V310 Construction Project Management

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Senior Business Analyst

Timing and Agenda

May 7, 2024 -10 AM -12 PM

Day 1

Lesson 1: Preparing WIP and Bonding Reports

Lesson 2: Configuring Two-Tier Change Management

Lesson 3: Tracking Cost Changes to Projects

Lesson 4: Tracking Cost and Revenue Changes to Projects

Lesson 5: Preparing Cost Projections

May 8, 2024 -10 AM -12 PM

Day 2

Lesson 6: Tracking Compliance and Lien Waivers

Lesson 7: Using Project Issues and Change Requests

Lesson 8: Working with Requests for Information

Acumatica
The Cloud ERP

Timing and Agenda

May 9, 2024 -10 AM -12 PM

Day 3

Lesson 9: Using Drawing Logs

Lesson 10: Working with Photo Logs

Lesson 11: Working with Daily Field Reports and Progress Worksheets

Lesson 12: Processing Submittals

Acumatica
The Cloud ERP

Day 1

Curran
Acumatica Customer

Lesson 1.1: Create a Batch

Learning Objectives

In this lesson, you will learn how to do the following:

• Print and send substantiated billing reports, and understand what information is included in them

• Print and send American Institute of Architects (AIA) reports, and understand what information is included in them

• Print and send work-in-progress and bonding reports, and understand which information is included in them

• Review the project lifecycle and performance with the help of Acumatica ERP Construction Edition reports

Construction Reports: To Prepare a Work-in-Progress Report

Story

Suppose that the ToadGreen Building Group company is building a hotel for The Equity Group Investors, its customer, and is in the middle of the lifecycle of the construction project. The ToadGreen project estimator needs to track the progress of active project tasks, as well as their financial performance. The company uses the percentage-of-completion method for revenue recognition and includes the work-in-progress reports in the company's financial statements.

Acting as a project estimator, you will determine whether the project is overbilled or underbilled relative to its progress

Figure: Work-in-progress report for the project

ToadGreen

Projected Cost at Completion	Est. Gross Profit	Est. Gross Profit %	Actual				Period Billings	Billings to Period	Revenue Recognized	Gross Profit	Billings in Excess of Cost	Cost in Excess of Billings
			Period Costs	Costs to Period	% Budget Used	% Completed						
29,541,929.71	10,173,527.29	25.62 %	7,568,171.52	7,650,371.52	25.62 %	25.62 %	0.00	0.00	10,174,467.05	2,606,295.53	0.00	10,174,467.05
29,541,929.71	10,173,527.29	25.62 %	7,568,171.52	7,650,371.52	25.62 %	25.62 %	0.00	0.00	10,174,467.05	2,606,295.53	0.00	10,174,467.05

Construction Reports: To Prepare a Bonding Report

Story

Suppose that to ensure profitability, a project estimator of the ToadGreen company wants to see how projects are progressing in May 2024, and which projects may need special attention.

Acting as a project estimator, you will prepare and review the construction bonding report for this purpose.

Figure: Construction bonding report for May

CONSTRUCTION BONDING REPORT

Company/Branch	TOADGREEN	Exclude Projects Completed Through Date	-	
Status	Active	Use Cost Projections	No	
Actuals to Period	05-2024			

ToadGreen

PROJECT	DESCRIPTION	PROJECT CURRENCY	CONTRACT AMOUNT	% COMPLETE	EARNED REVENUE	BILLED TO DATE	% BILLED	OVER/UNDER BILLED	UNBILLED CONTRACT AMOUNT	COST TO DATE	COST TO COMPLETE	COST AT COMPLETION	PERIOD BILLINGS	PERIOD COSTS
HOTEL	The Beach Hotel and Condominiums (Warner Street)	USD	39,715,457.00	43.05 %	17,099,417.42	22,667,202.71	57.07 %	5,567,785.29	17,048,254.29	12,719,223.84	0.00	12,719,223.84	16,205,604.62	5,068,852.32
HOTELCP	The Beach Hotel and Condominiums (Golden Street)	USD	39,715,457.00	42.60 %	16,920,180.44	7,635,067.24	19.22 %	(9,285,113.20)	32,080,389.76	12,580,574.84	0.00	12,580,574.84	7,219,630.64	3,073,852.32
HOTELR	The Beach Hotel and Condominiums (Parkways East)	USD	39,715,457.00	43.08 %	17,108,349.05	0.00	0.00 %	(17,108,349.05)	39,715,457.00	12,725,867.54	0.00	12,725,867.54	0.00	3,073,852.32
HOTELRT	The Beach Hotel and Condominiums (Tyler Avenue)	USD	39,715,457.00	42.22 %	16,768,646.64	7,635,067.24	19.22 %	(9,133,579.40)	32,080,389.76	12,467,905.69	0.00	12,467,905.69	7,219,630.64	1,785,852.32
HOTELSM	The Beach Hotel and Condominiums	USD	39,715,457.00	42.79 %	16,994,264.91	12,807,479.84	32.25 %	(4,186,785.07)	26,907,977.16	12,641,007.24	0.00	12,641,007.24	2,000,919.63	3,213,352.32
ITALIAN	Italian restaurant (Market Street)	USD	2,186,984.80	60.17 %	1,315,967.63	0.00	0.00 %	(1,315,967.63)	2,186,984.80	1,014,388.84	0.00	1,014,388.84	0.00	120,652.32
ITALIAN2	Italian restaurant (Denver Avenue)	USD	2,186,984.80	22.17 %	484,794.67	0.00	0.00 %	(484,794.67)	2,186,984.80	919,452.84	0.00	919,452.84	0.00	15,852.32
ITALIAN3	Construction project (Italian Restaurant)	USD	2,186,984.80	0.00 %	0.00	0.00	0.00 %	0.00	2,186,984.80	0.00	0.00	0.00	0.00	0.00
	Totals:		205,138,239.40	41.93 %	86,691,620.77	50,744,817.03	24.74 %	(35,946,803.74)	154,393,422.37	65,068,420.83	0.00	65,068,420.83	32,645,785.53	16,352,266.24

Lesson 2: Configuring Two-Tier Change Management

Learning Objectives

In this lesson, you will learn how to do the following:

• Configure a change order class that supports the two-tier change management

• Configure default markups

• Create a change request to update the project budget

• Create a change order based on the change request

• Process a change request with a cost change order

• Process a change request with a revenue change order

• Cancel a change request

• Close a change request

Processing a change request with cost and revenue part

Job titles may vary across companies.

Create a project with the change order workflow

① Create a change request
Projects (PM301000)
Change Requests (PM308500)

Project clerk

Change request
Status: On Hold

Estimation tab

Project Task: Cost project task
Account Group: Cost account group
Inventory ID: Cost inventory item, or empty item code
Ext. Cost: Change cost
Quantity: Change quantity
Revenue Task: Revenue project task
Inventory ID: Revenue inventory item, or empty item code
Revenue Account Group: Revenue account group
Ext. Price: Change revenue
Create Commitment: Selected

Cost part

Revenue part

Markups tab

Project Task: Markup project task
Account Group: Markup account group
Markup Amount: Markup amount

② Prepare the change request for adding to a change order
Change Orders (PM308000)

Project clerk

Change request
Status: Open

Projects (PM301000) form, Revenue Budget or Cost Budget tab

Potential CO		Budgeted CO	
Quantity	Amount	Quantity	Amount

③ Add the change request to a change order
Change Orders (PM308000)

Project manager

Change order
Status: On Hold

Change request
Status: Closed

Process the change order

Revenue Budget tab

Line 1
Project Task: Revenue project task
Account Group: Revenue account group
Inventory ID: Revenue inventory item, or empty item code
Quantity: Change quantity
Amount: Change revenue

Line 2
Project Task: Markup project task
Account Group: Markup account group
Quantity: 0
Amount: Markup amount

Cost Budget tab

Project Task: Cost project task
Account Group: Cost account group
Inventory ID: Cost inventory item, or empty item code
Quantity: Change quantity
Amount: Change cost

Commitments tab

Project Task: Cost project task
Account Group: Cost account group
Inventory ID: Cost inventory item, or empty item code
Quantity: Change quantity
Amount: Change cost

Two-Tier Change Management: Implementation Activity

Story

Suppose that you, as the system administrator, need to configure two-tier change management so that the change requests to projects can be processed in the system. Also, you need to configure the following price markups to be applied to the new projects:

- A default price markup of 25% to be applied to each individual change made with a change request

- A markup of 8% of the total costs to be applied to an entire change request

- A markup of 4% of overhead to be applied to an entire change request

- A markup of 5% of all the previously charged markups to be applied to an entire change request

- A flat fee of $100 per change request

You also need to configure an additional 10% markup to be automatically applied to the change request lines that relate to labor. Acting as the system administrator, you will perform these tasks.

Two-Tier Change Management: To Configure Project Markups

Story

Suppose that you, as the project manager need to configure the following price markups to be applied to change requests created for the ITALIAN project:

• A markup of 9% of the total costs to be applied to an entire change request

• A markup of 6% of overhead to be applied to an entire change request

• A markup of 7% of all the previously charged markups to be applied to an entire change request

• A flat fee of $1250 per change request

Also, you need to associate these markups with the particular project task, account group, and cost code to track them in the revenue budget of the project. Acting as the project manager, you will perform these tasks.

Lesson 3: Tracking Cost Changes to Projects

This lesson explains how you can process cost changes for construction projects.

Two-Tier Change Management: To Process Cost-Only Changes to a Project

Story

Suppose that ToadGreen is a general contractor building an Italian restaurant for the Italian Company, its customer.

The ToadGreen project manager has created a project for the work to be performed, and the budget has been agreed upon with the customer. The construction work has been started. Further suppose that on March, 21, 2024, an on-site worker found out that the wet subfloor in the building needs to be dried, cleaned, and aired out, and this worker has notified the project manager about this.

After reviewing the damages, the project manager has decided to hire a subcontractor, Acme Doors & Glass, to perform this work. The subcontractor notifies the project manager that four working days are needed for completing the cleaning. The customer for which the project is being performed did not approved the changes because the damages were the workers' fault.

Acting as the project manager, you need to reflect the additional work in the cost project budget and cancel the changes in the revenue budget.

Figure: Budgeted amounts updated after the release of the change order

Lesson 4: Tracking Cost and Revenue Changes to Projects

This lesson explains how you can process cost and revenue changes for construction projects.

Two-Tier Change Management: To Process Cost and Revenue Changes to a Project

Story

Suppose that ToadGreen Building Group is a general contractor building an Italian restaurant for the Italian Company customer. The ToadGreen project accountant has created a project for the work to be performed and the budget has been agreed upon with the customer. The construction work has been started.

Then suppose that on April, 15, 2024, a worker of a subcontractor, Acme Doors & Glass, arrived at the construction site to perform cleaning work. The worker found out that the French-style window specified in the plans does not fit the framed opening and notified the ToadGreen project manager about this. The project manager has estimated that five days will be needed to fix this issue, and this will cost $3,500. Also, the ToadGreen manager has decided to add an extra markup in the amount of $1,450 for the work to be performed.

Acting as the project manager, you need to agree upon the cost budget with the engineer and the revenue budget with the customer. For this purpose, you will prepare a change request with the related project issue, and then process the cost change order along with the related commitments to make changes to the project cost budget.

After the work is finished in June, you will process the revenue change order to record the revenue.

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Figure: The updated potential amount and quantity in the project

Projects
ITALIAN - Italian restaurant (Market Street)

← ⟲ 💾 ↶ + 🗑 |← ← → →| COMPLETE PROJECT **RUN PROJECT BILLING** ⋯

* Project ID:	ITALIAN - Italian restaurant (Market St 🔍	Status:	Active	Actual Income:	0.00
Customer:	ITACOM - Italian Company 🔍 ✏			Actual Expenses:	1,030,241.16
Template:	CONTM - Construction project (time and ✏			Margin:	-1,030,241.16	%:	0.00
* Description:	Italian restaurant (Market Street)				

SUMMARY TASKS REVENUE BUDGET **COST BUDGET** BALANCES COMMITMENTS INVOICES CHANGE ORDERS CHANGE REQUESTS UNION LOCALS ACTIVITIES EMPLOYEES EQUIPMENT ADDRESSES DEFAULTS ATTRIBUTES

Project Task: [   ] 🔍   ☐ Group by Task

↻ + ✕ VIEW COMMITMENT DETAILS VIEW TRANSACTIONS ↦ ☒ ⬆

		* Project Task	Cost Code	* Account Group	Description	Original Budgeted Quantity	UOM	Unit Rate	Original Budgeted Amount	Revised Budgeted Quantity	Revised Budgeted Amount	Original Committed Quantity	Original Committed Amount	Actual Quantity	Actual Amount	Potential CO Quantity	Potential CO Amount
📎 🗋		08	08-100	MATERIAL	Doors- Exterior	8.00	EA	1,000.0000	8,000.00	8.00	8,000.00	0.00	0.00	0.00	0.00	0.00	0.00
📎 🗋		08	08-100	SUBCON	Doors- Exterior	28.00	EA	50.0000	1,400.00	28.00	1,400.00	0.00	0.00	0.00	0.00	20.00	1,040.00
📎 🗋		08	08-200	MATERIAL	Doors- Interior	9.00	EA	750.0000	6,750.00	9.00	6,750.00	0.00	0.00	0.00	0.00	0.00	0.00
📎 🗋		08	08-200	SUBCON	Doors- Interior	30.00	EA	50.0000	1,500.00	30.00	1,500.00	0.00	0.00	0.00	0.00	0.00	0.00
📎 🗋		08	08-400	MATERIAL	Doors- Overhead	1.00	EA	2,000.0000	2,000.00	1.00	2,000.00	0.00	0.00	0.00	0.00	0.00	0.00
📎 🗋		08	08-400	SUBCON	Doors- Overhead	16.00	EA	50.0000	800.00	16.00	800.00	0.00	0.00	0.00	0.00	0.00	0.00
📎 🗋		08	08-520	MATERIAL	Windows- Wood	30.00	EA	525.0000	15,750.00	30.00	15,750.00	0.00	0.00	0.00	0.00	0.00	0.00
📎 🗋		08	08-520	SUBCON	Windows- Wood	90.00	EA	50.0000	4,500.00	90.00	4,500.00	0.00	0.00	0.00	0.00	17.00	850.00
📎 🗋		08	08-800	MATERIAL	Entrances, Storefronts, Curtain Walls	1.00	EA	24,500.0000	24,500.00	1.00	24,500.00	0.00	0.00	0.00	0.00	0.00	0.00
📎 🗋		08	08-800	SUBCON	Entrances, Storefronts, Curtain Walls	80.00	EA	100.0000	8,000.00	80.00	8,000.00	0.00	0.00	0.00	0.00	0.00	0.00

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Lesson 5: Preparing Cost Projections

Learning Objectives

In this lesson, you will learn how to do the following:

- Configure a cost projection class

- Create a cost projection for a project

- Create a new revision of a cost projection

- Estimate the costs of a project at a different level of detail

- Review the projected costs in a project budget

Project Cost Projections: To Create a Cost Projection Class

Story

Suppose that you are the construction project manager of the ToadGreen Building Group company, and you need to create a cost projection class to be used for estimating the costs of a project. The cost projection class must provide the ability to estimate the costs at the task, item, and account group level of detail.

Project Cost Projections: Process Activity

Story

Suppose that the ToadGreen company is building an Italian restaurant for the Italian Company, its customer, and is in the middle of the lifecycle of the construction project. The project manager analyzes the current project state and notices the following:

• For the purchases of concrete and on-site work for the project, $6,200 has to be spent; after that, the work will be finished, and the corresponding project tasks will be considered as completed.

• For the masonry work, $26,650 has to be spent to complete the on-site work. The project manager wants to know the exact details of the costs to be incurred for the completion of the task.

In response to the project manager's request the ToadGreen project estimator needs to analyze the current state of the project and estimate how the planned expenses will affect the project budget. Then the project estimator should prepare a construction bonding report with the projected amounts related to masonry work.

Acting as the project estimator, you will prepare a cost projection revision for the project.

Figure: The prepared cost projection revision

Day 2

Boca Terry
Acumatica Customer

Lesson 6: Tracking Compliance and Lien Waivers

Learning Objectives

In this lesson, you will learn how to do the following:

• Configure categories and statuses for compliance documents

• Enter compliance documents for a vendor

• Track expired compliance documents

Compliance Documents: To Configure Attributes for Compliance Documents

Story

Suppose that the ToadGreen company needs to keep track of the insurance documents and certificates in the system. Acting as a ToadGreen system administrator, you need to specify the values for the custom attributes of the Insurance, Certificate, and Status compliance type, so that users can specify their values for the compliance documents.

Compliance Documents: To Track Compliance Documents for a Vendor

Story

Suppose that the Standard Hardware Company vendor has provided the ToadGreen company with its OSHA certificate and its general liability insurance. Acting as a construction project manager, you need to enter this information in the system.

Lien Waivers: General Information

Learning Objectives

In this lesson, you will learn how to do the following:

• Configure the automatic generation of conditional lien waivers

• Configure the automatic generation of unconditional lien waivers

• Specify actions to be performed for outstanding lien waivers

• Manually add a lien waiver for a document

• Mark a lien waiver as the final one

• Print and email lien waivers

Lien Waivers: To Configure Automatic Generation of Lien Waivers

Story

Suppose that the ToadGreen company requires conditional lien waivers to be automatically generated when payments of an amount greater than $2000 are submitted. Acting as a system administrator, you need to configure the mailing and automatic generation of lien waivers. Then you need to configure the automatic generation of lien waivers for a particular vendor.

Lien Waivers: To Process an AP Document with Lien Waivers

Story

Suppose that the ToadGreen company needs to pay a bill to a subcontractor, the Architectural Design Company.

Acting as a project manager, you need to enter a subcontract, create and pay the bill in the system, and make sure that the related lien waiver has been generated and sent to the subcontractor.

Figure: The lien waiver generated for the payment

Lesson 7: Using Project Issues and Change Requests

Learning Objectives

In this lesson, you will learn how to do the following:

• Configure project management classes that may be used to ease the creation of project issues

• Define project issue types

• Report project issues

• Convert project issues to change requests

• Convert project issues to requests for information

• Mass-assign project issues to owners

Project Issues: Implementation Activity

Story

Suppose that you, a system administrator of a construction company, ToadGreen Building Group, need to define the types of project issues for the company. You need to track design issues, violations of safety regulations, and problems with equipment, materials, or people. You also need to configure a project management class that is going to be used for creating project issues so that the due date for resolving a newly created project issue will be set to seven days by default.

Project Issues: To Create a Change Request from a Project Issue

Story

Suppose that on 3/21/2024, a design issue has occurred on the construction site of the Beach Hotel and Condominiums project that the ToadGreen company is working on: A subcontractor put a hole in a wall when stacking materials. The project engineer has reported that one day is necessary to fix the issue, and it will cost $2000.

Acting as a ToadGreen construction project manager, you need to create the project issue in the system, and then convert it to a change request.

Figure: Project issue that has been converted to a change request

Lesson 8: Working with Requests for Information

Learning Objectives

In this lesson, you will learn how to do the following:

• Create and process a new request for information

• Create a new request for information that relates to another request for information

• Create a change request from a request for information

Requests for Information: To Process an Outgoing Request for Information

Story

Suppose that the ToadGreen company is building a hotel for the Equity Group Investors customer. Then suppose that the customer has requested a specification for the hotel roofing. In order to provide this specification, the ToadGreen project engineer (Ricky Thompson) needs to request these specifications from Balaji Rajan, an engineer of the subcontractor company that performs this part of the work for the project.

Acting as the ToadGreen project engineer, you need to create an incoming request for information from the subcontractor, and then create the related outgoing request for information for an external engineer who can provide the requested specifications. After the specifications are received, you send them to a project engineer for review.

Figure: Outgoing request for information

Requests for Information: To Create a Request for Information from a Project Issue

Story

Suppose that a design issue has been discovered on the construction site of the Beach Hotel and Condominiums, a project that the ToadGreen company is working on: Because of the unstable terrain, the paving should be placed differently. The engineer has reported that the issue will take three days to be resolved and it will cost $60,000.

Acting as a construction foreman, you need to enter the project issue in the system, and then you need to clarify which paving material needs to be used by processing a request for information for the project issue.

Figure: Request for information created based on the project issue

Request for Information
RF-000003 - The Beach Hotel and Condominiums (Warner Street)

* Project:	HOTEL - The Beach Hotel an
Project Task:	
Business Account:	SUNTECH - Suntech Concret
* Contact:	Ally Ralts
* Class ID:	DOCRFI - Construction RFI d
* Summary:	Paving should be replaced

☐ Incoming

Status:	New
Reason:	N/A
Priority:	Medium
Documentation Link:	
Specification Section:	
Converted From:	IS-000003

* RFI ID:	RF-000003
* Creation Date:	2/15/2024
Created By:	Ernest P. Smith
Owner:	Ricky Thompson
Answer Due Date:	2/17/2024
Workgroup:	

☑ Schedule Impact

Schedule Impact (days):	3

☑ Cost Impact

Cost Impact:	60,000.00

☐ Design Change

Converted To:

DETAILS   ATTRIBUTES   ACTIVITIES   RELATIONS   DRAWINGS

Question

Due to unstable terrain, the paving needs to be laid differently. Refer to the updated site plan.
What paving material should be used?

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40

Day 3

DiamondBack Covers
Acumatica Customer

Lesson 9: Using Drawing Logs

Learning Objectives

In this lesson, you will learn how to do the following:

• Configure drawing logs and set up disciplines and statuses

• Create drawing logs

• Upload and download images linked to drawing logs

• Link requests for information and project issues to existing drawing logs

• Email drawings and requests for information

• Create revisions of drawing logs

Drawing Logs: Implementation Activity

Story

Suppose that the ToadGreen company needs to maintain drawing logs in the system and track their statuses.

Acting as a system administrator, you need to perform the necessary configuration in the system.

Drawing Logs: Process Activity

Story

Suppose that the ToadGreen architect has prepared a floor plan blueprint for the Beach Hotel and Condominiums, the project that the ToadGreen company is working on. Then the architect has submitted a request for information about the plan of the first floor to make sure that the current location of the storage room (next to the service elevator) is correct. Based on the submitted request for information, a new revision of the blueprint should be created and linked to the original drawing, and the original blueprint must be marked as obsolete.

Acting as the architect, you will process all required documents in the system with the assumption that these changes will not affect the schedule, cost, and design.

Figure: The new revision of the drawing log

Drawing Log
DL-000004 - The Beach Hotel and Condominiums (Warner Street)

* Drawing Log ID: DL-000004
Project: HOTEL - The Beach Hotel and C
Project Task:
Discipline: Architectural
Owner: Ellen Watson

Drawing Number: 1
* Revision: 1
* Drawing Date: 3/15/2024
Received Date: 3/15/2024
* Status: Active
☑ Current

* Title: Floor plan
Description: Revised floor plan blueprint
Sketch:
Original Drawing: DL-000003

DRAWINGS | ATTRIBUTES | ACTIVITIES | REVISIONS | RELATIONS

File Name	Comment	Current	Created By
Floor_Plan_Revision_2.jpg		☑	Richard Smith

Lesson 10: Working with Photo Logs

Learning Objectives

In this lesson, you will learn how to do the following:

• Create a photo log

• Upload photos to a photo log

• Update a photo that has been uploaded to a photo log

• Download a ZIP archive with all the photos and files of a photo log

• Send an email with all the photos and files of a photo log

Photo Logs: Implementation Activity

Story

Suppose that the ToadGreen company needs to keep photo logs in the system. Acting as a system administrator, you need to define the statuses to be used for photo logs.

Photo Logs: Process Activity

Story

Suppose that on February 15, 2024, the construction foreman has inspected the project site and taken progress photos. Acting as the construction foreman, you will create a photo log for the particular project and project task and upload the photos to this photo log. Then you will send the photos to the responsible person.

Figure: Photo log with uploaded photos

Lesson 11: Working with Daily Field Reports and Progress Worksheets

Learning Objectives

In this lesson, you will learn how to do the following:

• Create and assign an approval map for daily field reports

• Create a daily field report

• Add to the daily field report the following entities: progress worksheets, labor time and activities, change orders, change requests, subcontractor activities, project issues, weather conditions, site visitors

• Email the daily field report

Daily Field Reports: To Configure Approval for Daily Field Reports

Story

Suppose that the ToadGreen company needs to keep daily field reports in the system. These reports need to be approved by managers. Acting as a system administrator, you need to create the approval map for the daily field reports and specify the daily field report settings in the system.

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Daily Field Reports: Process Activity

Story

Suppose that on February 15, 2024, Ernest Smith, a construction foreman in the ToadGreen company, spent a day on the construction site of the Italian restaurant that the company is building for the Italian Company. During the day, he has recorded the current progress of the work related to electricity installation and made notes about subcontractor activities, weather conditions, visitors, and other important information that relates to the day's work at the project site. Also, he has taken photos to support his report about weather conditions. At the end of the day, Ernest creates a daily field report, adds notes, and sends the daily field report for approval to the construction project manager.

Acting as the construction foreman, you will create and process the daily field report and add all needed information to it. Then acting as the construction project manager, you will approve the daily field report.

Figure: Daily field report submitted for approval

Lesson 12: Processing Submittals

Learning Objectives

In this lesson, you will learn how to do the following:

• Configure submittal types

• Create a submittal in the system

• Define the people that will take part in processing a submittal and their submittal roles

• Process submittal-related activities

• Create a new revision of a submittal

• Close the completed submittal

Submittals: Implementation Activity

Story

Suppose that the ToadGreen company needs to track submittals. Also, the construction project manager wants to be able to categorize the submittals for which photos have been provided, and those for which product samples have been provided. Thus, you need to create these types of submittals in the system. Acting as a system administrator, you need to configure the submittal types to be used for the categorization of submittals in the system.

Submittals: Process Activity

Story

Suppose that the ToadGreen Building Group company is building an Italian restaurant for the Equity Group Investors customer. The company needs to confirm that the customer wants to use the carpet being proposed for the dining area of the restaurant.

Ellen Watson, as the construction project manager, is managing the submittal process. Jonathan Stone, the customer's designer, needs to approve a sample of the carpet. Teresa Willis—a new sales manager of Karn Design Inc., for which the construction project manager needs to add a contact in the system—needs to send the carpet sample to Jonathan Stone, who should approve the color and the material of the carpet. Also, the construction project manager needs to send the approved sample for an informational review to Larry Robinson, a purchase manager of the ToadGreen company.

Also suppose that after reviewing the sample, the designer rejects the submittal because a part of the carpet's pattern was cut off; the designer requests a larger sample.

Acting as the construction project manager, you need to create a new contact to be used in the submittal, enter the submittal in the system, open it, and add the necessary information during the processing of the submittal. Then you need to close the submittal and create a new revision for it.

Acumatica
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Figure: Closed submittal revision

Thank you!

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