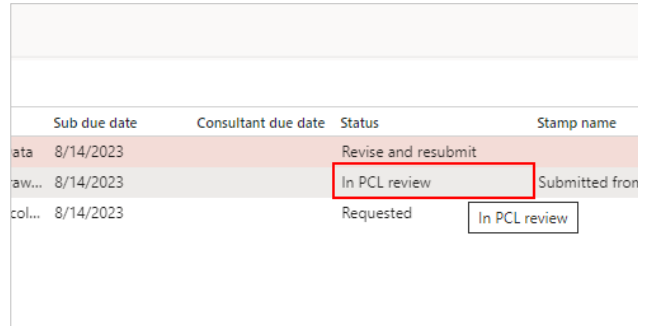
A screenshot of a software interface. At the top, a red notification bar says "Email was sent successfully.". Below it, the page title is "Submittal management (external) - Late Project". There are fields for "Job contact company" (filled with "Electrical Contractors Ltd.") and "Submittal type". A "Summary" section is partially visible at the bottom.

Click on the **My company's submittals** tabbed list.



The screenshot shows a web interface for submittals. At the top, there is a 'Submit submittals' button. Below it is an 'Actions' section with a dropdown menu. The dropdown menu has three options: 'My company's submittals to submit', 'My company's submittals' (which is highlighted with a red box), and 'All closed submittals'. To the right of the dropdown is a search filter box labeled 'Filter' and a 'Submit' button. Below the dropdown is a table with two columns: 'Sub submittal no' and 'Submittal Id'. The table contains two rows: one with 'SUM-00004' and another with 'SUM-00006'.

The submitted submittal is now in **In PCL review** status.



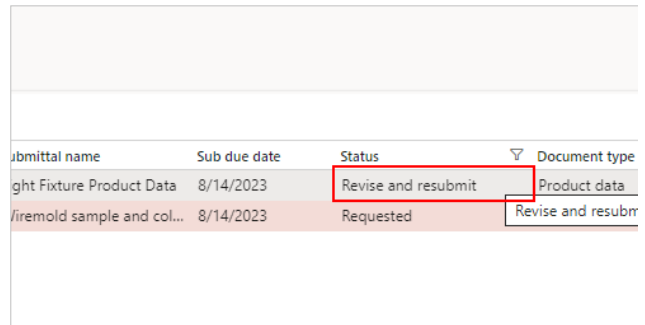
The screenshot shows a table with four columns: 'Sub due date', 'Consultant due date', 'Status', and 'Stamp name'. There are three rows of data. The first row has 'ata' in the first column, '8/14/2023' in the second, 'Revise and resubmit' in the third, and an empty cell in the fourth. The second row has 'aw...' in the first column, '8/14/2023' in the second, 'In PCL review' in the third (highlighted with a red box), and 'Submitted from' in the fourth. The third row has 'col...' in the first column, '8/14/2023' in the second, 'Requested' in the third, and 'In PCL review' in the fourth (highlighted with a red box).

#### 4.9.2.3. Submit a Revised and Resubmit Submittal

If a submittal is lacking information, PCL may send it back to you. These submittals will have a status of 'Revise and resubmit'. Make sure to provide the required information and submit it back using the same steps as outlined in the previous section of this work instruction.

The following steps will help you identify which submittals require you to revise and resubmit:

The 'Status' field will indicate if the submittal requires you to **Revise and resubmit**.



The screenshot shows a table with four columns: 'Submittal name', 'Sub due date', 'Status', and 'Document type'. There are two rows of data. The first row has 'ght Fixture Product Data' in the first column, '8/14/2023' in the second, 'Revise and resubmit' in the third (highlighted with a red box), and 'Product data' in the fourth. The second row has 'firemold sample and col...' in the first column, '8/14/2023' in the second, 'Requested' in the third, and 'Revise and resubmit' in the fourth (highlighted with a red box).

The **Reason for return** field will tell you why PCL has sent the submittal back to you and what might be required for you to revise.

Type	Submittal coordinator	Reason for return
Employee 1	Employee 1	There are pages missing
Employee 1	Employee 1	

With the submittal record selected, click the **Submit** button and follow the same steps outlined in the above section to submit the submittal back to PCL.

Submit  
 Select a record in the log and click the Submit button to submit

Sub submittal no	Submittal Id	↑	Spec section
SUM-00004	SUM-00004		26 06 50.16
SUM-00006	SUM-00006		26 05 29.05

#### 4.9.2.4. View Assigned Submittals

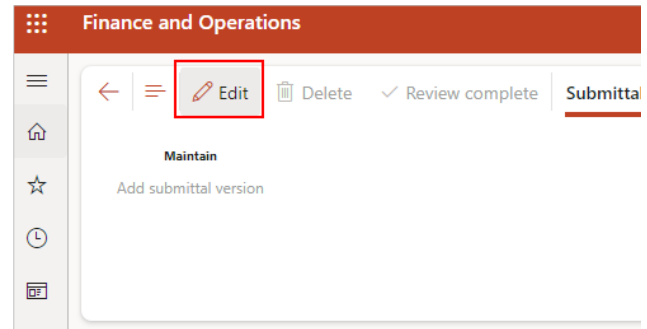
The **My company's submittals** tabbed list displays submittals assigned to your company.

Sub submittal no	Submittal Id	↑	Rev
SUM-00004	SUM-00004		0
SUM-00005	SUM-00005		0
SUM-00006	SUM-00006		0

Click on the **Submittal Id** hyperlink.

Sub submittal no	Submittal Id	↑	Rev	Spec s
SUM-00004	SUM-00004		0	26 06
SUM-00005	SUM-00005		0	28 13
SUM-00006	SUM-00006		0	26 05

Click on the **Edit** button.

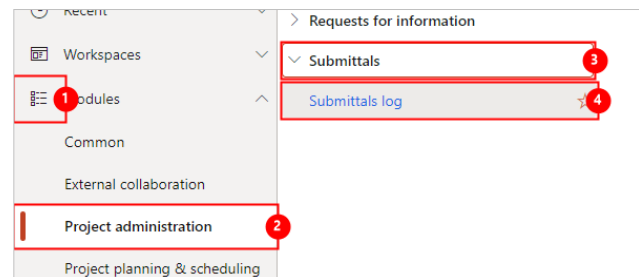


Make desired edits to the **Sub submittal no** field.

Additional comments related to the selected submittal can be added in the **External comments** field.

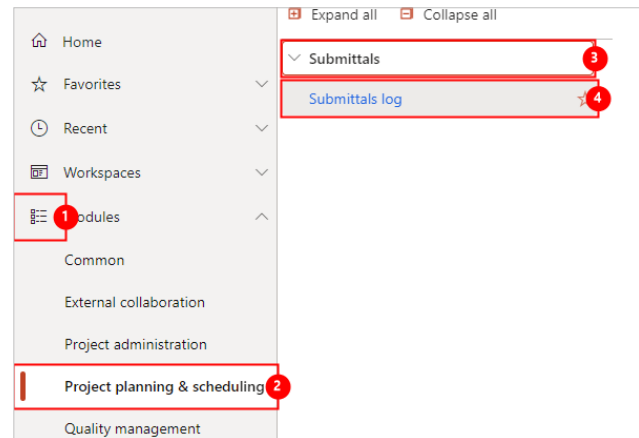
#### 4.9.2.5. View Submittals Log

1. Click on the **Modules** icon.
2. Click on the **Project administration** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.

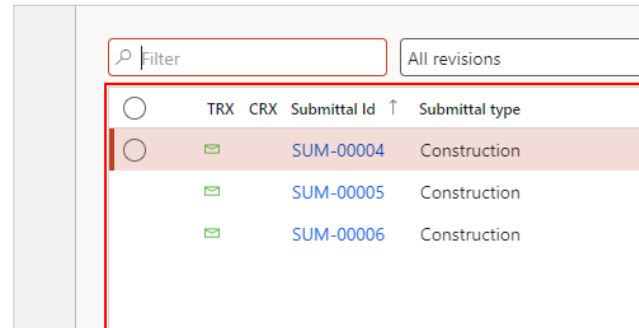


Alternatively you can navigate to the 'Submittals log' through the 'Project planning and scheduling' module.

1. Click on the **Modules** icon.
2. Click on the **Project planning & scheduling** module.
3. Click on the **Submittals** menu section.
4. Click on the **Submittals log** menu item.



The **Submittals log** displays all submittals assigned to your company.



### 4.9.3. Conclusion

Now that you have an understanding of how to submit a submittal, proceed to the next work instruction.

## 4.10. Download a Closed Submittal Package

### 4.10.1. Introduction

#### 4.10.1.1. Objective

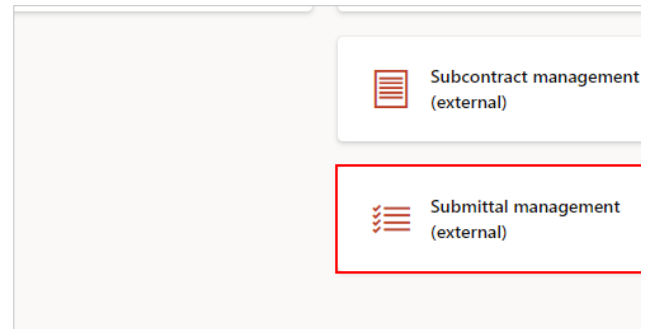
This work instruction will cover downloading a closed submittal package.

#### 4.10.1.2. Background Information

To download the closed submittal package from PCL, a corresponding closed submittal record must exist in PM4+. For further details, contact the PCL Submittal Coordinator.

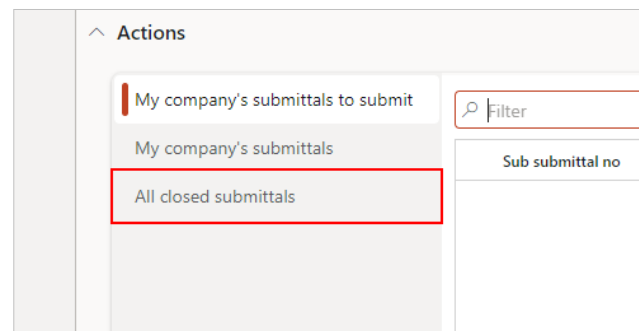
### 4.10.2. Work Instructions

Click on **Submittal management (external)**

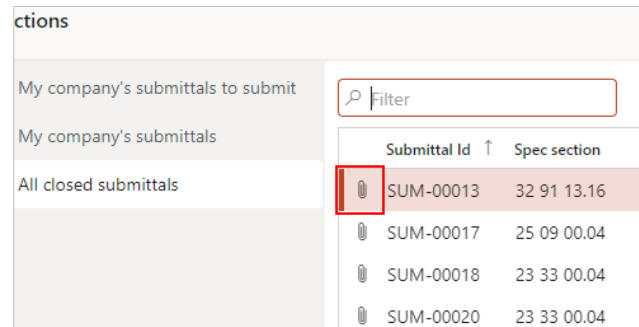


#### 4.10.2.1. View a 'Closed' Submittal

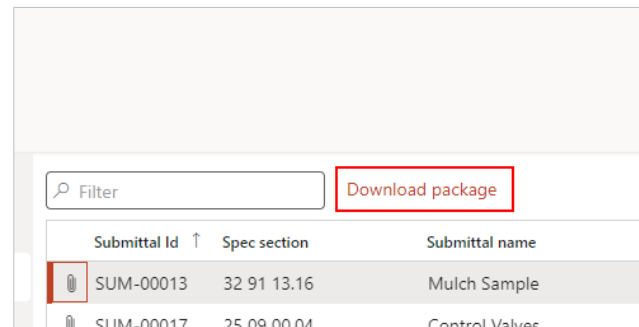
To view a 'Closed' submittal, click on the **All closed submittals** tabbed list.



Click on the **Paperclip** icon to view the closed package.



Alternatively, you can click on the **Download package** button.



#### 4.10.3. Conclusion



PM4+

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Now that you have an understanding of how to download a closed submittal package proceed to the next work instruction.



## 5. Project Files and EPR

### 5.1. Consultants, Clients and Design Teams Project Links Workspace

#### 5.1.1. Introduction

##### 5.1.1.1. Objective

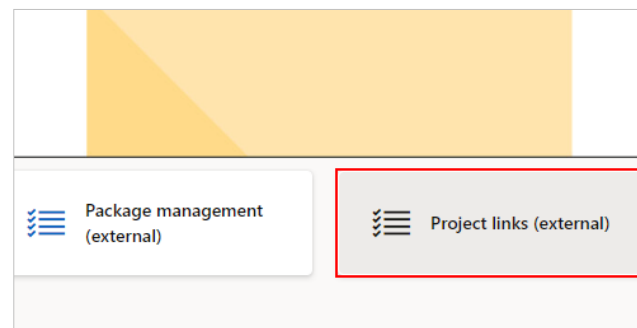
This work instruction covers the Project links workspace for PCL Clients, Consultants, and Design Teams.

##### 5.1.1.2. Background Information

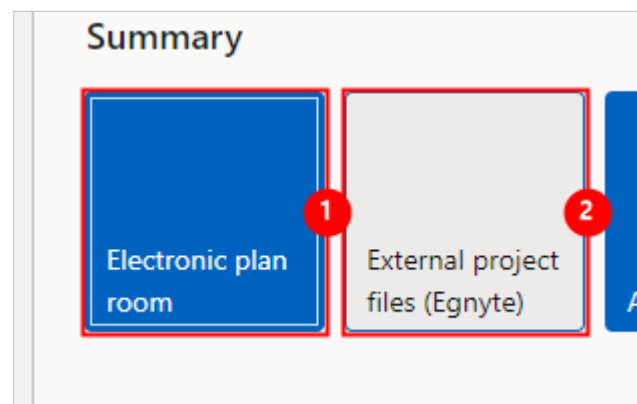
In this workspace, you can access external links that will launch other applications when clicked. Depending on which links are set up by the project team, this will dictate which links are available. Your view of this workspace may not match the example shown.

#### 5.1.2. Work Instructions

Click on the **Project links (external)** tile in the PM4+ dashboard.



1. If your project team is using Autodesk Build as the Electronic Plan Room (EPR) for the project, and if the setup has been completed by the project team, the **Electronic plan room** tile will navigate you directly to Build. The EPR displays the drawings and specification in use.
2. If you have been granted access to the project's file folder structure in Egnyte, and if the project team has done the setup to link the PM4+ project to the Egnyte site, click the **External project files (Egnyte)** tile to access Egnyte.



The remaining tiles may be in use, depending on which external applications the project team is using and which they want you to access. Talk to your PCL Project Coordinator or Project Manager for details.

### 5.1.3. Conclusion

Now that you have an understanding of the Project links (external) workspace, proceed to the next work instruction.

## 5.2. Access the EPR from PM4+

### 5.2.1. Introduction

#### 5.2.1.1. Objective

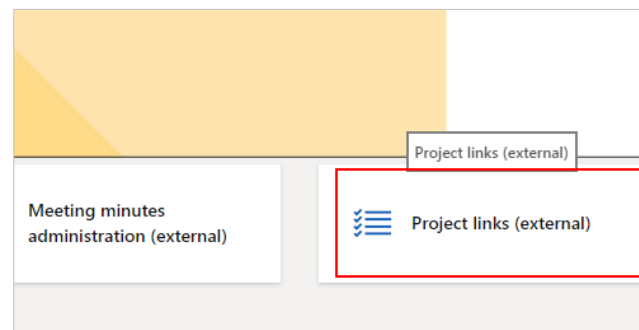
This work instruction covers how to access the project's Electronic Plan Room (EPR) from PM4+.

#### 5.2.1.2. Background Information

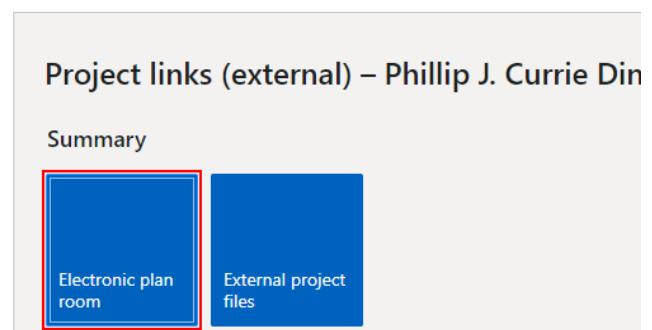
INote: If you receive a permissions error or can't access the folders on BIM 360Docs site, contact your Project Manager to request permissions so you can access the project EPR.

### 5.2.2. Work Instructions

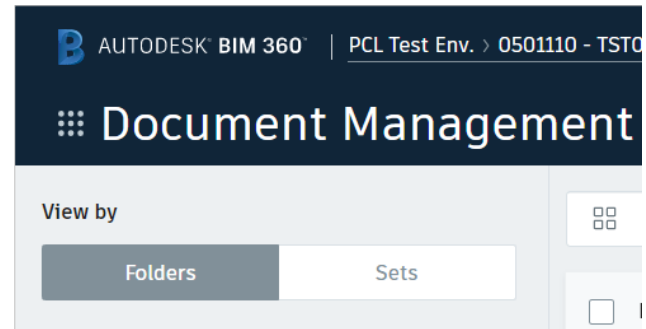
Click on the **Project links (external)** workspace.



Click on the **Electronic plan room** tile.



The **Electronic Plan Room** opens.



### 5.2.3. Conclusion

Now that you have an understanding of how to access the EPR, proceed to the next work instruction.

## 5.3. Access the Project Files Folder in PM4+

### 5.3.1. Introduction

#### 5.3.1.1. Objective

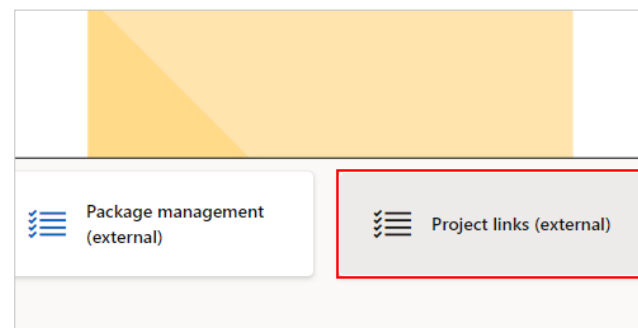
This work instruction covers how to access the project files folder structure for your project.

#### 5.3.1.2. Background Information

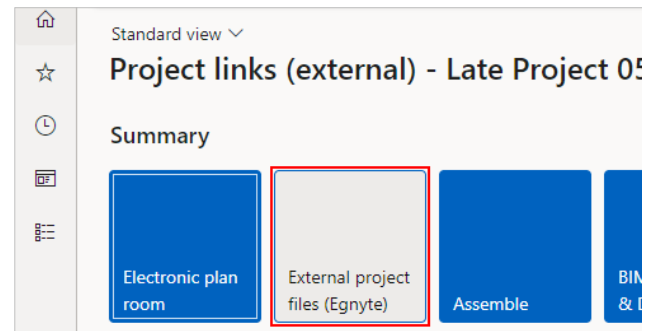
Project artifacts, ranging from legal documents to progress photos, need to be safely stored while still accessible to the project team. Folders on Egnyte provide access to these artifacts not stored or attached directly in PM4+. The Project Files folders for your project can be accessed from links on PM4+.

### 5.3.2. Work Instructions

From the main dashboard, click on the **Project links (external)** workspace.



Click on the **External project files** tile.

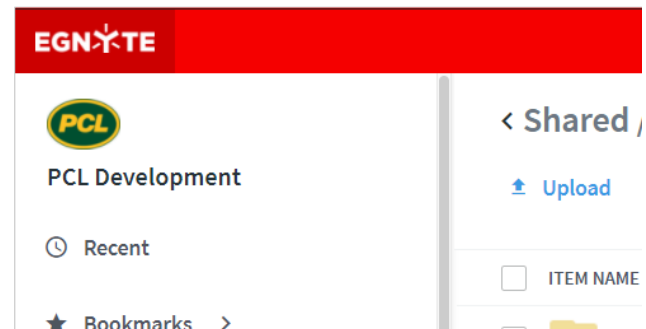


Ensure the pop-up blocker is not preventing access. The Microsoft Dynamics for Finance and Operations site should allow pop-ups.

In the Chrome browser: A 'red star' indicator to the right of the navigation bar indicates pop-ups are blocked. Click this indicator and choose 'Always allow pop-ups and redirects'.

In the Edge browser: A message appears at the bottom of the screen. Choose the 'Always allow' option.

The project files folder displays.



Note: If you receive a permissions error or can't access the folders on Egnyte, contact your Project Manager to request access to the folders.

### 5.3.3. Conclusion

Now that you have an understanding of how to access project files, proceed to the next work instruction.

## 6. Quality

### 6.1. Quality Management Workspace

#### 6.1.1. Introduction

##### 6.1.1.1. Objective

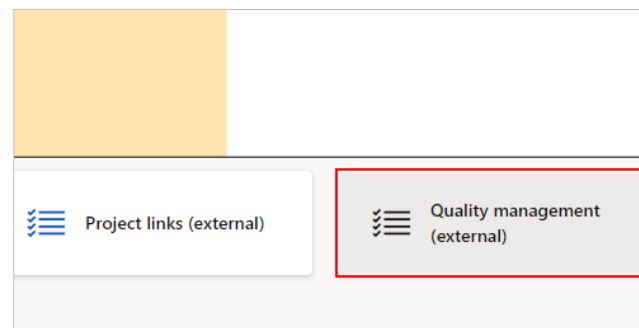
This work instruction covers the Quality management (external) workspace for Consultants, Clients, and the Design Team.

##### 6.1.1.2. Background Information

The 'Quality log' in PM4+ may be in use on your project. In that case, the 'Quality Management workspace' will contain records requiring your review or input.

#### 6.1.2. Work Instructions

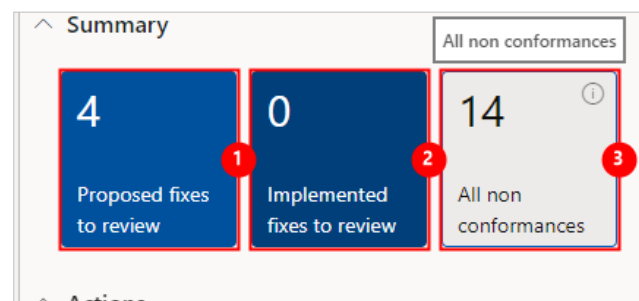
Click on the **Quality management (external)** tile in the PM4+ dashboard.



##### 6.1.2.1. Tiles

Click on a count tile to navigate you to the Quality log, filtered to only display the records from the selected count.

1. The **Proposed fixes to review** count tile displays the number of non-conformance quality items with a status of 'In consultant review' or 'In Owner Review' that are assigned to your company and requires a review of the proposed fix.
2. The **Implemented fixes to review** count tile displays the number of non-conformance quality items with a status of 'In consultant sign-off' or 'In Owner sign-off' that are assigned to your company and



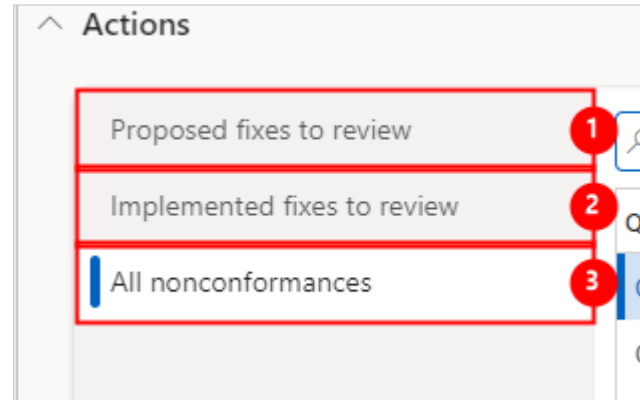
requires a review of the implemented fix.

3. The **All non conformances** count tile indicates the total number of nonconformances recorded in the 'Quality log', which are not 'in 'Draft status.

#### 6.1.2.2. Tabbed Lists

There are two tabbed lists in the workspace:

1. The **Proposed fixes to review** tabbed list displays the same number of records as the count tile, but more details are visible.
2. The **Implemented fixes to review** tabbed list displays the same number of records as the count tile, but more details are visible.
3. The **All nonconformances** tabbed list displays the same number of records as the count tile, but more details are visible.



#### 6.1.3. Conclusion

Now that you have an understanding of how to Quality management (external) workspace, proceed to the next work instruction.

## 6.2. Review the Proposed Fix to a 'Nonconformance' Quality Deficiency - as a Primary Consultant

### 6.2.1. Introduction

#### 6.2.1.1. Objective

This work instruction covers how to review and respond to a proposed fix on a nonconformance quality item, as a Primary Consultant.

#### 6.2.1.2. Background Information

When the proposed fix to resolve a quality deficiency does not conform to the contract documents, it is flagged as a 'nonconformance' in PM4+. When the nonconformance record is in 'In Consultant Review' status, the Primary Consultant and optional Sub-consultants, are required to review the proposed fix and respond. The Primary Consultant then returns the nonconformance record back to PCL's court for a review, and further action.

The term 'Primary Consultant' is used to describe the party who has primary responsibility to review and approve the nonconformance. This is generally the Engineer of Record for the project, but may differ, depending on the nature of the project.

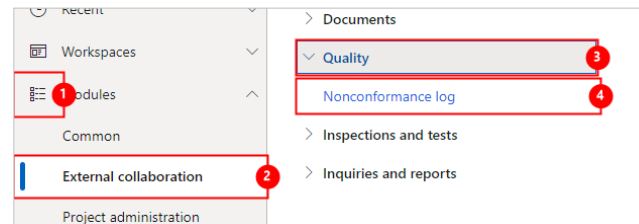
## 6.2.2. Work Instructions

### 6.2.2.1. Navigation

You may choose to navigate directly to the 'Nonconformance log', to view all quality items, or you may choose to navigate to your 'Quality Management' workspace to view just the quality items in your company's court. Both navigation options are shown in this section.

#### 6.2.2.1.1. Navigate to the Nonconformance Log

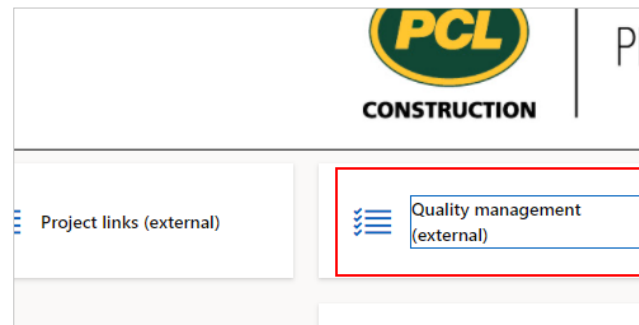
1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Quality** menu section.
4. Click on the **Nonconformance log** menu item.



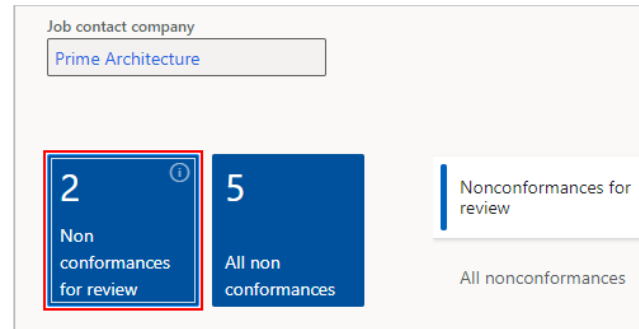
The Nonconformance log is displayed.

#### 6.2.2.1.2. Navigate to the Quality Management Workspace

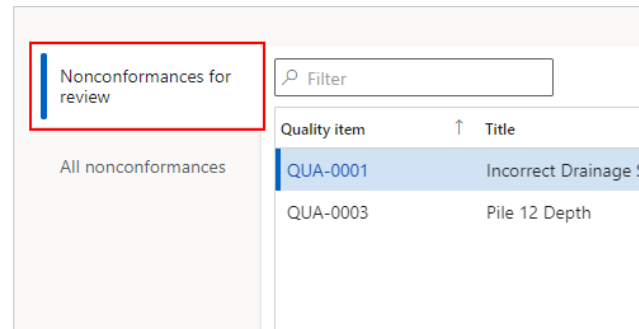
Click on the **Quality management (external)** workspace.



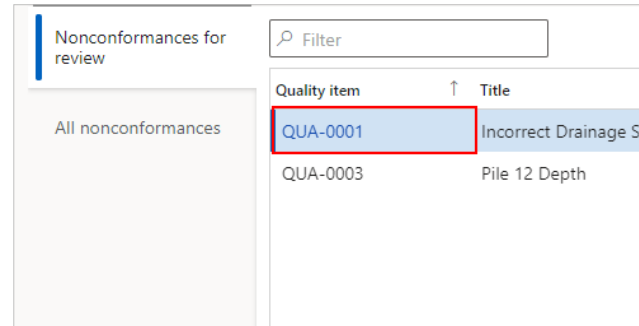
The **Non conformances for review** count tile displays a count of the nonconformances for review and currently assigned to your company.



The **Nonconformances for review** tabbed list also displays the list of nonconformances assigned to your company.

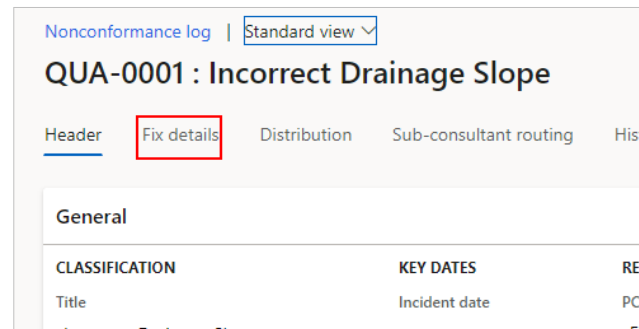


Click on the **Quality item** hyperlink to open the quality record.



### 6.2.2.2. Review and Respond to a Proposed Fix on a Nonconformance

Click on the **Fix details** tab.





Review the commentary in the **Proposed fix** tab.

If the 'View attachments' button contains a number higher than (0), review the documents related to the 'Proposed fix'.

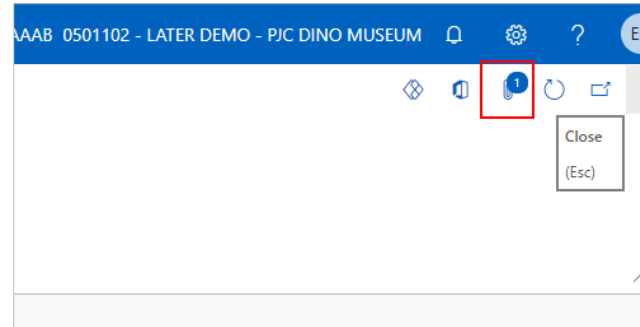
Click on the **View attachments** button.

The attachments screen for the 'Proposed fix' field opens.

Click on the **Open** button to download the file.

Click on the **Close** button to close the attachments screen.

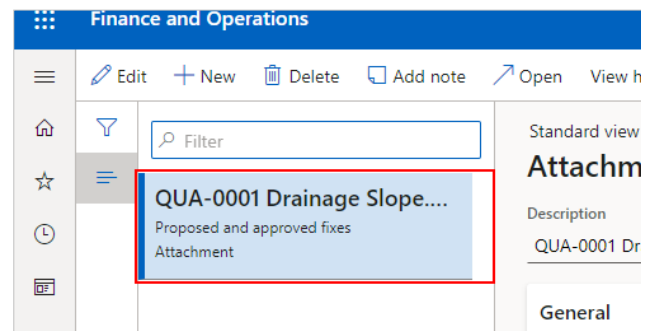
In addition to reviewing the proposed fix details directly in the quality log record, you can also review the 'Nonconformance Report' that was generated, based on this record. This is the same report that was attached in the automated email you received when the status of the record was moved to 'In Consultant Review'.



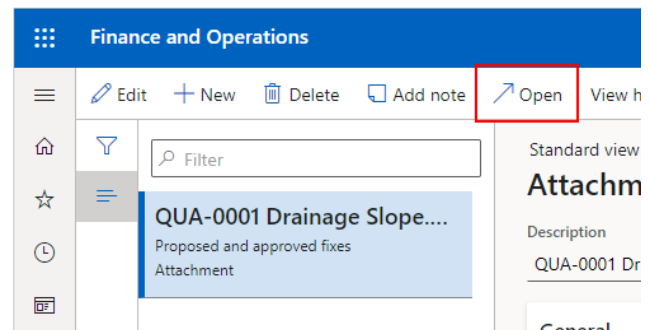
Click on the **Paperclip** icon at the top right of your screen.

The attachments screen for the entire nonconformance record opens.

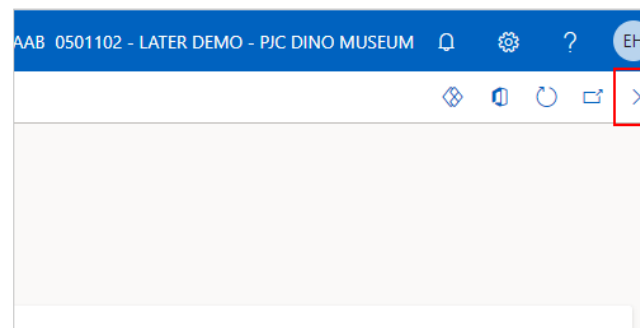
The **Nonconformance Report** displays in the list.



Click on the **Open** button to download the file.

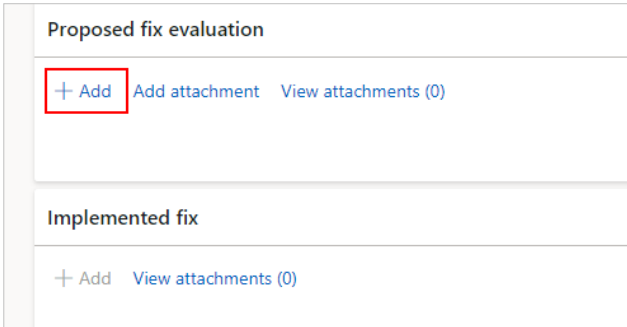


Click on the **Close** button to close the attachments screen.



When you have reviewed the proposed fix, input your evaluation of the proposal.

In the 'Proposed fix evaluation' fast tab, click on the **Add** button.



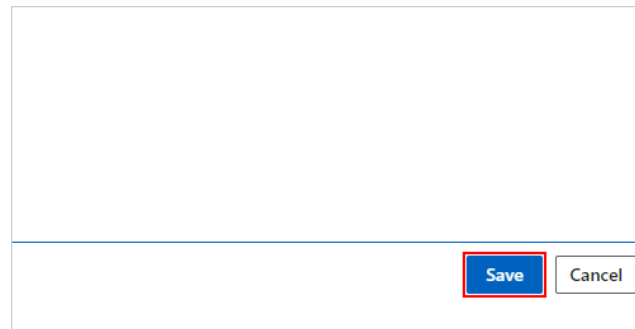
Proposed fix evaluation

+ Add Add attachment View attachments (0)

Implemented fix

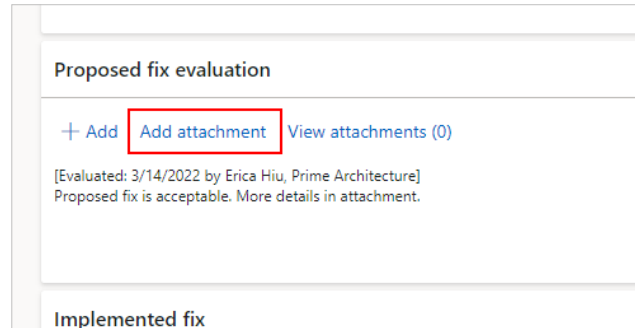
+ Add View attachments (0)

Click on the **Save** button.



Save Cancel

If you want to add a document, click on the **Add attachment** button.



Proposed fix evaluation

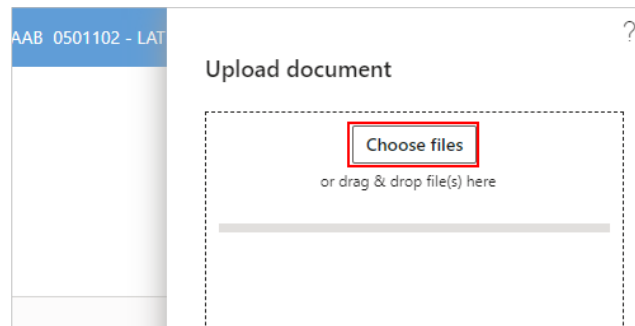
+ Add Add attachment View attachments (0)

[Evaluated: 3/14/2022 by Erica Hiu, Prime Architecture]  
Proposed fix is acceptable. More details in attachment.

Implemented fix

The 'Upload document' dialog opens to browse for the file.

Click on the **Choose files** button. You may also use the drag and drop feature.



AAB 0501102 - LAT ?

Upload document

Choose files

or drag & drop file(s) here

Click on the **Close** button when the upload of your file is 'Complete'.



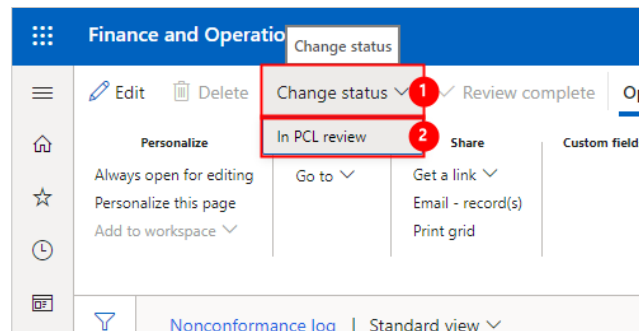
### 6.2.2.3. Return a Quality Deficiency Item to PCL

When all Sub-consultant reviews are complete (as required), it is the responsibility of the Primary Consultant (named in the 'Review company' field of the quality item header) to return the nonconformance to PCL.

If you are named as the Primary Consultant on the nonconformance, and Sub-consultant responses were required, you would have received an automated email when the final Sub-consultant clicked the 'Review complete' button.

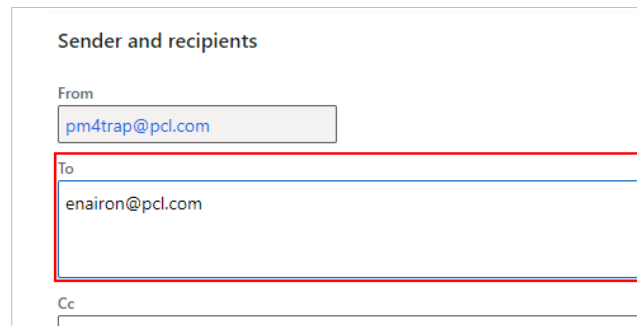
This is your indication to do a final check of the 'Fix evaluation' fast tab and its attachments, and then return the record to PCL's court via a status change to 'In PCL review'.

1. Click on the **Change status** drop-down in the action pane.
2. Click on **In PCL review**.



The 'Send email' dialog opens. By default, the email template set for sending the quality item back to PCL fills in the 'From' line, the 'To' line, the 'Subject' line and the body of the email.

You can free-type additional email addresses in the **To** field and fields.



Or click the (+) icon beside each of these fields to choose from your job contacts and distribution groups.



Confirm the information contained in the email is correct. You can edit the text before sending it.

**Subject and content**

Subject  
Phillip J. Currie Dino Museum - PCL Review required: QUA-0001 Incorrect Drain

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, link, unlink, list, indent, outdent, text color, background color, and source.

Project name: Phillip J. Currie Dino Museum  
Project number: 0501102

Click on the **Send** button when you are satisfied with the contents of the email.

Find anything to show here.

**Send**

The system sends a message to indicate the transmission was successful.

Personalize: Always open for editing, Personalize this page, Add to workspace

Page options: Go to

Share: Get a link, Email - record(s), Print grid

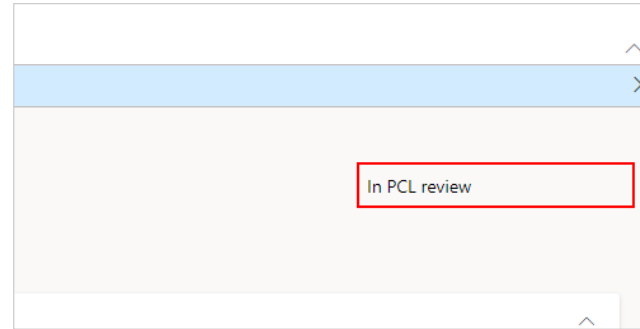
Custom field

**Email was sent successfully.**

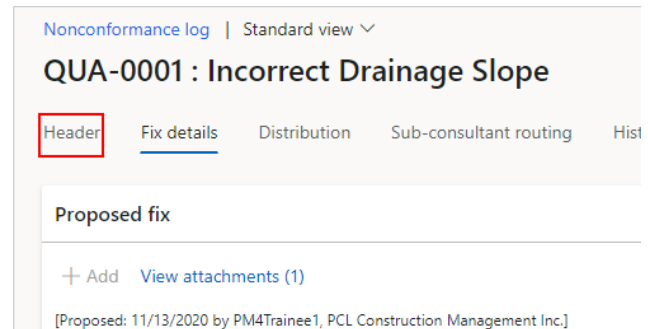
Nonconformance log | Standard view

**QUA-0001 : Incorrect Drainage Slo**

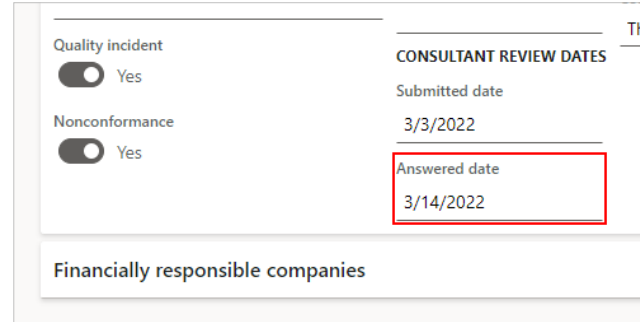
The quality item you just sent to PCL is now in the status of **In PCL review**.



In the **Header** tab...



The **Answered date** field is filled in based on the date you communicated the approved fix and sent the quality item to PCL.



### 6.2.3. Conclusion

Now that you have an understanding of how to review and respond to a proposed quality deficiency fix, proceed to the next work instruction.

## 6.3. Manage Subconsultant Input on a Proposed Fix Under Review

### 6.3.1. Introduction

#### 6.3.1.1. Objective

This work instruction covers how to manage Sub-consultant input for a proposed fix as a Primary Consultant.

#### 6.3.1.2. Background Information

Engaging additional reviews of a nonconformance fix is optional and will depend on what workflows are established by the project team. Either the PCL Coordinator or the Primary Consultant is able to add Sub-consultants to a nonconformance in the Quality log, while it is in 'In consultant review' status.

There are two ways to engage Sub-consultants:

1) Sub-consultant routings can be set up at the start of the project by a PCL Project Manager or Coordinator. If this was done, then routings will be available, as shown.

2) If no routings were set-up, use the 'Add' button in the Sub-consultant routing tab to manually add people from the project's contact list.

Note: Even if a Sub-consultant does not collaborate directly in PM4+, you can use the 'Sub-consultant routing' feature to send an email notification about their required input. Both the PCL Coordinator and the Primary Consultant's company may input an evaluation of a proposed fix on the Sub-consultant's behalf.

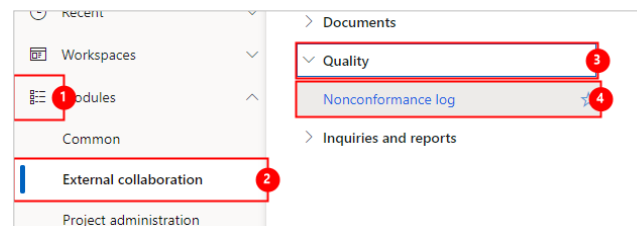
## 6.3.2. Work Instructions

### 6.3.2.1. Navigation

You may choose to navigate directly to the 'Nonconformance log', to view all quality items, or you may choose to navigate to your 'Quality Management' workspace to view just the quality items in your company's court. Both navigation options are shown in this section.

#### 6.3.2.1.1. *Navigate to the Nonconformance Log*

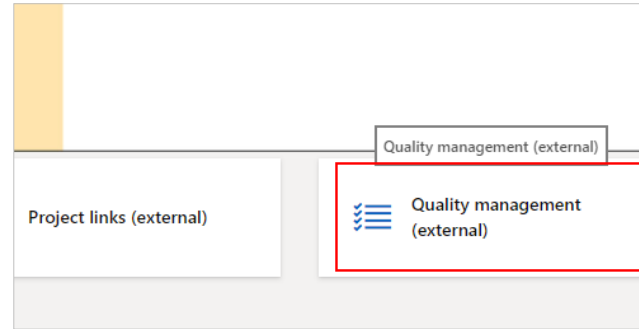
1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Quality** menu section.
4. Click on the **Nonconformance log** menu item.



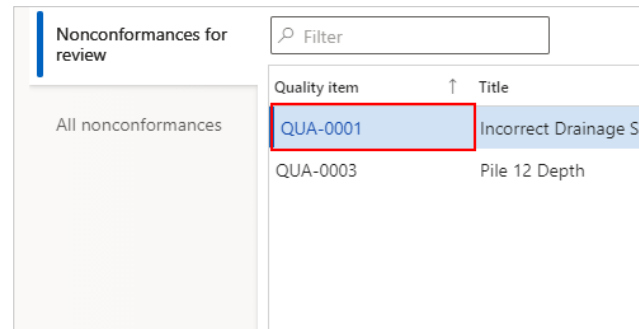
The Quality log is displayed.

#### 6.3.2.1.2. *Navigate to the Quality Management Workspace*

Click on the **Quality management (external)** workspace.

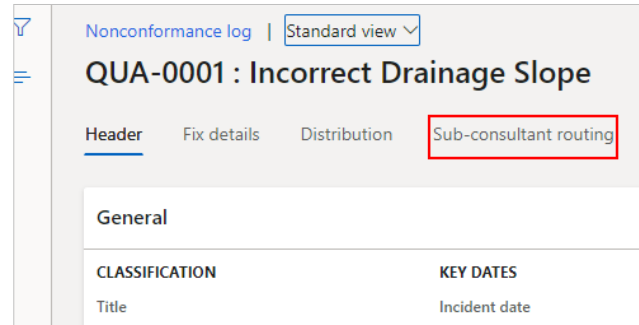


In the **Nonconformances for review** tabbed list, click on the **Quality item** hyperlink to manage Sub-consultant input.



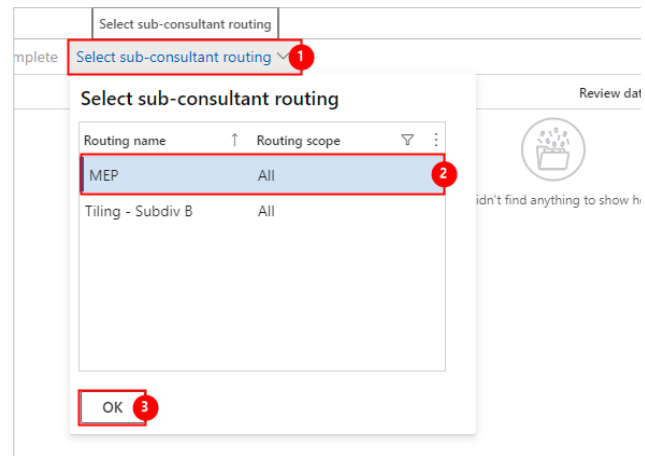
### 6.3.2.2. Engage Additional Sub-consultants to Evaluate a Proposed Fix

Click on the **Sub-consultant routing** tab.





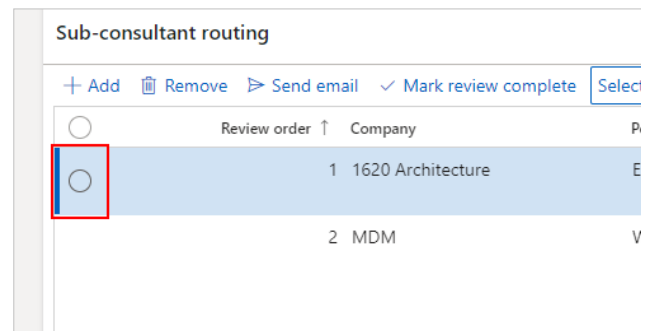
1. Click on the **Select sub-consultant routing** drop down.
2. Select the **sub-consultant routing**.
3. Click on the **OK** button.



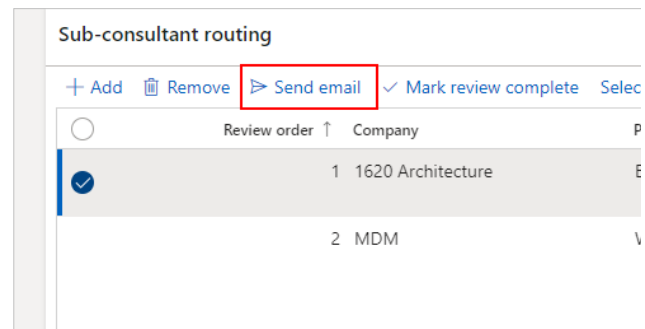
A row is created in the Sub-consultant tab for each person in the routing.

Click the **Row Checkbox** for the first Sub-consultant you will engage.

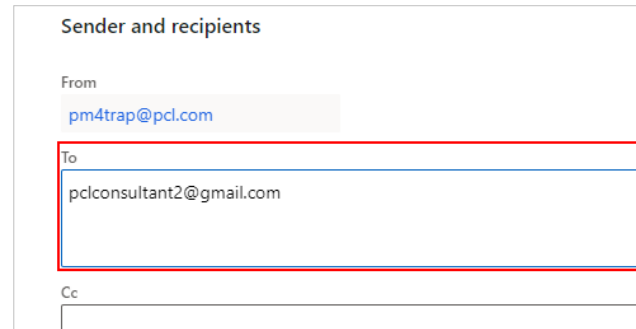
Note: the 'Review order' column indicates the planned order for the review. The numbers can be adjusted as required to reflect the order for the specific quality item. If relevant, you may also put the same 'Review order' number for multiple Sub-consultants, if concurrent reviews are appropriate.



Click on the **Send email** button.



You can free-type additional email addresses in the TO, CC and BCC fields.

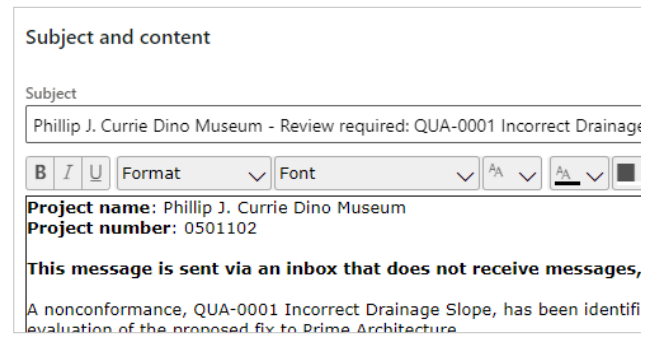


Or click the (+) icon beside each of these fields to choose from the project's job contacts and distribution groups



Note: Adding people to the email does not automatically give them access to edit the record in PM4+. Their company must be listed in the 'Sub-consultant routing' tab, and it must be their turn in the 'Review order', to edit the record.

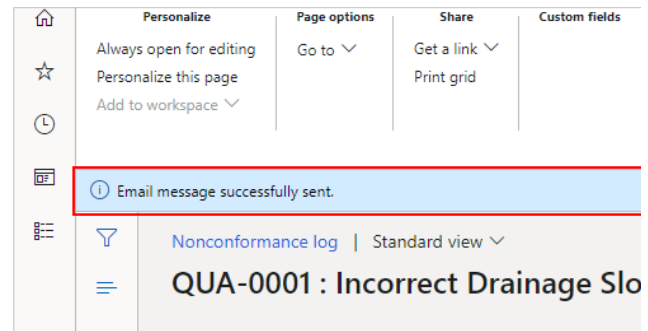
Confirm the information contained in the email is correct. You can edit the text before sending it.



Click on the **Send** button.



The system sends a message to indicate the transmission was successful.



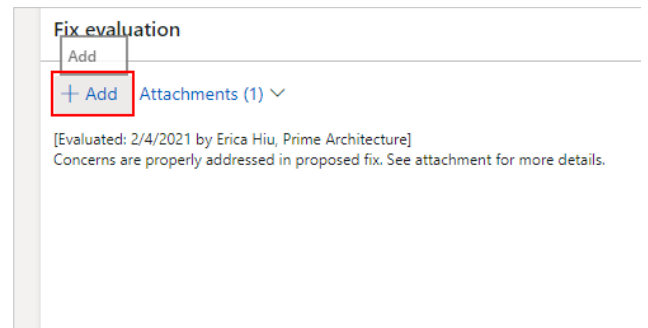
The quality item is now in the court of the selected Sub-consultant(s). You still have access to edit the quality item and/or take action on behalf of a Sub-consultant who is not collaborating directly in PM4+.

### 6.3.2.3. Mark a Review Complete on the Sub-consultant's Behalf

Click on the **Fix details** tab.

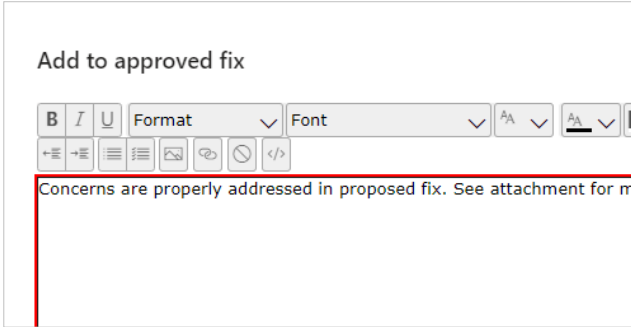


Click on the **Add** button in the **Fix evaluation** fast tab to add the Sub-consultant's input.



You may have previously made your own comments to the **Fix evaluation**.

On the Sub-consultants behalf, enter their **Fix evaluation**.

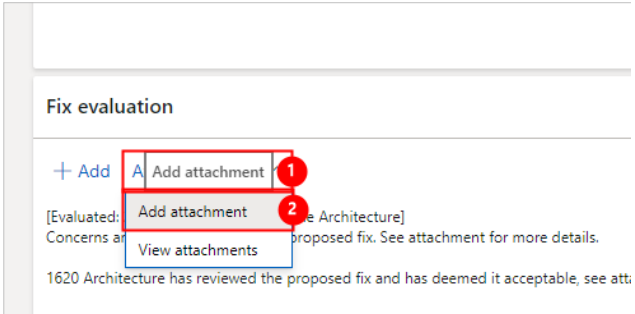


Click on the **Save** button.



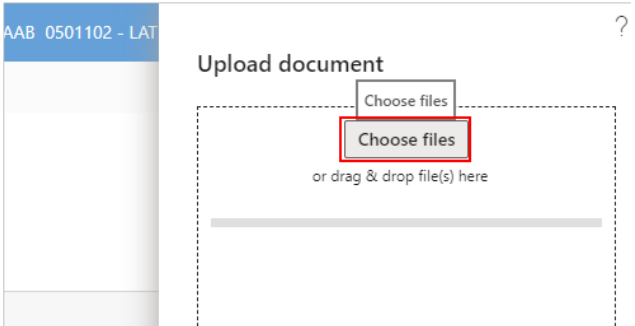
Add any attachments from the Sub-consultant if provided.

1. Click on the **Attachments** drop-down.
2. Click on **Add attachment**.



Click on the **Choose files** button.

Or drag and drop the file.



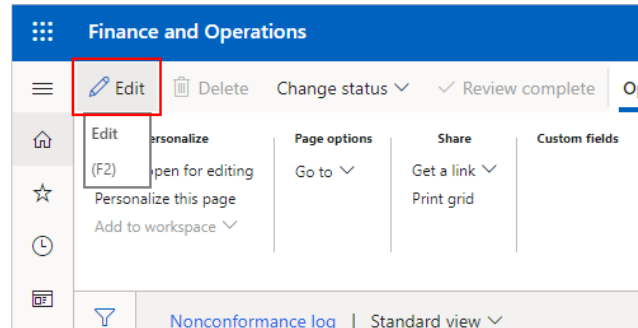
Click on the **Close** button once the file is uploaded.



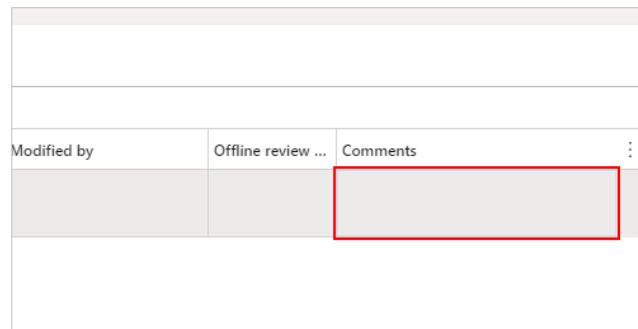
Click on the **Sub-consultant routing** tab.



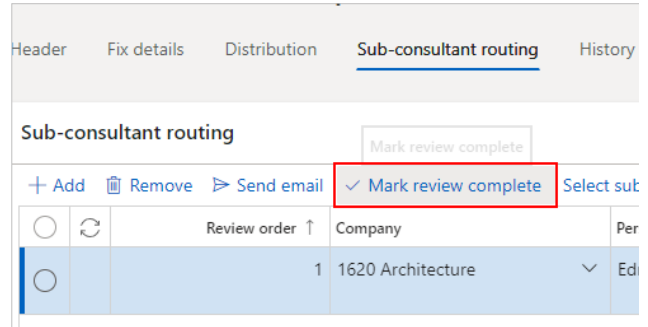
Click on the **Edit** button in the action pane if not already selected.



Enter any useful commentary about the Sub-consultant's response in the **Comments** field.



Click on the **Mark review complete** button.



Header Fix details Distribution Sub-consultant routing History

Sub-consultant routing Mark review complete

+ Add Remove Send email **Mark review complete** Select sub

	Review order ↑	Company	Per
	1	1620 Architecture	Ed

Click on the **Yes** button to confirm this action.

review as complete will complete the review process for the selected sub-consultant routing line(s). The sub-consultant company will no longer be able to review this Quality item. Do you wish to proceed?

**Yes** No

The **Modified by** column shows the user ID of the person who took the action on behalf of the Sub-consultant.

Days spent for review	Modified by	Offline review
0	pclconsultant3	✓

The **Offline review complete** checkmark indicates that this Sub-consultant's response was provided outside of PM4+.

view	Modified by	Offline review ...	Comments
	pclconsultant3	✓	Proposed fix is appro

An automated email is sent to the next reviewer, based on the contents of the 'Review order' column. Or, if no further reviewers are listed, the record is returned to the court of the Primary Consultant company named in the 'Header' tab. After a final review, the record can be returned to PCL via a status change to 'In PCL review'.

### 6.3.3. Conclusion

Now that you have an understanding of how to manage Sub-consultant input for a proposed fix, proceed to the next work instruction.

## 6.4. Review the Proposed Fix to a 'Nonconformance' Quality Deficiency - as a Sub-consultant

### 6.4.1. Introduction

#### 6.4.1.1. Objective

This work instruction covers how to review and respond to a proposed quality deficiency fix as a Sub-consultant.

#### 6.4.1.2. Background Information

When the proposed fix to resolve a quality deficiency does not conform to the contract documents, it is flagged as a 'nonconformance' in PM4+. When the nonconformance record is in 'In Consultant Review' status, the Primary Consultant, and optional Sub-consultants, are required to review the proposed fix and respond. The Primary Consultant then returns the nonconformance record back to PCL's court for a review, and further action.

The term 'Primary Consultant' is used to describe the party who has primary responsibility to review and approve the nonconformance. This is generally the Engineer of Record for the project, but may differ, depending on the nature of the project.

When you receive an email that your input is required on the review of a proposed fix, and your company's name is not listed in the 'Consultant reviewer' fields of the record in PM4+, this means you are a secondary reviewer. In PM4+, this is referred to as a 'Sub-consultant review'. Your role as a 'Sub-consultant' reviewer includes evaluating the proposed fix, reviewing commentary from other reviewers, and then marking your review as complete so that the record is either moved to the next Sub-consultant, or returned to the Primary Consultant.

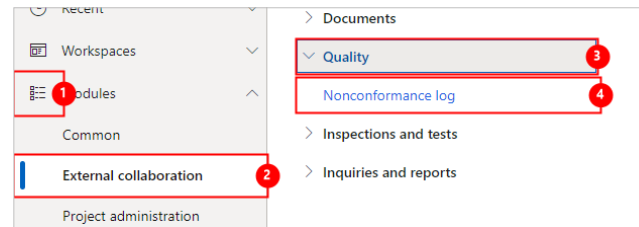
### 6.4.2. Work Instructions

#### 6.4.2.1. Navigation

You may choose to navigate directly to the 'Nonconformance log', to view all quality items, or you may choose to navigate to your 'Quality Management' workspace to view just the quality items in your company's court. Both navigation options are shown in this section.

##### 6.4.2.1.1. *Navigate to the Nonconformance Log*

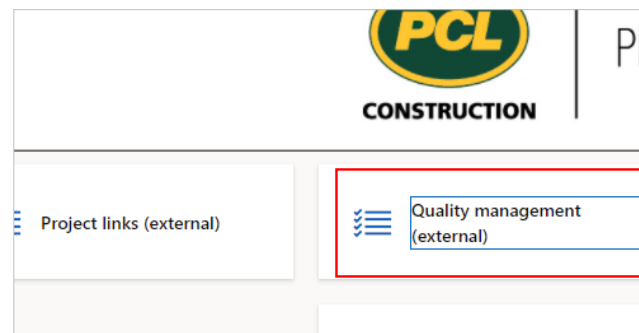
1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Quality** menu section.
4. Click on the **Nonconformance log** menu item.



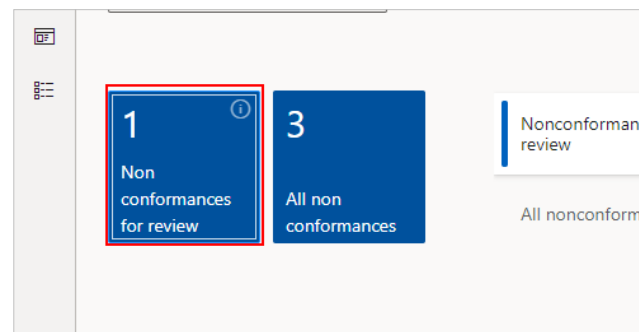
The Nonconformance log is displayed.

#### 6.4.2.1.2. *Navigate to the Quality Management Workspace*

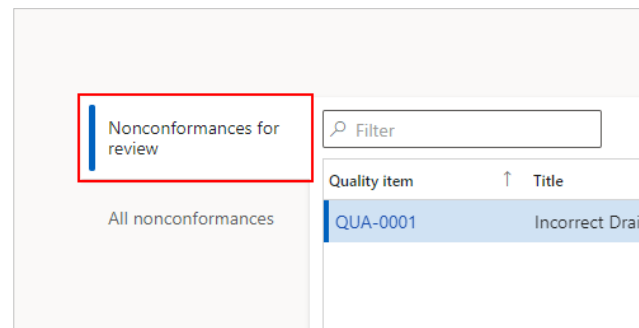
Click on the **Quality management (external)** workspace



The **Nonconformances for review** count tile displays a count of the nonconformances for review and currently assigned to your company.

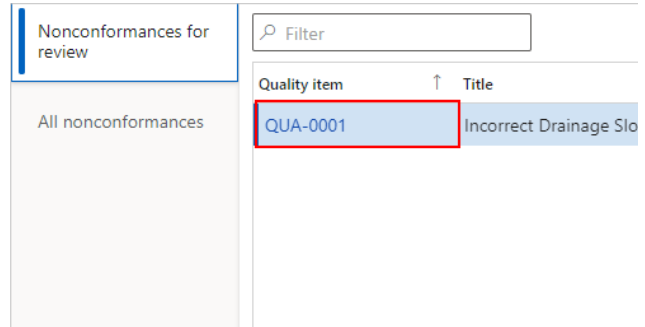


The **Nonconformances for review** tabbed list also displays the list of nonconformances assigned to your company.





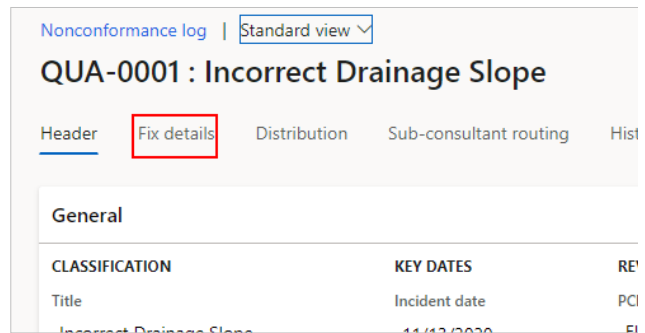
Click on the **Quality item** hyperlink to open the quality record.



Quality item	Title
QUA-0001	Incorrect Drainage Slope

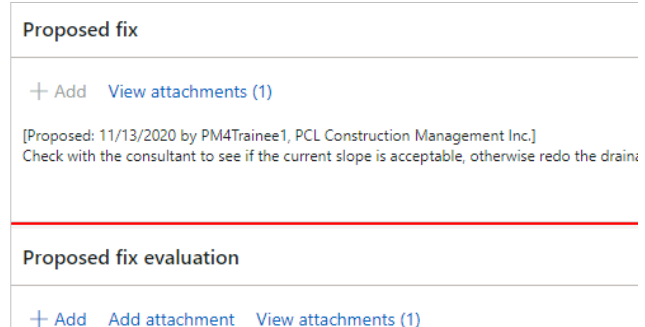
#### 6.4.2.2. Review and Evaluate a Proposed Fix to a Nonconformance

Click on the **Fix details** tab.



CLASSIFICATION		KEY DATES	RE
Title		Incident date	PCI
Incorrect Drainage Slope		11/13/2020	FI

Review the comments in the **Proposed fix** fast tab.



**Proposed fix**

+ Add [View attachments \(1\)](#)

[Proposed: 11/13/2020 by PM4Trainee1, PCL Construction Management Inc.]  
Check with the consultant to see if the current slope is acceptable, otherwise redo the drain...

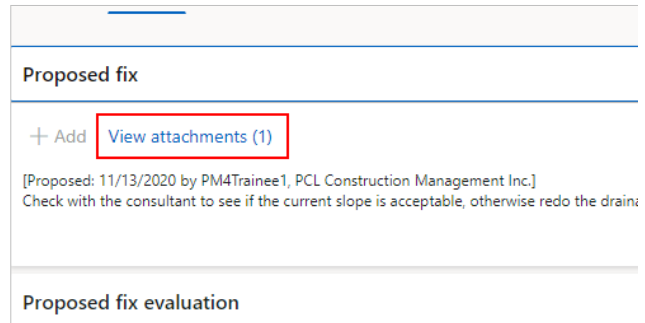
---

**Proposed fix evaluation**

+ Add [Add attachment](#) [View attachments \(1\)](#)

If the 'View attachments' button contains a number higher than (0), review the documents related to the 'Proposed fix':

Click on **View attachments** button.



**Proposed fix**

+ Add [View attachments \(1\)](#)

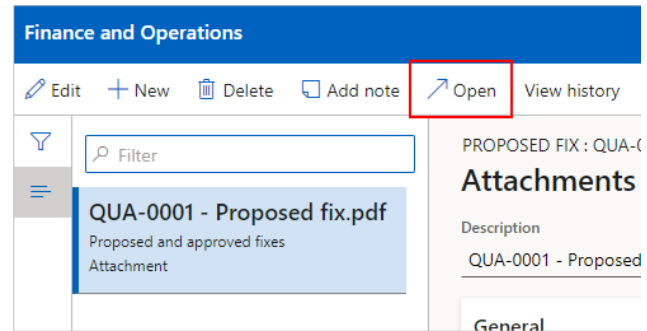
[Proposed: 11/13/2020 by PM4Trainee1, PCL Construction Management Inc.]  
Check with the consultant to see if the current slope is acceptable, otherwise redo the drain...

---

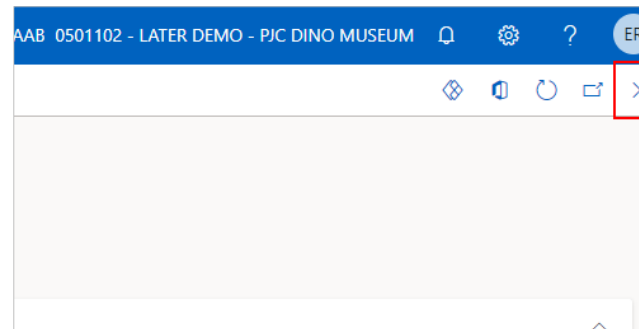
**Proposed fix evaluation**

The attachments screen for the 'Proposed fix' field opens.

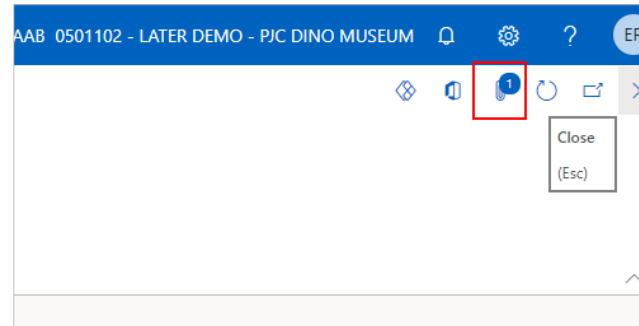
Click on the **Open** button to download the file.



Click on the **Close** button to close the attachments screen.



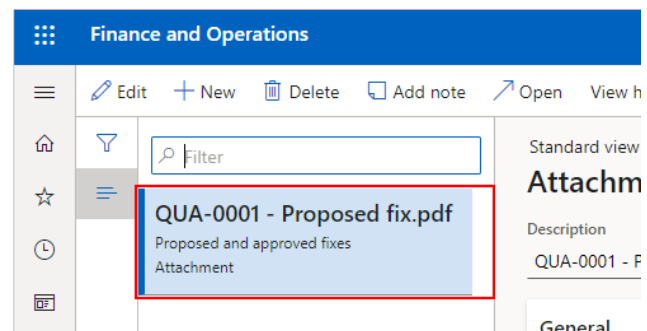
In addition to reviewing the proposed fix details directly in the quality log record, you can also review the 'Nonconformance Report' that was generated, based on this record. This report reflects the contents of the record at the time it was first moved to 'In consultant review' status and does not include prior reviewers' evaluations of the fix.



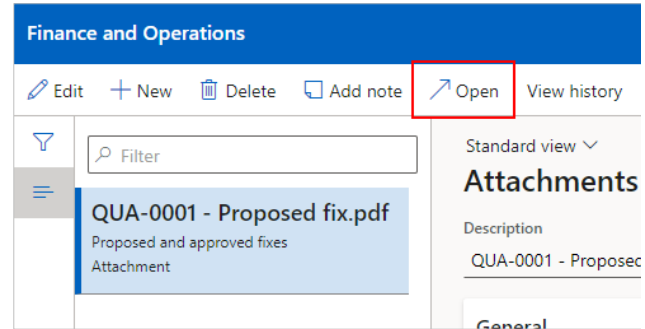
Click on the **Paperclip** icon.

The attachments screen for the entire nonconformance record opens.

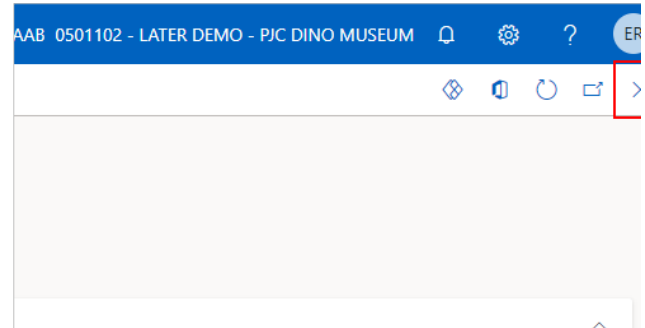
The **Nonconformance Report** displays in the list.



Click on the **Open** button to download the file.



Click on the **Close** button to close the attachments screen.

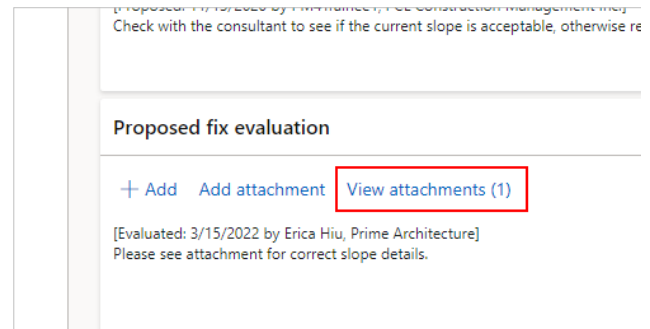


Review the **Proposed fix evaluation** fast tab for any commentary added by the Primary Consultant or any other contributing Sub-consultants.



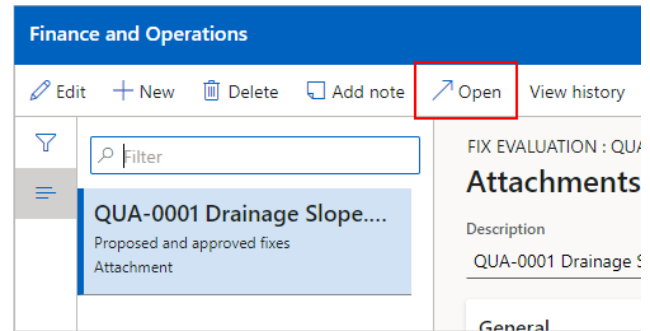
If the 'View attachments' button contains a number higher than (0), review the documents related to the 'Proposed fix evaluation':

Click on the **View attachments** button.

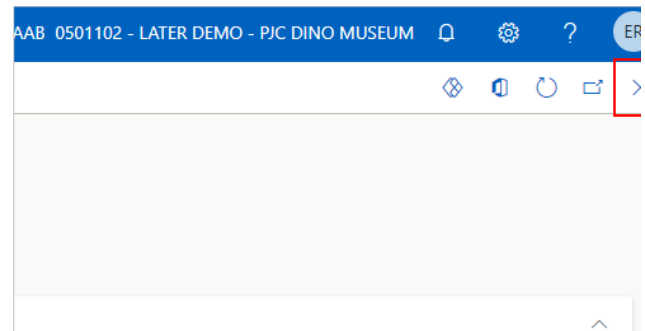


The attachments screen for the 'Proposed fix evaluation' field opens.

Click on the **Open** button to download the file.

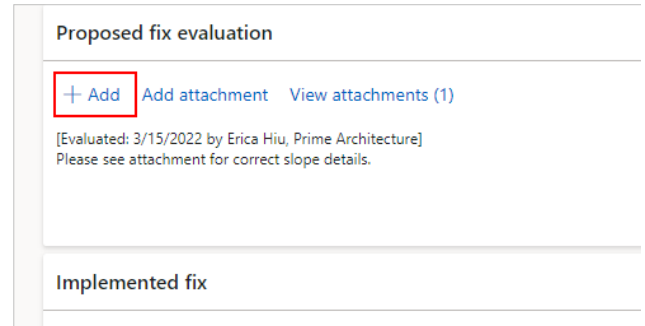


Click on the **Close** button to close the attachments screen.

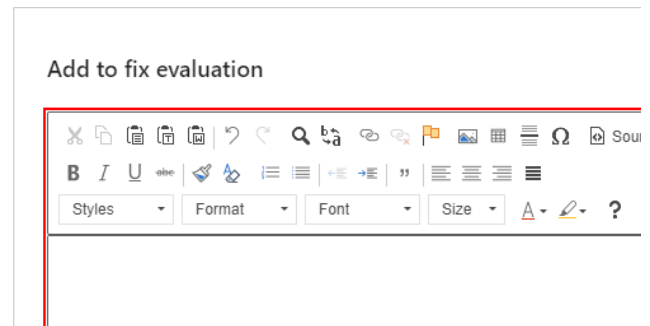


When you have reviewed the proposed fix and any previously entered proposed fix evaluations, and you are ready to contribute to the evaluation:

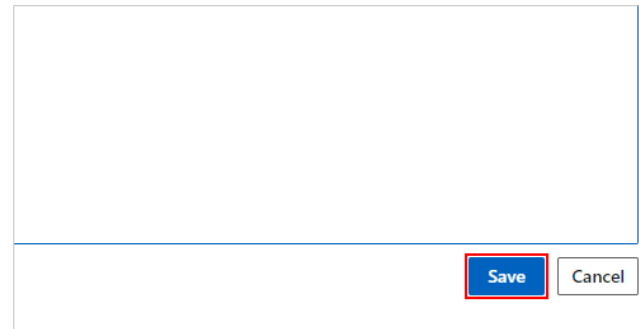
Click on the **Add** button.



Enter the **Approval** text.



Click on the **Save** button.



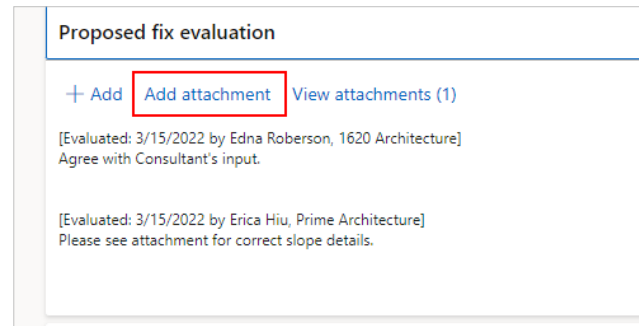
A screenshot of a form with a large empty text area. At the bottom right, there are two buttons: a blue 'Save' button and a white 'Cancel' button. The 'Save' button is highlighted with a red rectangular border.

The **Proposed fix evaluation** field now displays your entry, with time-stamps showing who and when.



A screenshot of the 'Proposed fix evaluation' field. It shows a list of evaluations with the following text: '+ Add Add attachment View attachments (1)'. Below this, there are two evaluation entries: '[Evaluated: 3/15/2022 by Edna Roberson, 1620 Architecture] Agree with Consultant's input.' and '[Evaluated: 3/15/2022 by Erica Hiu, Prime Architecture] Please see attachment for correct slope details.'

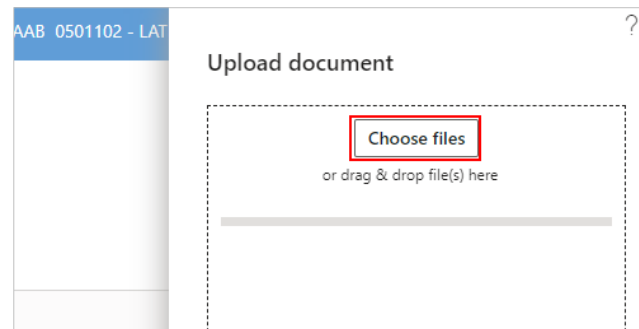
Click on the **Add attachment** button.



A screenshot of the 'Proposed fix evaluation' field, similar to the previous one, but with the 'Add attachment' button highlighted with a red rectangular border.

The 'Upload document' dialog opens to browse for the file.

Click on the **Choose files** button. You may also use the drag and drop feature.



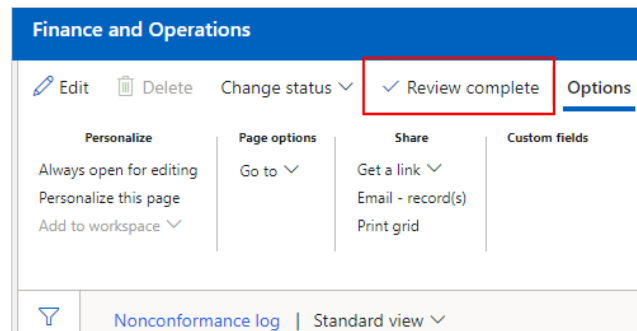
A screenshot of the 'Upload document' dialog. It shows a header 'AAB 0501102 - LAT' and a question mark icon. The main area is titled 'Upload document' and contains a dashed box with a 'Choose files' button highlighted in red. Below the button, it says 'or drag & drop file(s) here'.

Click on the **Close** button when the upload of your file is 'Complete'.

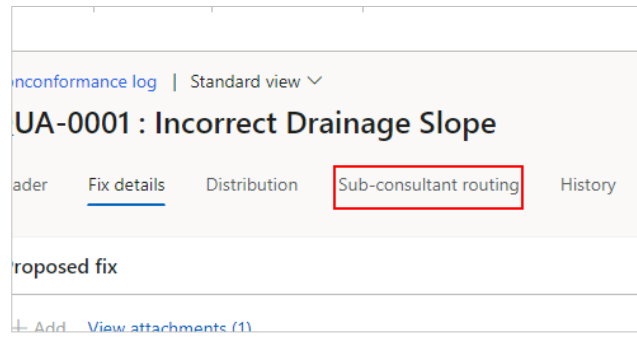


### 6.4.2.3. Mark Review as Complete

Once you are satisfied with your provided answer, click on the **Review complete** button.



Click on the **Sub-consultant routing** tab.



The **Review date** field on the line with your company's name is now filled in.

Email	Review date	Days spent for
pclconsultant2@gmail.com	3/15/2022	0

The system checks the 'Sub-consultant routing' tab to see if other reviewers have the same 'review order' number as your company.

If not, the system checks for any additional Sub-consultants in the list and sends an email to the person next in the 'review order', to alert them that the quality nonconformance is now in their company's court.

After the final Sub-consultant has clicked the 'Review complete' button, an automated email is sent to the Primary Consultant, informing them their final review of the fix evaluation is required before returning it to PCL's court.

### **6.4.3. Conclusion**

Now that you have an understanding of how to review and respond to a proposed quality deficiency fix, proceed to the next work instruction.

## **6.5. Review the Proposed fix to a Quality Deficiency as an Owner**

### **6.5.1. Introduction**

#### **6.5.1.1. Objective**

This work instruction covers how to review and respond to a proposed fix on a nonconformance quality item, as an Owner.

#### **6.5.1.2. Background Information**

When the proposed fix to resolve a quality deficiency does not conform to the contract documents, it is flagged as a 'nonconformance' in PM4+. When the nonconformance record is in 'In Owner Review' status, the Owner is required to review the proposed fix and respond. The Owner then returns the nonconformance record back to PCL's court for a review, and further action.

The nonconformance may have received input by the Consultant prior to sending the record to 'In Owner Review'. In this case, comments and/or attachments were provided for the evaluation of the proposed fix.

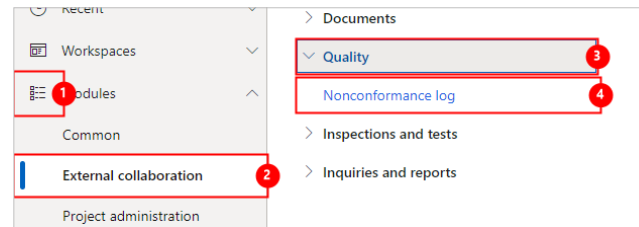
### **6.5.2. Work Instructions**

#### **6.5.2.1. Navigation**

You may choose to navigate directly to the 'Nonconformance log', to view all records, or you may choose to navigate to your 'Quality Management' workspace to view just the quality items in your company's court. Both navigation options are shown in this section.

##### **6.5.2.1.1. *Navigate to the Nonconformance Log***

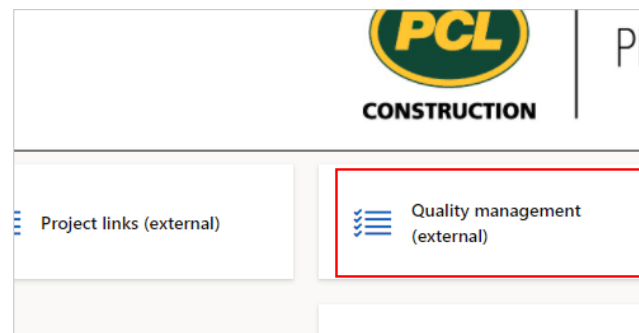
1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Quality** menu section.
4. Click on the **Nonconformance log** menu item.



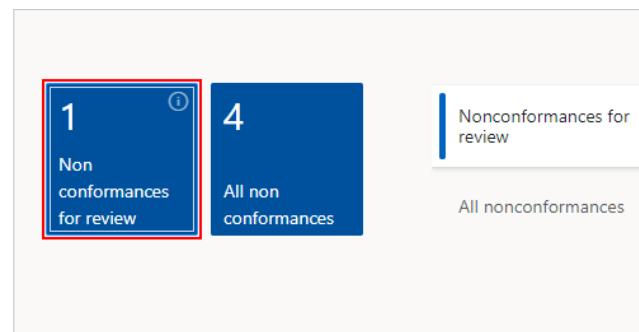
The Nonconformance log is displayed.

### 6.5.2.1.2. *Navigate to the Quality Management Workspace*

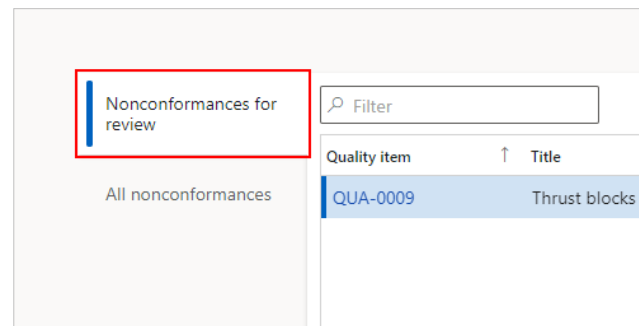
Click on the **Quality management (external)** workspace.



The **Non conformances for review** count tile displays a count of the nonconformances for review and currently assigned to your company.

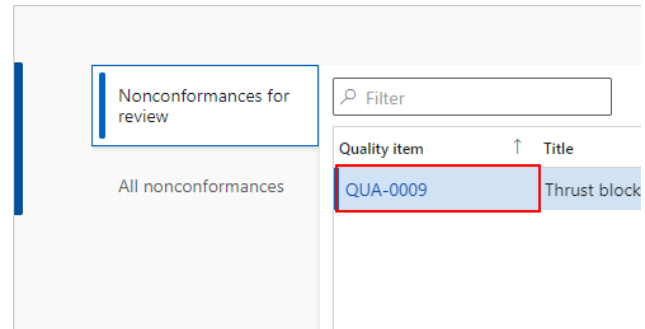


The **Nonconformances for review** tabbed list also displays the list of nonconformances assigned to your company.





Click on the **Quality item** hyperlink to open the quality record.

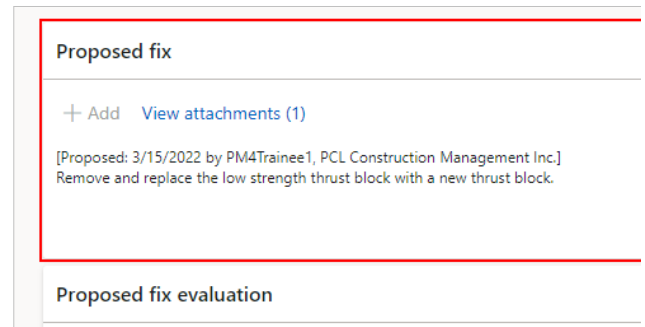


### 6.5.2.2. Review and Respond to a Proposed Fix on a Nonconformance

Click on the **Fix details** tab.

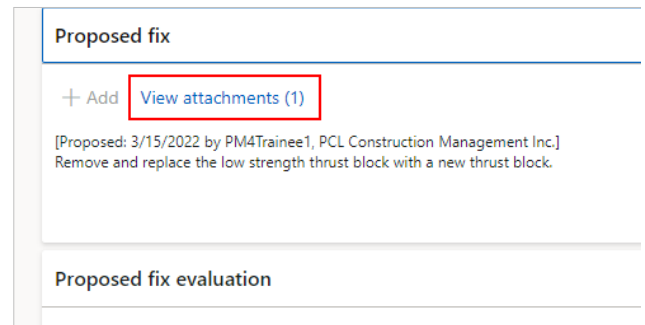


Review the commentary in the **Proposed fix** tab.



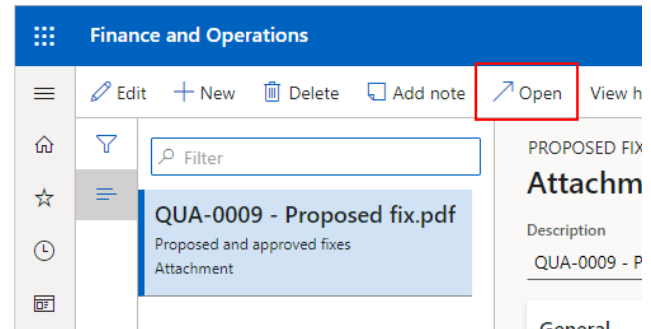
If the 'View Attachments' button contains a number higher than (0), review the documents related to the 'Proposed fix'.

Click on the **View attachments** button.

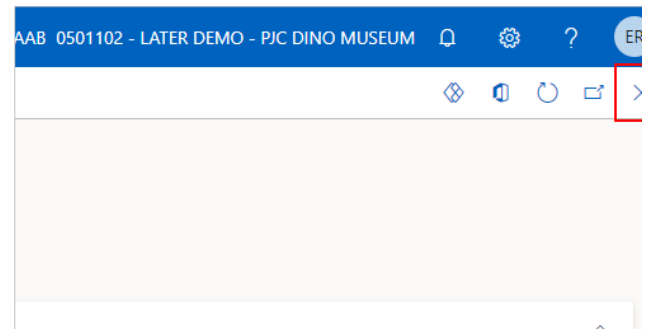


The attachments screen for the 'Proposed fix' field opens.

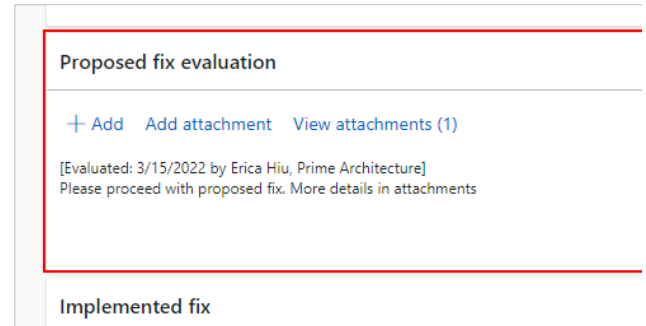
Click on the **Open** button to download the file.



Click on the **Close** button to close the attachments screen.

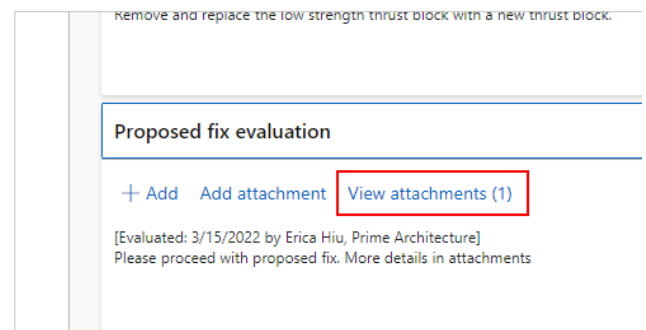


The **Proposed fix evaluation** fast tab may also have commentary added from PCL or from the Consultant before the nonconformance is in your court.



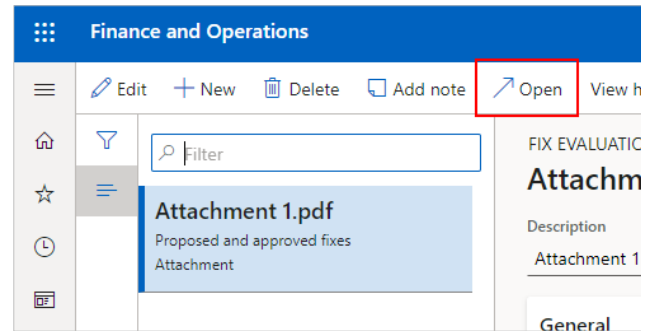
If the 'View Attachments' button contains a number higher than (0), review the documents related to the 'Proposed fix evaluation'.

Click on the **View attachments** button.

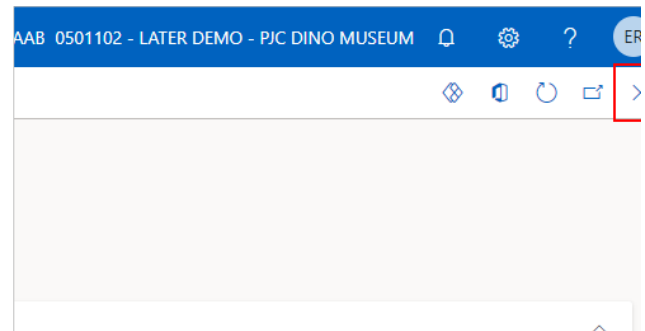


The attachments screen for the 'Proposed fix evaluation' field opens.

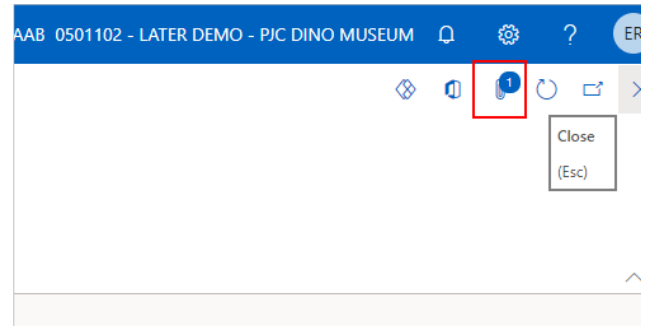
Click on the **Open** button to download the file.



Click on the **Close** button to close the attachments screen.



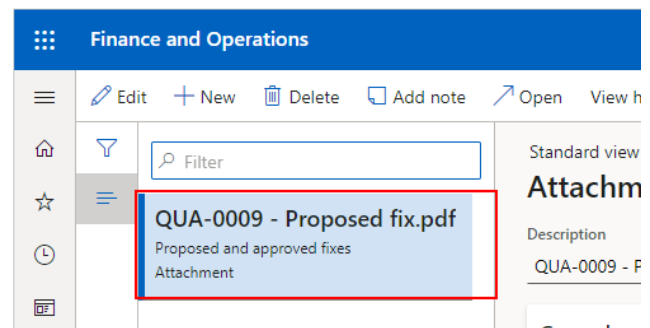
In addition to reviewing the proposed fix details directly in the quality log record, you can also review the 'Nonconformance Report' that was generated, based on this record. This is the same report that was attached in the automated email you received when the status of the record was moved to 'In Owner Review'.



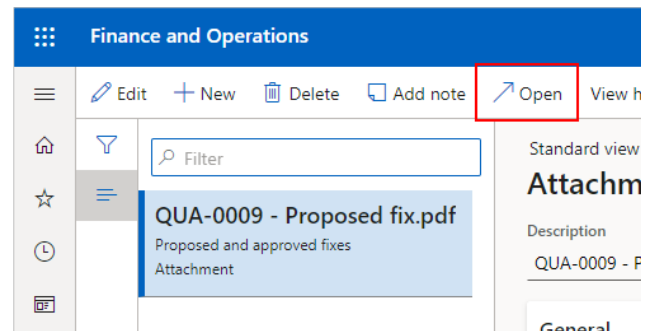
Click on the **Paperclip** icon at the top right of your screen.

The attachments screen for the entire nonconformance record opens.

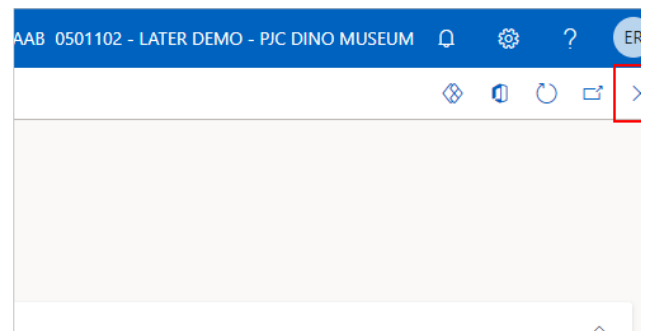
The **Nonconformance Report** displays in the list.



Click on the **Open** button to download the file.



Click on the **Close** button to close the attachments screen.

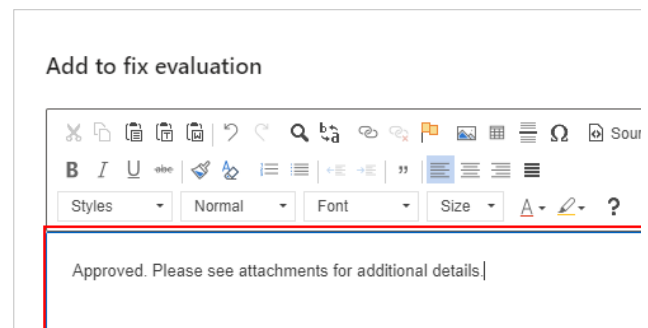


When you have reviewed the proposed fix and proposed fix evaluation (if available), input your evaluation of the proposal.

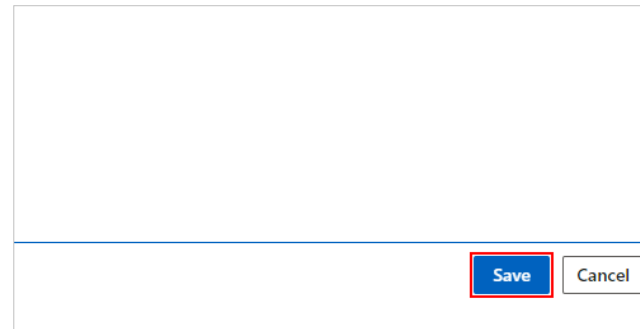
In the 'Proposed fix evaluation' fast tab, click on the **Add** button.



Enter the **Approval** text.

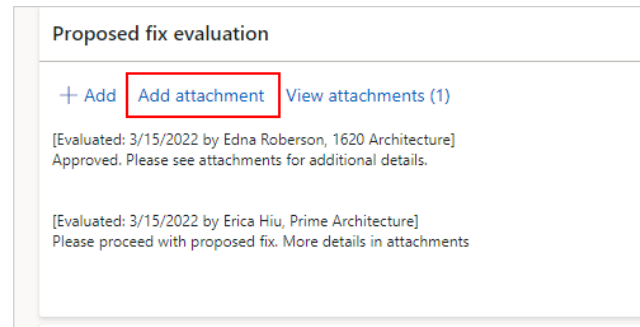


Click on the **Save** button.



A screenshot of a form interface. At the bottom right, there are two buttons: a blue 'Save' button and a white 'Cancel' button with a grey border. The 'Save' button is highlighted with a red rectangular box.

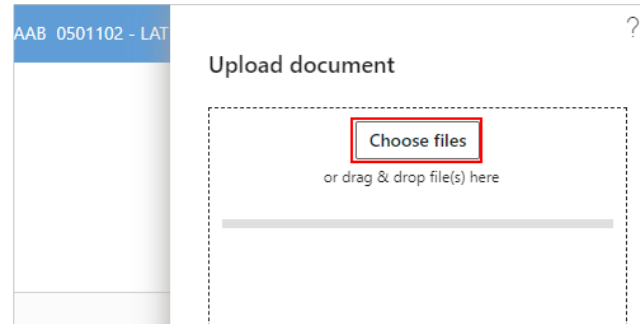
If you want to add a document, click on the **Add attachment** button.



A screenshot of a 'Proposed fix evaluation' section. It features a '+ Add' link, an 'Add attachment' button highlighted with a red box, and a 'View attachments (1)' link. Below this, there are two evaluation entries: '[Evaluated: 3/15/2022 by Edna Roberson, 1620 Architecture] Approved. Please see attachments for additional details.' and '[Evaluated: 3/15/2022 by Erica Hiu, Prime Architecture] Please proceed with proposed fix. More details in attachments'.

The 'Upload document' dialog opens to browse for the file.

Click on the **Choose files** button. You may also use the drag and drop feature.



A screenshot of an 'Upload document' dialog box. The title bar shows 'AAB 0501102 - LAT'. The main area contains a 'Choose files' button highlighted with a red box, and the text 'or drag & drop file(s) here' below it. A dashed-line box indicates the drop area.

Click on the **Close** button when the upload of your file is 'Complete'.

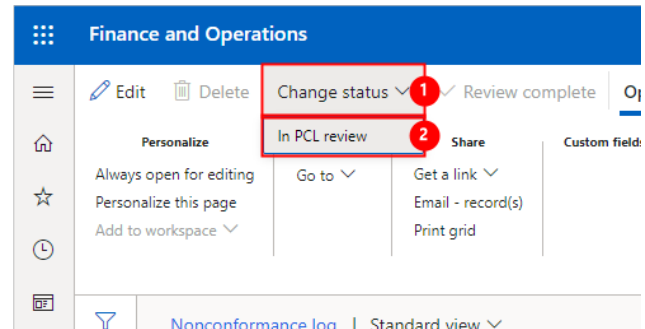


A screenshot of the 'Upload document' dialog box. At the bottom right, there is a 'Close' button highlighted with a red box. The dialog is otherwise empty, indicating the upload process is complete.

### 6.5.2.3. Return a Quality Deficiency Item to PCL

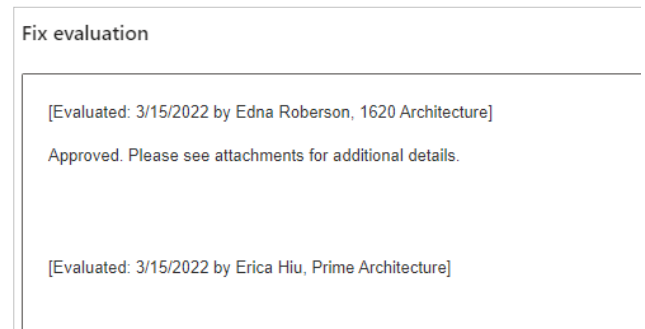
When you are ready to move the nonconformance back to PCL, changing the status of the record allows you a final review of the commentary in the 'Fix evaluation'. You will also be prompted to enter an approval status plus any additional comments.

1. Click on the **Change status** drop-down in the action pane.
2. Click on **In PCL review**.

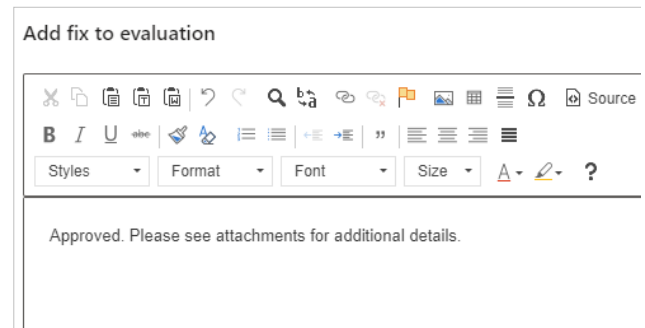


The 'Evaluate proposed fix' dialog opens.

Review the comments added to the **Proposed fix evaluation**. Your input, as well as other parties' inputs will display.

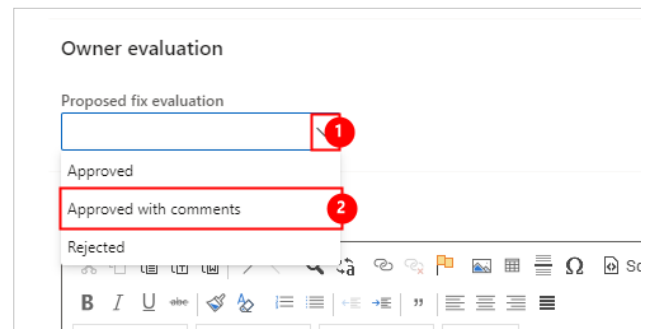


If changes need to be made to your comments made to the evaluation of the proposed fix, make adjustments in the **Add fix to evaluation** tab.



The approval status of the **Proposed fix evaluation** is required.

1. Click on the **Proposed fix evaluation** field.
2. Select the status of the **Proposed fix evaluation**. The available options are: 'Approved', 'Approved with comments', and 'Rejected'.

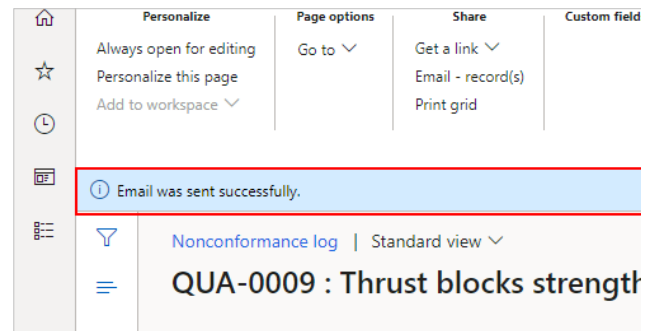


Click on the **OK** button to send the record back to PCL.

Please see attachments for additional details.

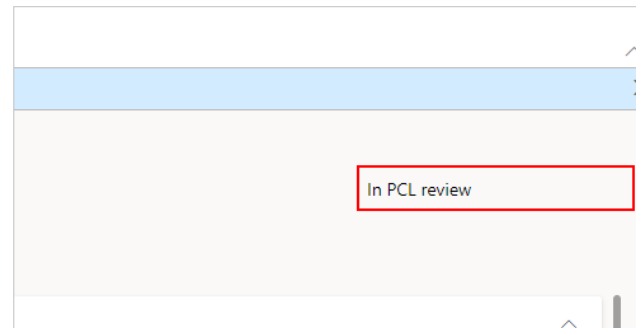
**OK** Cancel

The system sends a message to indicate the transmission was successful.



The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar contains icons for home, star, clock, and a list. The main content area has a top navigation bar with tabs: Personalize, Page options, Share, and Custom field. Below the navigation bar, a blue message box states "Email was sent successfully." Below that, there is a section titled "Nonconformance log" with a "Standard view" dropdown. The main content area displays "QUA-0009 : Thrust blocks strengt".

The quality item you just sent to PCL is now in the status of **In PCL review**.



The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar contains icons for home, star, clock, and a list. The main content area has a top navigation bar with tabs: Personalize, Page options, Share, and Custom field. Below the navigation bar, a blue message box states "Email was sent successfully." Below that, there is a section titled "Nonconformance log" with a "Standard view" dropdown. The main content area displays "QUA-0009 : Thrust blocks strengt".

### 6.5.3. Conclusion

Now that you have an understanding of how to review and respond to a proposed quality deficiency fix, proceed to the next work instruction.

## 6.6. Sign-off on Nonconformance as a Consultant

### 6.6.1. Introduction

#### 6.6.1.1. Objective

This work instruction covers how to review the implemented fix and sign-off on a nonconformance quality item, as a Consultant.

#### 6.6.1.2. Background Information

When the implemented fix of a nonconformance record is in 'In Consultant Sign-off' status, the Consultant named in the 'Review company' field is required to review the implemented fix and respond. The Consultant then returns the nonconformance record back to PCL's court for a review, and further action.

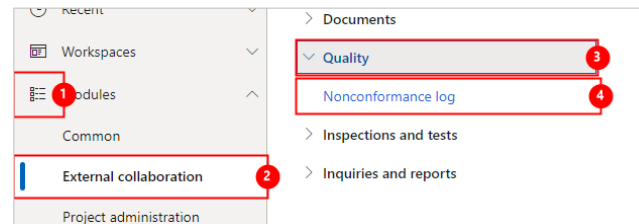
## 6.6.2. Work Instructions

### 6.6.2.1. Navigation

You may choose to navigate directly to the 'Nonconformance log', to view all records, or you may choose to navigate to your 'Quality Management' workspace to view just the quality items in your company's court. Both navigation options are shown in this section.

#### 6.6.2.1.1. Navigate to the Nonconformance Log

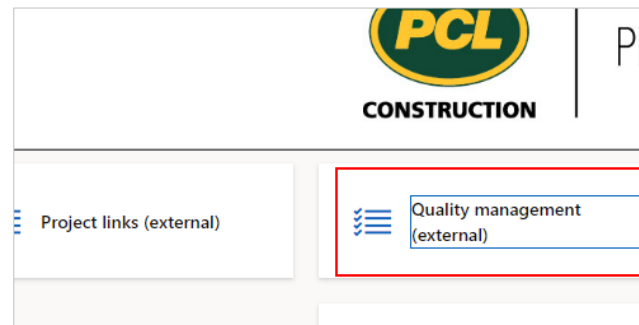
1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Quality** menu section.
4. Click on the **Nonconformance log** menu item.



The Nonconformance log is displayed.

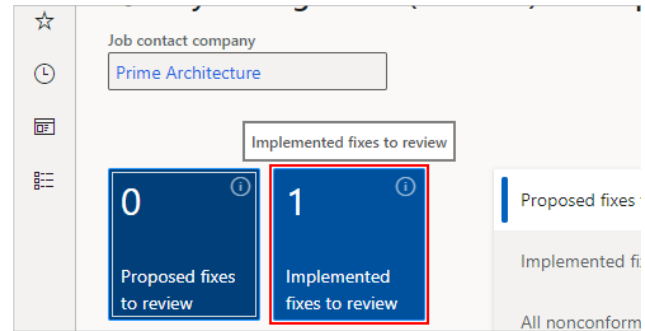
#### 6.6.2.1.2. Navigate to the Quality Management Workspace

Click on the **Quality management (external)** workspace.

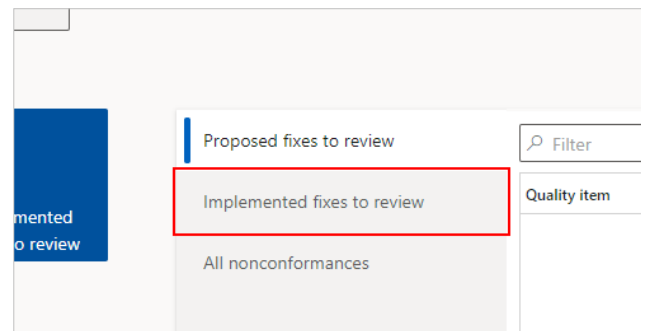




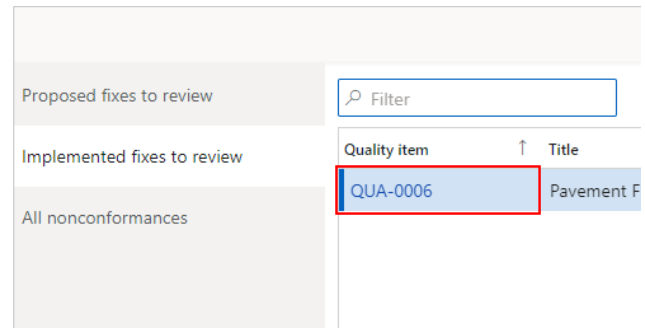
The **Implemented fixes for review** count tile displays a count of the nonconformances requiring review & sign-off and currently assigned to your company.



The **Implemented fixes to review** tabbed list also displays the list of nonconformances assigned to your company.



Click on the **Quality** item hyperlink to open the quality record.

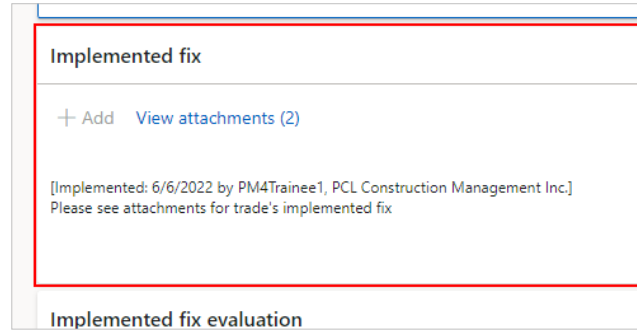


### 6.6.2.2. Review and Respond to an Implemented Fix on a Nonconformance

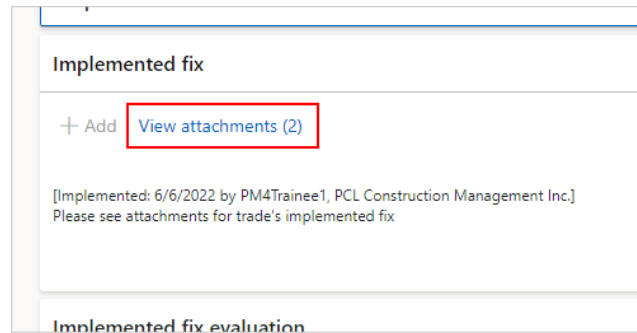
Click on the **Fix details** tab.



Review the commentary in the **Implemented fix** tab.



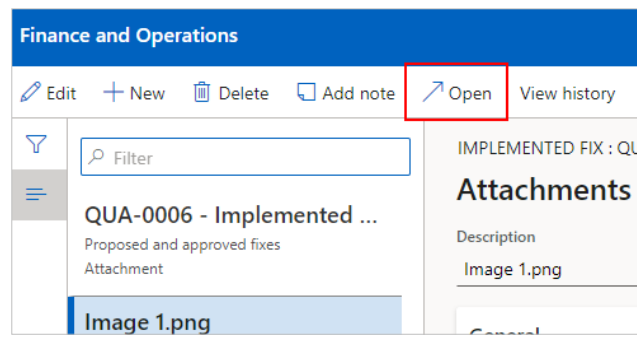
If the 'View Attachments' button contains a number higher than (0), review the documents related to the 'Implemented fix'.



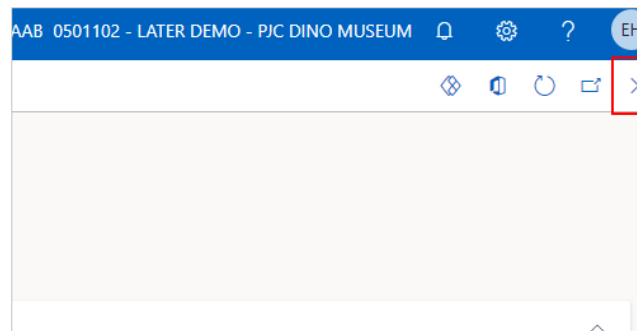
Click on the **View attachments** button.

The attachments screen for the 'Implemented fix' opens.

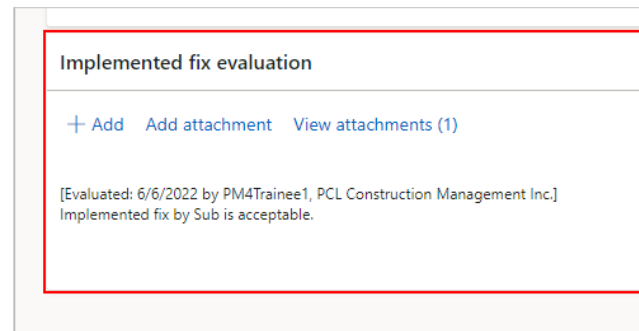
Click on the **Open** button to download the file.



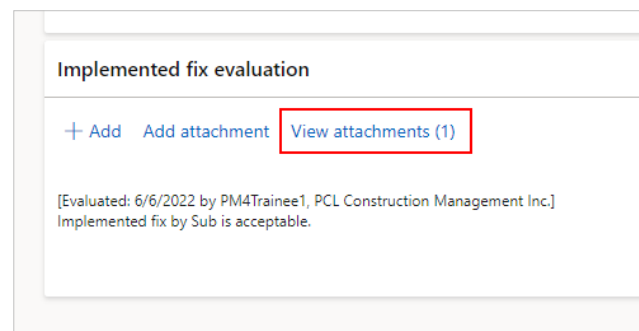
Click on the **Close** button to close the attachments screen.



The **Implemented fix evaluation** fast tab may also have commentary added from PCL or from the Consultant before the nonconformance is in your court.



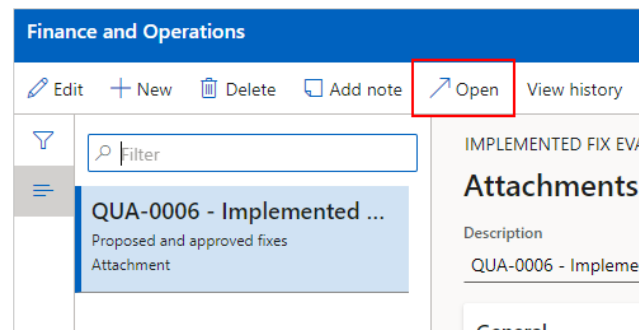
If the 'View Attachments' button contains a number higher than (0), review the documents related to the 'Implemented fix evaluation'.



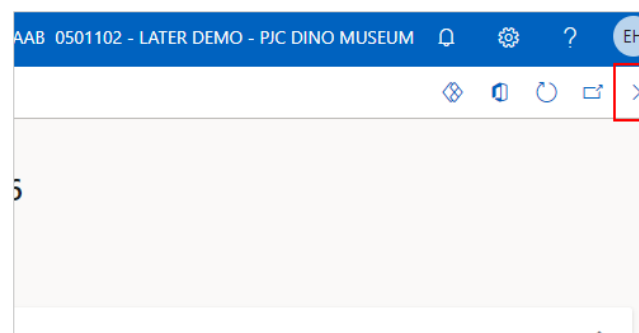
Click on the **View attachments** button.

The attachments screen for the 'Implemented fix evaluation' field opens.

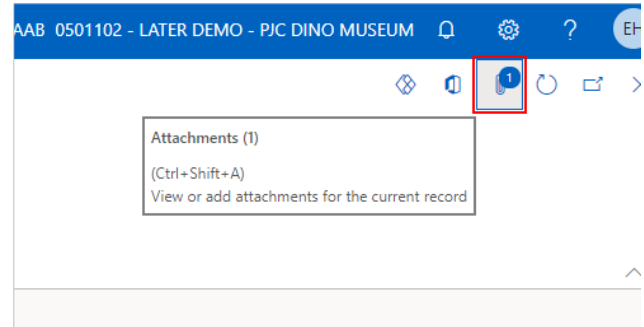
Click on the **Open** button to download the file.



Click on the **Close** button to close the attachments screen.



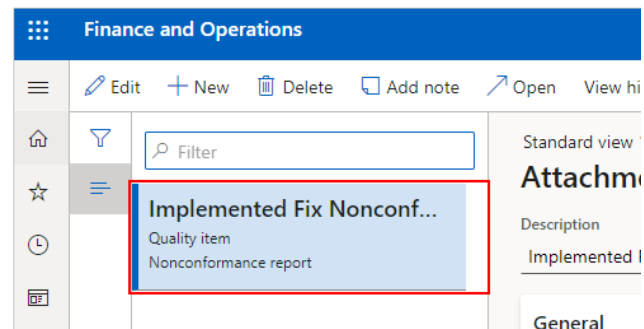
In addition to reviewing the implemented fix details directly in the quality log record, you can also review the 'Nonconformance Report' that was generated, based on this record. This is the same report that was attached in the automated email you received when the status of the record was moved to 'In Consultant Sign-off'.



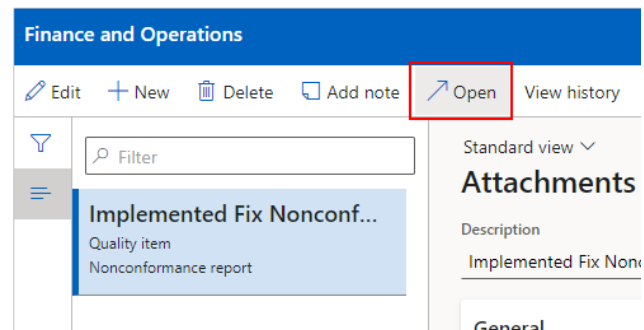
Click on the **Paperclip** icon at the top right of your screen.

The attachments screen for the entire nonconformance record opens.

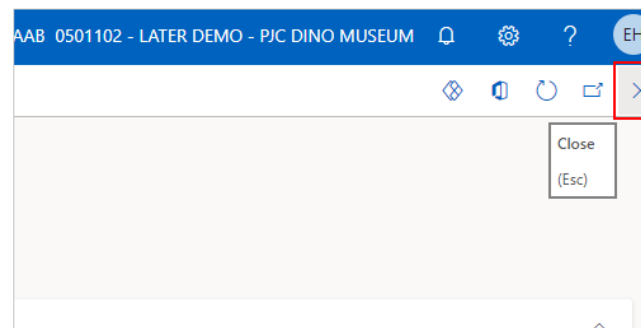
The **Nonconformance Report** displays in the list.



Click on the **Open** button to download the file.

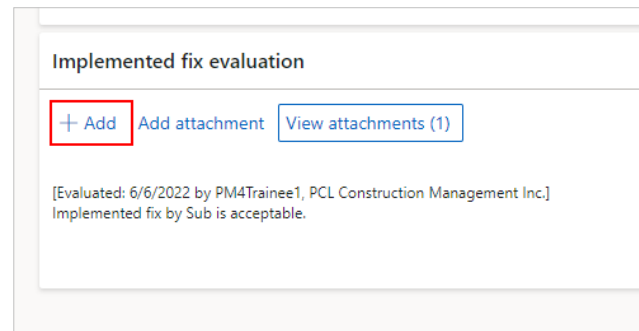


Click on the **Close** button to close the attachments screen.



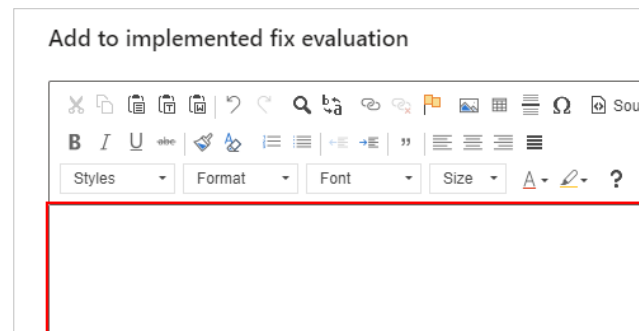
When you have reviewed the implemented fix and implemented fix evaluation (if available), input your evaluation of the fix.

In the 'Implemented fix evaluation' fast tab, click on the **Add** button.



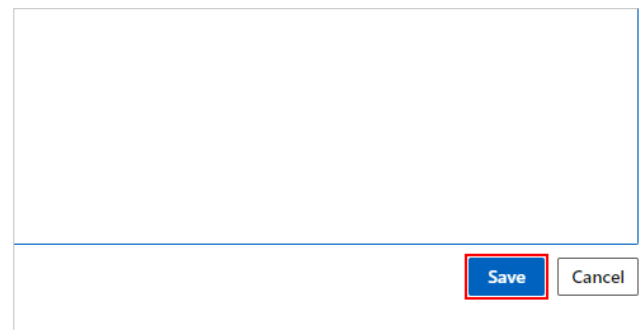
The screenshot shows the 'Implemented fix evaluation' fast tab. At the top, there is a title bar with the text 'Implemented fix evaluation'. Below the title bar, there are two buttons: '+ Add' (highlighted with a red box) and 'Add attachment' (highlighted with a blue box), followed by 'View attachments (1)'. Below the buttons, there is a text area containing the following text: "[Evaluated: 6/6/2022 by PM4Trainee1, PCL Construction Management Inc.] Implemented fix by Sub is acceptable."

Enter the **Approval** text.



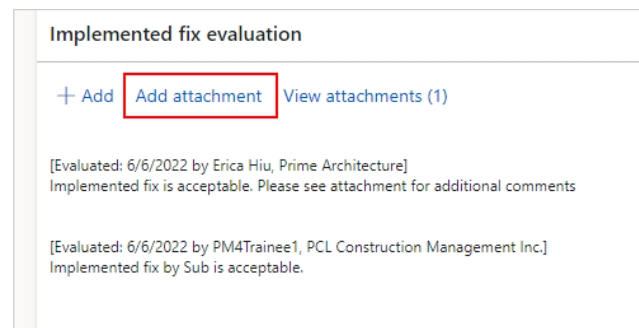
The screenshot shows the 'Add to implemented fix evaluation' fast tab. At the top, there is a title bar with the text 'Add to implemented fix evaluation'. Below the title bar, there is a rich text editor toolbar with various icons for text formatting, alignment, and insertion. Below the toolbar, there is a large empty text area with a red border, intended for entering approval text.

Click on the **Save** button.



The screenshot shows a large empty text area with a blue border. At the bottom right of the text area, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

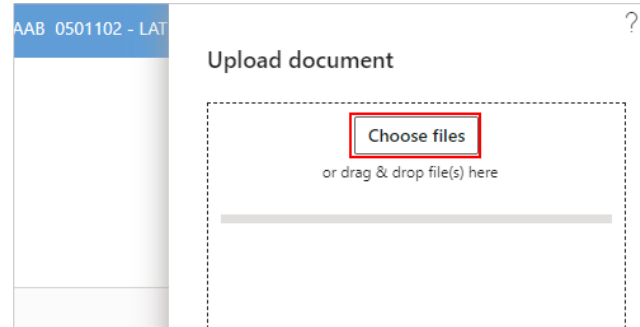
If you want to add a document, click on the **Add attachment** button.



The screenshot shows the 'Implemented fix evaluation' fast tab. At the top, there is a title bar with the text 'Implemented fix evaluation'. Below the title bar, there are three buttons: '+ Add' (highlighted with a red box), 'Add attachment' (highlighted with a blue box), and 'View attachments (1)'. Below the buttons, there are two text areas. The first text area contains the text: "[Evaluated: 6/6/2022 by Erica Hiu, Prime Architecture] Implemented fix is acceptable. Please see attachment for additional comments". The second text area contains the text: "[Evaluated: 6/6/2022 by PM4Trainee1, PCL Construction Management Inc.] Implemented fix by Sub is acceptable."

The 'Upload document' dialog opens to browse for the file.

Click on the **Choose files** button. You may also use the drag and drop feature.



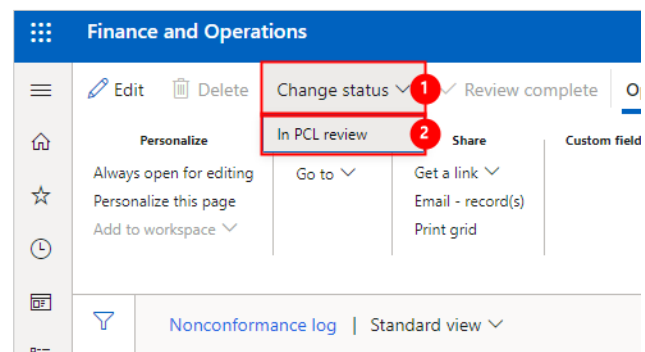
Click on the **Close** button when the upload of your file is 'Complete'.



### 6.6.2.3. Return a Quality Deficiency Item to PCL

When you are ready to move the nonconformance back to PCL, changing the status of the record allows you a final review of the commentary in the Implemented Fix evaluation. You will also be prompted to enter an approval status plus any additional comments.

1. Click on the **Change status** drop-down in the action pane.
2. Click on **In PCL review**.

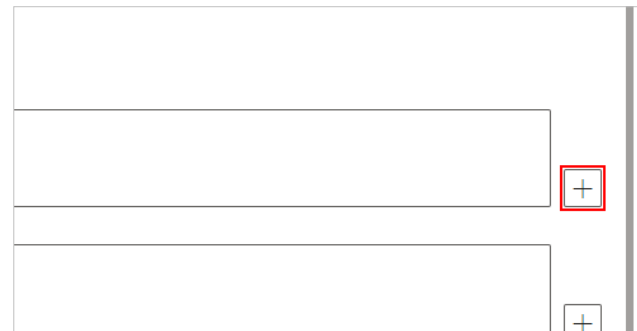


The 'Send email' dialog opens. By default, the email template set for sending the quality item back to PCL fills in the 'From' line, the 'To' line, the 'Subject' line and the body of the email.

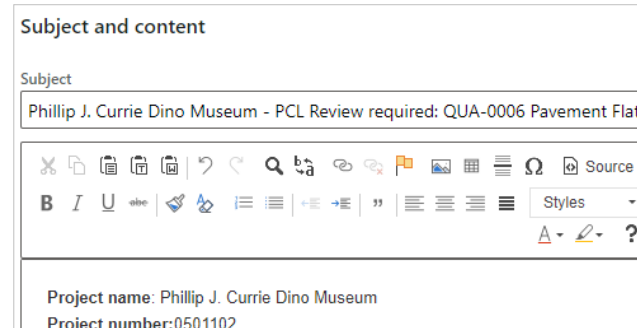
You can free-type additional email addresses in the **To** field and **CC**, or **BCC** fields.



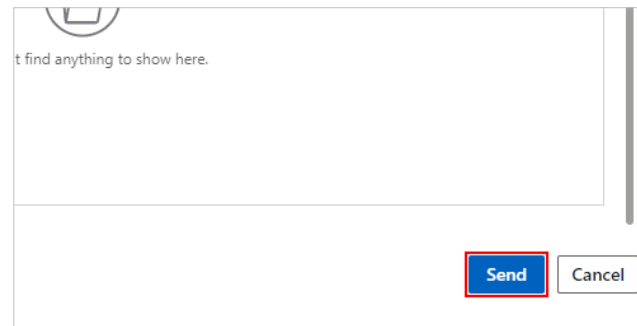
Or click the **(+)** icon beside each of these fields to choose from your job contacts and distribution groups.



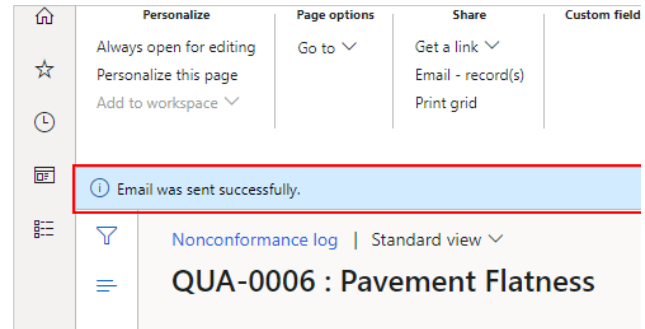
Confirm the information contained in the email is correct. You can edit the text before sending it.



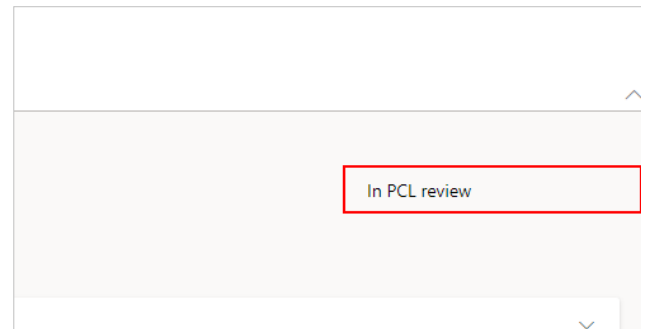
Click on the **Send** button when you are satisfied with the contents of the email.



The system sends a message to indicate the transmission was successful.



The quality nonconformance item you just sent to PCL is now in the status of **In PCL review**.



### 6.6.3. Conclusion

Now that you have an understanding of how to review and sign-off on an implemented fix of a nonconformance, proceed to the next work instruction.

## 6.7. Sign-off on Nonconformance as an Owner

### 6.7.1. Introduction

#### 6.7.1.1. Objective

This work instruction covers how to review the implemented fix and sign-off on a nonconformance quality item, as an Owner.

#### 6.7.1.2. Background Information

When the implemented fix of a nonconformance record is in 'In Owner Sign-off' status, the Owner is required to review the implemented fix and respond. The Owner then returns the nonconformance record back to PCL's court for a review, and further action. Sign-off for a nonconformance may not be required for your project, speak with the PCL Project Manager to check if signing-off is part of the workflow.

The nonconformance may have received input by the Consultant prior to sending the record to 'In Owner Sign-off'.

### 6.7.2. Work Instructions

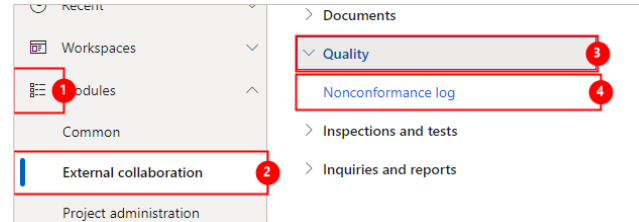


### 6.7.2.1. Navigation

You may choose to navigate directly to the 'Nonconformance log', to view all records, or you may choose to navigate to your 'Quality Management' workspace to view just the quality items in your company's court. Both navigation options are shown in this section.

#### 6.7.2.1.1. Navigate to the Nonconformance Log

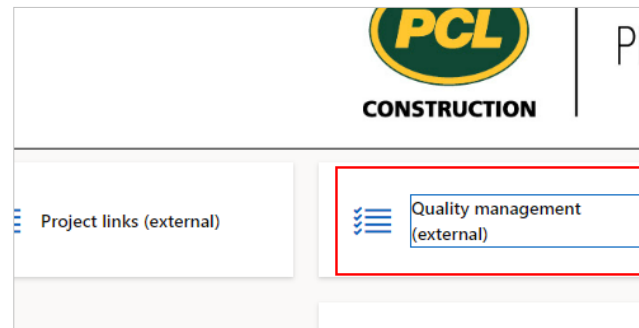
1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Quality** menu section.
4. Click on the **Nonconformance log** menu item.



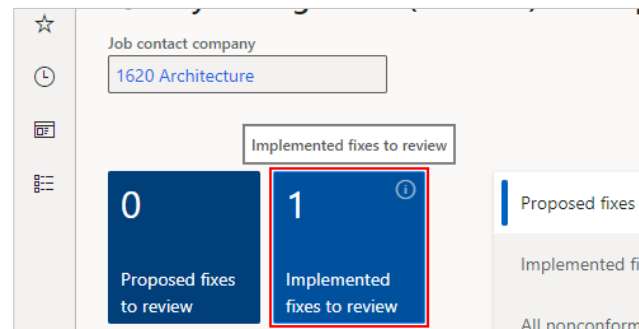
The Nonconformance log is displayed.

#### 6.7.2.1.2. Navigate to the Quality Management Workspace

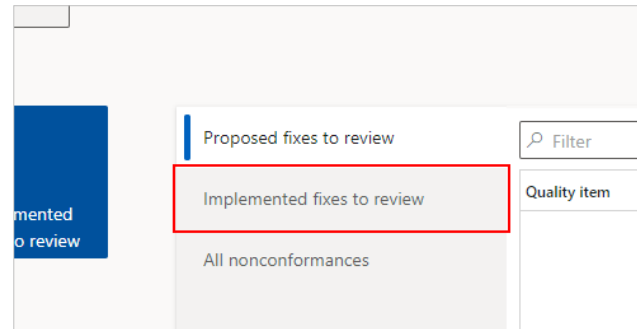
Click on the **Quality management (external)** workspace.



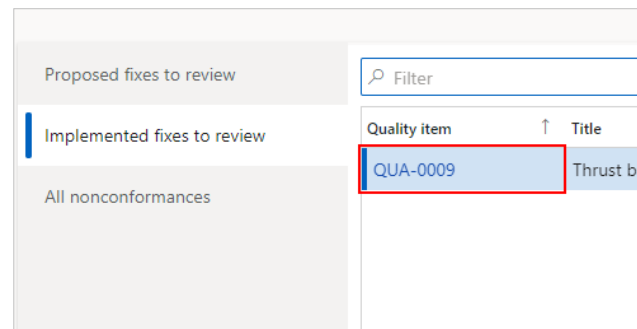
The **Implemented fixes for review** count tile displays a count of the nonconformances requiring review & sign-off and currently assigned to your company.



The **Implemented fixes to review** tabbed list also displays the list of nonconformances assigned to your company.



Click on the **Quality item** hyperlink to open the quality record.

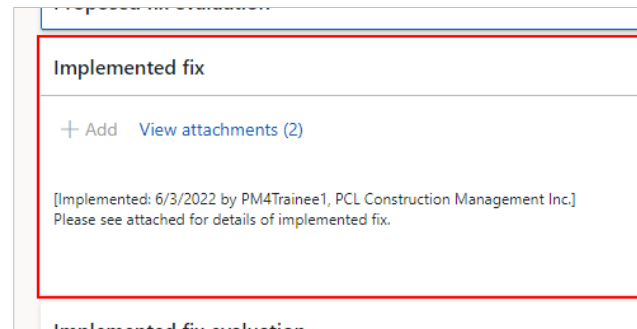


### 6.7.2.2. Review and Respond to an Implemented Fix on a Nonconformance

Click on the **Fix details** tab.

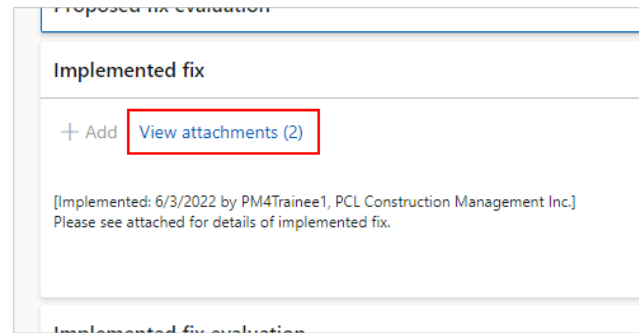


Review the commentary in the **Implemented fix** tab.



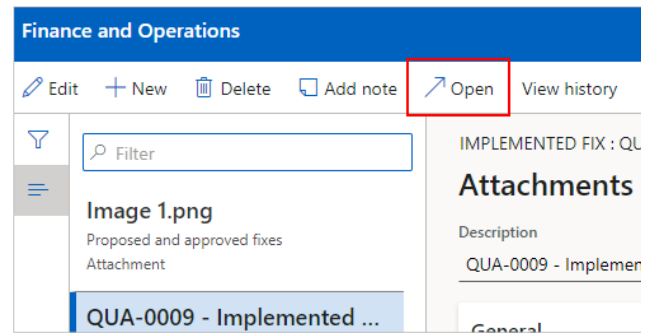
If the 'View Attachments' button contains a number higher than (0), review the documents related to the 'Implemented fix'.

Click on the **View attachments** button.

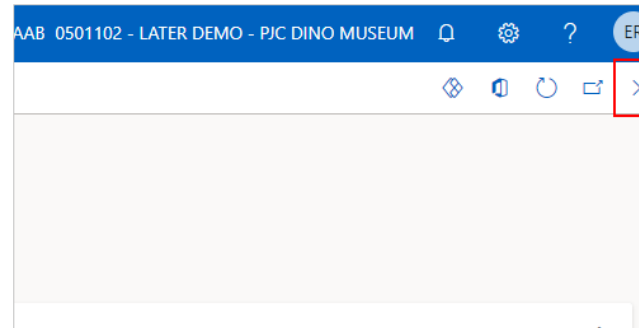


The attachments screen for the 'Implemented fix' field opens.

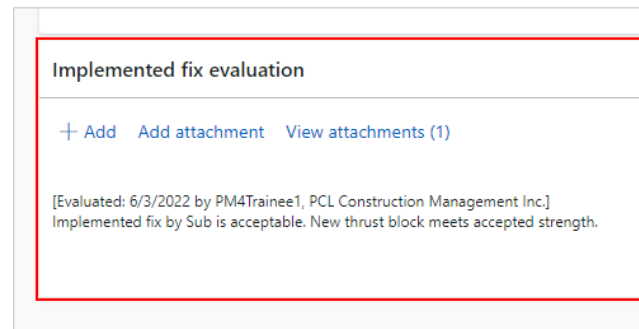
Click on the **Open** button to download the file.



Click on the **Close** button to close the attachments screen.



The **Implemented fix evaluation** fast tab may also have commentary added from PCL or from the Consultant before the nonconformance is in your court.



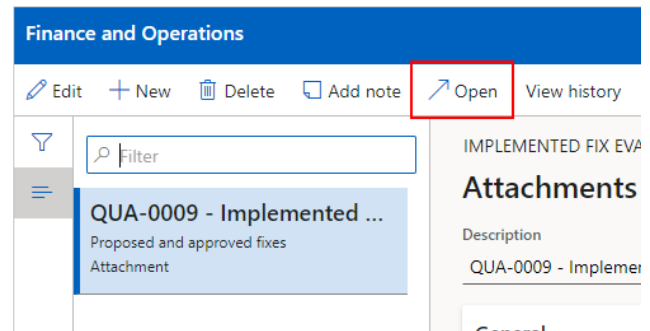
If the 'View Attachments' button contains a number higher than (0), review the documents related to the 'Implemented fix evaluation'.

Click on the **View attachments** button.

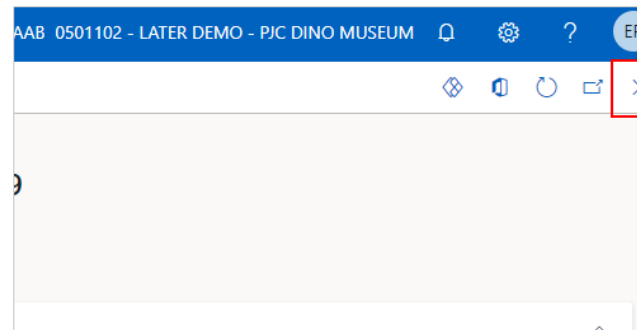


The attachments screen for the 'Implemented fix evaluation' field opens.

Click on the **Open** button to download the file.

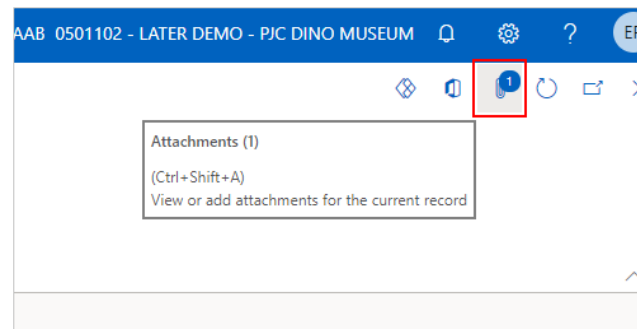


Click on the **Close** button to close the attachments screen.



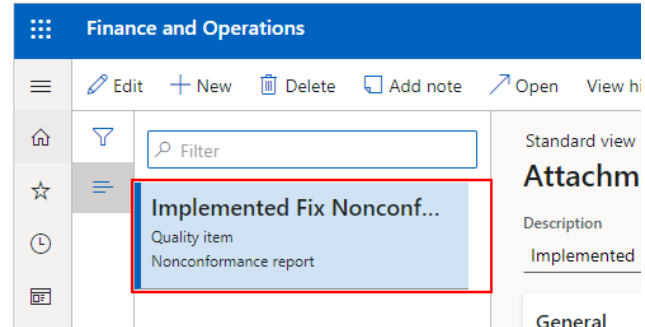
In addition to reviewing the implemented fix details directly in the quality log record, you can also review the 'Nonconformance Report' that was generated, based on this record. This is the same report that was attached in the automated email you received when the status of the record was moved to 'In Owner Sign-off'.

Click on the **Paperclip** icon at the top right of your screen.

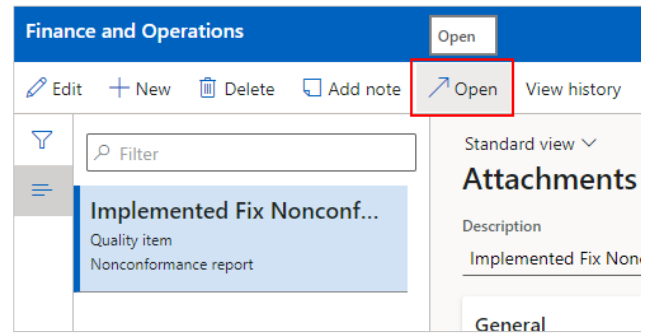


The attachments screen for the entire nonconformance record opens.

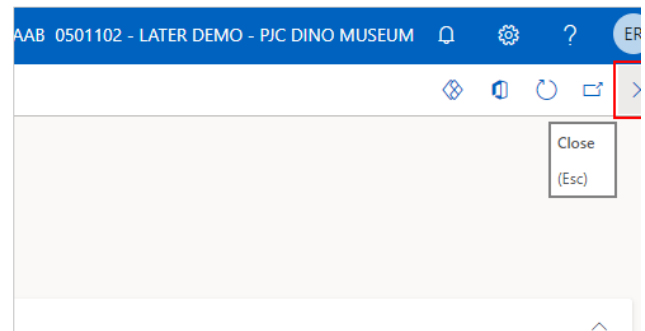
The **Nonconformance Report** displays in the list.



Click on the **Open** button to download the file.

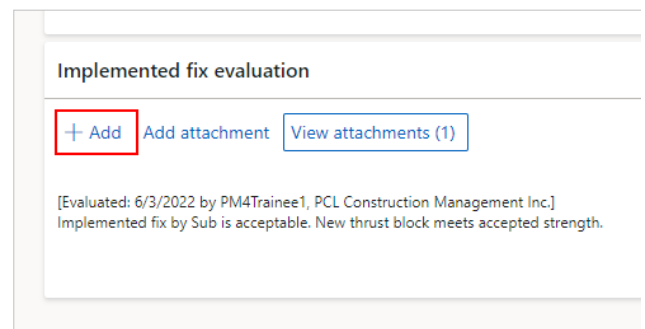


Click on the **Close** button to close the attachments screen.

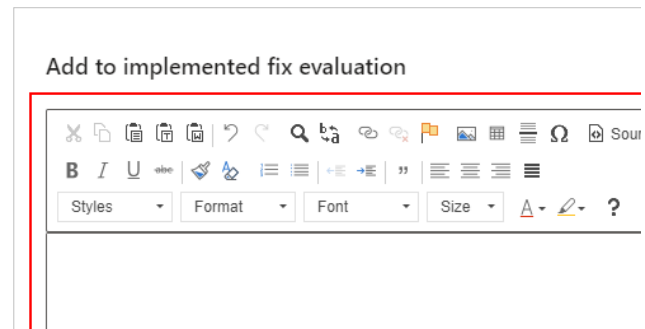


When you have reviewed the implemented fix and implemented fix evaluation (if available), input your evaluation of the fix.

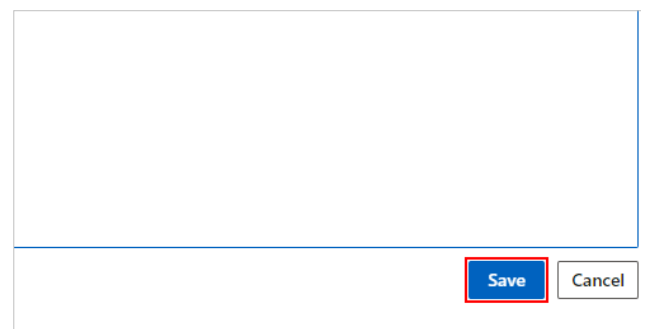
In the 'Implemented fix evaluation' fast tab, click on the **Add** button.



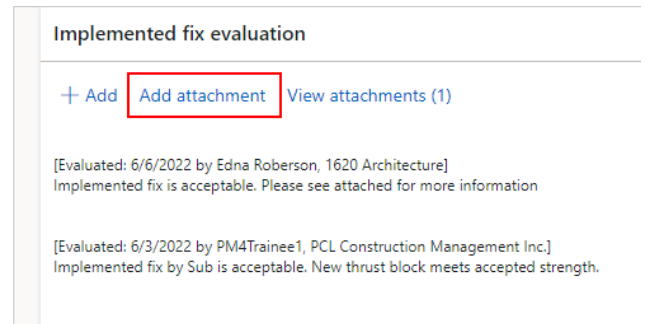
Enter the **Approval** text.



Click on the **Save** button.

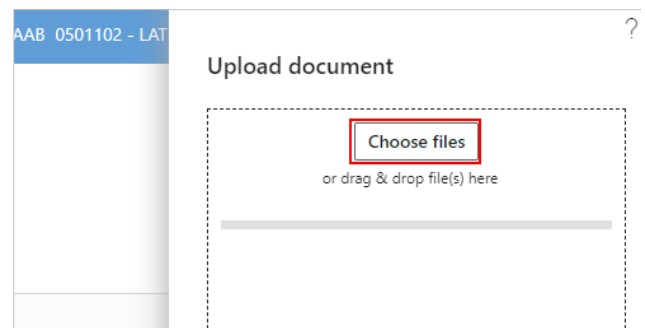


If you want to add a document, click on the **Add attachment** button.



The 'Upload document' dialog opens to browse for the file.

Click on the **Choose files** button. You may also use the drag and drop feature.



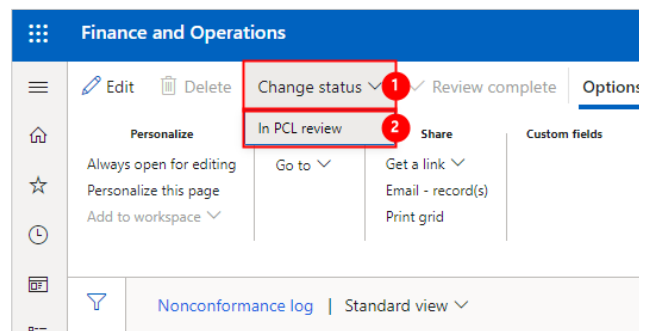
Click on the **Close** button when the upload of your file is 'Complete'.



### 6.7.2.3. Return a Quality Deficiency Item to PCL

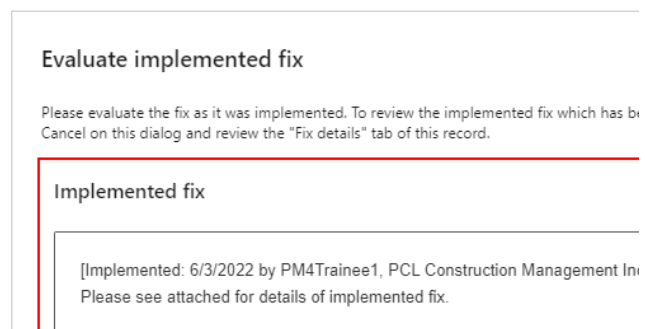
When you are ready to move the nonconformance back to PCL, changing the status of the record allows you a final review of the commentary in the 'Implemented Fix evaluation'. You will also be prompted to enter an approval status plus any additional comments.

1. Click on the **Change status** drop-down in the action pane.
2. Click on **In PCL review**.

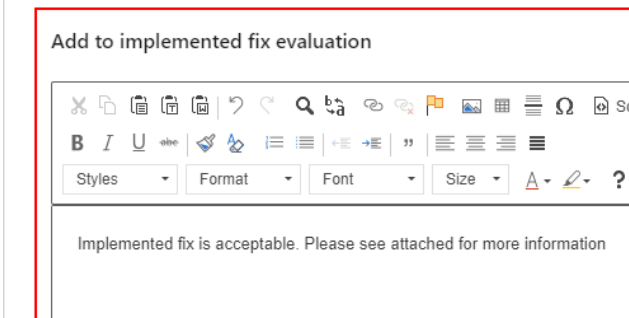


The 'Evaluate implemented fix' dialog opens.

Review the comments added to the **Implemented fix evaluation**.

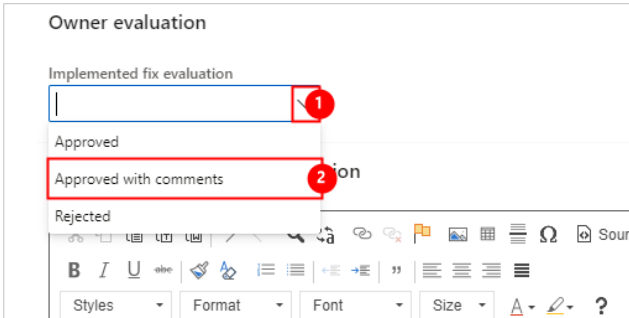


If changes need to be made to your comments made to the evaluation of the implemented fix, make adjustments in the **Add to implemented fix evaluation** tab.

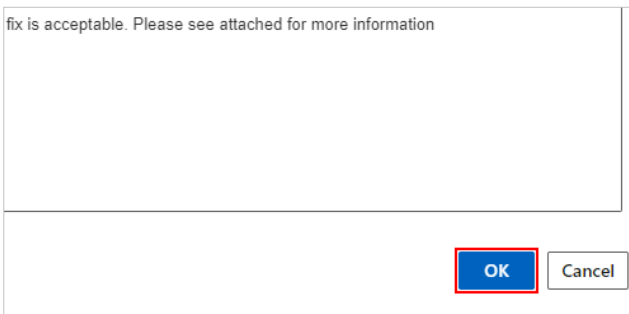


The approval status of the Implemented fix evaluation is required.

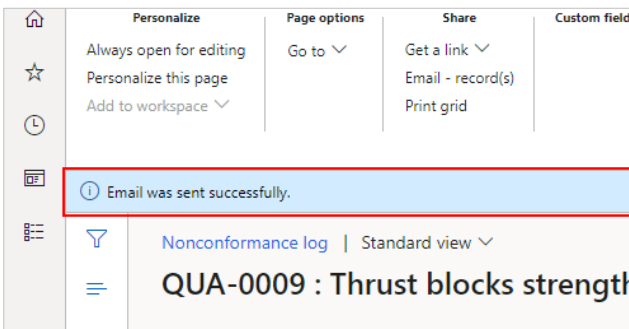
1. Click on the **Implemented fix evaluation** drop-down.
2. Select the status of the **Implemented fix evaluation**. The available options are: 'Approved', 'Approved with comments', and 'Rejected'.



Click on the **OK** button to send the record back to PCL.

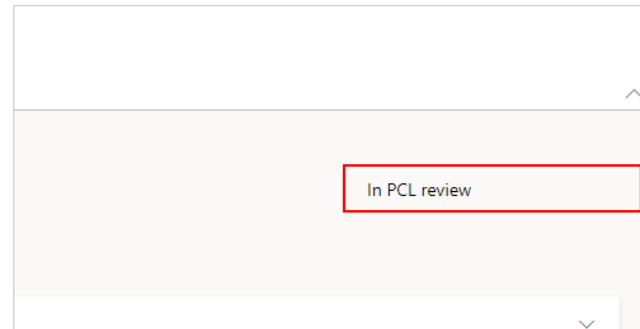


The system sends a message to indicate the transmission was successful.





The quality item you just sent to PCL is now in the status of **In PCL review**.



### 6.7.3. Conclusion

Now that you have an understanding of how to review and sign-off on an implemented fix of a nonconformance, proceed to the next work instruction.

## 6.8. Quality Management Workspace

### 6.8.1. Introduction

#### 6.8.1.1. Objective

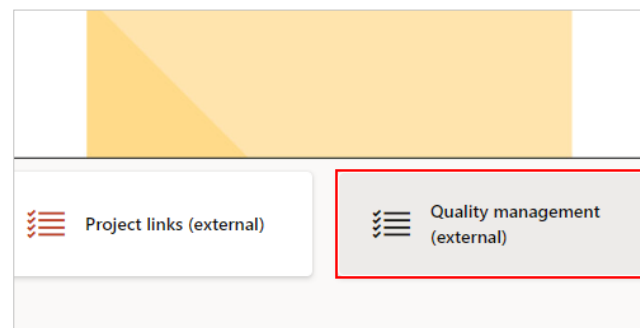
This work instruction covers the Quality management workspace for Subcontractors.

#### 6.8.1.2. Background Information

The 'Quality log' in PM4+ may be in use on your project. In that case, the 'Quality Management workspace' may contain records requiring your review or input.

### 6.8.2. Work Instructions

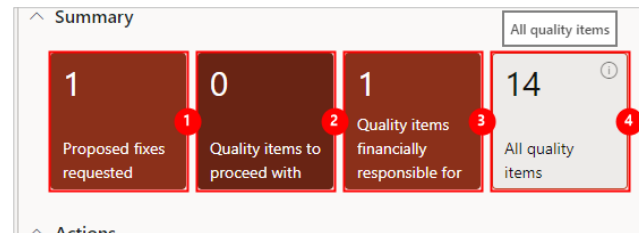
Click on the **Quality management (external)** tile in the PM4+ dashboard.



#### 6.8.2.1. Tiles

Click on a count tile to navigate you to the Quality log, filtered to only display the records from the selected count.

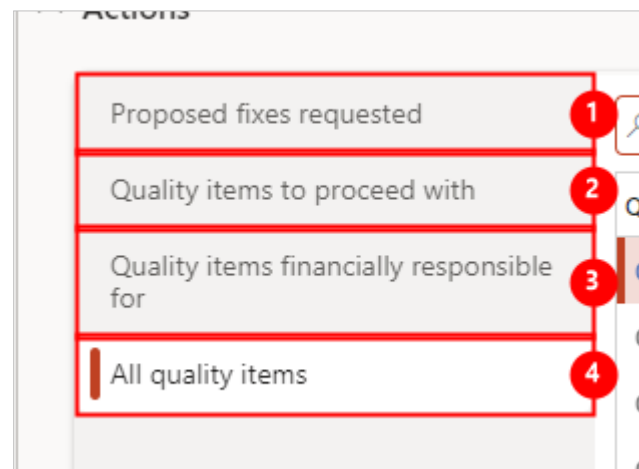
1. The **Proposed fixes requested** count tile indicates the number of quality items awaiting input from your company. This includes records that are in 'Requested' or 'Revise and resubmit' statuses.
2. The **Quality items to proceed with** count tile indicates the number of quality items that your company may proceed with.
3. The **Quality items financially responsible for** count tile indicates the total number of quality items in the 'Quality log' where your company is listed in the 'Financially responsible companies' fast tab.
4. The **All quality items** count tile displays the total number of quality items in the log, which are not drafts.



### 6.8.2.2. Tabbed Lists

The tabbed lists for the Quality Management workspace displays the same number of records as the count tile, but more details are visible.

1. The **Proposed fixes requested** tabbed list displays the same number of records as the count tile, but more details are visible.
2. The **Quality items to proceed with** tabbed list displays the same number of records as the count tile, but more details are visible.
3. The **Quality items financially responsible for** count tile indicates the total number of quality items in the 'Quality log' where your company is listed in the 'Financially responsible companies' fast tab.
4. The **All quality items** tabbed list displays the same number of records as the count tile, but more details are visible.



### 6.8.3. Conclusion

Now that you have an understanding of the Quality management workspace, proceed to the next work instruction.

## 6.9. Provide a Proposed Fix to a Quality Deficiency

### 6.9.1. Introduction

#### 6.9.1.1. Objective

This work instruction covers how to provide a proposed fix to a quality deficiency.

#### 6.9.1.2. Background Information

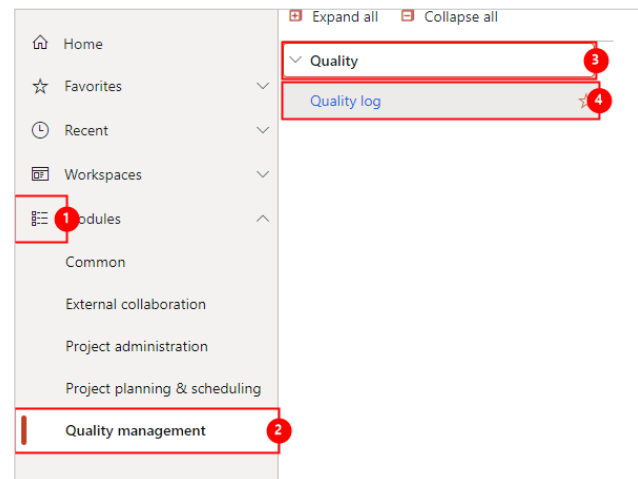
When a quality deficiency requires tracking in PM4+, you may be required to provide a proposal about how to fix the deficiency. You can do this directly in PM4+. You have access to enter a proposed fix in a 'Quality log' record when it is in a status of 'Requested', or 'Revise and resubmit', and when your company is named in the 'Correction company' fields of the record.

### 6.9.2. Work Instructions

#### 6.9.2.1. Navigate to the Quality Log

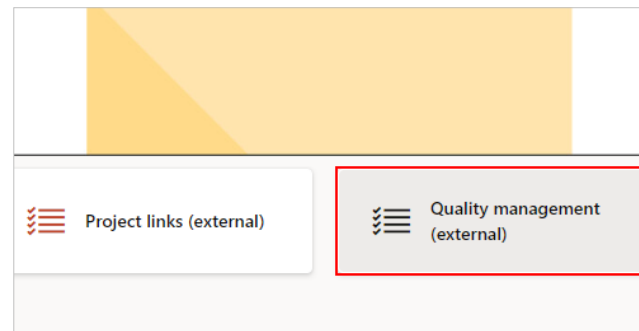
You may choose to navigate directly to the 'Quality log', to view all quality items, or you may choose to navigate to your 'Quality Management' workspace to view just the quality items in your company's court. Both navigation options are shown in this section.

1. Click on the **Modules** icon.
2. Click on the **Quality management** module.
3. Click on the **Quality** menu section.
4. Click on the **Quality log** menu item.

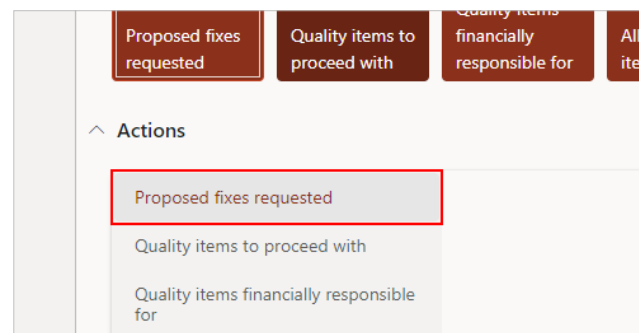


#### 6.9.2.2. Navigate to the Quality Management Workspace

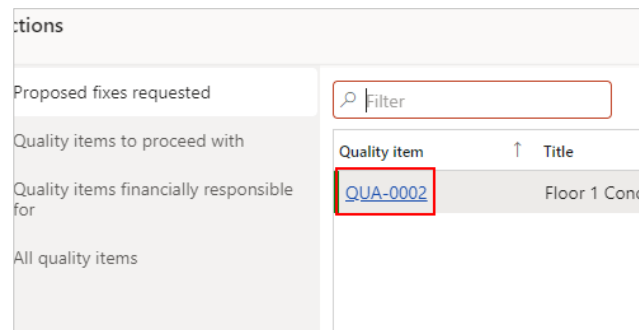
Click on the **Quality management (external)** workspace.



Click on the **Proposed fixes requested** tab.



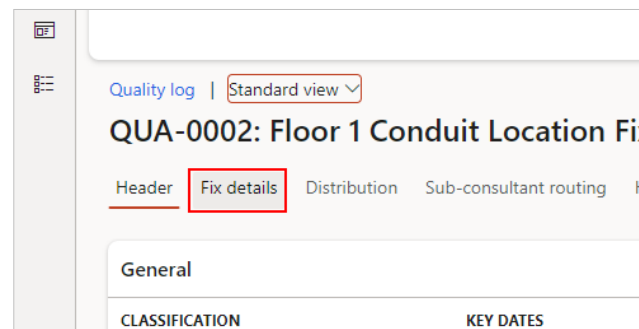
The tab opens and displays records where a proposed fix - or a revision of an already submitted proposed fix - have been requested of your company.



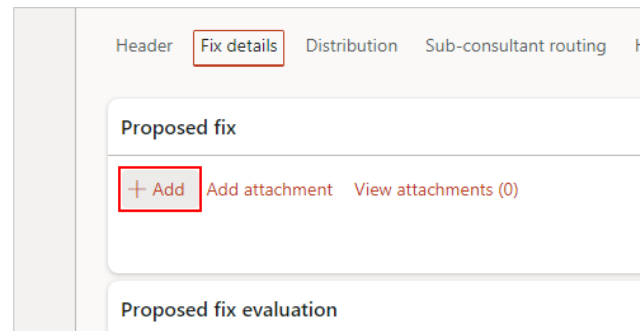
Click on the **Quality item** hyperlink to open the quality item.

### 6.9.2.3. Review a Proposed Quality Deficiency Fix

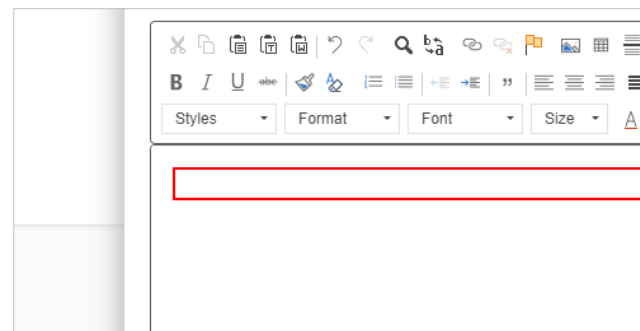
Click on the **Fix details** tab.



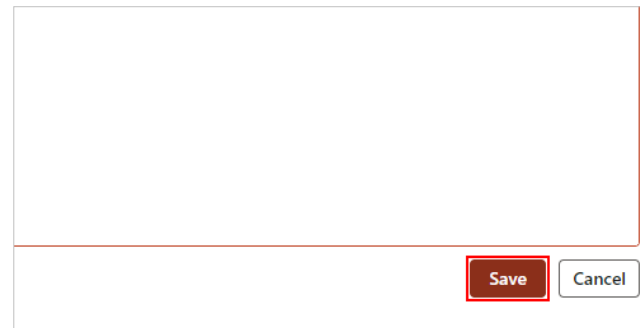
Click on the **Add** button.



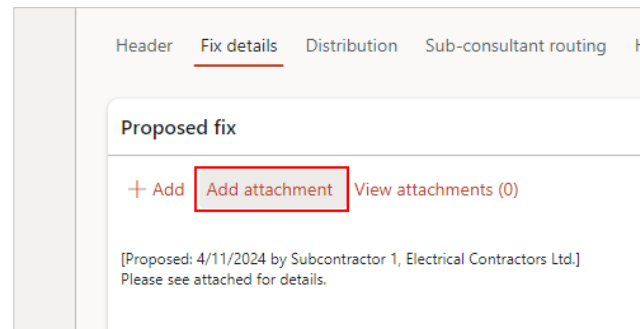
Enter the **Proposed fix**.



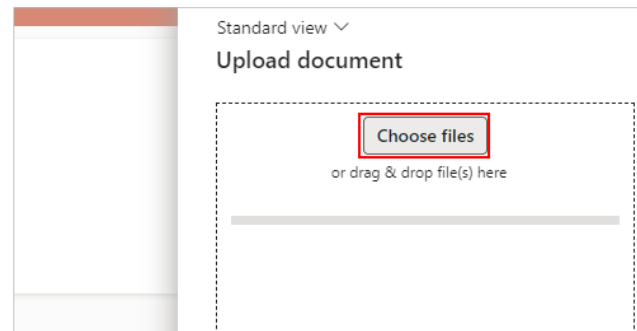
Click on the **Save** button.



Click on the **Add attachment** button if you want to include a document to support your proposed fix.



Click on the **Choose files** button to browse for the file. You may also use the drag and drop feature.



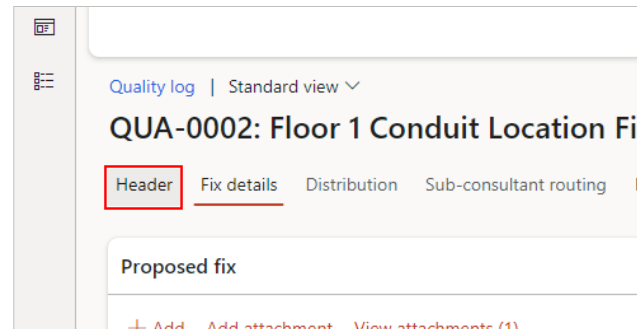
Click on the **Close** button when the upload of your file is 'Complete'.



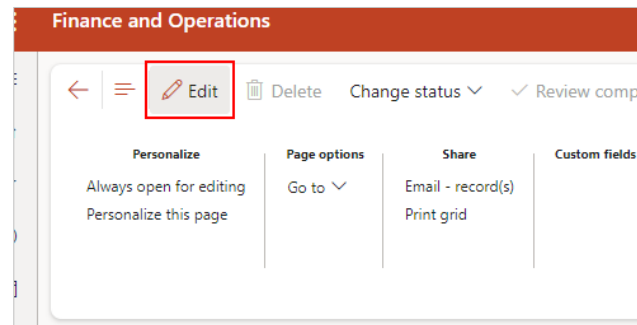
#### 6.9.2.4. Add the Target Correction Date

After adding the details of the proposed fix, enter the date for when you expect the fix can be implemented by.

Click on the **Header** tab.



In the action pane, click on the **Edit** button if not already selected.



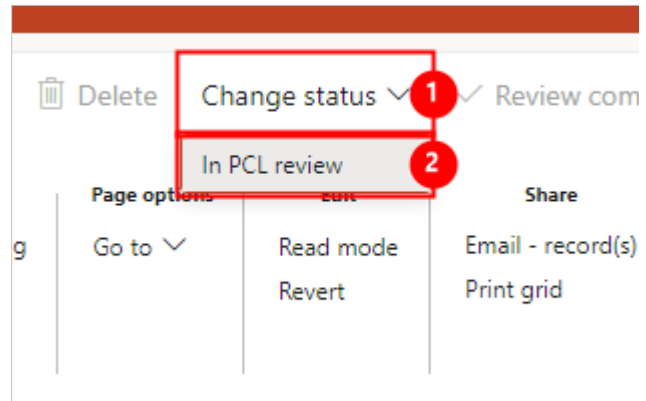
In the 'General' fast tab, enter the **Target correction date** of the fix.

KEY DATES		REVIEW INFO	
Incident date	8/9/2023	PCL reviewer	Employee 1
Target correction date	<input type="text"/>	Review company	Prime Architecture
Issued to field date	<input type="text"/>	Review assigned to	Consultant 3
Correction date	<input type="text"/>	CORRECTION INFO	
		Correction company	

#### 6.9.2.5. Return the Proposed Fix to PCL

When you are satisfied with your response, move the record back to PCL's court by changing the status.

1. Click on the **Change status** drop-down in the action pane.
2. Click on **In PCL review**.



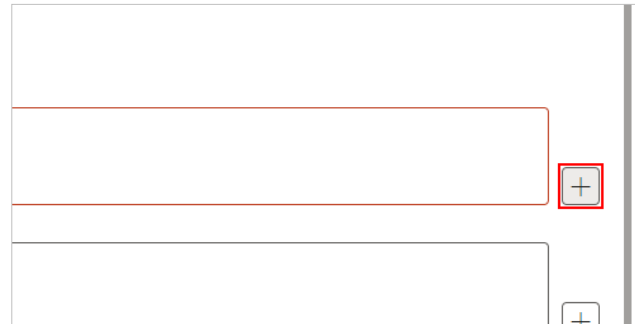
The 'Send email' dialog opens.

The **To** field is pre-populated with the email address of the person named in the 'PCL reviewer' field in the quality item header.

You can free type additional email addresses in the TO, BCC or CC fields.

Sender and recipients	
From	pm4trap@pcl.com
To	pm4trainee1@pcl.com
Cc	

Or click the (+) icon beside each of these fields to choose from your job contacts and distribution groups.



The text in the subject line and body are based on a template. Confirm the information contained in the email is correct. You can edit the text before sending it.

Subject and content

Subject

Late Project - PCL Review required: QUA-0002 Floor 1 Conduit Location Fix

Project name: Late Project

Click on the **Send** button.

Please access the record by the following link:

Send Cancel

This completes the status change to **In PCL review**.

Status

Quality item status

In PCL review

A message displays when the transmission was sent successfully.

Finance and Operations

Email was sent successfully

Save Delete Change status Review co

Personalize Page options Edit Share

Always open for editing Go to Read mode Get a link

Personalize this page Revert Email - record

Add to workspace Print grid

### 6.9.3. Conclusion

Now that you have an understanding of how to provide a proposed fix to a quality deficiency, proceed to the next work instruction.



## 7. Inspections and Tests

### 7.1. Attach Report to an Inspection and Test Item (Consultant and Owner)

#### 7.1.1. Introduction

##### 7.1.1.1. Objective

This work instruction covers how add a completed report to an inspection and test record.

##### 7.1.1.2. Background Information

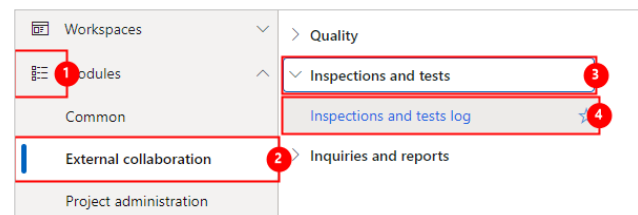
The 'Inspections and Tests Log' is intended to include all contractually specified verifications, validations, monitoring, measurements, inspections and testing activities, as well as any additional quality control activities deemed prudent by the project team.

If a special review is required for the Consultant and/or Owner to carry out their work, the PCL Project Manager may have sent an email notifying you to upload a completed report for an inspection and test record.

Check with the PCL Project Manager of your project if Inspections and Tests records are enabled for Consultant and/or Owner collaboration.

#### 7.1.2. Work Instructions

1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Inspections and tests** menu section.
4. Click on the **Inspections and tests log** menu item.



Any inspections and tests 'parent' records with a status of **In progress** can have a report attached it. The 'parent' item serves as a categorization of related inspections or tests and is bolded.

Embeds Accurat...	0002	In progress	03 15 00
Embeds Acc...	0002	In progress	03 15 00
Embeds Accura...	0002	In progress	03 15 00
	0002	In progress	
		<b>In progress</b>	
Has Been Ap...	0003	In progress	01 32 23
t & Elevatio...	0003	In progress	01 32 23
Window Locati...	0003	In progress	01 32 23

Click on the **Item no** hyperlink to open the parent inspection and test item to attach a report to.

<a href="#">0002.27</a>	Embeds - Stair Embeds Accurat...
<a href="#">0002.28</a>	Embeds - Handrail Embeds Acc...
<a href="#">0002.29</a>	Embeds - Other Embeds Accura...
<a href="#">test 001</a>	sydiwydiu
<b>0003</b>	<b>Masonry</b>
<a href="#">0003.01</a>	Mock-Up Has Been Ap...
<a href="#">0003.02</a>	Wall Layout & Elevatio...
<a href="#">0003.03</a>	Layout - Door & Window Locati...

Review the details for the inspection and test items.

Note: If adjustments need to be made, contact the person in the 'Responsible PCL contact' field.

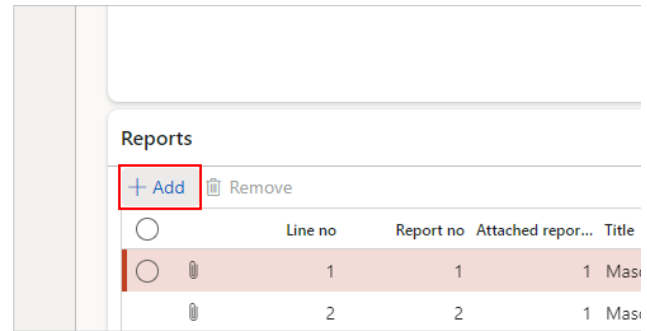
Header	History	Associations (0)
<b>General</b>		
<b>CLASSIFICATION</b>	<b>TEST DETAILS</b>	
Item no	Hold point activity	
<input type="text" value="0003"/>		
Description		
Masonry	Acceptance criteria	

The **Number of reports required** field displays the number of reports to complete the inspection or test.

Employee 1
Company performing work
Brick and Mastory Inc.
<b>DOCUMENTATION TRACKING</b>
<b>Number of reports required</b>
20
Reports attached
2
Reports completed outside DMM...

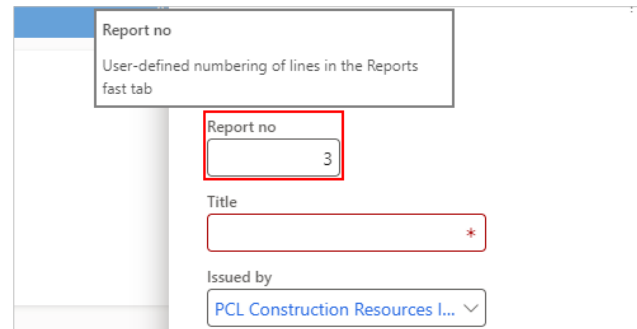
### 7.1.2.1. Add an Inspection and Test Report

In the 'Reports' fast tab, click on the **Add** button.

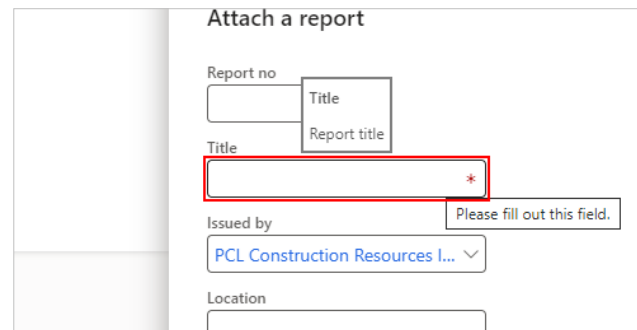


The 'Attach a report' dialog opens.

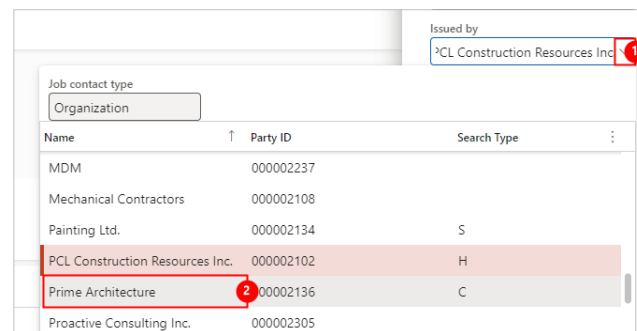
The **Report no** field populates based on the latest report number. This increments by one.



Enter the **Title** of the report.



1. Click on the **Issued by** button - Begin typing the name of the company to filter the list.
2. Select the **Issued by** company.



Enter the **Location** relevant to the report you are attaching.

Title  
B3F Checklist

Issued by  
Prime Architecture

Location

Document type

Received date

1. Click on the **Document type** drop-down.
2. Select the **Document type**.

Document type

Document type	Description
Landscaping	Landscaping
LEED	LEED
Mechanical	Mechanical
Structural	Structural
Survey	Survey

The **Received date** is the date when PCL receives the attached report(s). This populates to day's date and can be changed.

Location  
All

Document type  
Structural

Received date

Site visit date

Document date

Enter the **Site visit date**.

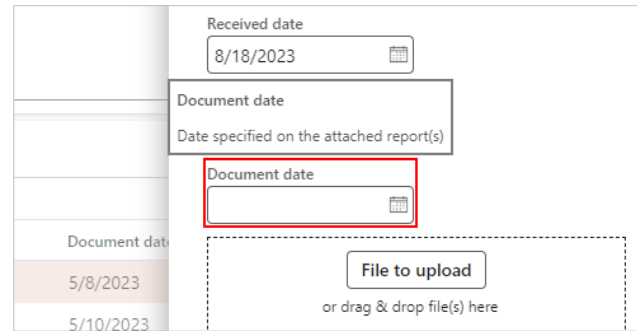
Document type  
Structural

Recd Site visit date  
8/ Date of the site visit

Site visit date

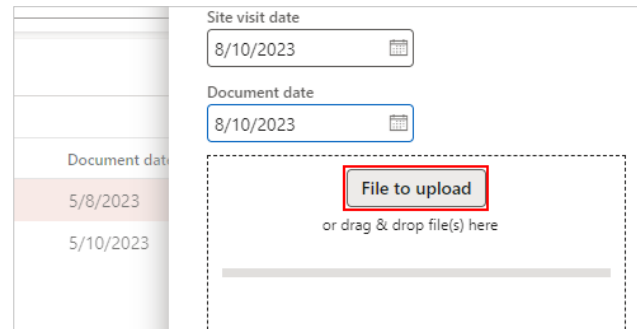
Document date

Enter the **Document date** as specified in the attached report(s).



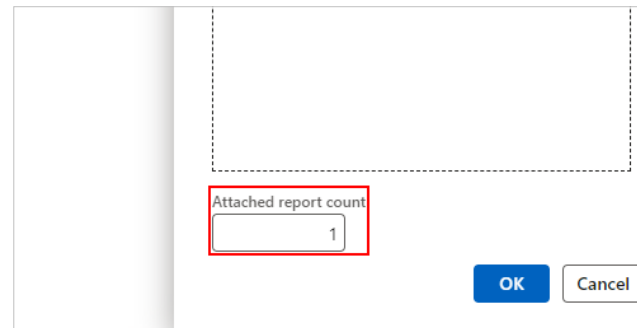
The screenshot shows a dialog box with a table on the left and a date selection interface on the right. The table has a header 'Document date' and two rows with values '5/8/2023' and '5/10/2023'. The right side has a 'Received date' field with '8/18/2023', a 'Document date' label, and a sub-label 'Date specified on the attached report(s)'. Below this is a 'Document date' field with a calendar icon, highlighted with a red box. At the bottom right is a dashed box containing a 'File to upload' button and the text 'or drag & drop file(s) here'.

Click on the **File to upload** button or use the drag and drop feature to upload the report(s).



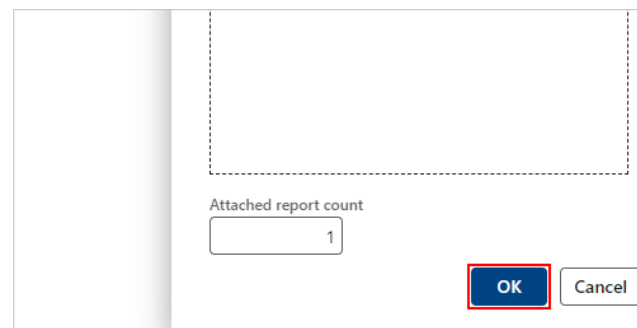
This screenshot is similar to the previous one, but the 'Document date' field on the right is now filled with '8/10/2023'. The 'File to upload' button in the dashed box is highlighted with a red box.

The **Attached report count** field updates based on the number of files attached in the dialog. This feeds into the field in the 'General' fast tab.



The screenshot shows the dialog box with the 'Attached report count' field at the bottom, containing the number '1', highlighted with a red box. The 'File to upload' button is no longer visible. 'OK' and 'Cancel' buttons are at the bottom right.

Click on the **OK** button.



This screenshot is identical to the previous one, but the 'OK' button at the bottom right is highlighted with a red box.

In the 'General' fast tab the following fields update based on the number of reports attached.

1. **Reports attached.**
2. **Percentage of reports completed.**

20
<div style="border: 1px solid red; padding: 2px;"> <b>Reports attached</b>          2       </div> <span style="color: red; font-weight: bold; font-size: 1.2em;">1</span>
Reports completed outside PM4+
5
<div style="border: 1px solid red; padding: 2px;"> <b>Percentage of reports completed</b>          35 %       </div> <span style="color: red; font-weight: bold; font-size: 1.2em;">2</span>
Reports submitted

### 7.1.2.2. Remove a Report

Only reports that you have uploaded can be removed. If a report that another user uploaded is selected, the 'Remove' button will be disabled.

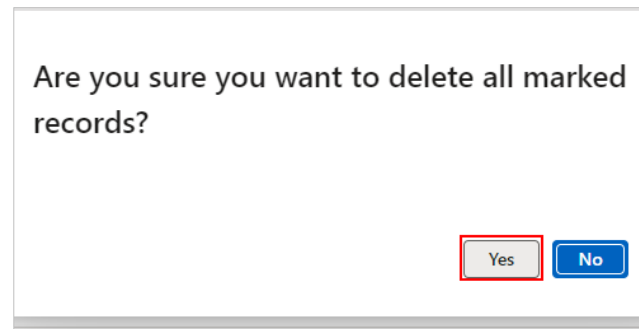
Click on the **Row Checkbox** of the report to remove.

		+ Add	Remove
<input type="checkbox"/>	Line no	Report no	Attached repor... Title
<input type="checkbox"/>	1	1	1 Mas
<input type="checkbox"/>	2	2	1 Mas
<input checked="" type="checkbox"/>	3	3	1 B3F
Select or unselect row			

Click on the **Remove** button.

		+ Add	Remove
<input type="checkbox"/>	Line no	Report no	Attached repor... Title
<input type="checkbox"/>	1	1	1 Mas
<input type="checkbox"/>	2	2	1 Mas

Click the **Yes** button to confirm the deletion.



### 7.1.3. Conclusion

Now that you have an understanding of how to attach a completed report to an inspection and test record, proceed to the next work instruction.

## 7.2. Contribute to an Inspection and Test Item

### 7.2.1. Introduction

#### 7.2.1.1. Objective

This work instruction covers how to contribute to an inspection and test record.

#### 7.2.1.2. Background Information

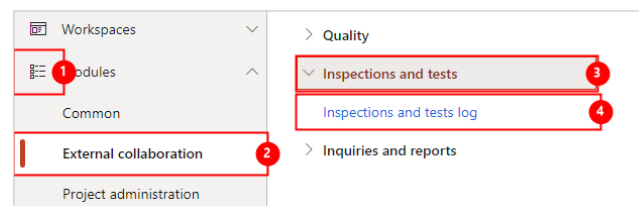
The 'Inspections and Tests Log' is intended to include all contractually specified verifications, validations, monitoring, measurements, inspections and testing activities, as well as any additional quality control activities deemed prudent by the project team.

The PCL Project Manager may have sent an email notifying you to contribute to to an inspection and test record. Any records that are in 'Draft' status and assigned to your company in the 'Company performing inspection/test' field can be modified.

Check with the PCL Project Manager of your project if Inspections and Tests records are enabled for Subcontractor collaboration.

### 7.2.2. Work Instructions

1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Inspections and tests** menu



section.

- Click on the **Inspections and tests log** menu item.

Any inspections and tests 'parent' records with a status of **Draft** can be modified. The 'parent' item serves as a categorization of related inspections or tests and is bolded.

1	In progress	02 25 29
1	In progress	02 25 29
	<b>Draft</b>	<b>02 25 26</b>
2	Draft	02 25 26
	<b>In progress</b>	<b>32 93 00</b>
3	In progress	32 93 00

Click on the **Item no** hyperlink to open the parent inspection and test item to modify.

1.02	Concrete substrate moisture	1
1.03	Curbs blocking nailers secure	1
1.04	Curing compound removed	1
<b>2</b>	<b>Fastener Pull Out</b>	
2.01	Fastener Pull Out	2
<b>3</b>	<b>Landscaping Inspection</b>	
3.01	Rough grading	3

In the 'General' fast tab, certain fields for the inspection and test record can be updated.

Fields that cannot be updated will be greyed out.

General	
<b>CLASSIFICATION</b>	<b>TEST DETAILS</b>
Item no	Hold point activity
2	
Description	Acceptance criteria
Fastener Pull Out	
Fastener Pull Out	
Spec section	

The following fields can be updated:



The **Hold point activity** indicates if an activity cannot proceed without approval. Update if necessary.

TEST DETAILS	PCL INFO
Hold point activity <input type="text"/>	Responsible PCL contact <input type="text" value="Bernice Stangenberg"/>
Acceptance criteria <input type="text"/>	<b>PARTICIPANTS</b> Company performing insp./test <input type="text" value="Acoustic Products Inc."/>
Frequency/coverage <input type="text"/>	Contact performing insp./test <input type="text" value="Dominic Chapa"/>
	Company performing work <input type="text"/>

The **Acceptance criteria** is the required result which will certify as a pass of the inspection or test. Update if necessary.

TEST DETAILS	PCL INFO
Hold point activity <input type="text"/>	Responsible PCL contact <input type="text" value="Bernice Stangenberg"/>
Acceptance criteria <input type="text"/>	<b>PARTICIPANTS</b> Company performing insp./test <input type="text" value="Acoustic Products Inc."/>
Frequency/coverage <input type="text"/>	Contact performing insp./test <input type="text" value="Dominic Chapa"/>
	Company performing work <input type="text"/>

Enter the **Frequency/coverage** required for the inspection or test. Update if necessary.

Frequency/coverage <input type="text"/>	Company performing work <input type="text"/>
Tracking method <input type="text"/>	<b>DOCUMENTATION TRACKING</b> Number of reports required <input type="text" value="4"/>
Documentation required <input type="text" value="BIM 360 Checklist"/>	Reports attached <input type="text" value="0"/>
	Reports completed outside PM4 <input type="text" value="2"/>

Enter the **Tracking method** which will be used to track the inspection or test. Update if necessary.

Frequency/coverage <input type="text" value="To perform once per month for a period of 3 months"/>	Company performing work <input type="text"/>
Tracking method <input type="text"/>	<b>DOCUMENTATION TRACKING</b> Number of reports required <input type="text" value="4"/>
Documentation required <input type="text" value="BIM 360 Checklist"/>	Reports attached <input type="text" value="0"/>
	Reports completed outside PM4 <input type="text" value="2"/>

Enter the **Documentation required** for the inspection or test. Update if necessary.

<p>Frequency/coverage</p> <p>To perform once per month for a period of 3 months.</p> <p>Tracking method</p> <p>Documentation required</p> <p>BIM 360 Checklist</p>	<p>Number of reports required</p> <p>4</p> <p>Reports attached</p> <p>0</p> <p>Reports completed outside PM4</p> <p>2</p>
--	---

Enter the total **Number of reports required** to complete the inspection or test.

<p>DOCUMENTATION TRACKING</p> <p>Number of reports required</p> <p>4</p> <p>Reports attached</p> <p>0</p> <p>Reports completed outside PM4+</p> <p>2</p> <p>Percentage of reports completed</p> <p>50 %</p>	<p>Third party involvement</p> <p>AHJ involvement</p> <p>Other involvement</p>
---	--

The **Subcontractor involvement** field specifies the Subcontractor's involvement in the inspection or test. The options are:

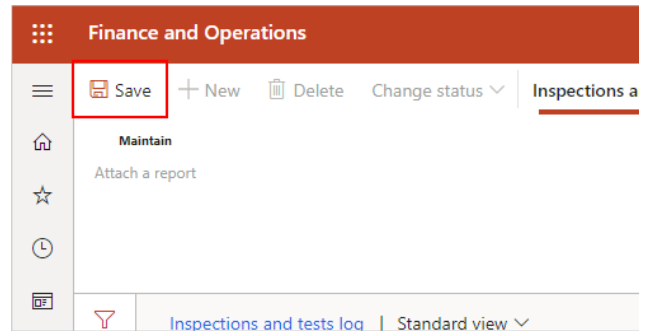
1. Performs.
2. Witnesses.
3. Receives documentation.
4. Notification.

<p>INVOLVEMENT LEVELS</p> <p>PCL involvement</p> <p>4 - Notification</p> <p>Consultant involvement</p> <p>3 - Receives documentation</p> <p>Subcontractor involvement</p> <p>1 - Performs</p> <p>Owner involvement</p> <p>4 - Notification</p>	<p>COMMENTS</p> <p>Comments</p>
--	---------------------------------

**Comments** can be added to provide additional detail of the inspection or test item if necessary.

<p>COMMENTS</p> <p>Comments</p>
---------------------------------

Click on the **Save** button.



### 7.2.3. Conclusion

Now that you have an understanding of how to contribute to inspection and test record, proceed to the next work instruction.

## 7.3. Attach Report to an Inspection and Test Item

### 7.3.1. Introduction

#### 7.3.1.1. Objective

This work instruction covers how to attach a completed report to an inspection and test record.

#### 7.3.1.2. Background Information

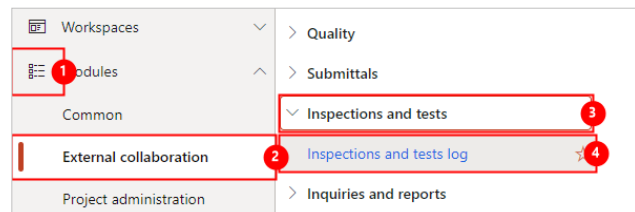
The 'Inspections and Tests Log' is intended to include all contractually specified verifications, validations, monitoring, measurements, inspections and testing activities, as well as any additional quality control activities deemed prudent by the project team.

The PCL Project Manager may have sent an email notifying you to upload a completed report for an inspection and test record.

Check with the PCL Project Manager of your project if Inspections and Tests records are enabled for Subcontractor collaboration.

### 7.3.2. Work Instructions

1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Inspections and tests** menu section.



4. Click on the **Inspections and tests log** menu item.

Any inspections and tests 'parent' records with a status of **In progress** can have a report attached to it. The 'parent' item serves as a categorization of related inspections or tests and is bolded.

ons	0001	Completed	Mfgr requir
moisture	0001	Completed	Spec xzy, A'
lers secured	0001	Completed	Spec 3.1.A.2
removed	0001	Completed	Spec 3.1.A.7
		<b>In progress</b>	
y Inspected	0002	In progress	In progress } 3 11 00
de Inspected...	0002	In progress	03 11 00
ions Verified	0002	In progress	03 11 00

Click on the Item number hyperlink to open the parent inspection and test item to attach a report to.

<a href="#">0003.17</a>	Mortar & Grout - Grout For Cor...
<a href="#">0003.18</a>	Mortar & Grout - Temperature ...
<a href="#">0003.19</a>	Mortar & Grout - Locaton Of Gr...
<a href="#">0003.20</a>	Mortar & Grout - 100% Solid Fill...
<b>0004</b>	<b>Fire Protection Systems</b>
<a href="#">0004.01</a>	0004 Test
<a href="#">0004.02</a>	Click to follow link rols and Safeties Test
<a href="#">0004.03</a>	Inspect Sprinkler System

The following fields will indicate that the inspection and test item is assigned to you or your company.

1. **Company performing insp./test.**
2. **Contact performing insp./test.**

Employee

---

**PARTICIPANTS**

Company performing insp./test 1  
 Electrical Contractors Ltd.

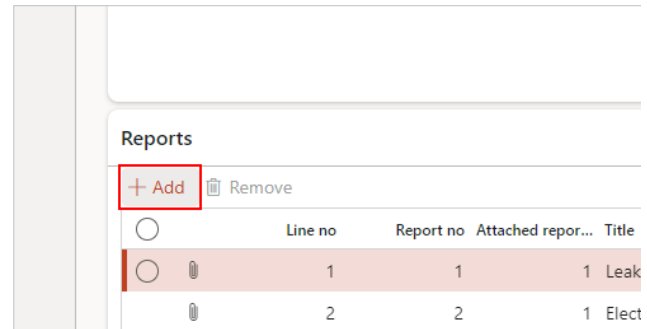
Contact performing insp./test 2  
 Subcontractor 1

Company performing work

The **Number of reports required** field displays the number of reports to complete the inspection or test.

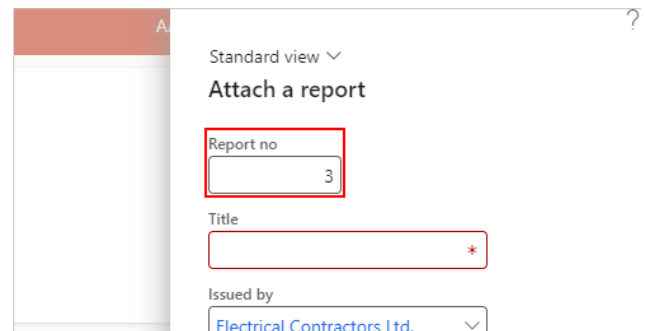
Subcontractor 1	Company performing work
frequency/coverage	
ost installation	
cking method	
M4+ ITP Log	
umentation required	
	<b>DOCUMENTATION TRACKING</b>
	Number of reports required
	0
	Reports attached
	2
	Reports completed outside PM4+

In the 'Reports' fast tab, click on the **Add** button.

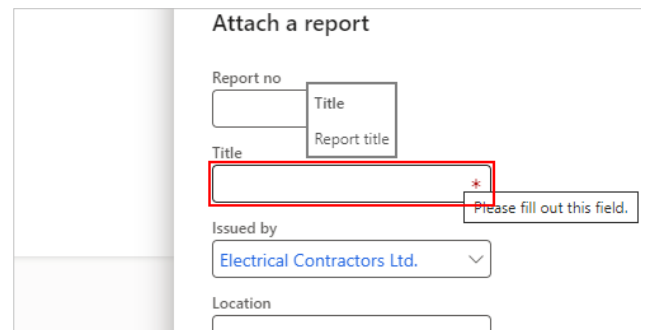


The 'Attach a report' dialog opens.

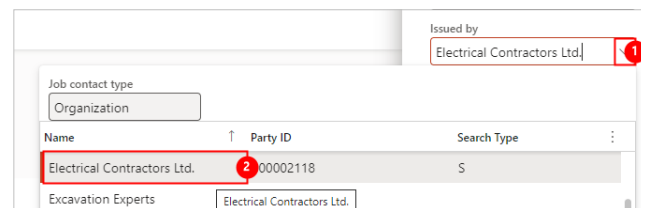
The **Report no** field populates based on the latest report number. This increments by one.



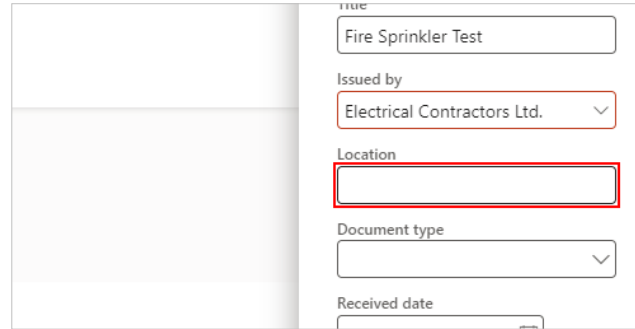
Enter the **Title** of the report.



1. Click on the **Issued by** drop-down - Begin typing the name of the company to filter the list.
2. Select the **Issuedby** company.



Enter the **Location** relevant to the report you are attaching.



Title  
 Fire Sprinkler Test

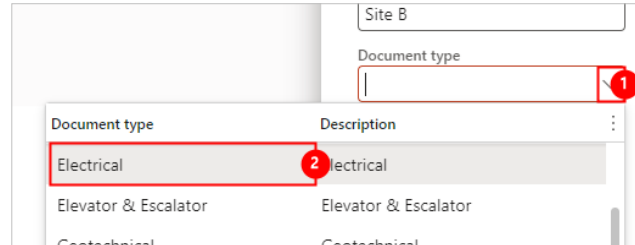
Issued by  
 Electrical Contractors Ltd.

Location

Document type

Received date

1. Click on the **Document type** drop-down.
2. Select the **Document type**.



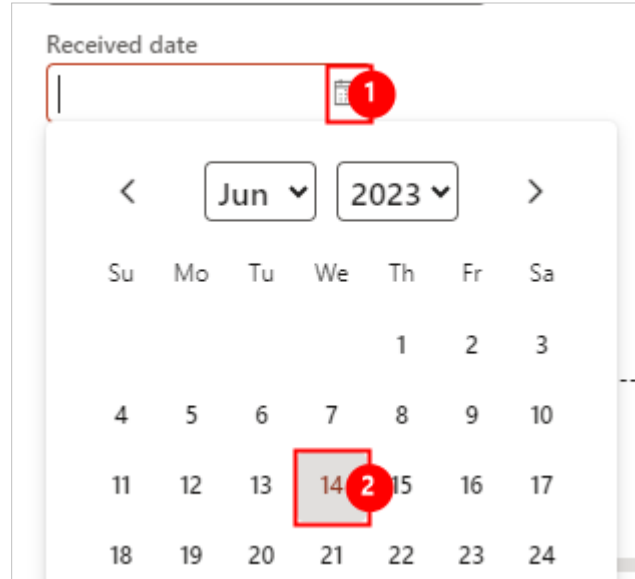
Site B

Document type

Document type	Description
Electrical	Electrical
Elevator & Escalator	Elevator & Escalator
Geotechnical	Geotechnical

The **Received date** is the date when PCL receives the attached report(s). This populates to day's date and can be changed.

1. Click on **Received date** field.
2. Select the **date**.



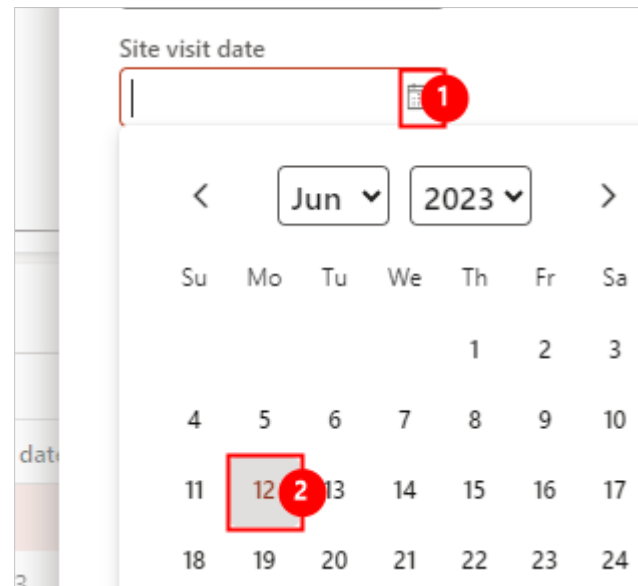
Received date

< Jun 2023 >

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

To select a **Site visit date**.

1. Click on the **Site visit date** field.
2. Select the **Date**.



Site visit date

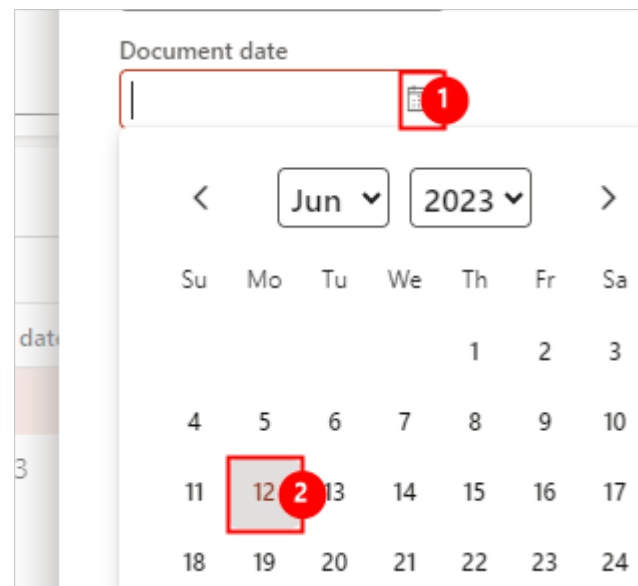
6/12/2023

< Jun 2023 >

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

Enter the **Document date** as specified in the attached report(s).

1. Click on **Document date** field.
2. Select the **Date**.



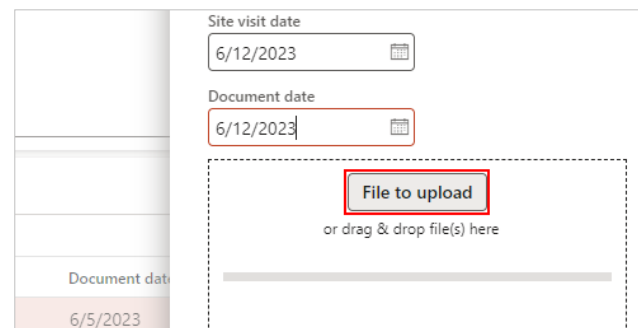
Document date

6/12/2023

< Jun 2023 >

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

Click on the **File to upload** button or use the drag and drop feature to upload the report(s).



Site visit date

6/12/2023

Document date

6/12/2023

**File to upload**

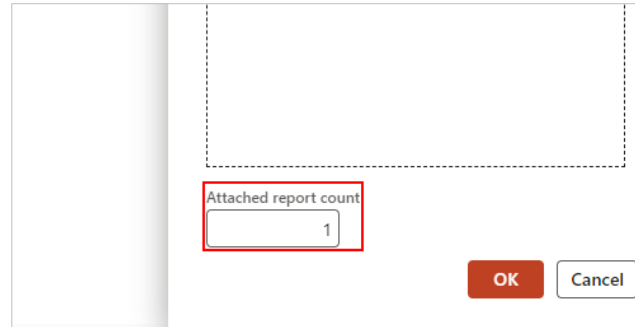
or drag & drop file(s) here

Document date

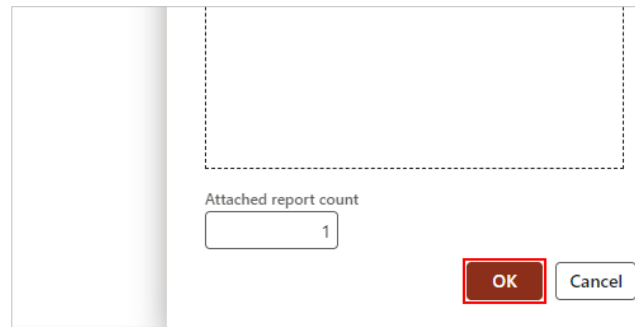
6/5/2023

The **Attached report** count field updates based on the number of files attached in the dialog. This feeds into the field in the 'General' fast tab.

If you are uploading a single file with multiple, merged reports, manually update this field to accurately reflect the number of reports being attached.

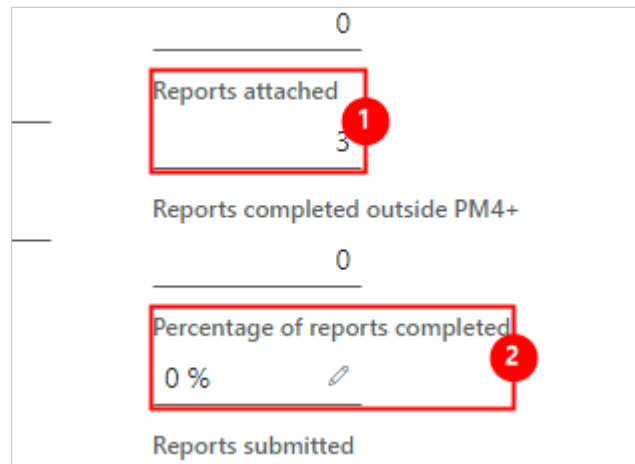


Click on the **OK** button.



In the 'General' fast tab the following fields update based on the number of reports attached. If the 'Number of reports required' field is set to 0, the 'Percentage of reports completed' field will remain at 0 percent.

1. **Reports attached.**
2. **Percentage of reports completed.**

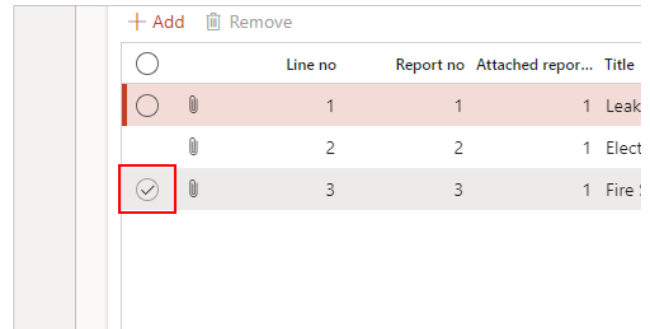





### 7.3.2.1. Remove a Report

Only reports that you have uploaded can be removed. If a report that another user uploaded is selected, the 'Remove' button will be disabled.

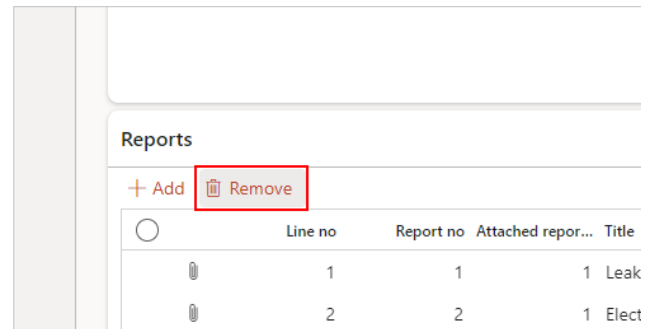


Click on the **Row Checkbox** of the report to remove.






		Line no	Report no	Attached repor...	Title
<input type="checkbox"/>					
<input type="checkbox"/>		1	1		1 Leak
<input type="checkbox"/>		2	2		1 Elect
<input checked="" type="checkbox"/>		3	3		1 Fire

Click on the **Remove** button.

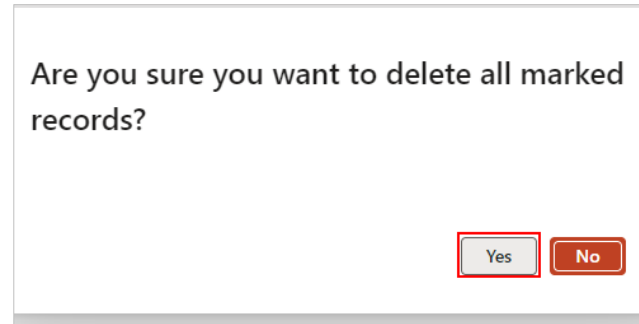


Reports

+ Add  Remove

		Line no	Report no	Attached repor...	Title
<input type="checkbox"/>					
<input type="checkbox"/>		1	1		1 Leak
<input type="checkbox"/>		2	2		1 Elect

Click the **Yes** button to confirm the deletion.



Are you sure you want to delete all marked records?

### 7.3.3. Conclusion

Now that you have an understanding of how to attach a report to an inspection and test record, proceed to the next work instruction.

## 8. Change Management

### 8.1. CRX Approval Workspace

#### 8.1.1. Introduction

##### 8.1.1.1. Objective

This work instruction covers the CRX approval (external) workspace for Consultants, Clients, and the Design Team.

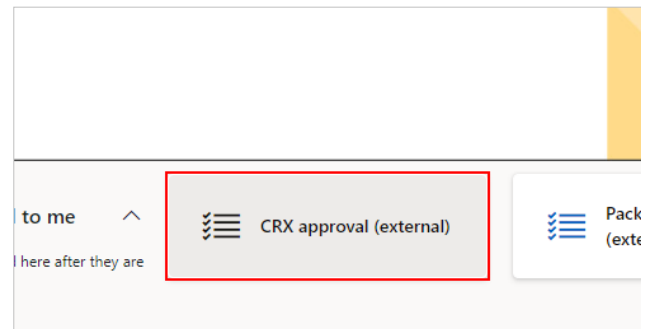
##### 8.1.1.2. Background Information

You can view and track the outstanding CRXs that require your review/approval from this workspace. For more information on how to respond to CRXs refer to [Respond to Quote Package as Approver](#) or [Respond to Quote Package as Reviewer](#) work instruction.

#### 8.1.2. Work Instructions

Click on the **CRX approval (external)** tile in the PM4+ dashboard.

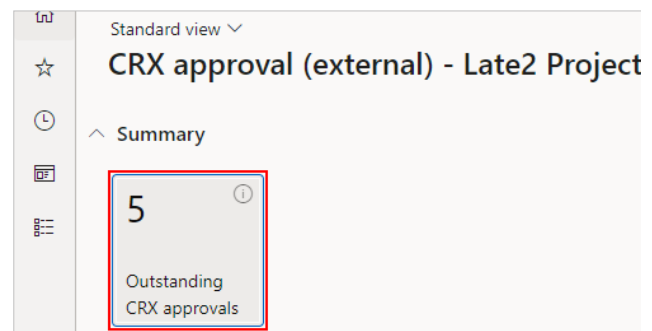
This workspace provides a single location where you can track any outstanding CRXs that require your review/approval.



##### 8.1.2.1. Tiles

The **Outstanding CRX approvals** count tile displays all CRXs assigned to you in 'Quoted' status and requires a response from you or your company.

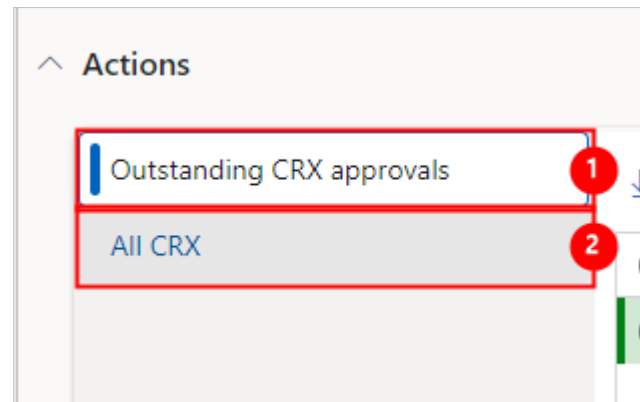
Click on the count tile to navigate you to the CRX log, filtered to only display the records from the selected count.



##### 8.1.2.2. Tabbed Lists

There are two tabbed lists in the workspace:

1. The **Outstanding CRX approvals** tabbed list displays the same number of records as the count tile, but more details are visible.
2. The **All CRX** tabbed list displays all CRX records for the project.



### 8.1.3. Conclusion

Now that you have an understanding of the CRX management (external) workspace, proceed to the next work instruction.

## 8.2. Package Management Workspace

### 8.2.1. Introduction

#### 8.2.1.1. Objective

This work instruction covers the Package Management (external) workspace for Consultants, Clients, and the Design Team.

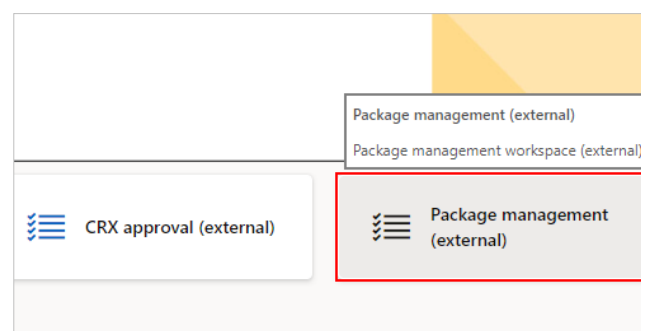
#### 8.2.1.2. Background Information

You can view existing document packages and upload new document packages which represent a new or contemplated change. Your project team should establish whether the Package and Document logs will be used to track document revisions.

### 8.2.2. Work Instructions

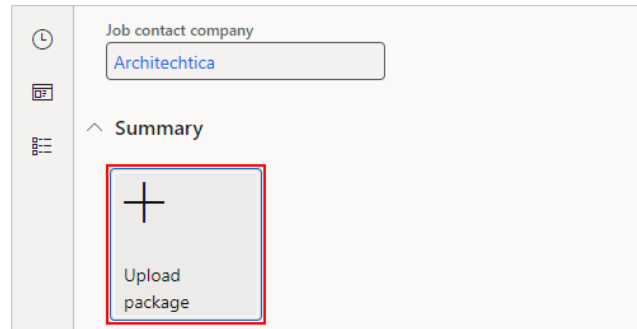
Click on the **Package management (external)** tile in the PM4+ dashboard.

This workspace provides a single location where you can view and upload document packages.

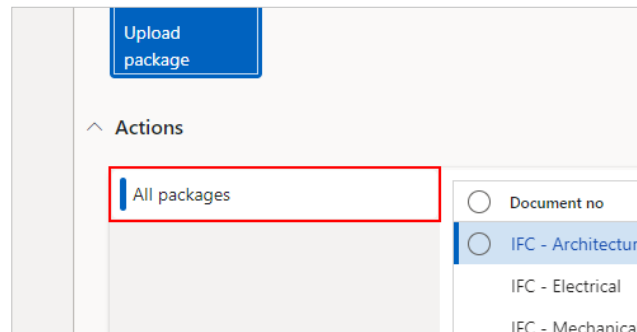


The **Upload package** action tile may be used if your project is using the Packages and Documents logs to manage drawing revisions. Anyone with 'Consultant' or 'Owner' level access may create a package record and attach the document package to it.

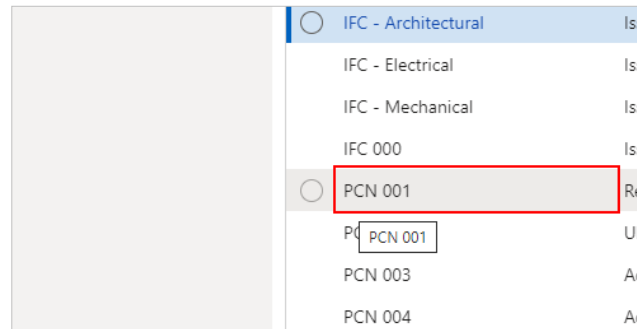
Note: The drawing package file (PDF) must be uploaded as part of this process.



The **All packages** tabbed list displays all the document packages for the project.



To view a document package, click on the **Document no.** hyperlink.



### 8.2.3. Conclusion

Now that you have an understanding of the Package management (external) workspace, proceed to the next work instruction.

## 8.3. View Document Log and Revision Inquiry

### 8.3.1. Introduction

#### 8.3.1.1. Objective

This work instruction covers how to view the Document log and the Revision inquiry. Both provide a different view of the same information.

#### 8.3.1.2. Background Information

The 'Document log' provides a list of revisions for drawings, specifications or other contractual documents. They can be viewed by anyone with access to the project in PM4+.

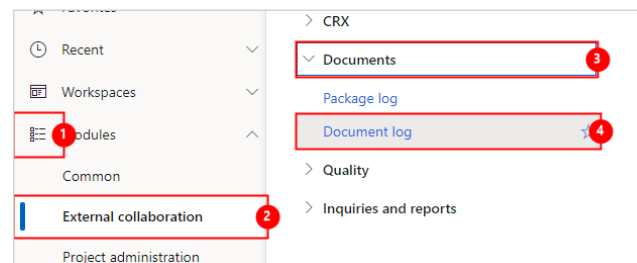
The 'Revision inquiry' allows you to create a sorted or filtered view of documents from the document log for export, or to produce ad hoc reports.

These features are available only if your project team is using the 'Package log' to manage drawing sets and specifications to track changes and revisions.

## 8.3.2. Work Instructions

### 8.3.2.1. View the Document Log

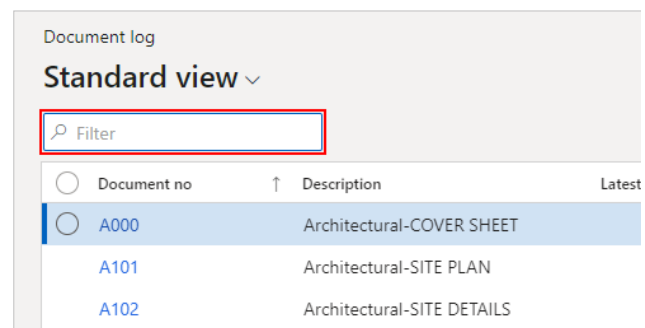
1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Documents** menu section.
4. Click on the **Document log** menu item.



The Document log lists the most recently received drawing revisions or specification versions, including those that are not yet approved for construction. Best practice is to refer to the documents in the electronic Plan Room (EPR) as the source for current construction activities.

Note that your project team may use a different system for tracking document packages received over the course of the project. Talk to the Project Manager to confirm if the package and document logs in PM4+ are being used.

You may use the **Filter** field to quickly locate a record or group of records.



In this example we typed 'E' \* (asterisk) to indicate we want to view all records starting with the letter 'E'.

Click on the **Document no** hyperlink to view the details.

Document no	Description	Latest
<a href="#">E100</a>	Electrical-DRAWING LIST, LEGEN...	
<a href="#">E101</a>	Electrical-ELECTRICAL SITE PLAN	
<a href="#">E200</a>	Electrical-BASEMENT LIGHTING ...	
<a href="#">E201</a>	Electrical-FIRST FLOOR LIGHTIN...	
<a href="#">E202</a>	Electrical-SECOND FLOOR LIGH...	
<a href="#">E300</a>	Electrical-BASEMENT POWER PL...	
<a href="#">E301</a>	Electrical-FIRST FLOOR POWER ...	

Click on the **Header** tab if not already visible

Document log | Standard view ∨

### E200 : Electrical-BASEMENT LIGHTING PLAN

[Header](#) | [Revisions](#) | [Associations \(0\)](#)

---

**General**

CLASSIFICATION	LATEST REVISION
Document no	Latest revision

The **Header** tab contains the same basic information found in the log.

**General**

CLASSIFICATION	LATEST REVISION
Document no	Latest revision
E200	7
Description	Latest revision document date
Electrical-BASEMENT LIGHTING PLAN	3/3/2020
Document URL	

Click on the **Revisions** tab

Document log | Standard view ∨

### E200 : Electrical-BASEMENT LIGHTING PLAN

[Header](#) | [Revisions](#) | [Associations \(0\)](#)

---

**General**


CLASSIFICATION	LATEST REVISION
Document no	Latest revision

The **Revisions** tab displays every instance of a sheet, its revision number, the package it was received in, its current status, and whether it is posted to the EPR.

E200	4	Yes
E200	5	Yes
E200	6	Yes
<input type="radio"/> E200	7 ✓	Yes
E200	8	No
E200	0	Yes

The **Latest revision** flag indicates which drawing revision is the most recent revision for construction. The Electronic Plan Room (EPR) should be considered the source of what documents are in use in the field.

A package must have a status of **Issued to field** to indicate the information it contains is ready to proceed with work.

Revise Multi-Purpose Rm and Cl...	Issued to field
Revision to Stair 3 lighting and ...	Issued to field
Lighting: Exhibit Hall B	Issued to field
Revision to Stair 2 lighting	Issued to field
Site Communications Conduits	Issued to field 
Kitchen Supply Air Modification	In PCL review
Complete IFC Set	Issued to field

Additional revisions may be visible with other statuses, indicating a new revision is under review or is ready to be issued to the field.

Return to log view by clicking the **Document log** link above the title bar.

[Document log](#) | Standard view ▼

### E200 : ELECTRICAL-BASEMENT LIGHTING PLAN

Header **Revisions** Associations (0)

**General**

Mark as latest

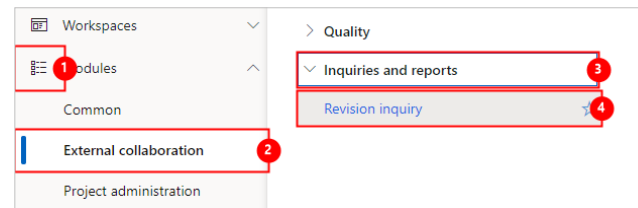
<input type="radio"/>	Document no	Revision no	Latest revision	Posted
-----------------------	-------------	-------------	-----------------	--------

The **Latest revision** column displays the revision that was marked as latest in the 'Revisions' tab

↑ Description	Latest revision	Latest revision document
Electrical-DRAWING LIST, LEGEN...	0	1/14/2020
Electrical-ELECTRICAL SITE PLAN	0	1/14/2020
Electrical-BASEMENT LIGHTING ...	7	3/3/2020
Electrical-FIRST FLOOR LIGHTIN...	7	3/3/2020
Electrical-SECOND FLOOR LIGH...	1	3/3/2020
Electrical-BASEMENT POWER PL...	7	3/3/2020

### 8.3.2.2. View the Revision Inquiry

1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Inquiries and reports** menu section .
4. Click on the **Revision inquiry** menu item.

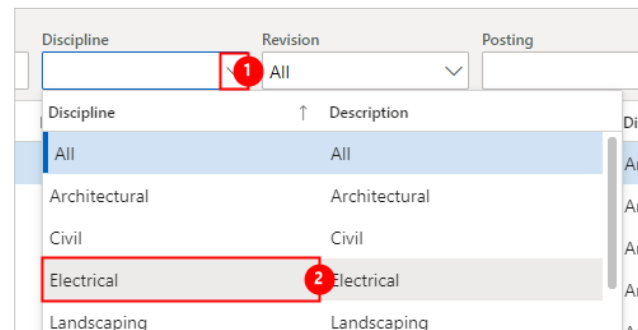


Whereas the 'Document log' displays a list of unique drawing numbers, and all revisions of it within the details, the 'Revision inquiry' displays a flat list of every instance (revision) of a drawing.

Use this inquiry to produce a list based on discipline, package status, or posting status; or select specific packages to display just the sheets they contain. You may also combine the filters as required.

In this example, we search for electrical drawing sheet revisions flagged as 'latest'.

1. Start typing the name of the **Discipline** if you know it, or click on the drop down.
2. Select the **Discipline** you want to filter on.

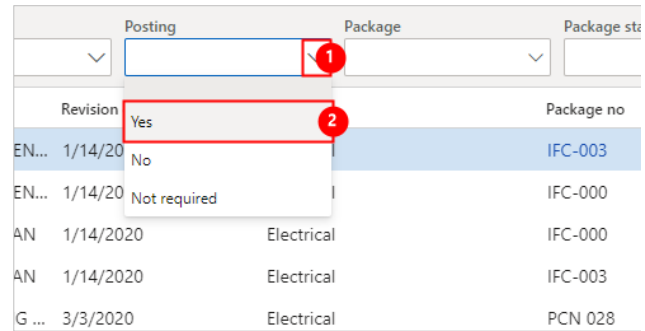


1. Click on the **Revision** field.
2. Click on **Latest** to filter the list to show only revisions flagged as 'latest' in the document log.

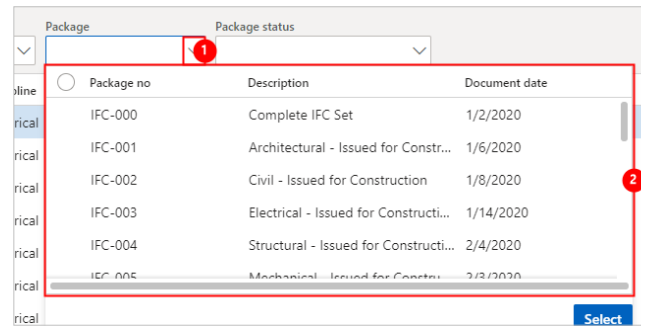
Revision	Posting	Package
All		
All		
Latest		
	document date	Discipline
Electrical-DRAW	1/14/2020	Electrical
Electrical-DRAWING LIST, LEGEN...	1/14/2020	Electrical
Electrical-ELECTRICAL SITE PLAN	1/14/2020	Electrical
Electrical-ELECTRICAL SITE PLAN	1/14/2020	Electrical
Electrical-BASEMENT LIGHTING ...	1/14/2020	Electrical



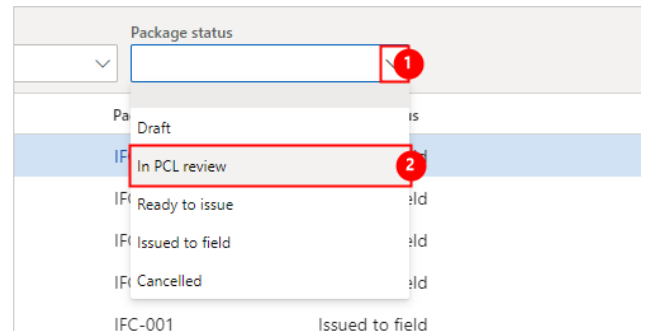
1. Click on the **Posting** field.
2. Click on **Yes** to view only revisions where the drawing has been posted to the EPR.



1. Click on the **Package** dropdown to view a list of document packages in the package log. All sheets found in the 'Document log' and 'Revision inquiry' are sourced from packages.
2. If you want to view information in specific packages only, choose the packages here.



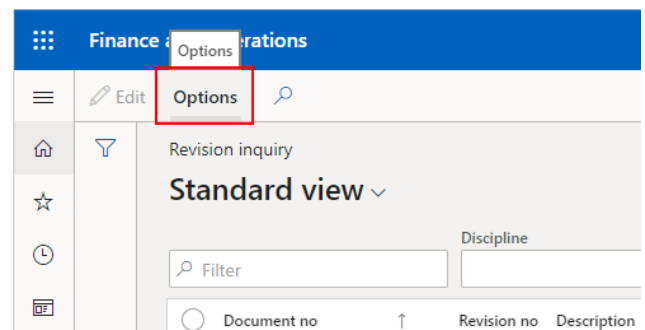
1. Click on the **Package status** field.
2. Filter by **Package status** when you are interested in reviewing documents in a particular stage of review, or if you want to view all documents that have been 'Issued to the field', for example.



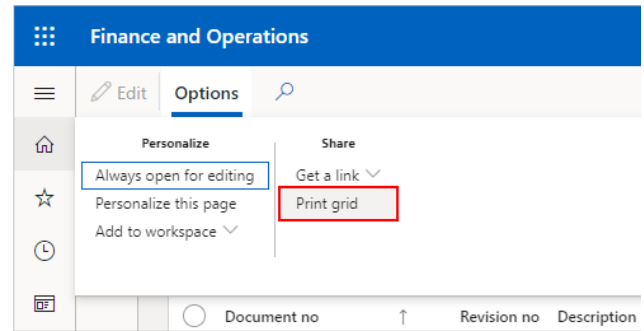
### 8.3.2.2.1. Print a Report

After you have filtered the 'Document inquiry' screen to display the information you require, use the 'Print grid' feature to produce a formatted report of the information on the screen.

To print the filtered revision inquiry, click on the **Options** tab in the action pane

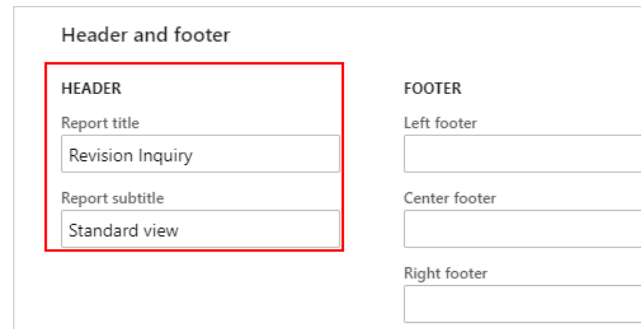


Click on the **Print grid** button

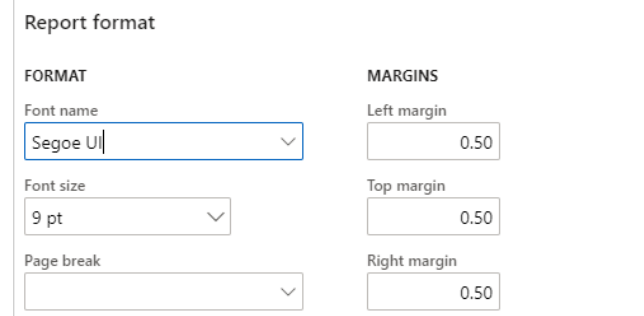


The 'Print grid' dialog opens.

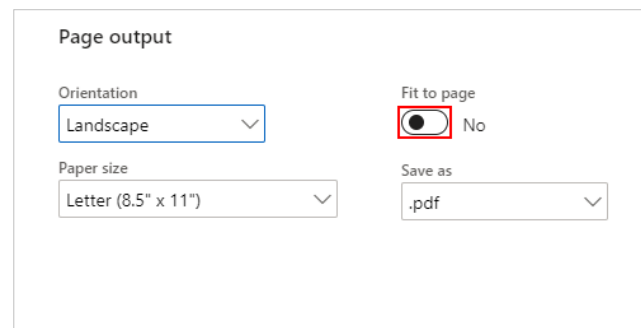
Enter a new **Report title** or **Report subtitle** if necessary.



In the **Report format** tab, you can control some elements of the layout



If the **Fit to page** toggle is set to 'Yes', the report is formatted to fit on a single page. This only applies to 'Word' or 'PDF' output formats.



1. Click on the **Save as** field.
2. Click on **.pdf**. You will select the format most suitable for your circumstance.

**Page output**

Orientation: Landscape

Paper size: Letter (8.5" x 11")

Fit to page:  Yes

Save as:

- 1
- 
- 2
-

Click on the **OK** button.

OK

The **Revision inquiry report** is generated.

Depending on the browser you are using, the attachment will be downloaded to your Downloads folder (Chrome); or you will be prompted to open or save the file (Edge).

**Revision Inquiry**  
 PCL Construction Management Inc.  
 Edmonton Buildings

In PCL Review Status Sheets

Description	Revision Document Date
ST FLOOR PLAN	3/3/2020

### 8.3.3. Conclusion

Now that you have an understanding of how to view the revision inquiry, proceed to the next work instruction.

## 8.4. Create and Update Package Records

### 8.4.1. Introduction

#### 8.4.1.1. Objective

This work instruction covers how to create and update package records.

#### 8.4.1.2. Background Information

The 'Package log' is used to maintain and track the information about the construction drawings and specifications. Changes to these documents are provided by the Design Team, Consultants, Engineers, and/or Clients. They are uploaded into PM4+ to create a 'package record'.

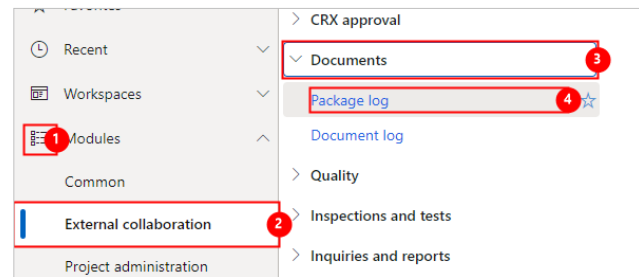
## 8.4.2. Work Instructions

### 8.4.2.1. Navigation

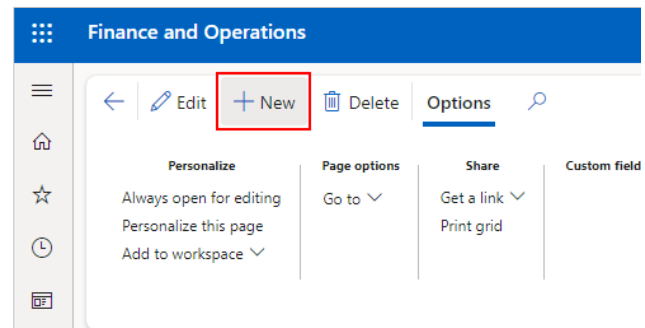
There are two navigation options. You can add the package directly in the package log and from your Package Management workspace. Both navigation options are shown below.

#### 8.4.2.1.1. Navigate to the Package Log

1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Documents** menu section.
4. Click on the **Package log** menu item.

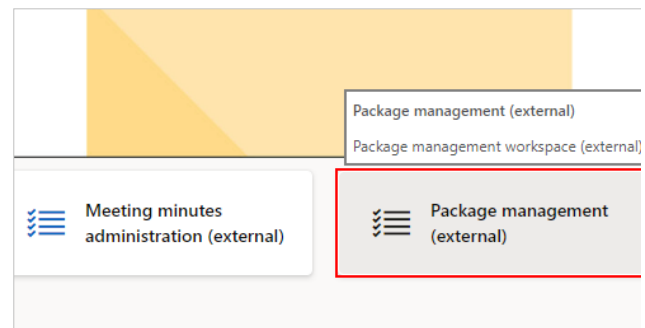


Click on the **New** button in the action pane in order to create a new package record.

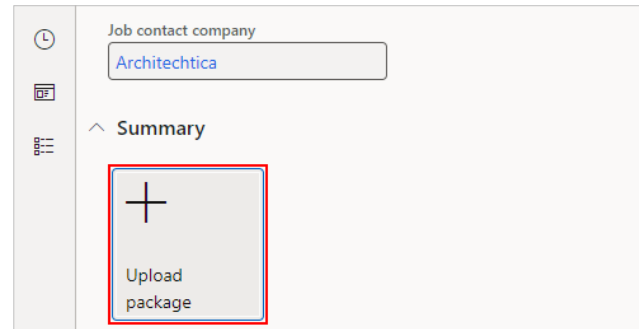


#### 8.4.2.1.2. Navigate from the Package Management Workspace

Alternatively, click on **Package management (external)** workspace.



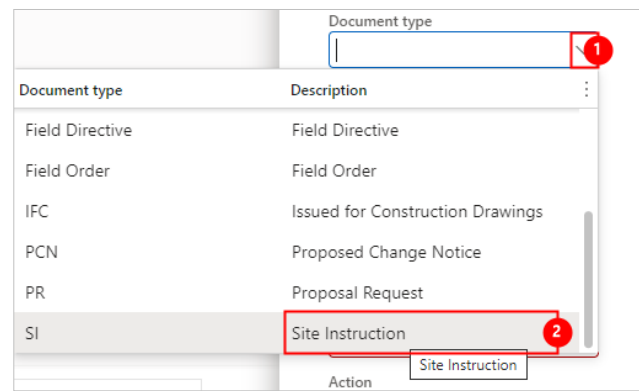
Click on the **Upload package** action tile.



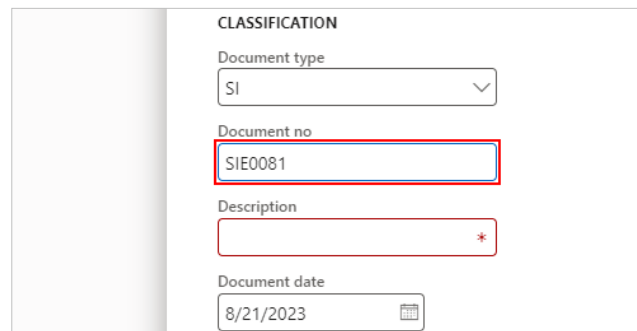
#### 8.4.2.2. Create the Package Record

The 'Create package' dialog opens.

1. Click on the **Document type** drop-down or start typing if you know the name.
2. Select the document type you are uploading.

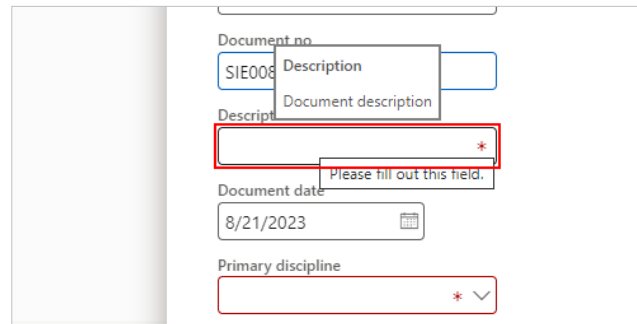


Enter the **Document no** found on the document, including prefix.

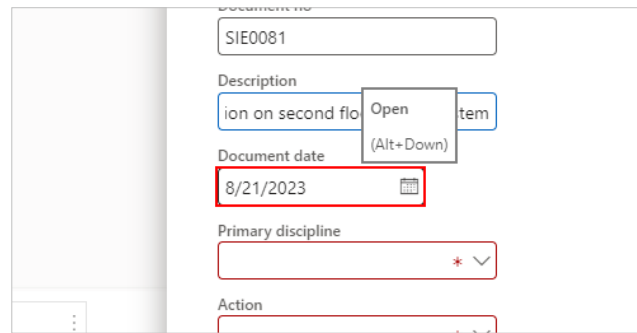

 A screenshot of the 'Create package' dialog box. The 'CLASSIFICATION' section is visible. It contains the following fields:
 

- 'Document type' drop-down menu with 'SI' selected.
- 'Document no' text input field containing 'SIE0081', highlighted with a red box.
- 'Description' text input field with a red asterisk and a red box around it.
- 'Document date' date input field with '8/21/2023' and a calendar icon.

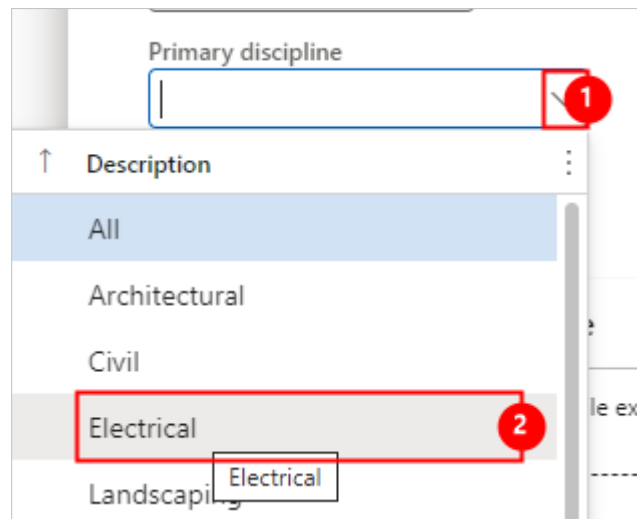
In the **Description** field, enter the title from the title block on the drawing set or specification.


 A screenshot of the 'Create package' dialog box. The 'Description' field is now filled with the text 'Description' and 'Document description'. A red box highlights the 'Description' field. A tooltip is visible over the field with the text 'Please fill out this field.' Below the 'Description' field is the 'Document date' field with '8/21/2023' and a calendar icon. At the bottom is the 'Primary discipline' drop-down menu with a red asterisk and a red box around it.

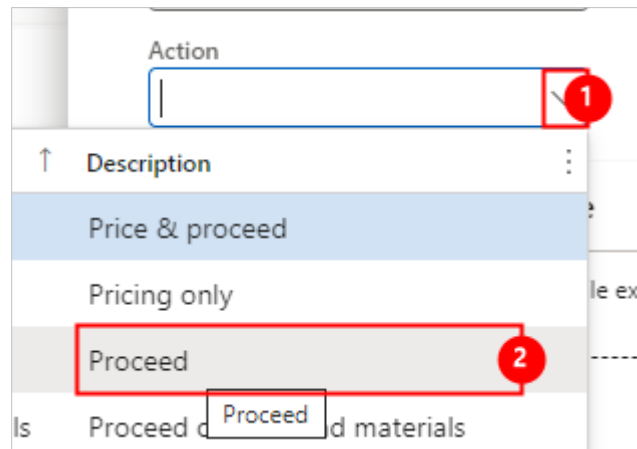
The **Document date** field defaults to the current date, this can be changed if necessary. This date is on the change document.



1. Click on the **Discipline** drop-down.
2. Select the appropriate **Discipline** for the package record. Additional affected disciplines can be added in the **Disciplines** tab.

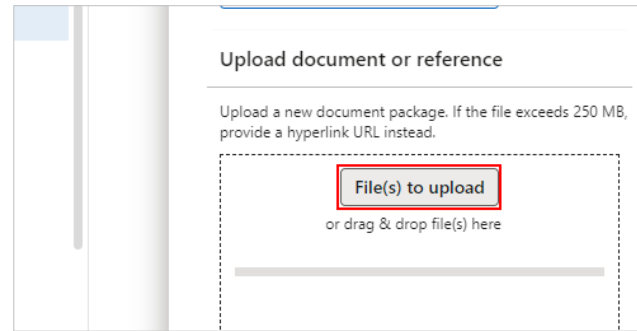


1. Click on the **Action** drop-down.
2. Select the **Action** that should be taken, based on the content of the document.

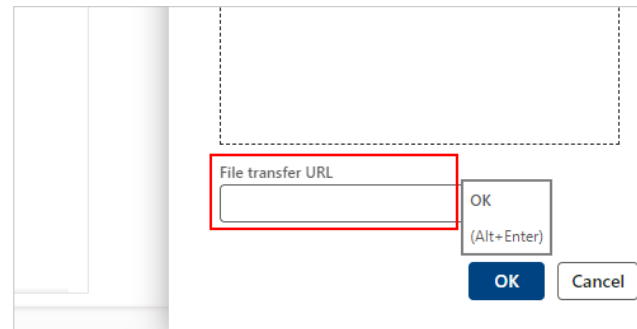


Click on the **File(s) to upload** button to locate the document file.

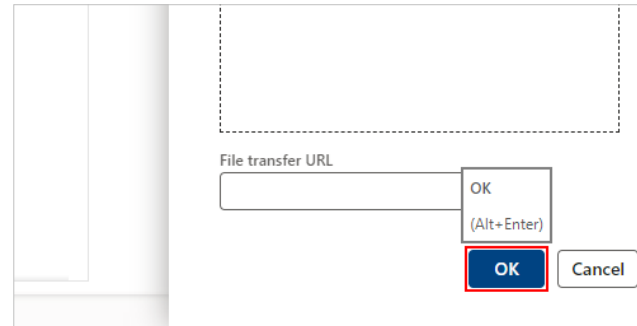
Or use the drag and drop feature. This is a required step.



If the file to upload exceeds 250 MB, enter the URL that links to the document in the **File transfer URL** field.



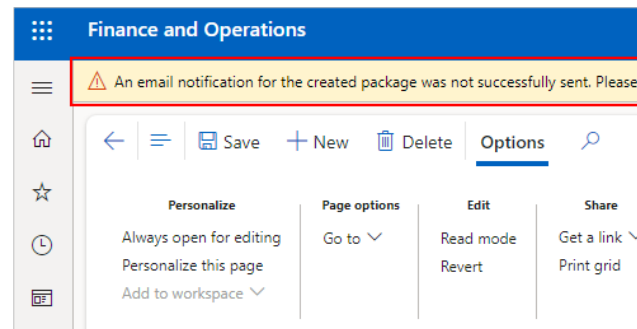
Click on the **OK** button when the file upload is complete or after entering the File Transfer URL.



The new package record is created in the 'Package log'. All packages are created in 'Draft' status.

When the 'Draft' record is created, an email is sent to a PCL party, notifying them that a new package was added to the log.

If the internal notification has not yet been set up, you will see a message as displayed. In this case, contact a PCL project manager to notify them of the new package.



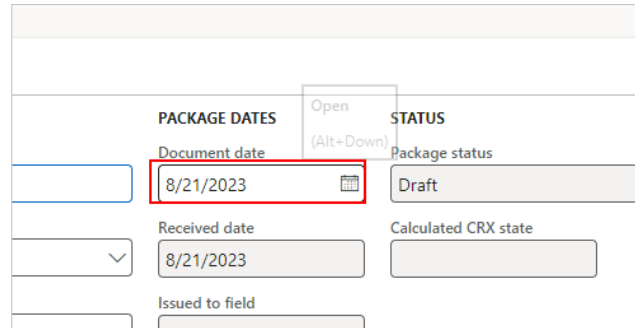
A blue bar with the message: 'Email successfully sent' displays when the notification feature is in use.

### 8.4.2.3. Complete Package Details

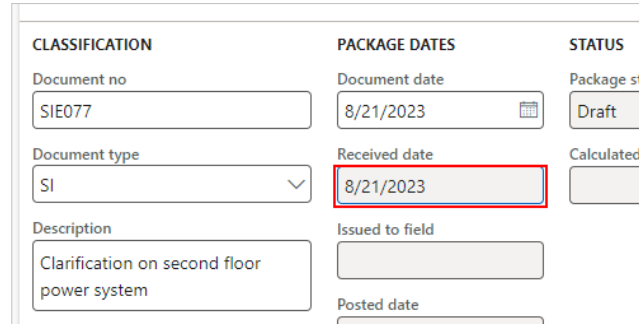
Package records can only be updated when in 'Draft' or 'Returned' status.

The first several fields in the 'Classification' group are already filled in based on what you entered in the 'Create new' dialog.

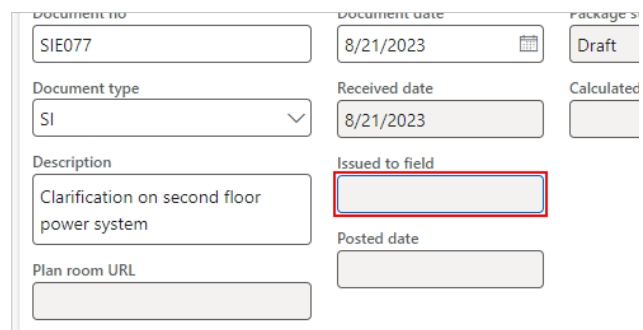
The **Document date** field contains the date entered when creating the package record.



The **Received date** field is populated with the data when the package was created. This is the date the document is received by PCL. Contact someone on the project team if you need this date changed.

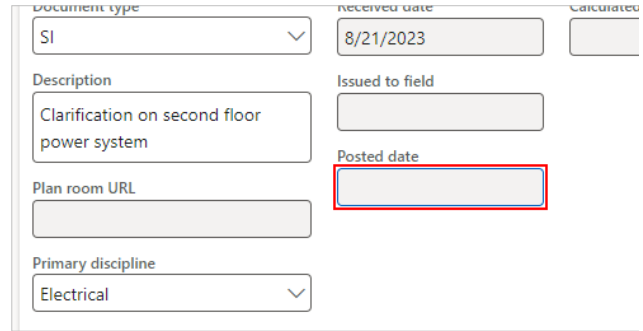


The **Issued to field** date is automatically populated when the status of the package is moved to 'Issued to field' status by the Document Controller, Coordinator or Project Manager.





The **Posted date** field is automatically populated when the 'Posted' flag is set to 'Yes' to indicate that the revised sheet has been slip sheeted into the package in the EPR.



Document type: SI

Received date: 8/21/2023

Calculated: [ ]

Description: Clarification on second floor power system

Issued to field: [ ]

Posted date: [ ]

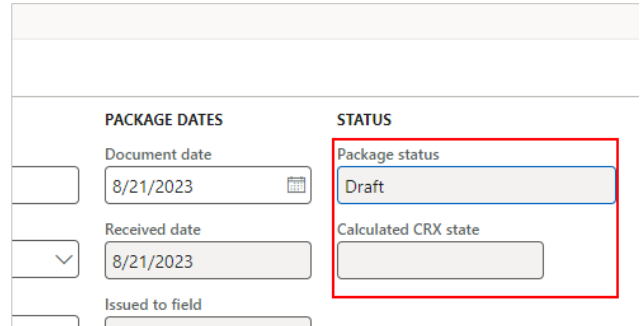
Plan room URL: [ ]

Primary discipline: Electrical

In the 'Status' field group:

The fields in the **Status** group automatically update as the package and its associated CRXs are processed.

Since practices for managing documents and CRXs may vary on different projects, talk to the PCL Project Manager if you require clarification.



PACKAGE DATES

Document date: 8/21/2023

Received date: 8/21/2023

Issued to field: [ ]

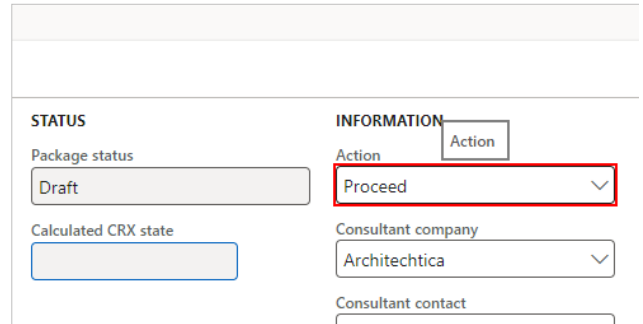
STATUS

Package status: Draft

Calculated CRX state: [ ]

In the 'Information' field group:

The **Action** field is populated when the package was created. Update as needed. The **Action** field should indicate what action should be taken as a result of the document.



STATUS

Package status: Draft

Calculated CRX state: [ ]

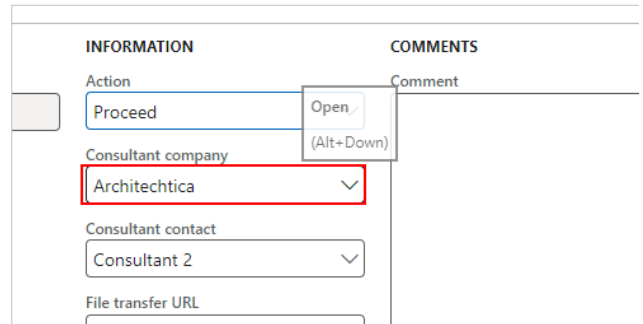
INFORMATION

Action: Proceed

Consultant company: Architectica

Consultant contact: [ ]

The **Consultant company** field should contain the company that is responsible for issuing - and will be a point of contact about - the package that was uploaded.



INFORMATION

Action: Proceed

Consultant company: Architectica

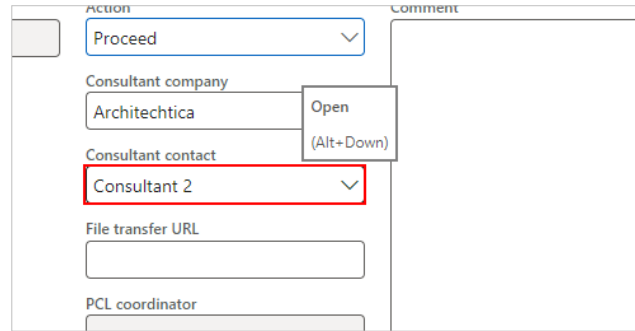
Consultant contact: Consultant 2

File transfer URL: [ ]

COMMENTS

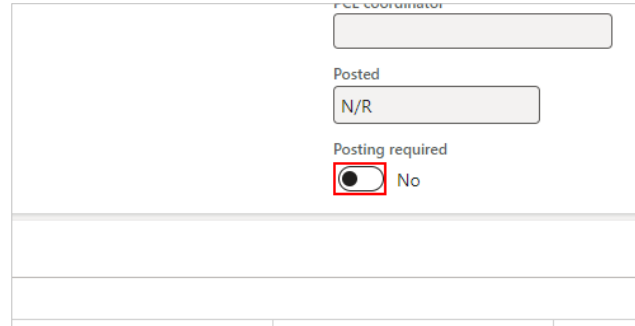
Comment: [ ]

The **Consultant contact** field automatically populates if there is only one contact for the 'Consultant company'. If more than one contact exists, select the contact from the drop-down.



The screenshot shows a form with several fields. The 'Action' dropdown is set to 'Proceed'. The 'Consultant company' field contains 'Architectica'. The 'Consultant contact' dropdown menu is open, showing 'Consultant 2' selected and highlighted with a red box. Other fields include 'File transfer URL' and 'PCL coordinator'.

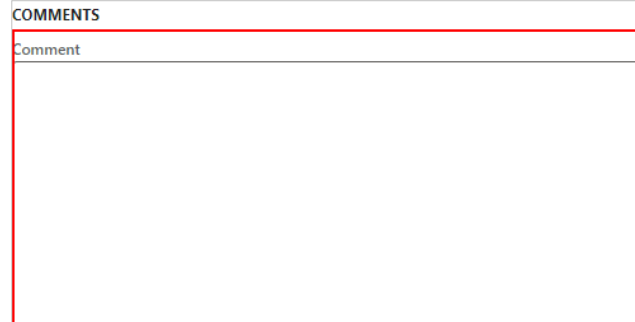
The **Posting required** toggle is set to 'No' by default. This toggle indicates if the document package will need to be available in the Electronic Plan Room (EPR). The Document Controller or Coordinator may manage this toggle.



The screenshot shows a form with a 'Posting required' toggle switch. The toggle is currently set to 'No', indicated by a red box around the switch. Other fields include 'PCL coordinator' and 'Posted' (set to 'N/R').

Talk to your Project Teams about if and how the '**Comments**' field should be used.

Enter any comments into the **Comments** field.



The screenshot shows a form with a 'COMMENTS' section. The section is titled 'COMMENTS' and has a red border. Below the title is a 'Comment' field, which is currently empty.

#### 8.4.2.4. Manage Sheets in a Package

The 'Sheets' tab is intended to show a list of what drawings were included in the package. If the IFC set was already uploaded, most packages will likely contain revisions to already existing sheets. This section shows the three ways to add lines to the 'Sheets' tab, based on how many lines you need to add and whether they are new drawing sheets or revisions to existing sheets.

Once the sheets are 'published' by PCL, they will be visible to all PM4+ users in the 'Document log', showing the document number, revision number, date it was received, and the status of the package.

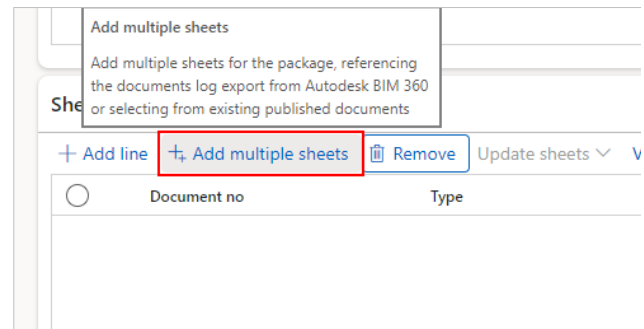
Jump to the section called 'Add new Sheets Manually, One Line at a Time' if you do not need to import many lines and want to manually add them instead.

Jump to the section called 'Revise Existing Sheets' if the IFC sets are in the package log - and you now have revisions to them.

#### 8.4.2.4.1. Import Multiple New Sheets

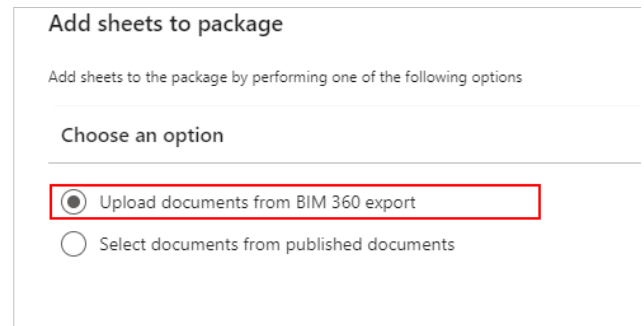
Use this process to import many lines quickly. If you are importing revisions to existing sheets already being tracked in the package log, do not use this process. Instead, jump to the section called 'Revise existing sheets'.

In the 'Sheets' fast tab, click on the **Add multiple sheets** button.



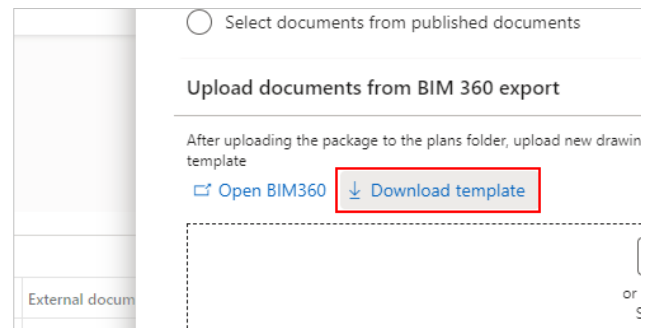
The 'Add sheets to package' dialog opens.

Click on the **Upload documents from BIM360 export** option.



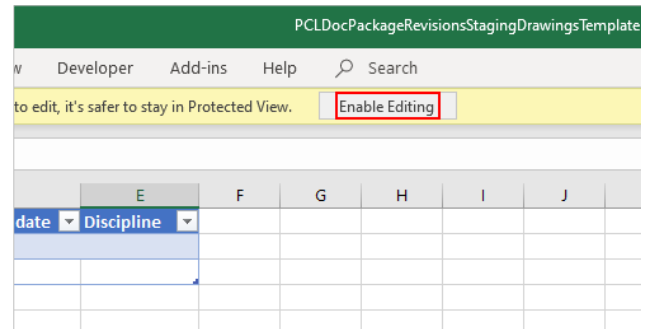
Click on the **Download template** or directly navigate to BIM360 via **Open BIM360**

In this example, we are choosing Download template.



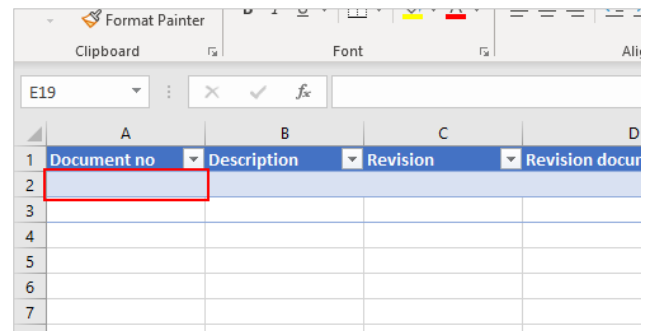
Depending on the browser you are using, the template will be downloaded to your Downloads folder (Chrome); or you will be prompted to open or save the file (Edge).

Click on the **Enable Editing** button



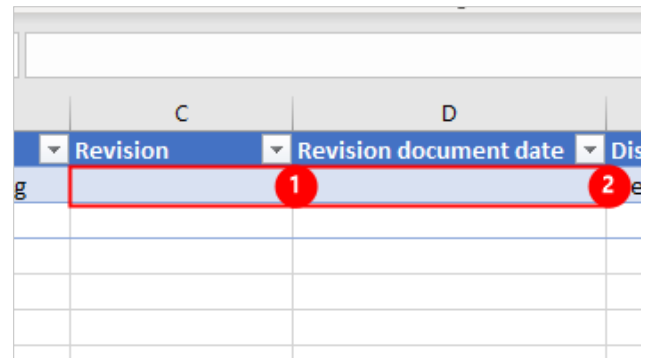
The Document number must be unique for each sheet included in the package.

Enter the 'Document no' and the 'Description' for each sheet contained in the package, as it appears on the title block of the drawing. This is the minimum information required to upload the template to the 'Sheets' tab. Each row in the template represents one sheet.



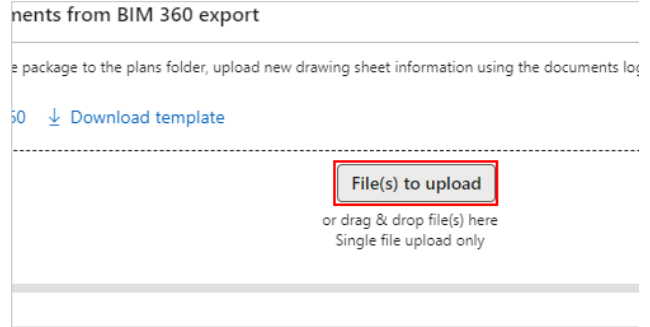
The following fields are automatically populated by PM4+.

1. **Revision.**
2. **Revision document date.**

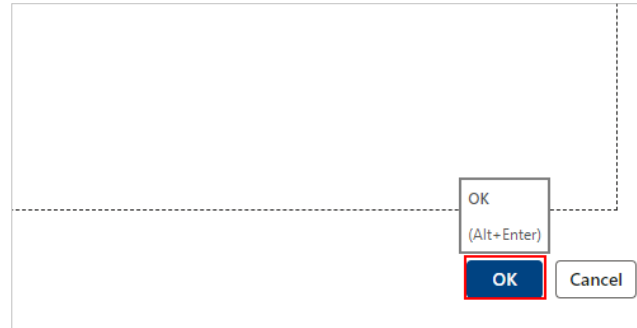


When the template contains a list of all sheets that are in the package, save the file to a location where you can upload it to PM4+.

Click on the **File(s) to Upload** button to locate the template file you just saved.

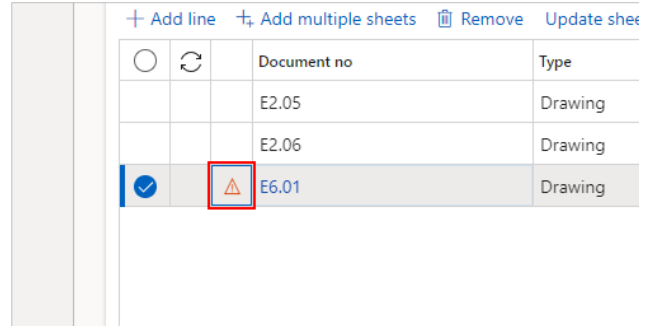


Click on the **OK** button.



If a red triangle appears to indicate the lines could not be imported, the error message will appear to state why the import is failed.

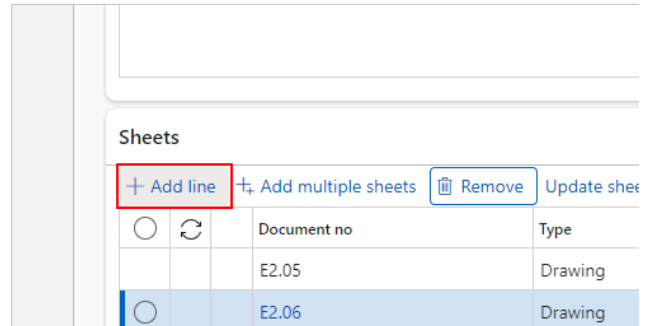
If the import was successful, the 'Sheets' tab is populated with the newly imported lines.



#### 8.4.2.4.2. Add New Sheets Manually, One Line at a Time

Use this process to add sheets to a package one at a time.

In the 'Sheets' fast tab, click on the **Add line** button.



1. Enter the **Document no.**
2. Enter the **Description.**

Document no	Type	Revision	Description
E2.05	Drawing	2	SECOND FLOOR LIGHTING PLAN
E2.09	Drawing	0	
E2.06	Drawing	1	SECOND FLOOR POWER & SYST...

You can also click on the **Update sheets** drop down to fill in the line details

Document no	Type	Revis
E2.05	Drawing	
+ E2.09	Drawing	

1. Click on the **Type** drop and down and select the appropriate option.
2. Enter the **Revision no.**
3. Enter the **Revision document date.**
4. Click on the **Discipline** drop-down.
5. Click on the **OK** button.

Type: Other

Revision no: 0

Revision document date: 8/21/2023

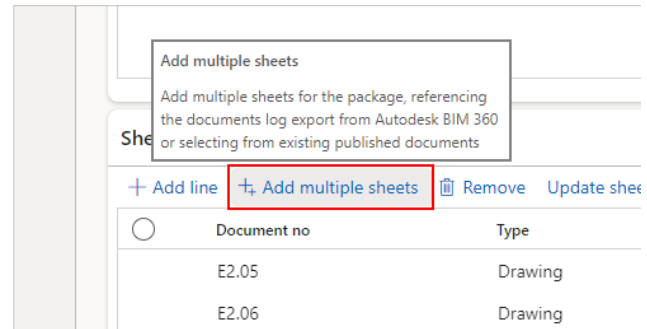
OK (Alt+Enter)

OK

#### 8.4.2.4.3. Revise Existing Sheets

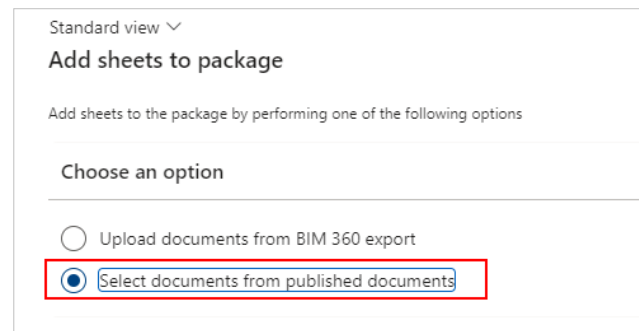
If other instances of sheets are already in the package log, use this method to indicate new revisions are being contemplated or issued.

In the 'Sheets' fast tab, click on the **Add multiple sheets** button.

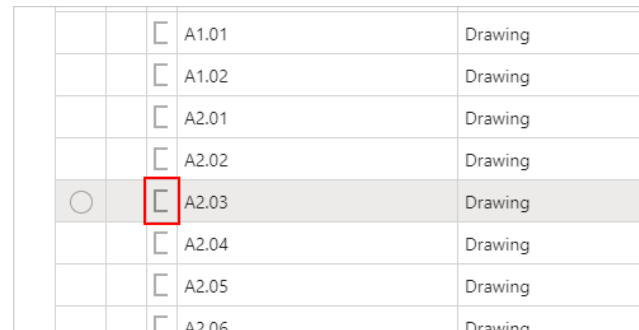


The 'Add sheets to package dialog opens.

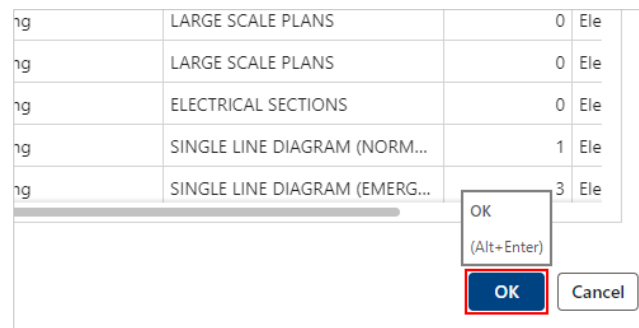
Click on the **Documents from published documents** option.



Click on the checkbox to the left of any **Document sheet(s)** that you want to add.



Click on the **OK** button.



The new revisions are added to the table under the Sheets tab. The Revision column will increment by '1'. You can manually adjust the Revision number as well using Update Sheets button to accurately reflect the contents of the package.

Sheets		
Document no	Type	
A2.03	Drawing	
E2.05	Drawing	
E2.06	Drawing	
E2.07	Drawing	
+ E2.09	Other	

#### 8.4.2.4.4. Validate Sheet Information

To confirm that you have not accidentally entered any duplicate data in the same, or across multiple packages, run the validation to check.

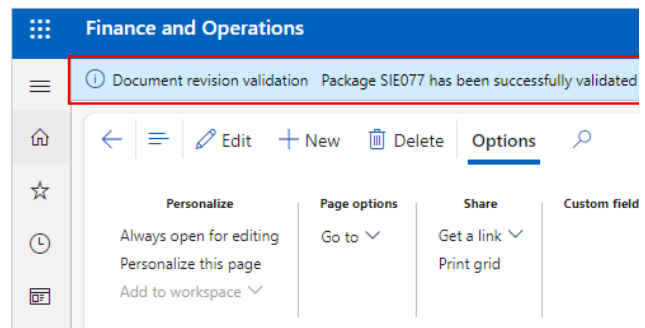
Click on the **Validate** button

Type	Revision	Description
Drawing	2	SECOND FLOOR PLAI
Drawing	2	SECOND FLOOR LIGH

Once the package is validated, you will see a success message.

All the sheets are now added and are ready to be published.

Note: After publishing, you can still adjust the Revision number and the Document date of a sheet by navigating to the Document log, selecting the sheet and opening the 'Revisions' tab.



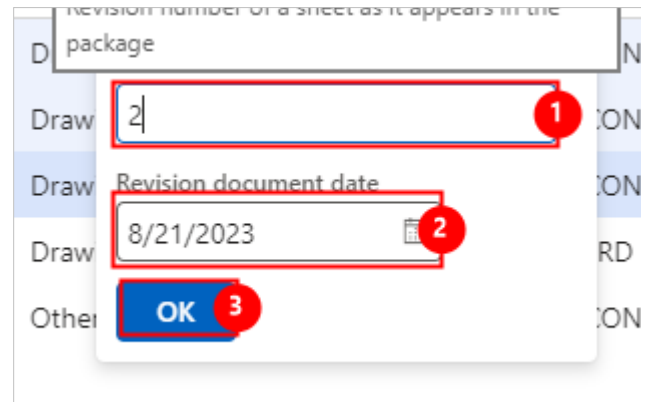
#### 8.4.2.4.5. Bulk Update Sheet Information

Rows in the 'Sheets' tab can be updated using **Update Sheets** Button as long as they are in 'Draft' status or 'Returned' status.

If the sheet has already been published, the Discipline can no longer be updated on its revisions. If a new sheet is entered, then you will get the option to update the Type and Discipline as well.



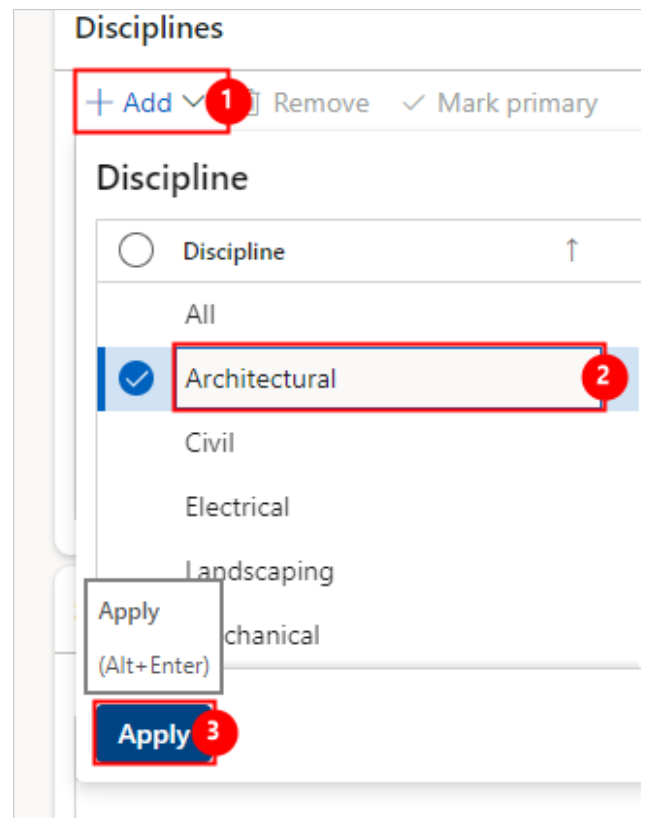
1. Update the **Revision no, if required..**
2. Update the **Revision Document date**, if required.
3. Click on the **Ok** button.



#### 8.4.2.5. Update Disciplines for a Package

A change package may affect more than the primary discipline specified on the 'Package' tab. When the package is processed, it can be useful to flag these disciplines for their attention.

1. To add a discipline, click on the **Add** drop-down.
2. Select one or more Disciplines.
3. Click on the **Apply** button.



A **Checkmark** displays when a discipline is marked as 'Primary'. This is what displays in the 'Discipline' column in the Document log.

Disciplines				
+ Add ▾   Remove   ✓ Mark primary				
<input type="radio"/>	<input type="checkbox"/>	Primary	Discipline	D
<input type="radio"/>	<input type="checkbox"/>		Architectural	A
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>		Electrical	E

### 8.4.3. Conclusion

Now that you have an understanding of how to create and update package records, proceed to the next work instruction.

## 8.5. Respond to a Quote Package as Approver

### 8.5.1. Introduction

#### 8.5.1.1. Objective

This work instruction covers how to respond to a quote package as an 'Approver'.

#### 8.5.1.2. Background Information

When PCL completes their review and determines the CRX is acceptable, PCL generates a quote package for the approval of the project Owner or their Consultant representative. Such requests may be made manually through email, or by PM4+. Talk to the PCL Project Manager to ensure you understand the process in place for your project.

A project can have a review routing in place where review participants can be added as an 'Approver' or 'Reviewer'. For more information on how to review a Quote package as a 'Reviewer' refer to [Respond to a Quote as Reviewer](#) work instruction.

### 8.5.2. Work Instructions

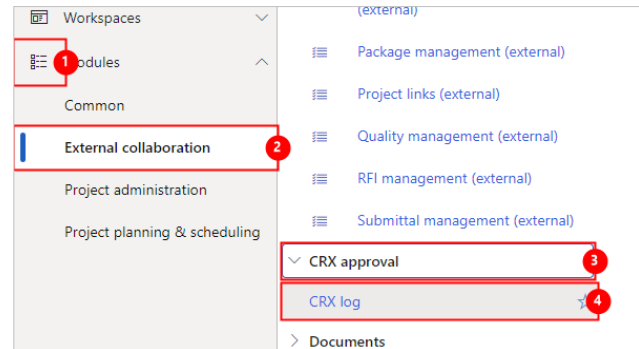
There are two ways to navigate to CRXs requiring approval:

1. Through the CRX log.
2. Through the 'CRX approval (external)' workspace.

The 'CRX approval (external)' workspace is recommended since it contains a count of all CRXs in your court to review and approve.

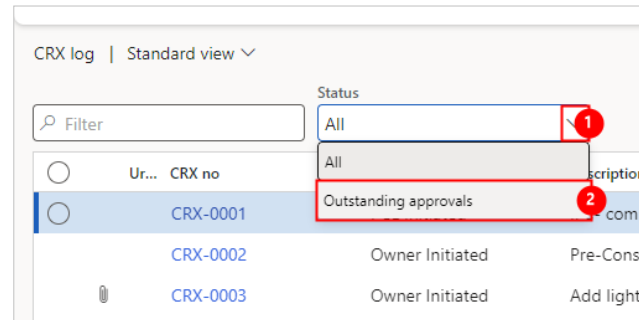
### 8.5.2.1. Review Using the CRX Log

1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **CRX** menu section.
4. Click on the **CRX log** menu item.

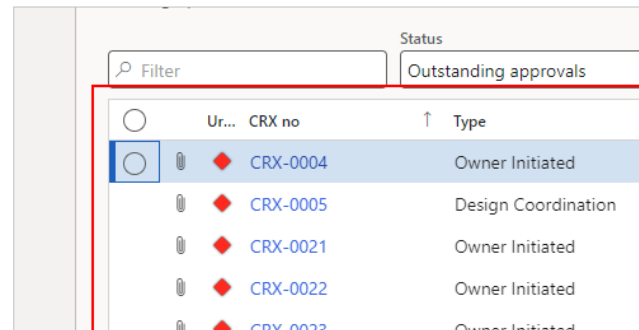


In the CRX log, filter the CRX's that require your attention.

1. Click on the **Status** drop-down.
2. Click on the **Outstanding approvals**.

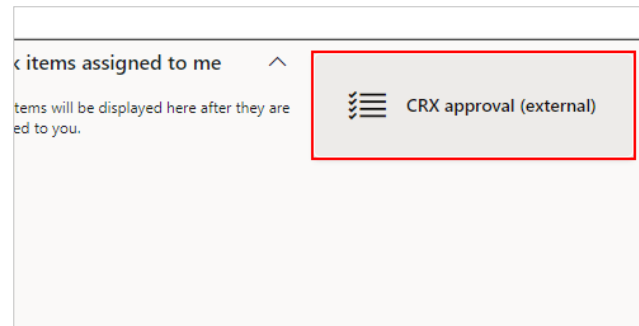


The filtered list displays all CRXs assigned to you in 'Quoted' status and requires a response from you or your company.



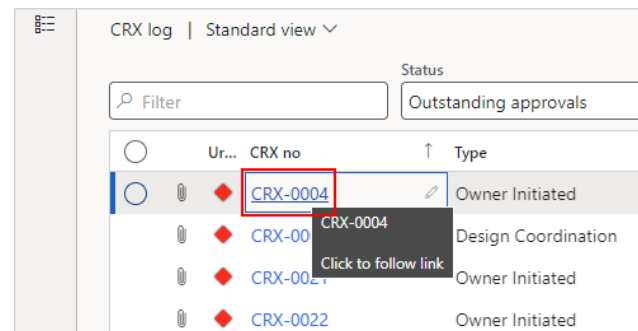
### 8.5.2.2. Review Using the CRX Workspace

Click on **CRX approval (external)** workspace.



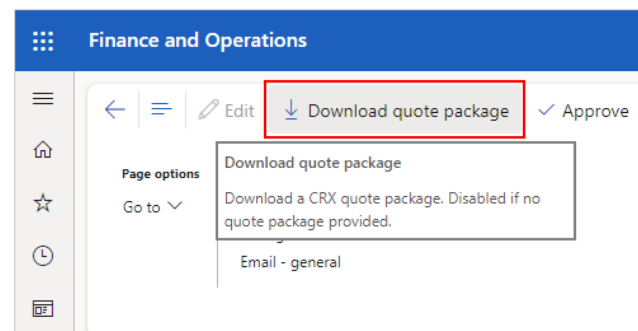
### 8.5.2.3. Download a Quote Package

Click on the **CRX no** hyperlink.



If the quote package is attached to the CRX, you can review it via clicking on the Download Quote package button. If its not attached to the CRX, then this option will be greyed out.

Click on the **Download quote package** button.



Note: You can also click on the 'Review' tab to view if there are any attachments uploaded, in case the quote package has been reviewed prior.

### 8.5.2.4. Action as an Approver

If you have been added as an 'Approver', after reviewing the quote package, there are three available responses:

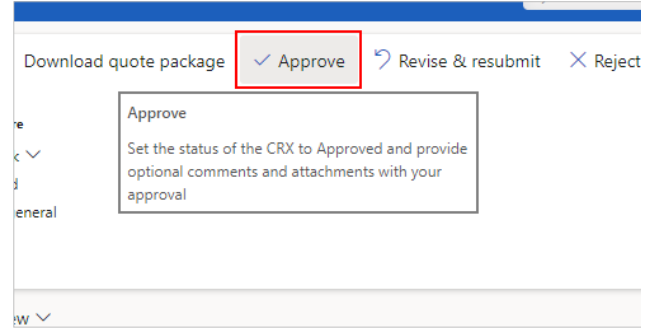
1. Approve the Quote Package.
2. Request the Quote Package to be Revised and Resubmitted.
3. Reject the Quote Package.

Note: If you have been added as a 'Reviewer', you will not see the 'Approve', 'Revise & Resubmit' or 'Reject' button. For more information on how to review a Quote package as a 'Reviewer' refer to [Respond to a Quote as Reviewer](#) work instruction.

#### 8.5.2.4.1. Approve a Quote Package

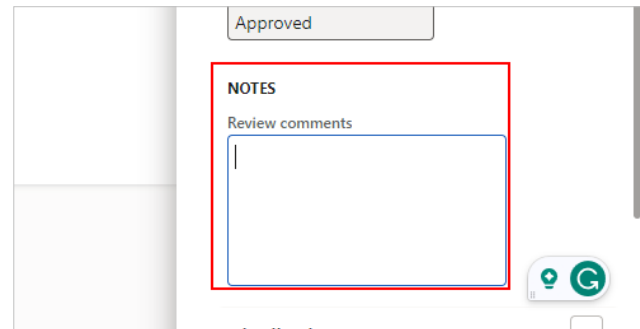
If the quote package is acceptable, and you are ready to approve it, follow the steps mentioned below.

Click on the **Approve** button.



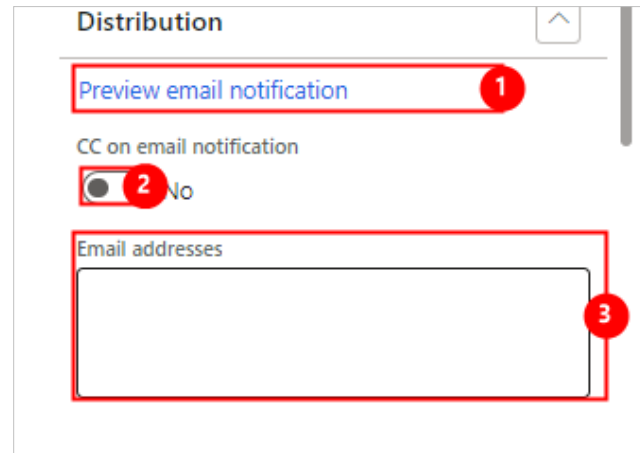
The 'Approve CRX' dialog opens.

You may add comments in the **Review comments** field.

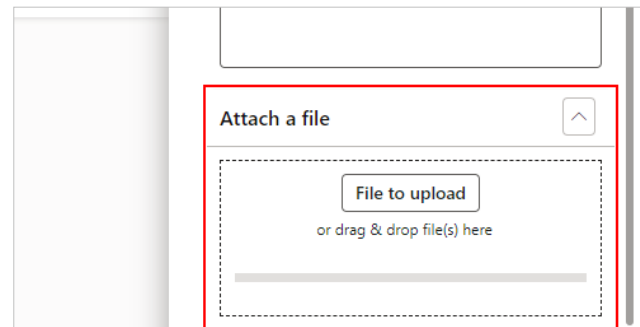


In the 'Distribution' fast tab:

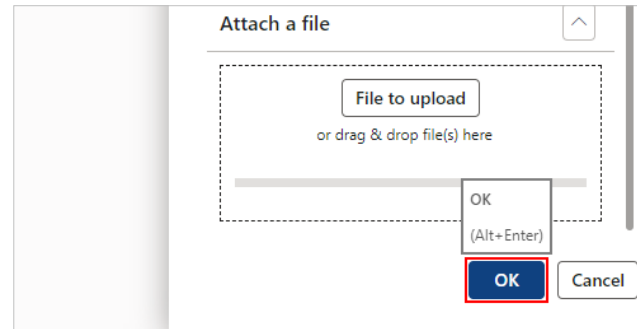
1. Click on the **Preview email notification** to view the system generated email notification and recipients. Comments added to the 'Review comments' field will be included in the email.
2. Set the **CC on email notification** toggle to 'Yes' to be added as a CC'd recipient on the email notification.
3. Specify **Email addresses** to manually send the distribution to, separated by a semi colon (;).



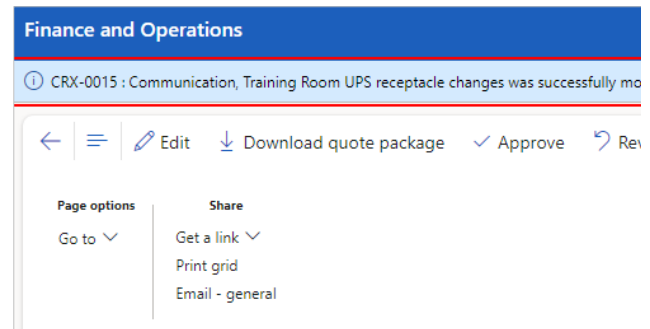
To upload any additional document, click on the **File to upload** button.



Click on the **OK** button.



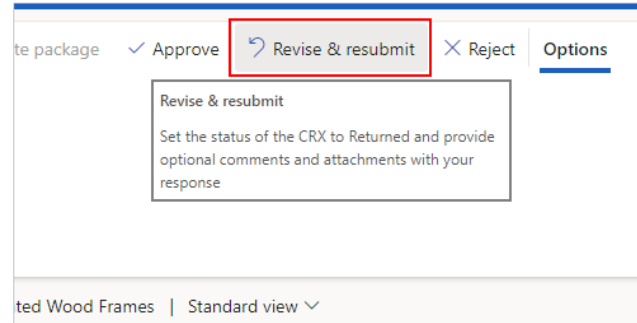
The CRX is now removed from the 'Outstanding CRX approvals' list and the status is updated to 'Approved'.



#### 8.5.2.4.2. Request a Quote to be Revised and Resubmitted

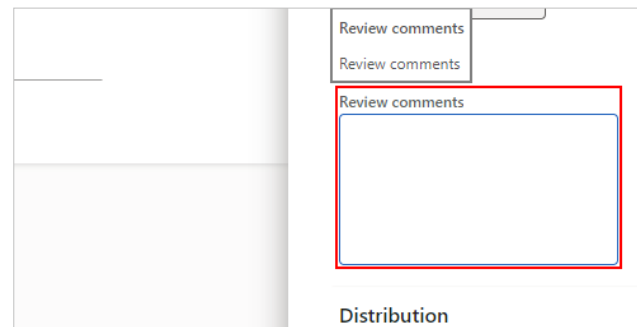
If changes are needed to the quote package, you can return the marked up quote package and CRX to PCL to update. Follow the steps mentioned below.

Click on the **Revise & resubmit** button.



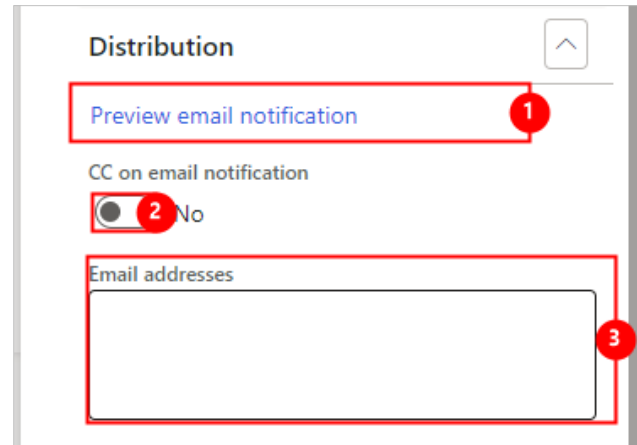
The 'Revise & Resubmit' dialog opens.

You may add comments in the **Review comments** field to provide additional information about the requested revision.

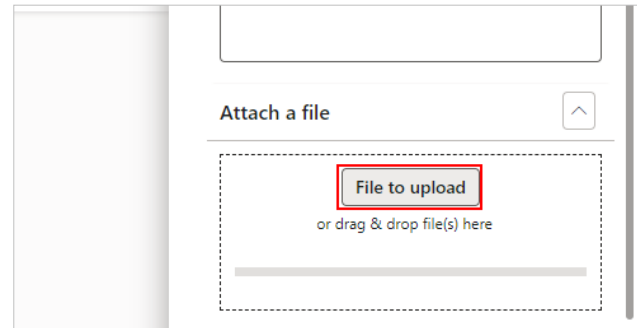


In the 'Distribution' tab:

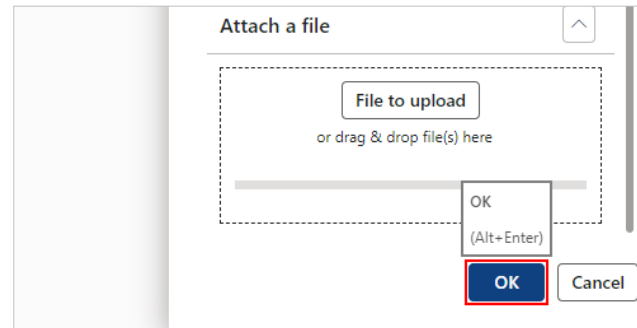
1. Click on the **Preview email notification** to view the system generated email notification and recipients. Comments added to the 'Review comments' field will be included in the email.
2. Set the **CC on email notification** toggle to 'Yes' to be added as a CC'd recipient on the email notification.
3. Specify **Email addresses** to manually send the distribution to, separated by a semi colon (;).



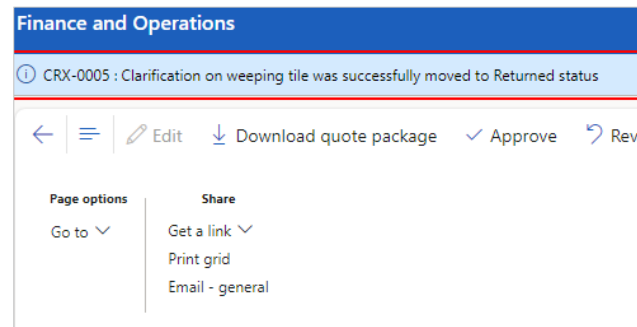
To upload any additional documents, click on the **File to upload** button.



Click on the **OK** button.



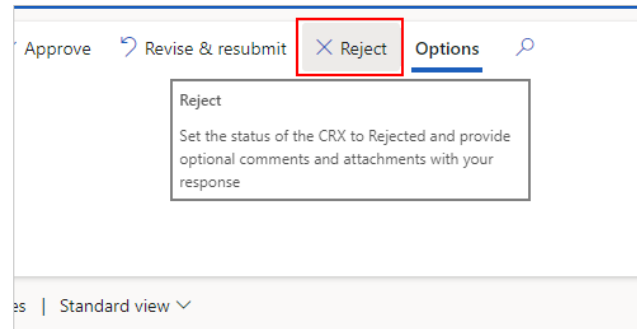
The CRX is now removed from the 'Outstanding CRX approvals' list and updated to 'Returned'.



### 8.5.2.4.3. Reject a Quote Package

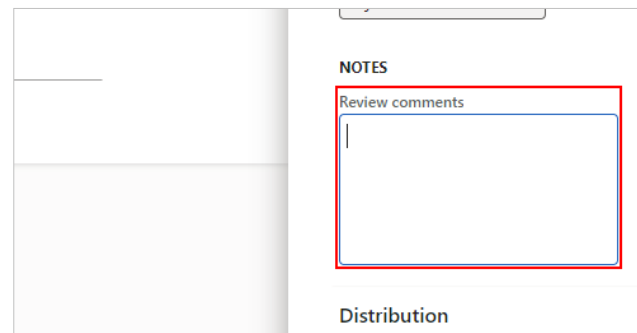
If you do not agree with the changes proposed, you can reject a quote package to obtain a new quote from the subcontractor. Follow the steps mentioned below.

Click on the **Reject** button.



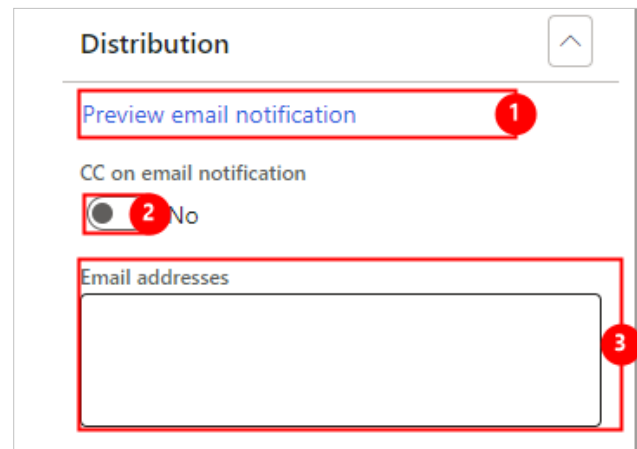
The 'Reject CRX' dialog opens.

You may enter comments in the **Review comments** field.



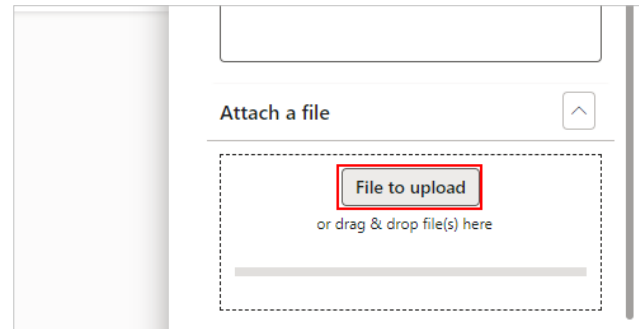
In the 'Distribution' tab:

1. Click on the **Preview email notification** to view the system generated email notification and recipients. Comments added to the 'Review comments' field will be included in the email.
2. Set the **CC on email notification** toggle to 'Yes' to be added as a CC'd recipient on the email notification.
3. Specify **Email addresses** to manually send the distribution to, separated by a semi colon (;).

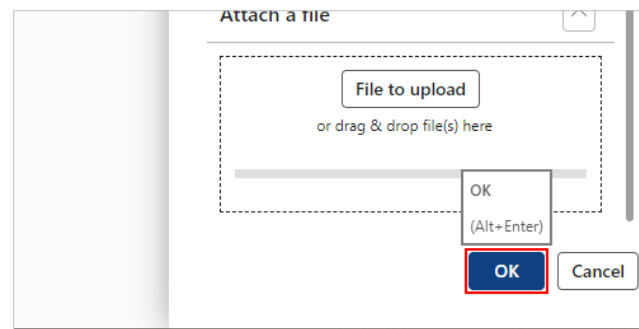




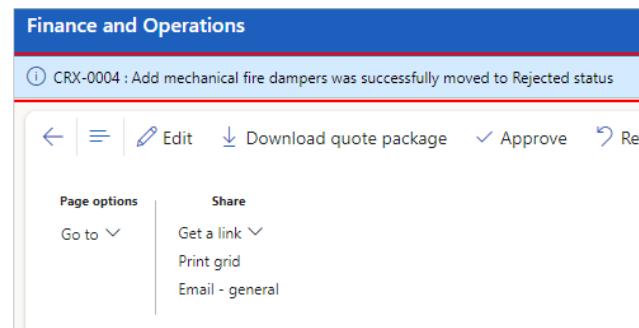
To upload any additional documents, click on the **File to upload** button.



Click on the **OK** button.



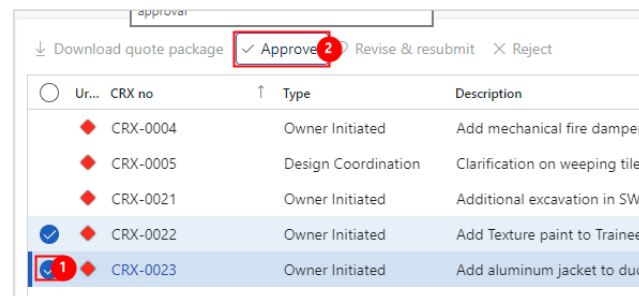
The CRX is now removed from the 'Outstanding CRX approvals' list and updated to 'Rejected'.



#### 8.5.2.4.4. Bulk Approve Quote Packages

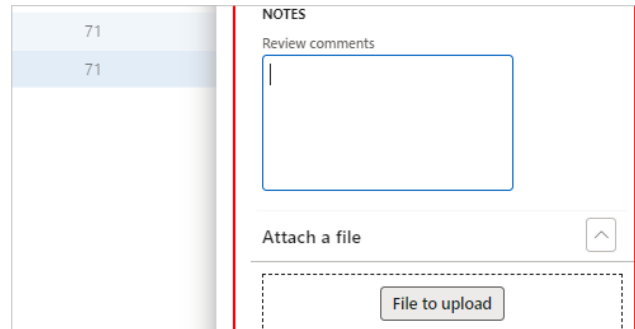
If there are multiple quote packages that are acceptable, they can be approved in bulk.

1. Click on the **Row checkbox** of the quote packages to approve.
2. Select the **Approve** button.



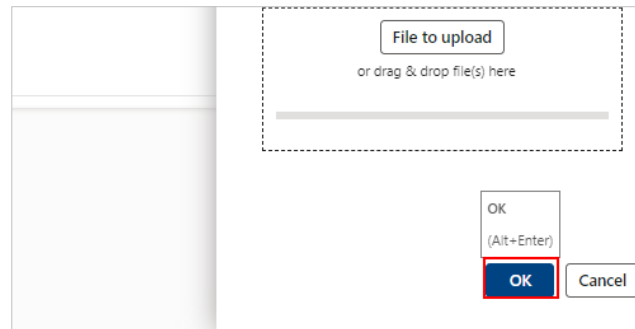
The 'Approve CRX' dialog opens.

You can add any comments and upload additional files.



Click on the **OK** button.

The selected CRXs are now removed from the 'Outstanding CRX approvals' list and will be set to 'Approved'.

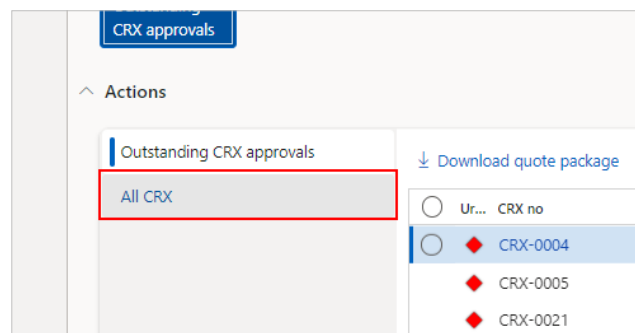


#### 8.5.2.4.5. **Review Attachments**

There may be a need to view uploaded attachments to the CRX after it has been set to Approved/Rejected/Returned status.

To view the attachments on a CRX record, follow the steps below:

In the CRX approval workspace, go to **All CRX**.



Click on the **CRX no** hyperlink.

CRX no	Type	Description
CRX-0001	PCL Initiated	IFC- complete set
CRX-0002	Owner Initiated	Pre-Construction - Building
<a href="#">CRX-0003</a>	Owner Initiated	Add light switch to PD office
CRX-0004	Owner Initiated	Add mechanical fire damper
CRX-0005	Design Coordination	Clarification on weeping tile
CRX-0006	Design Coordination	Extend NG appliance vent
CRX-0007	PCL Initiated	Credit for Fire Rated Wood

Go to the **Review** tab.

CRX log | CRX-0003 : Add light switch to PD office | Standard view

### CRX-0003 : Add light switch to PD office

Header **Review** Distribution

**General**

CLASSIFICATION	DATES
CRX number	Initiated date
CRX-0003	5/16/2022

Click on the **View attachments** button to view the attachments uploaded while reviewing/approving the quote package.

### CRX-0003 : Add light switch to PD office

Header **Review** Distribution

**Review**

[View attachments \(1\)](#)

Review order	Company	Person
1	Architectica	Consul
1	County No. 1	Client

### 8.5.3. Conclusion

Now that you have an understanding of how to review and respond to a quote package, proceed to the next work instruction.

## 8.6. Respond to a Quote Package as Reviewer

### 8.6.1. Introduction

#### 8.6.1.1. Objective

This work instruction covers how to respond to a quote package as a 'Reviewer'.

#### 8.6.1.2. Background Information

When PCL completes their review and determines the CRX is acceptable, PCL generates a quote package for the approval of the project Owner or their Consultant representative. Such requests may be made manually through email, or by PM4+. Talk to the PCL Project Manager to ensure you understand the process in place for your project.

A project can have a review routing in place where review participants can be added as an 'Approver' or 'Reviewer'. For more information on how to review a Quote package as an 'Approver' refer to [Respond to a Quote as Approver](#) work instruction.

### 8.6.2. Work Instructions

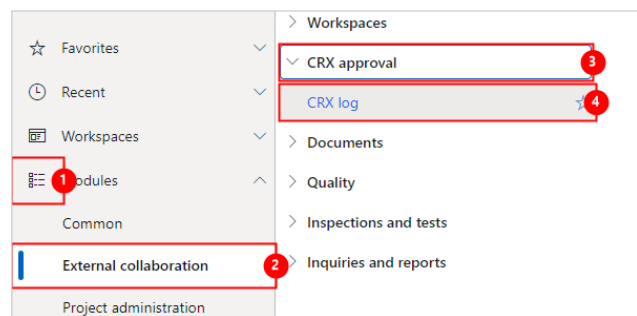
There are two ways to navigate to CRXs requiring approval:

1. Through the CRX log
2. Through the 'CRX approval (external)' workspace.

The 'CRX approval (external)' workspace is recommended since it contains a count of all CRXs in your court to review and approve.

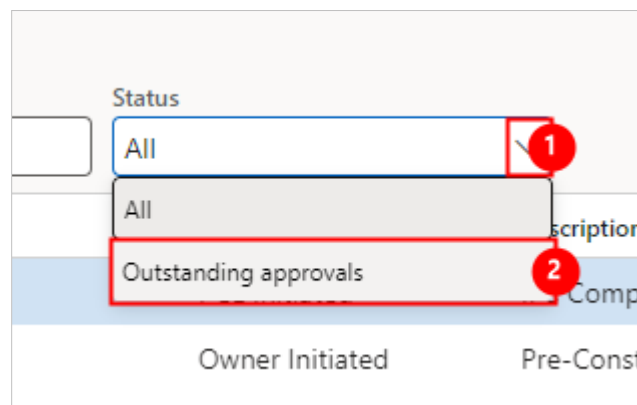
#### 8.6.2.1. Review Using the CRX Log

1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **CRX approval** menu section.
4. Click on the **CRX log** menu item.

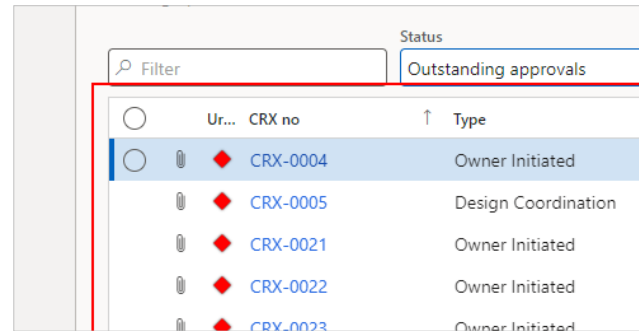


In the CRX log, filter the CRX's that require your attention.

1. Click on the **Status** field.
2. Click on **Outstanding approvals**.



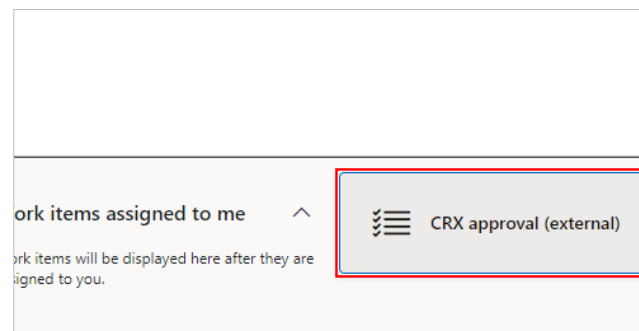
The filtered list displays all CRXs assigned to you in 'Quoted' status and requires a response from you or your company.



Ur...	CRX no	Type
<input type="radio"/>	CRX-0004	Owner Initiated
<input type="radio"/>	CRX-0005	Design Coordination
<input type="radio"/>	CRX-0021	Owner Initiated
<input type="radio"/>	CRX-0022	Owner Initiated
<input type="radio"/>	CRX-0023	Owner Initiated

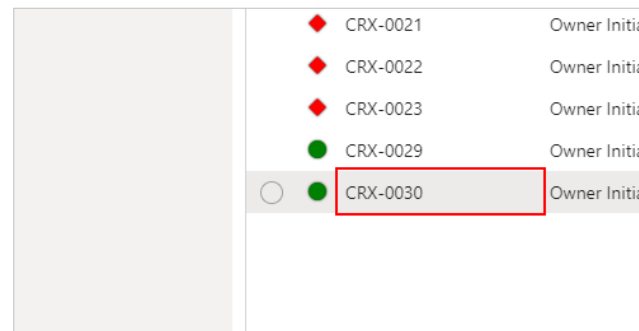
### 8.6.2.2. Review Using the CRX Workspace

Click on **CRX approval (external)**.



### 8.6.2.3. Download a Quote Package

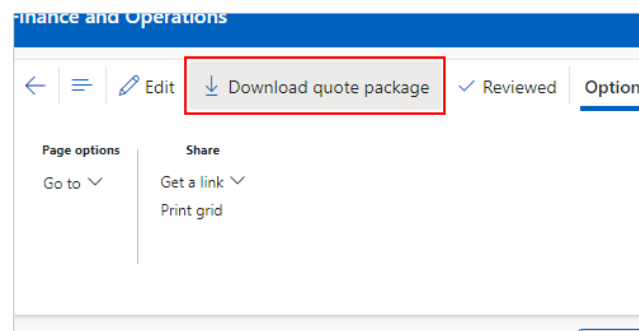
Click on the **CRX no** hyperlink.



<input type="radio"/>	CRX-0021	Owner Initia
<input type="radio"/>	CRX-0022	Owner Initia
<input type="radio"/>	CRX-0023	Owner Initia
<input type="radio"/>	CRX-0029	Owner Initia
<input type="radio"/>	CRX-0030	Owner Initia

If the quote package is attached to the CRX, you can review it via clicking on the Download Quote package button. If its not attached to the CRX, then this option will be greyed out.

Click on the **Download quote package** button.



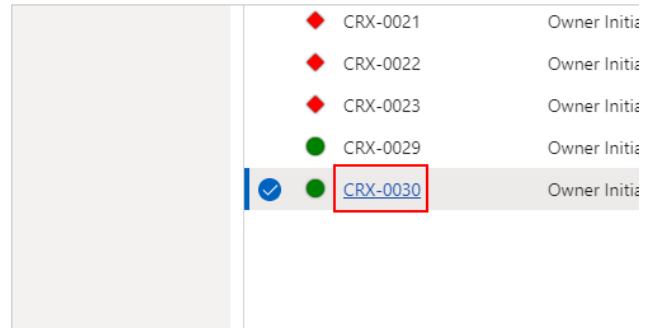
### 8.6.2.4. Action as a Reviewer






If you have been added as a Reviewer to review a quote package, follow the steps below:

### 8.6.2.4.1. Review a Quote Package

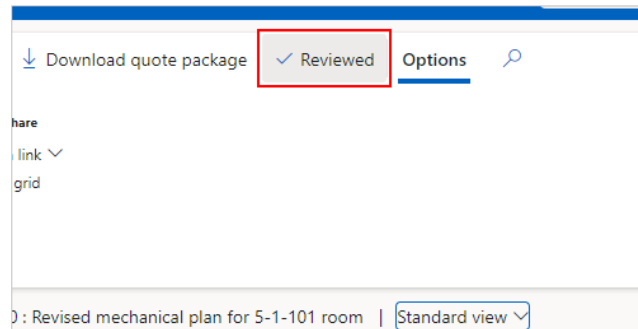
Once you have reviewed the Quote Package, you need to mark the CRX as 'Reviewed'.

Click on the **CRX no** hyperlink.



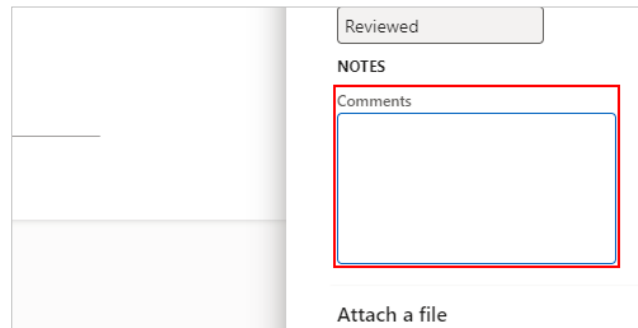
	CRX-0021	Owner Initia
	CRX-0022	Owner Initia
	CRX-0023	Owner Initia
	CRX-0029	Owner Initia
	<b>CRX-0030</b>	Owner Initia

Click on the **Reviewed** button.

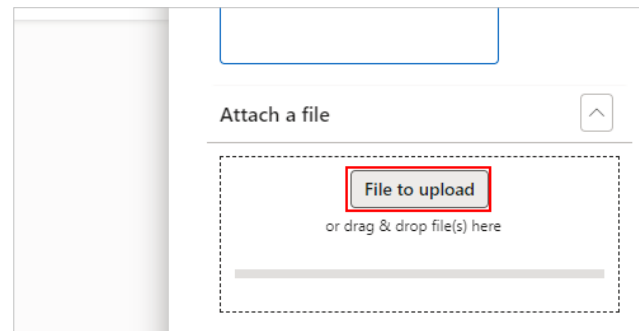


The 'Review' dialog opens.

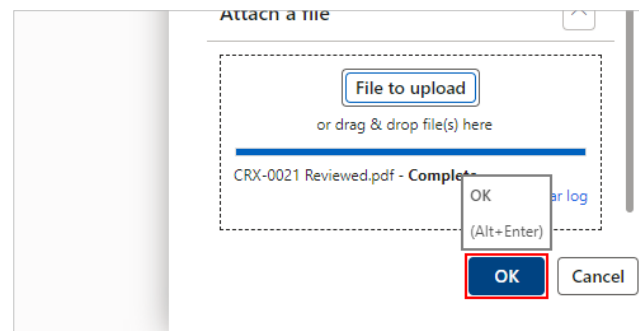
You may add comment in the **Comments** field.



To upload any additional documents, click on the **File to upload** button.



Click on the **OK** button.



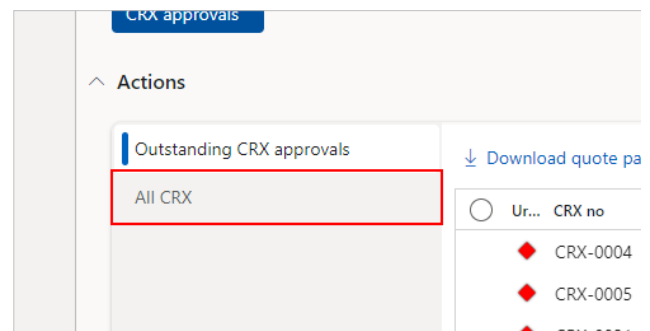
Note: If you have been added as an 'Approver', you will not see the 'Reviewed' button. For more information on how to review a Quote package as an 'Approver' refer to [Respond to a Quote as Approver](#) work instruction.

#### 8.6.2.4.2. Review Attachments

There may be a need to view uploaded attachments to the CRX after it has been set to Approved/Rejected/Returned status.

To view the attachments on a CRX record, follow the steps below:

Select the **All CRX** tab.



Click on the **CRX no** hyperlink of the record to review attachments for.

CRX-0025	Owner Initia
CRX-0026	Owner Initia
CRX-0027	Owner Initia
CRX-0028	Owner Initia
<input type="radio"/> CRX-0029	Owner Initia
CRX-0030	Owner Initia

Click on the **Review** tab.



CRX log | CRX-0029 : Revised electrical - E1.03 drawing | [Standards](#)

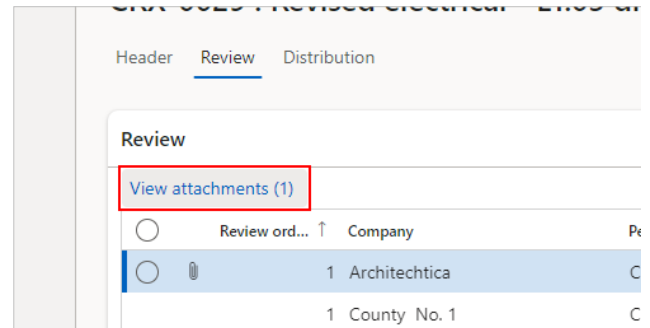
### CRX-0029 : Revised electrical - E1.03 dr

Header **Review** Distribution

General

CLASSIFICATION DATES

Click on the **View attachments** button to view the attachments uploaded while reviewing/approving the quote package.



Header **Review** Distribution

Review

**View attachments (1)**

<input type="radio"/>	Review ord...	Company	Pe
<input type="radio"/>	1	Architectica	C
<input type="radio"/>	1	County No. 1	C

### 8.6.3. Conclusion

Now that you have an understanding of how to review and respond to a quote package, proceed to the next work instruction.

## 8.7. CRX Pricing Workspace

### 8.7.1. Introduction

#### 8.7.1.1. Objective

This work instruction covers the CRX management (external) workspace for Subcontractors.

#### 8.7.1.2. Background Information

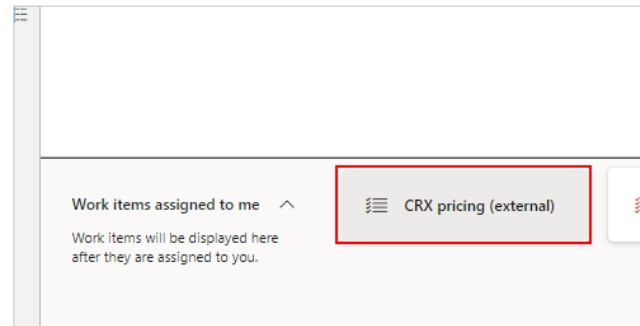
This work instruction covers the CRX pricing (external) workspace for Subcontractors.



## 8.7.2. Work Instructions

Click on the **CRX pricing (external)** tile in the PM4+ dashboard.

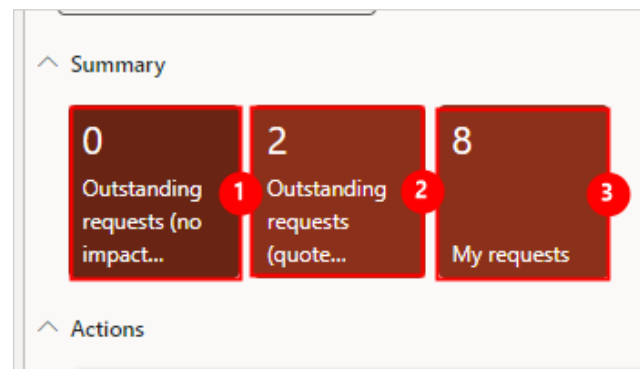
This workspace provides a single location where you can track any outstanding CRXs that require confirmation or a quotation.



### 8.7.2.1. Tiles

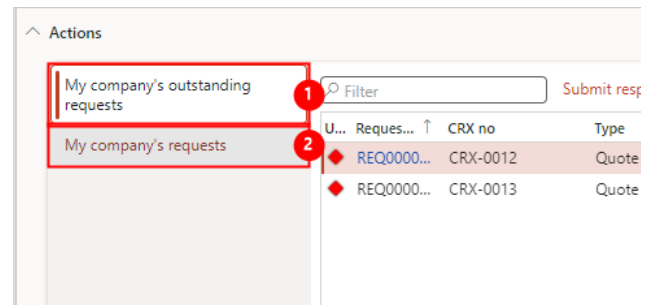
Click on the count tile to navigate you to the CRX log, filtered to only display the records from the selected count.

1. The **Outstanding requests (no impact confirmation)** count tile displays all Requests for confirmations assigned to you in 'Awaiting Submission' status and requires a response from you or your company.
2. The **Outstanding requests (quote required)** count tile displays all Requests for quotations assigned to you in 'Awaiting Submission' status and requires a response from you or your company.
3. The **My requests** count tile displays all Requests for confirmations and Requests for quotations assigned to you or your company.



### 8.7.2.2. Tabbed Lists

1. The **My company's outstanding requests** tabbed list displays all open requests in 'Awaiting Submission' status and requires a response from you or your company.
2. The **My company's requests** tabbed list displays all Requests for confirmations and Requests for quotations assigned to you or your company.



### 8.7.3. Conclusion

Now that you have an understanding of the CRX management (external) workspace, proceed to the next work instruction.

## 8.8. Review and Submit a Request

### 8.8.1. Introduction

#### 8.8.1.1. Objective

This work instruction covers how to respond to a change related request in PM4+.

#### 8.8.1.2. Background Information

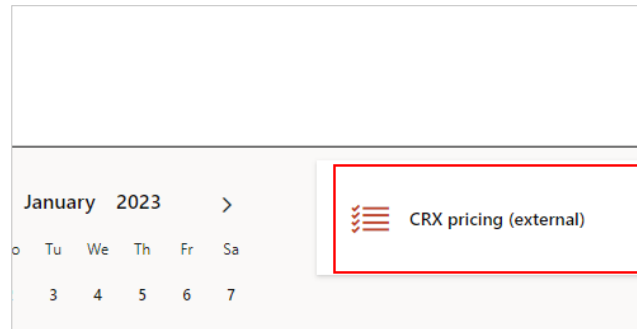
When PCL is notified of a change, a response from a Subcontractor may be necessary to obtain a quote for the contemplated change or confirm that no cost impact is anticipated.

To jump to specific sections:

1. Request for Quote - refer to 'Review a Request for Quote' section.
2. Request for Confirmation - refer to 'Review a Request for Confirmation' section.

### 8.8.2. Work Instructions

Click on the **CRX pricing (external)** workspace.



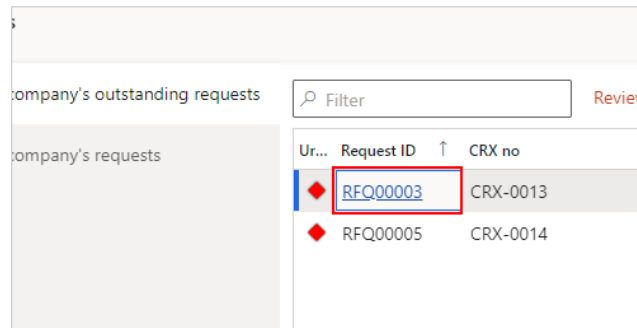
When the request is sent via email distribution, the request appears in your CRX workspace so you can respond to it directly in PM4+.

Your count tile indicates how many of each type of request are awaiting your response. The tabbed list displays the same requests, grouped together in one 'Request log'.

### 8.8.2.1. Review a Request for Quote

In the tabbed list, the request displays the Request ID hyperlink where you can submit your response.

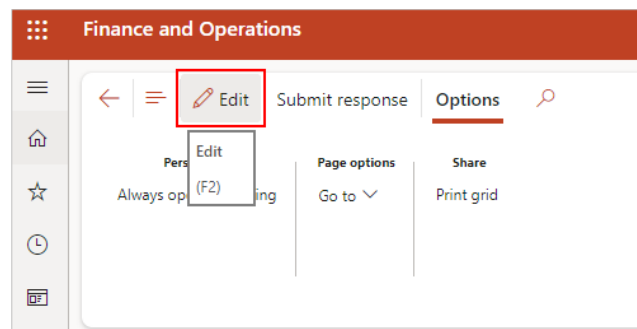
Some projects will have a prefix of RFQ or REQ as the Request ID (the CRX no. that the request is associated to and the type of request).



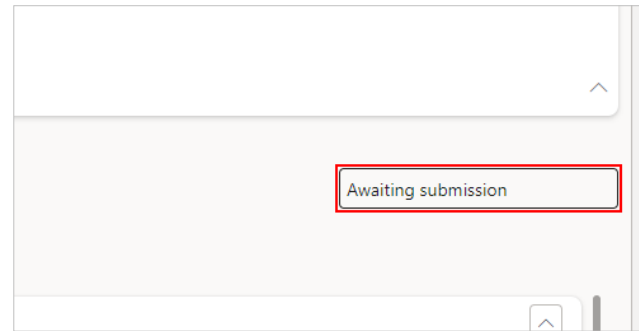
Click on the **Request ID** to view the details.

The details for the selected request display.

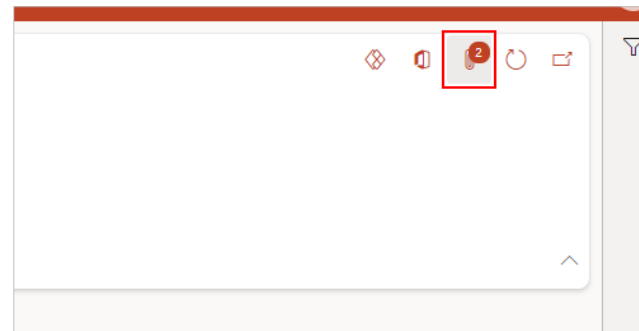
Click on the **Edit** button in the action pane.



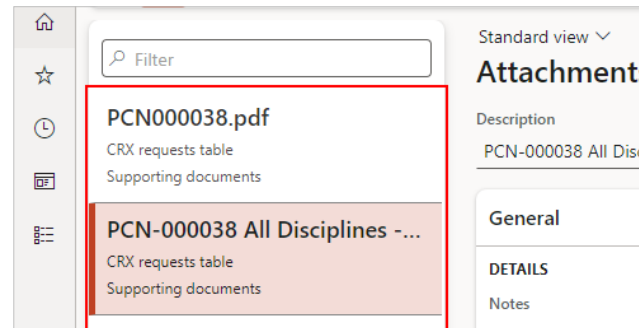
The **Request status** of the quote is in 'Awaiting submission'.



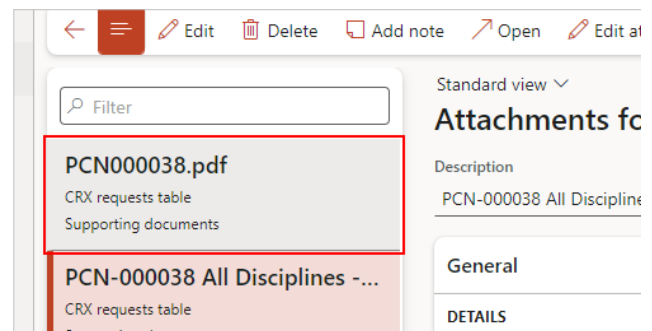
Click on the **Paperclip** icon to review the supporting documents and assess any cost or schedule impact.



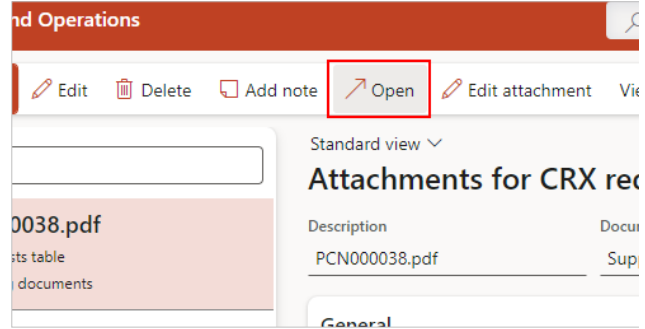
Supporting documents related to the request display in the attachment pane.



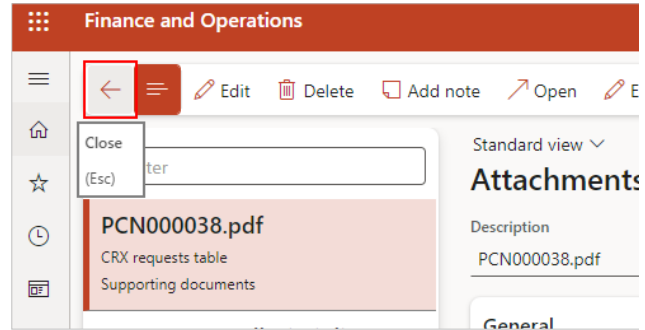
To view a supporting document, click on the **Attachment** from the list.



Click on the **Open** button to download and view the document.

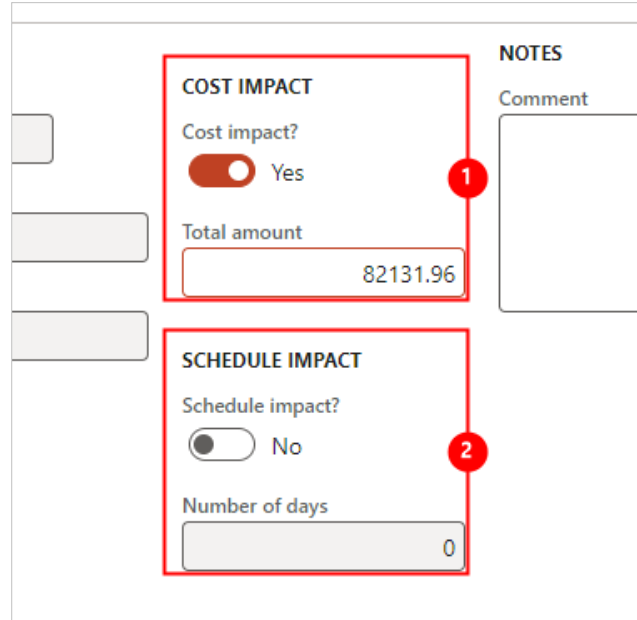


To return back to the request details, click on the **Close** button.



Once the impacts have been determined:

1. If there is a cost impact, set the **Cost impact?** toggle to 'Yes' and enter the **Total amount**.
2. If there is a schedule impact, set the **Schedule impact?** toggle to 'Yes' and enter the **Number of days**.

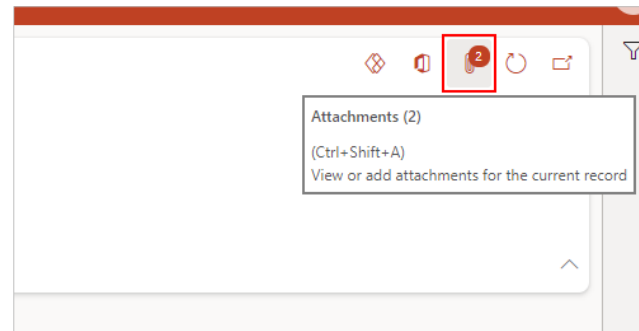


Type in additional information you want to include in the quote in the **Comment** field.

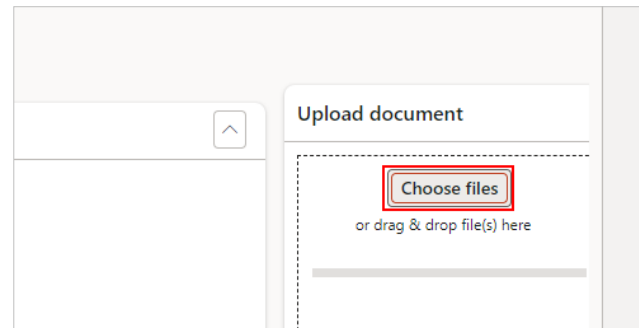


If the 'Cost impact?' toggle was selected, upload the quote document.

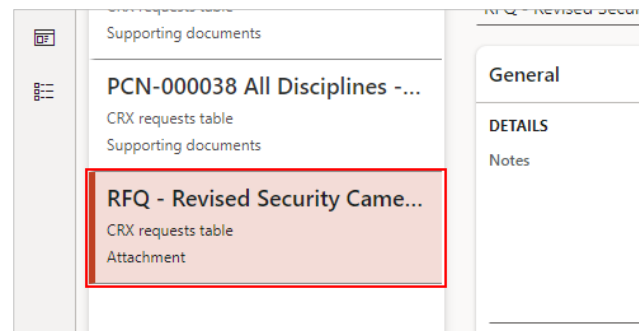
Click on the **Paperclip** icon.



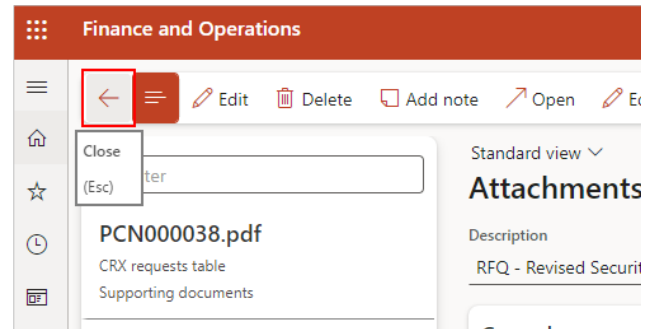
Click on the **Choose files** button to locate the file to upload.



The **Attachment** appears in the list.



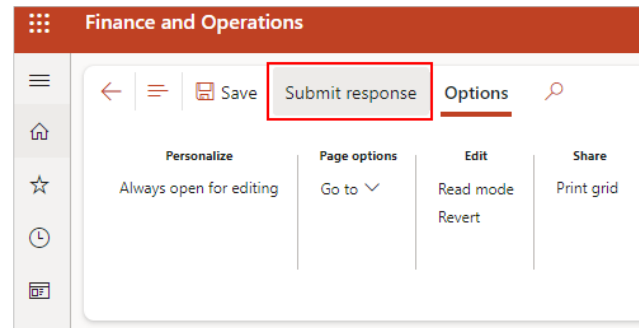
Click on the **Close** button to return back to the request.



### 8.8.2.2. Submit a Request for Quote to PCL

Once you have reviewed the request and determined the impact, you can submit your response through the automated workflow:

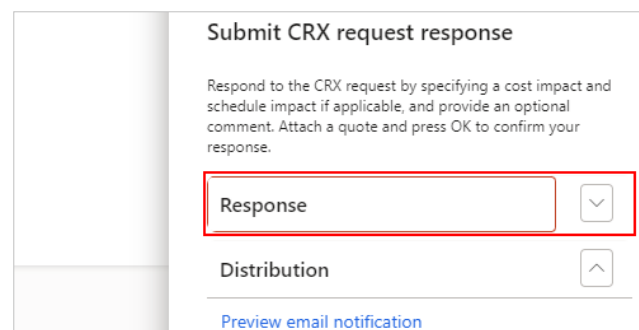
Once you have reviewed the request and determined the impact, you can submit your response.



Click on the **Submit response** button in the action pane.

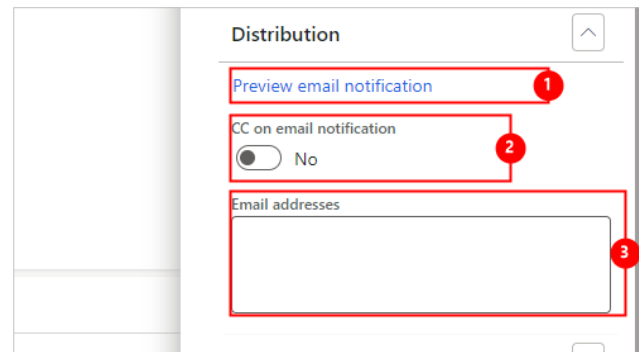
The 'Submit CRX request response' dialog opens.

In the **Response** fast tab, review the response of the CRX request. If additional changes need to be made, you can do so here.

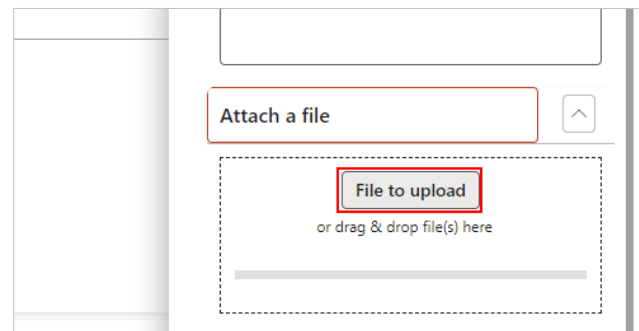


In the 'Distribution' fast tab:

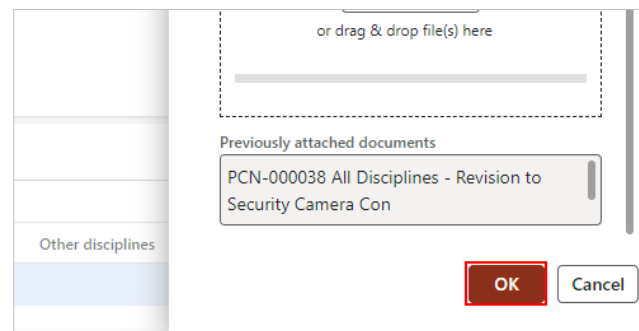
1. Optionally, click on the **Preview email notification** hyperlink to view the system generated email notification and recipients. Text added to the 'Comments' field will be included in the email.
2. Set the **CC on email notification** toggle to 'Yes' if you would like to be added as a CC'd recipient on the email notification.
3. Specify **Email addresses** to manually send the distribution to, separated by a semi colon (;).



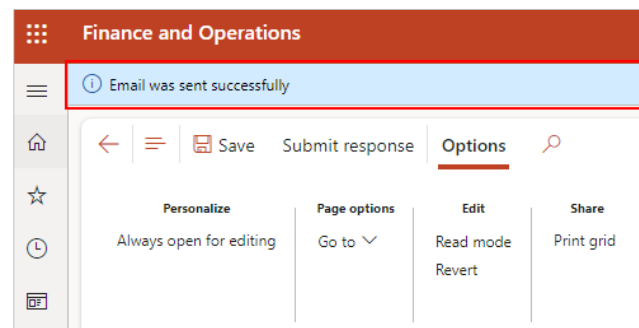
To upload any additional documents, click on the **File to upload** button.



Click on the **OK** button.



A message displays confirming an email was sent to the recipient in the 'PCL responsible' field.



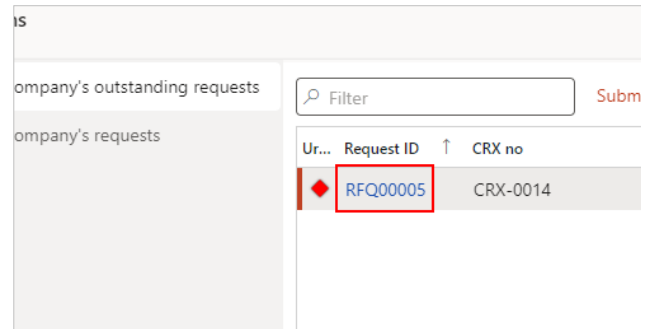
### 8.8.2.3. Review a Request for Confirmation



In the tabbed list, the request displays the Request ID hyperlink where you can submit your response.

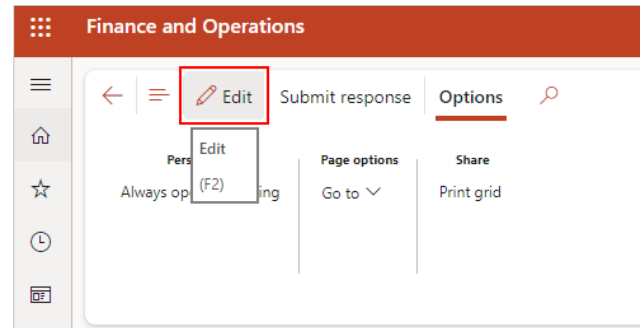
Some projects will have a prefix of **RFQ** or **REQ** as the Request ID (the CRX no. that the request is associated to and the type of request).

Click on the **Request ID** to view the details.

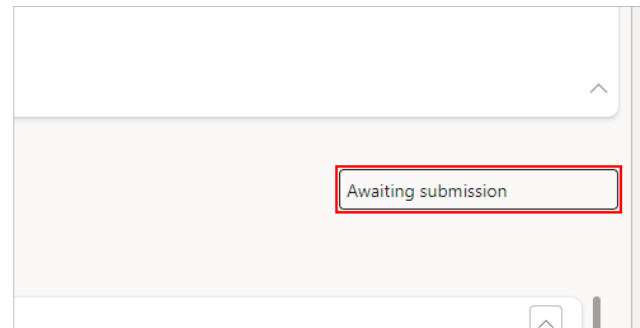


The details for the selected request display.

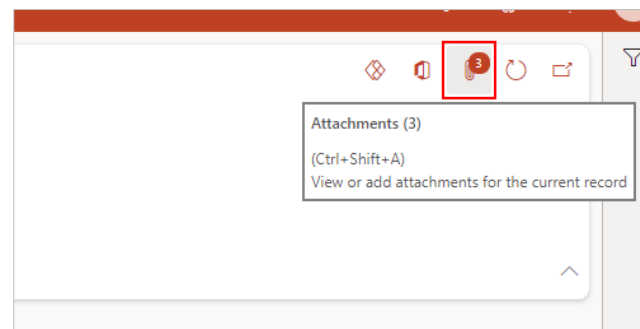
Click on the **Edit** button in the action pane.



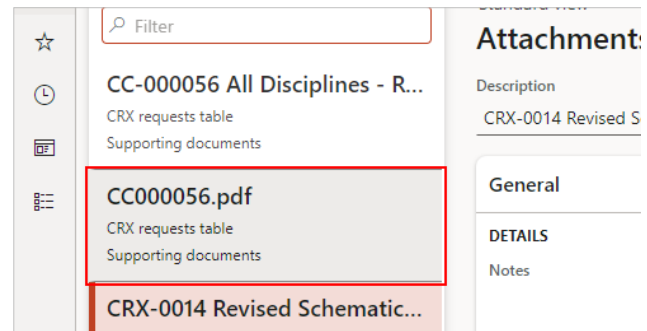
The **Request status** of the confirmation is in 'Awaiting submission'.



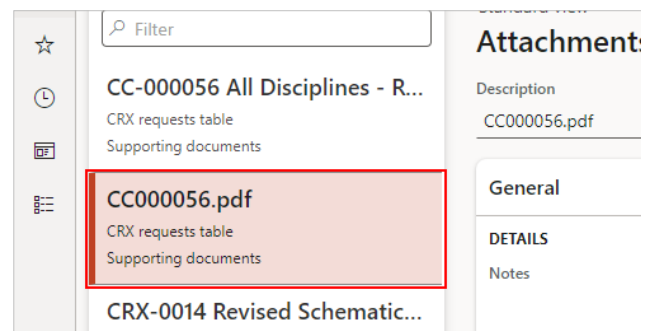
To review the supporting documents to confirm the change will have no impact, click on the **Paperclip** icon to review any supporting documents.



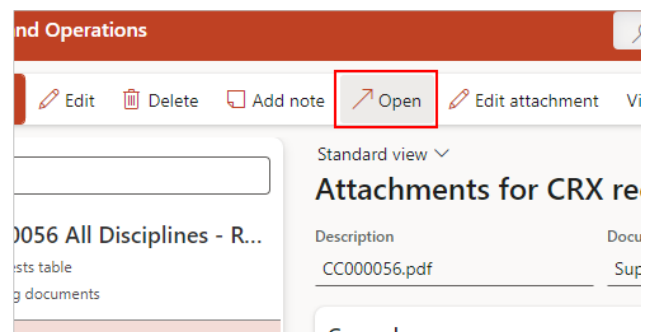
Supporting documents related to the request display in the attachment pane.



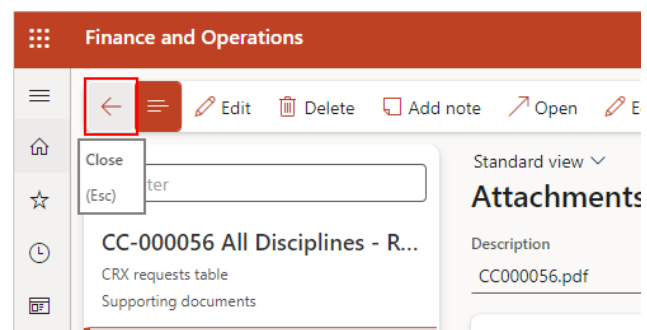
To view a supporting document, click on the **Attachment** from the list.



Click on the **Open** button to download and view the document.



To return back to the request details, click on the **Close** button.

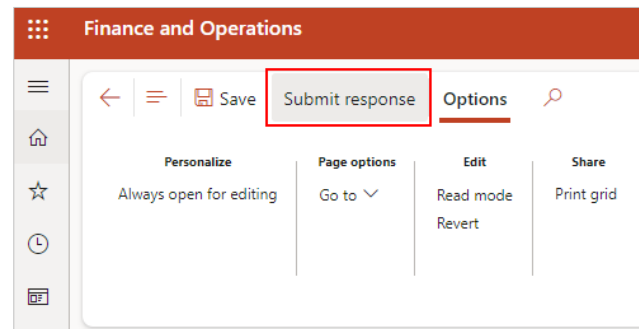


#### 8.8.2.4. Submit a Request for Confirmation to PCL

Once you have reviewed the request and confirmed that there is no impact to the project, you can submit your response through the automated workflow:

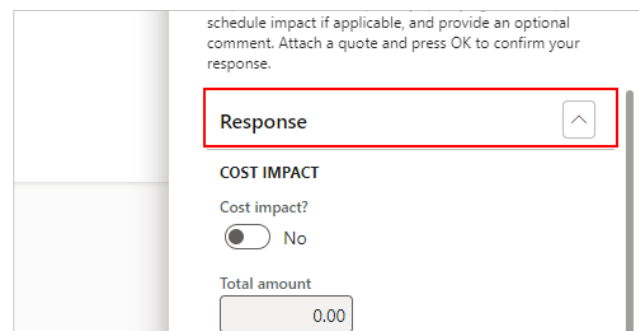
Once you have reviewed the request and confirmed that there is no impact to the project, you can submit your response.

Click on the **Submit response** button in that action pane.



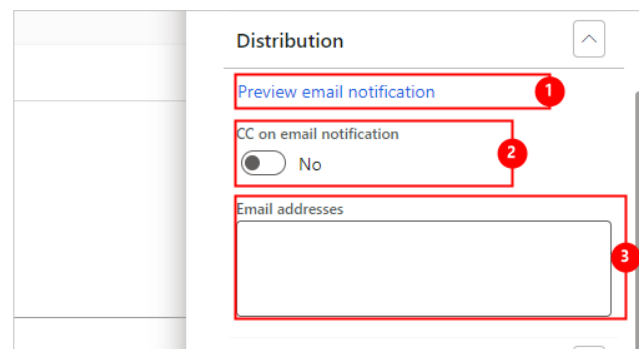
The 'Submit CRX request response' dialog opens.

In the **Response** fast tab, review the response of the CRX request. If additional changes need to be made, you can do so here.

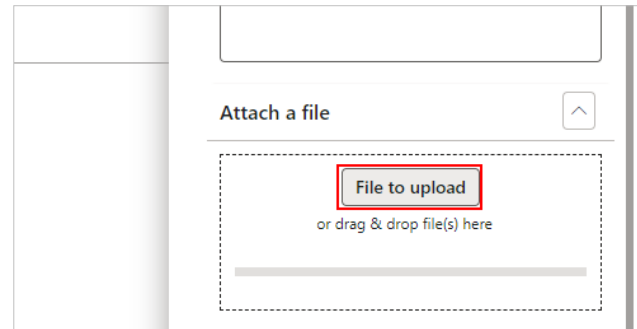


In the 'Distribution' fast tab:

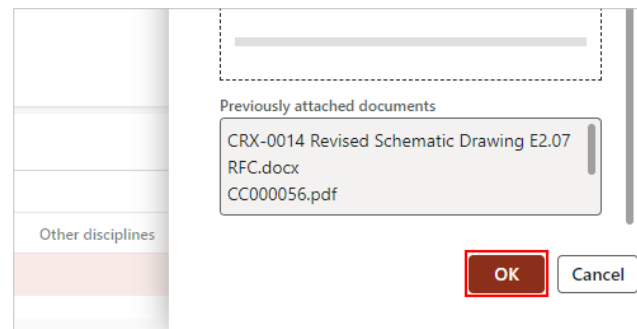
1. Click on the **Preview email notification** hyperlink to view the system generated email notification and recipients. Text added to the 'Comments' field will be included in the email.
2. Set the **CC on email notification** toggle to 'Yes' to be added as a CC'd recipient on the email notification.
3. Specify **Email addresses** to manually send the distribution to, separated by a semi colon (;).



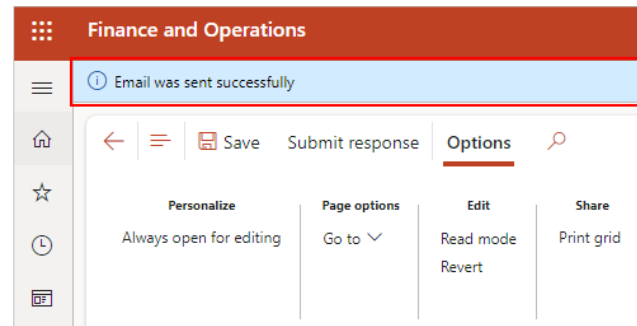
To upload any additional documents, click on the **File to upload** button.



Click on the **OK** button.



A message displays confirming an email was sent to the recipient in the 'PCL responsible' field.



### 8.8.3. Conclusion

Now that you have an understanding of how to respond and send the RFQ or RFC, proceed to the next work instruction.

## 8.9. View Document Log and Revision Inquiry

### 8.9.1. Introduction

#### 8.9.1.1. Objective

This work instruction covers how to view the Document log and the Revision inquiry. Both provide a different view of the same information.

#### 8.9.1.2. Background Information

The 'Document log' provides a list of revisions for drawings, specifications or other contractual documents. They can be viewed by anyone with access to the project in PM4+.

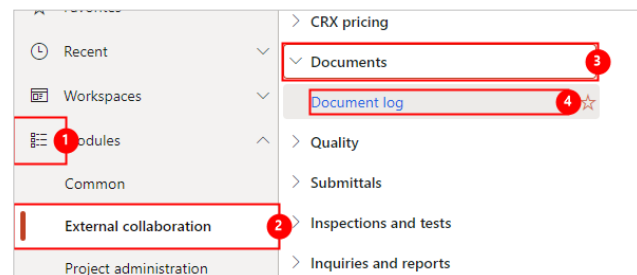
The 'Revision inquiry' allows you to create a sorted or filtered view of documents from the document log for export or, to produce ad hoc reports.

These features are available only if your project team is using the 'Package log' to manage drawing sets and specifications to track changes and revisions.

## 8.9.2. Work Instructions

### 8.9.2.1. View the Document Log

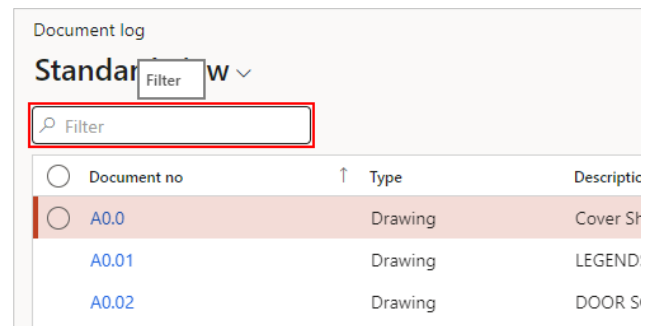
1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Documents** menu section.
4. Click on the **Document log** menu item.



The Document log lists the most recently received drawing revisions or specification versions, including those that are not yet approved for construction. Best practice is to refer to the documents in the electronic Plan Room (EPR) as the source for current construction activities.

Note that your project team may use a different system for tracking document packages received over the course of the project. Talk to the Project Manager to confirm if the package and document logs in PM4+ are being used.

You may use the **Filter** field to quickly locate a record or group of records.



In this example, we typed 'E' \* (asterisk) to indicate we want to view all document records starting with letter E.

Document log  
Standard view ▾

Search: E\*

- Document no: "E\*" (highlighted)
- Type: "E"
- Description: "E"
- Discipline: "E"
- A0.02

Type	Description
Drawing	Cover S
Drawing	LEGEND
Drawing	DOOR S

Click on the **Document no** hyperlink to view the details.

<a href="#">E2.02</a>	Drawing
<a href="#">E2.03</a>	Drawing
<a href="#">E2.04</a>	Drawing
<a href="#">E2.05</a>	Drawing
<a href="#">E2.06</a>	Drawing
<a href="#">E2.07</a>	Drawing
<a href="#">E2.08</a>	Drawing
<a href="#">E2.09</a>	Drawing

Click on the **Header** tab if not already visible

Document log | Standard view ▾

### E2.06 : SECOND FLOOR POWER & SYST

**Header** | Revisions | Associations (0)

**General**

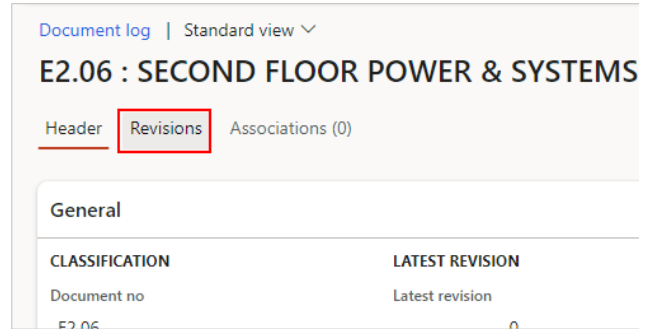
CLASSIFICATION	LATEST REVISION

The **Header** tab contains the same basic information found in the log.

**General**

CLASSIFICATION	LATEST REVISION
Document no E2.06	Latest revision 0
Type Drawing	Latest revision document date 4/1/2022
Description SECOND FLOOR POWER & SYSTEMS PLAN	

Click on the **Revisions** tab



Document log | Standard view

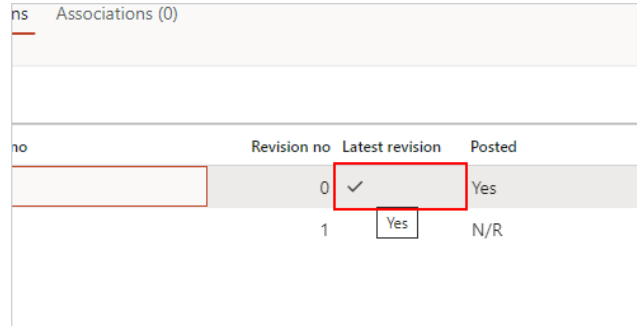
### E2.06 : SECOND FLOOR POWER & SYSTEMS

Header **Revisions** Associations (0)

**General**

CLASSIFICATION	LATEST REVISION
Document no	Latest revision
E2.06	0

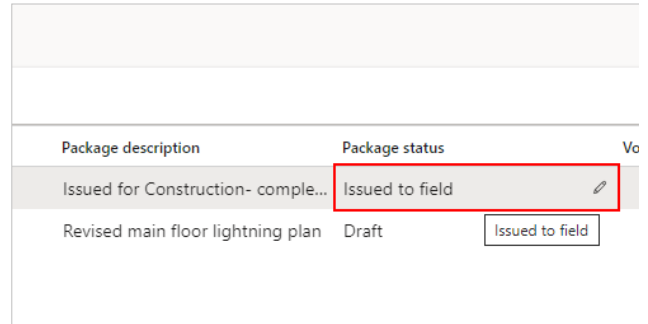
The 'Revisions' tab displays every instance of a sheet, its revision number, the package it was received in, its current status, and whether it is posted to the EPR.



Revision no	Latest revision	Posted
0	✓	Yes
1	Yes	N/R

The **Latest revision** flag indicates which drawing revision is the most recent revision for construction. The Electronic Plan Room (EPR) should be considered the source of what documents are in use in the field.

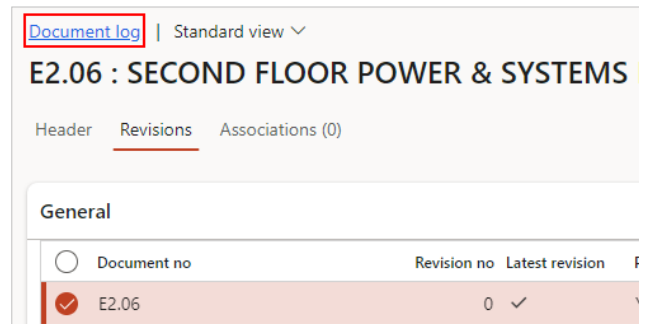
A package must have a status of **Issued to field** to indicate the information it contains is ready to proceed with work.



Package description	Package status	Vo
Issued for Construction- comple...	Issued to field	
Revised main floor lightning plan	Draft	Issued to field

Additional revisions may be visible with other statuses, indicating a new revision is under review or is ready to be issued to the field.

Return to log view by clicking the **Document log** link above the title bar.



**Document log** | Standard view

### E2.06 : SECOND FLOOR POWER & SYSTEMS

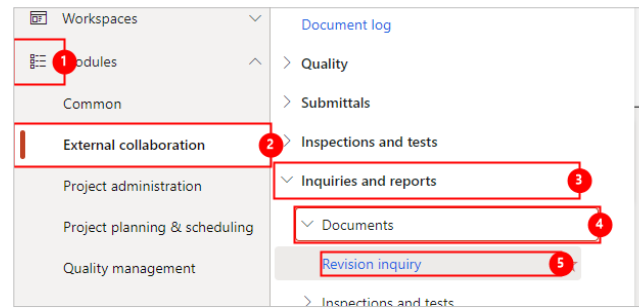
Header **Revisions** Associations (0)

**General**

Document no	Revision no	Latest revision
E2.06	0	✓

#### 8.9.2.1.1. View the Revision Inquiry

1. Click on the **Modules** icon.
2. Click on the **External collaboration** module.
3. Click on the **Inquiries and reports** menu section.
4. Click on the **Documents** menu section.
5. Click on the **Revision inquiry** menu item.

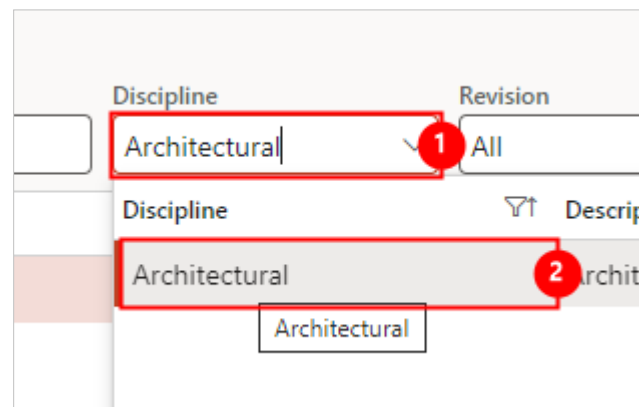


Whereas the 'Document log' displays a list of unique drawing numbers, and all revisions of it within the details, the 'Revision inquiry' displays a flat list of every instance (revision) of a drawing.

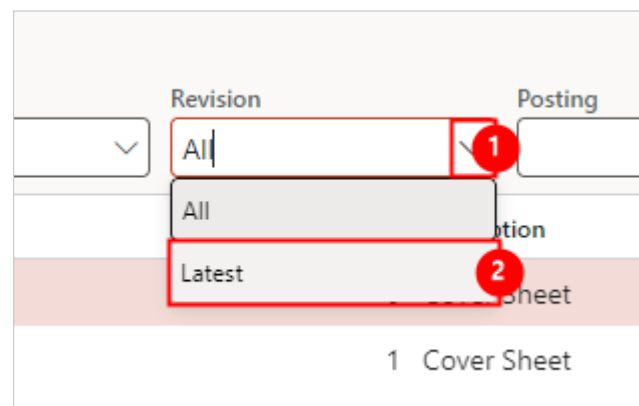
Use this inquiry to produce a list based on discipline, package status, or posting status; or select specific packages to display just the sheets they contain. You may also combine the filters as required.

In this example, we search for Architectural drawing sheet revisions flagged as 'latest'.

1. Start typing the name of the Discipline if you know it, or click on the drop down.
2. Select the **Discipline** you want to filter on.

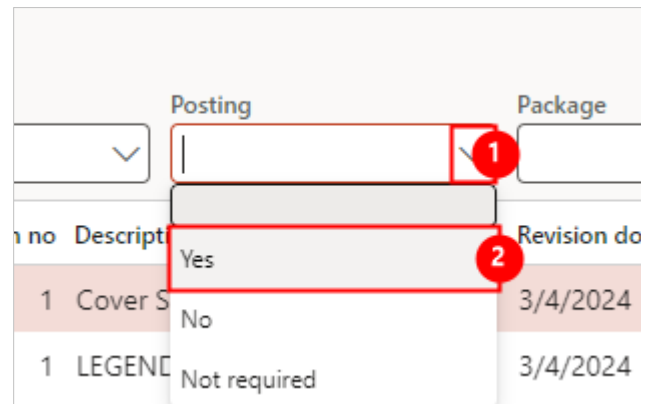


1. Click on the **Revision** field.
2. Select the **Latest** to filter the list to show only revisions flagged as 'latest' in the document log.

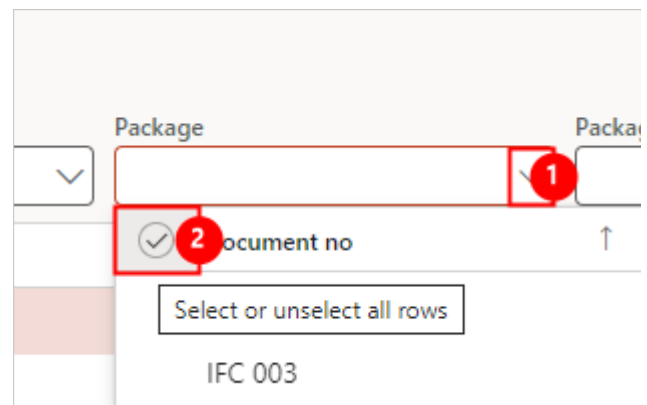




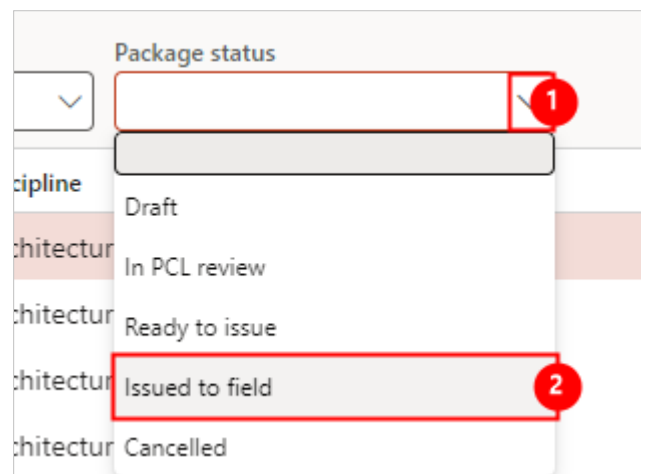
1. Click on the **Posting** field.
2. Click on **Yes** to view only revisions where the drawing has been posted to the EPR.



1. Click on the **Package** dropdown to view a list of document packages in the package log. All sheets found in the 'Document log' and 'Revision inquiry' are sourced from packages.
2. If you want to view information in specific packages only, choose the packages here.



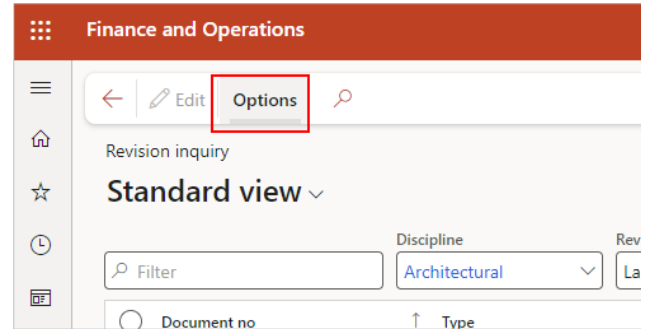
1. Click on the **Package status** field.
2. Filter by **Package status** when you are interested in reviewing documents in a particular stage of review, or if you want to view all documents that have been 'Issued to the field', for example.



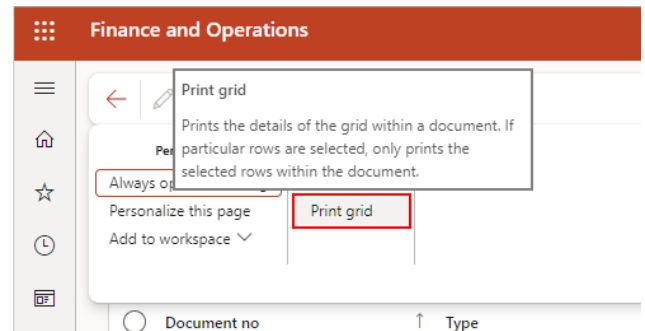
#### 8.9.2.1.1.1. *Print a Report*

After you have filtered the 'Document inquiry' screen to display the information you require, use the 'Print grid' feature to produce a formatted report of the information on the screen.

To print the filtered revision inquiry, click on the **Options** tab in the action pane



Click on the **Print grid** button



The 'Print grid' dialog opens.

Enter a new **Report title** or **Report subtitle** if necessary.

### Print grid

Header and footer

HEADER	FOOTER
Report title <input type="text" value="Revision Inquiry"/>	Left footer <input type="text"/>
Report subtitle <input type="text" value="Standard view"/>	Center footer <input type="text"/>

In the **Report format** tab, you can control some elements of the layout

### Report format

Maintain row formatting

FORMAT	MARGINS
Font name <input type="text" value="Segoe UI"/>	Left margin <input type="text" value="0.50"/>
Font size <input type="text" value="9 pt"/>	Top margin <input type="text" value="0.50"/>
Page break <input type="text"/>	Right margin <input type="text" value="0.50"/>

Under the 'Page output' tab, If the **Fit to page** toggle is set to 'Yes', the report is formatted to fit on a single page. This only applies to 'Word' or 'PDF' output formats.

1. Click on the **Save as** field.
2. Click on the **.pdf**. You will select the format most suitable for your circumstance.

Click on the **OK** button.

The **Revision inquiry report** is generated.

Depending on the browser you are using, the attachment will be downloaded to your Downloads folder (Chrome); or you will be prompted to open or save the file (Edge).

**Revision Inquiry**  
PCL Construction Resources Inc.  
Training - CAN  
Standard view

	Revision no	Description	Revision document date	Disci
ving	1	Cover Sheet	3/4/2024	Archit
ving	1	LEGENDS AND SCHEDULES	3/4/2024	Archit
ving	1	DOOR SCHEDULE	3/4/2024	Archit
ving	2	DOOR SCHEDULE	3/4/2024	Archit
ving	1	OVERALL CAMPUS PLAN	3/4/2024	Archit

### 8.9.3. Conclusion



PM4+

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Now that you have an understanding of how to view the Document log and Revision inquiry, proceed to the next work instruction.

## 9. Subcontract Management

### 9.1. Subcontract Management Workspace

#### 9.1.1. Introduction

##### 9.1.1.1. Objective

This work instruction covers the Subcontract management (external) workspace for Subcontractors.

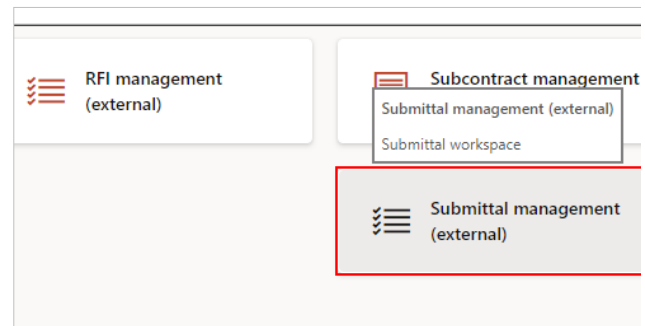
##### 9.1.1.2. Background Information

The 'Subcontract Management' workspace for Subcontractors is intended to provide quick access to signed subcontracts for your company. It may also contain documents you were requested to provide, related to your contractual agreement.

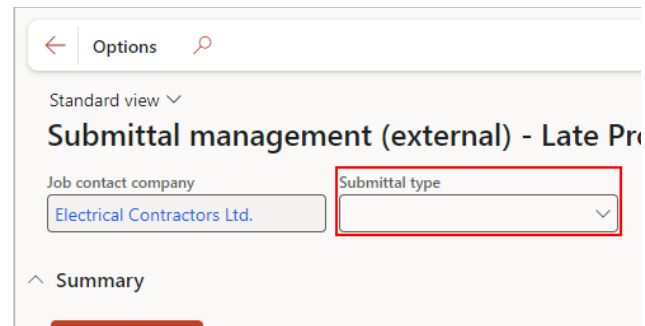
#### 9.1.2. Work Instructions

Click on the **Submittal management (external)** tile in the PM4+ dashboard.

This workspace provides a single location where you can track and monitor your company's Submittals, as well as submit documents being requested.



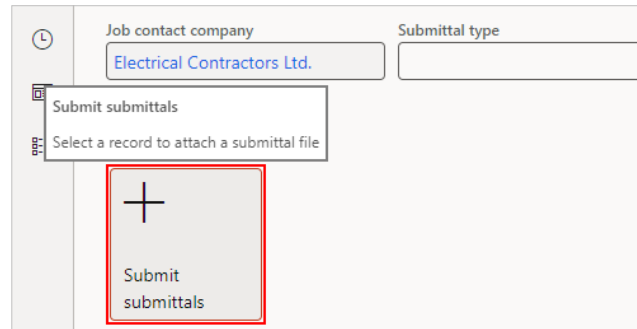
The **Submittal type** field filters the workspace according to the selected Submittal type. By default all Submittal types you have access to, are included when this field is blank. Multiple submittal types are optional and may not be in use on your project. Talk to the PCL Project Manager for clarification on what types you should see.



##### 9.1.2.1. Tiles

The **Submit submittals** action tile provides a way of attaching a document to the submittal being requested of you.

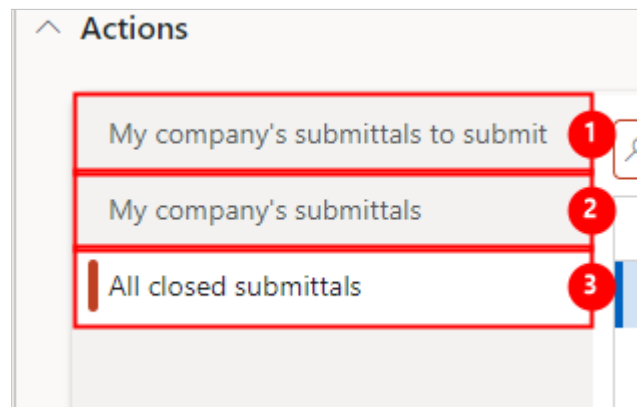
View the work instruction called, 'Submit a Submittal to PCL' for more details.



### 9.1.2.2. Tabbed Lists

There are three tabbed lists in the workspace.

1. The **My company's submittals to submit** tabbed list displays your company's submittals filtered by the 'Requested' or 'Revise and resubmit' status.
2. The **My company's submittals** tabbed list displays all records in the submittal log where your company is named as the party responsible for providing the submittal. Submittal records of any status are listed in this tab.
3. The **All closed submittals** tabbed list displays all the closed submittals for the project.



### 9.1.3. Conclusion

Now that you have an understanding of the subcontract management workspace, proceed to the next work instruction.

## 9.2. View Subcontracts and Subcontract Related Documents

### 9.2.1. Introduction

#### 9.2.1.1. Objective

This work instruction covers how to view the list of subcontract records, and related documents, for your company on this project.

#### 9.2.1.2. Background Information

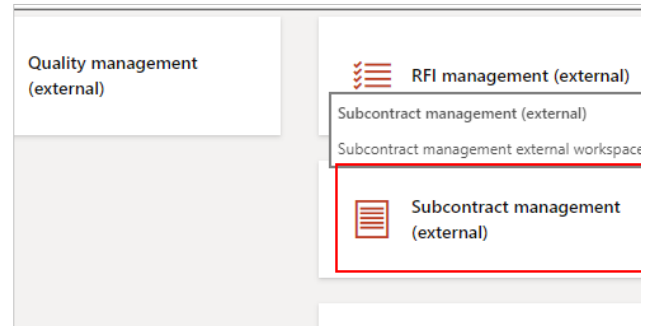
In PM4+, the Subcontract management workspace contains records which hold the descriptive information about your subcontracts on this project, as well as the signed document.

If the project team is also using the 'Subcontract related documents' log, the workspace also lists details about these documents, as well as the document file.

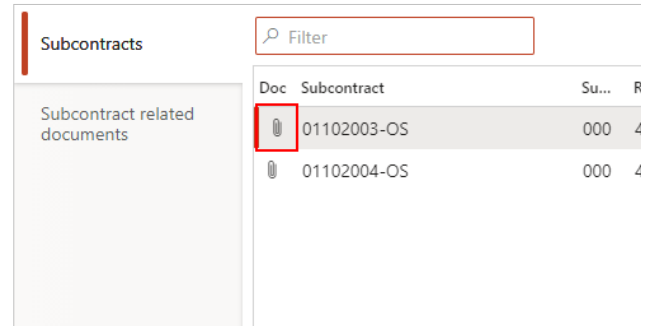
## 9.2.2. Work Instructions

### 9.2.2.1. View Subcontract

Click on the **Subcontract management (external)** workspace.

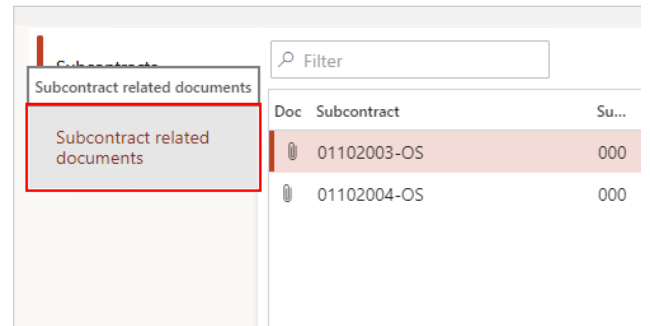


With the **Subcontract** tabbed list selected, click on the **Paperclip** icon to view the subcontract.

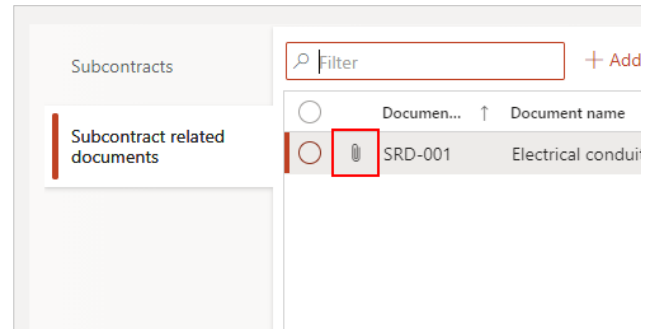


### 9.2.2.2. View Subcontract Related Documents

Click on the **Subcontract related documents** tabbed list.



To view an existing subcontract related document, click on the **Paperclip** icon.



### 9.2.3. Conclusion

Now that you have an understanding of how to view subcontracts and subcontract related documents, proceed to the next work instruction.

## 9.3. Upload Subcontract Related Documents

### 9.3.1. Introduction

#### 9.3.1.1. Objective

This work instruction covers how to upload subcontract related documents for your company on this project.

#### 9.3.1.2. Background Information

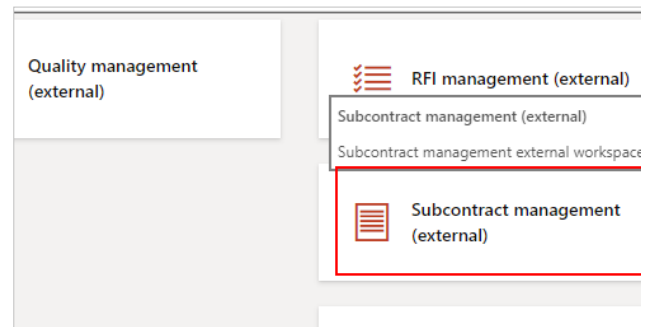
In PM4+, the Subcontract management workspace contains records which hold the descriptive information about your subcontracts on this project, as well as the signed document.

If the project team is also using the 'Subcontract related documents' log, the workspace also lists details about these documents, as well as the document file.

### 9.3.2. Work Instructions

#### 9.3.2.1. Upload Subcontract Related Document

Click on the **Subcontract management (external)** workspace.

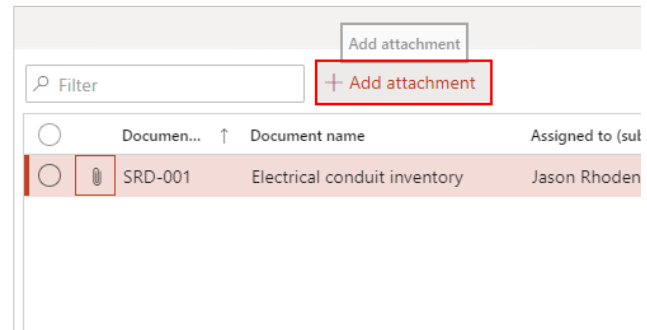




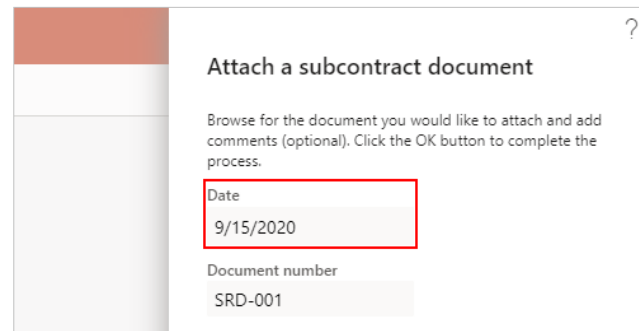
If your company received a request to provide a subcontract related document, and if your project team is using the 'Subcontract related documents' log, you can attach the requested files here.

You can also attach updated or revised documents, if these were requested.

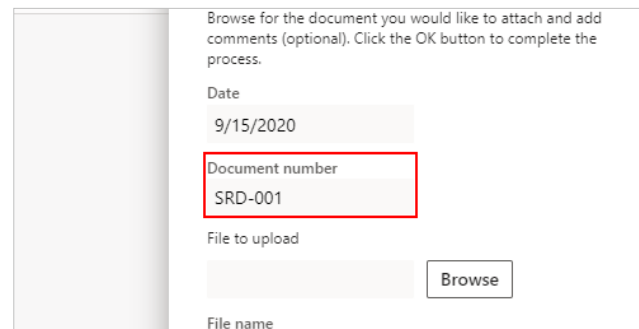
Click on the **Add attachment** button.



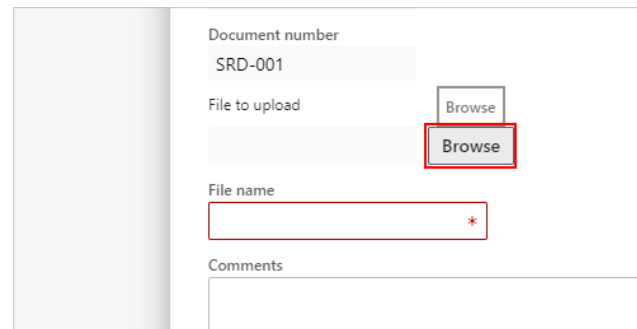
The **Date** field is read-only and populates the date when the attachment is added.



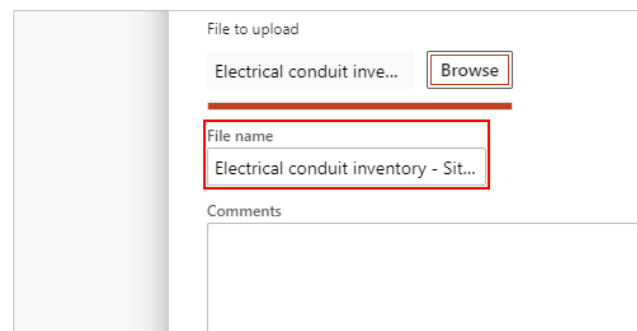
The **Document number** field is read-only.



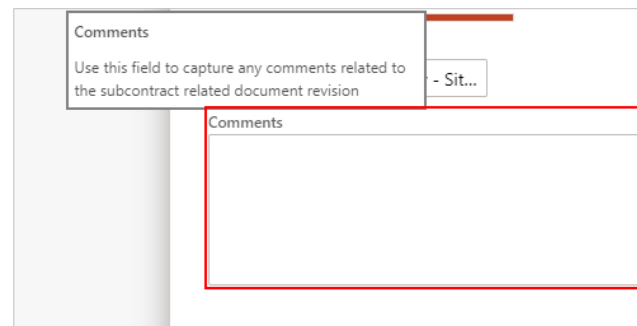
Click on the **Browse** button to upload the revision of the attachment.



The **File name** field populates with the name of the uploaded attachment.



Add comments about the file, if required.



Click on the **OK** button to add the attachment.



### 9.3.3. Conclusion

Now that you have an understanding of how to upload subcontract related documents, proceed to the next work instruction.