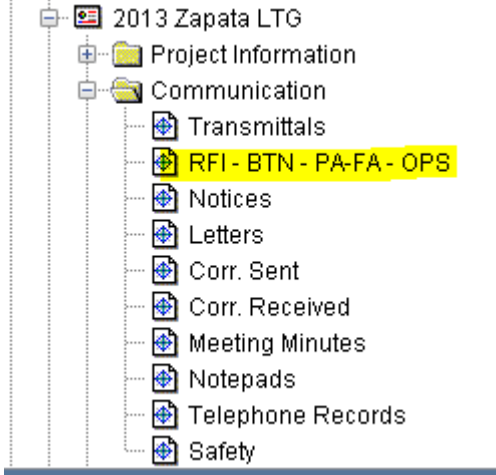
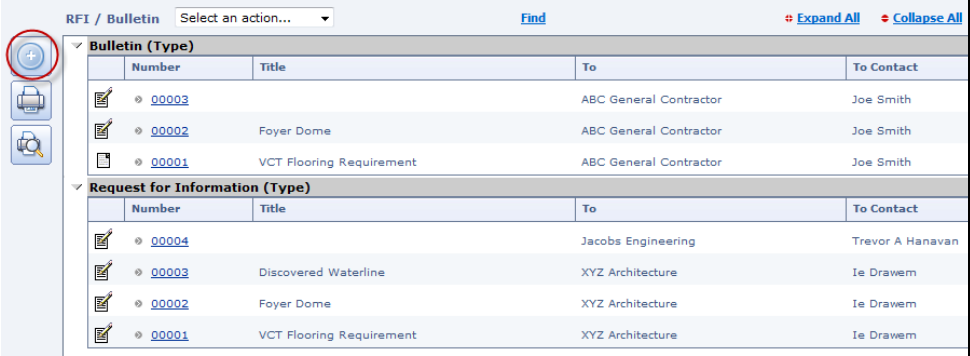
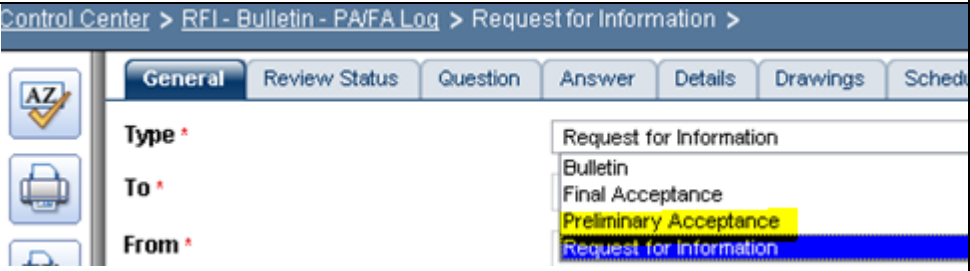


# Preliminary & Final Acceptance Instruction Manual

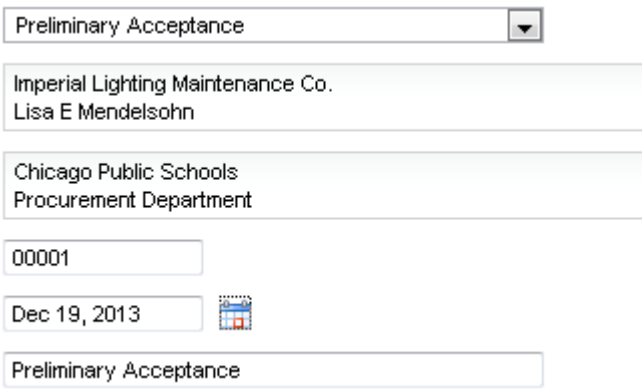
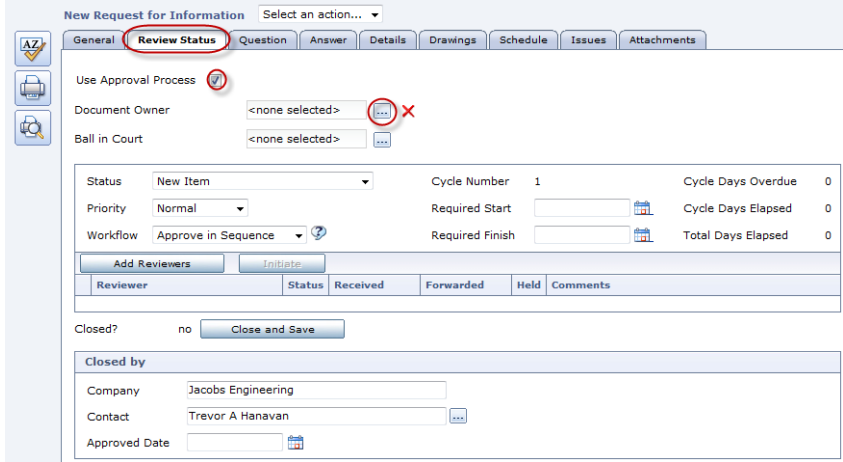
**AOR: Creates PA under direction of the PM.**

<p>1) After you have logged into CM expand the project that you will be creating the PA for.</p> <p>a) After expanding the project expand the folder "Communication"</p> <p>b) Select "RFI - Bulletin – PA-FA - OPS"</p>																																																																	
<p>2) Click the "Add Document" button on the left hand side of the screen.</p>	 <table border="1" data-bbox="646 1010 1529 1136"> <thead> <tr> <th colspan="5">RFI / Bulletin</th> </tr> <tr> <th colspan="2">Bulletin (Type)</th> <th>Number</th> <th>Title</th> <th>To</th> <th>To Contact</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>00003</td> <td></td> <td></td> <td>ABC General Contractor</td> <td>Joe Smith</td> </tr> <tr> <td><input type="checkbox"/></td> <td>00002</td> <td>Foyer Dome</td> <td></td> <td>ABC General Contractor</td> <td>Joe Smith</td> </tr> <tr> <td><input type="checkbox"/></td> <td>00001</td> <td>VCT Flooring Requirement</td> <td></td> <td>ABC General Contractor</td> <td>Joe Smith</td> </tr> </tbody> </table> <table border="1" data-bbox="646 1136 1529 1314"> <thead> <tr> <th colspan="5">Request for Information (Type)</th> </tr> <tr> <th colspan="2">Request for Information (Type)</th> <th>Number</th> <th>Title</th> <th>To</th> <th>To Contact</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>00004</td> <td></td> <td></td> <td>Jacobs Engineering</td> <td>Trevor A Hanavan</td> </tr> <tr> <td><input type="checkbox"/></td> <td>00003</td> <td>Discovered Waterline</td> <td></td> <td>XYZ Architecture</td> <td>Ie Drawem</td> </tr> <tr> <td><input type="checkbox"/></td> <td>00002</td> <td>Foyer Dome</td> <td></td> <td>XYZ Architecture</td> <td>Ie Drawem</td> </tr> <tr> <td><input type="checkbox"/></td> <td>00001</td> <td>VCT Flooring Requirement</td> <td></td> <td>XYZ Architecture</td> <td>Ie Drawem</td> </tr> </tbody> </table>	RFI / Bulletin					Bulletin (Type)		Number	Title	To	To Contact	<input type="checkbox"/>	00003			ABC General Contractor	Joe Smith	<input type="checkbox"/>	00002	Foyer Dome		ABC General Contractor	Joe Smith	<input type="checkbox"/>	00001	VCT Flooring Requirement		ABC General Contractor	Joe Smith	Request for Information (Type)					Request for Information (Type)		Number	Title	To	To Contact	<input type="checkbox"/>	00004			Jacobs Engineering	Trevor A Hanavan	<input type="checkbox"/>	00003	Discovered Waterline		XYZ Architecture	Ie Drawem	<input type="checkbox"/>	00002	Foyer Dome		XYZ Architecture	Ie Drawem	<input type="checkbox"/>	00001	VCT Flooring Requirement		XYZ Architecture	Ie Drawem
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<p>3) You will be brought to the "General" tab.</p> <p>a) Type: Open the drop down menu and select "Preliminary Acceptance"</p>	 <p>Control Center &gt; RFI - Bulletin - PA/FA Log &gt; Request for Information &gt;</p> <p>General   Review Status   Question   Answer   Details   Drawings   Sched</p> <p>Type * To * From *</p> <p>Request for Information Bulletin Final Acceptance Preliminary Acceptance Request for information</p>																																																																

- 4) After selecting “Preliminary Acceptance”:  
 a) To\*: Click on the ellipses button and select the GC

- 5) The Contacts Window will pop up.  
 a) Expand the GC Company  
 b) Click on “Select” next to the GC contact that is assigned to your project

- 6) Please leave the “From\*” as Chicago Public Schools

<p>7) After selecting the "From*" contact-</p> <p>a) Number: This will automatically generate the number 00001.</p> <p>b) Date: <b>Select the official date of the PA certificate.</b></p> <p>c) Title: Preliminary Acceptance</p>	 <p>The screenshot shows a web form with the following fields:</p> <ul style="list-style-type: none"> <li>Dropdown menu: Preliminary Acceptance</li> <li>Text input: Imperial Lighting Maintenance Co. Lisa E Mendelsohn</li> <li>Text input: Chicago Public Schools Procurement Department</li> <li>Text input: 00001</li> <li>Date picker: Dec 19, 2013</li> <li>Text input: Preliminary Acceptance</li> </ul> <p>Below the form, the text "Date of Preliminary Acceptance:" is followed by the handwritten date "DECEMBER 19, 2013".</p>
<p>8) Browse to "Review Status" tab.</p> <p>a) Use Approval Process: Make sure this stays checked.</p> <p>b) Document Owner: Click the ellipses button and select yourself (the AOR) to be the Document Owner (<b>until the end</b>).</p>	 <p>The screenshot shows the 'Review Status' tab of a 'New Request for Information' form. Key elements include:</p> <ul style="list-style-type: none"> <li>Navigation tabs: General, <b>Review Status</b>, Question, Answer, Details, Drawings, Schedule, Issues, Attachments.</li> <li>Form fields: <ul style="list-style-type: none"> <li>Use Approval Process: <input checked="" type="checkbox"/></li> <li>Document Owner: &lt;none selected&gt; (with an ellipsis button and a red 'x' mark)</li> <li>Ball in Court: &lt;none selected&gt; (with an ellipsis button)</li> <li>Status: New Item</li> <li>Cycle Number: 1</li> <li>Priority: Normal</li> <li>Workflow: Approve in Sequence</li> <li>Buttons: Add Reviewers, Initiate</li> <li>Table with columns: Reviewer, Status, Received, Forwarded, Held, Comments</li> <li>Closed?: no (with a 'Close and Save' button)</li> <li>Closed by section: <ul style="list-style-type: none"> <li>Company: Jacobs Engineering</li> <li>Contact: Trevor A Hanavan (with an ellipsis button)</li> <li>Approved Date: (with a date picker)</li> </ul> </li> </ul> </li> </ul>

9) The Select Contact pop up will appear.

- a) Click on the dropdown for your Company (AOR) and select your name.

10) Browse to the "Detail" tab. Select the General Contract

**SAVE**

11) Browse to the "Attachments" tab.

- a) Attach the **SIGNED** PA Certificate
- b) Attach the Punchlist

Architect of Record:

Michael A. Melodyre  
Signature

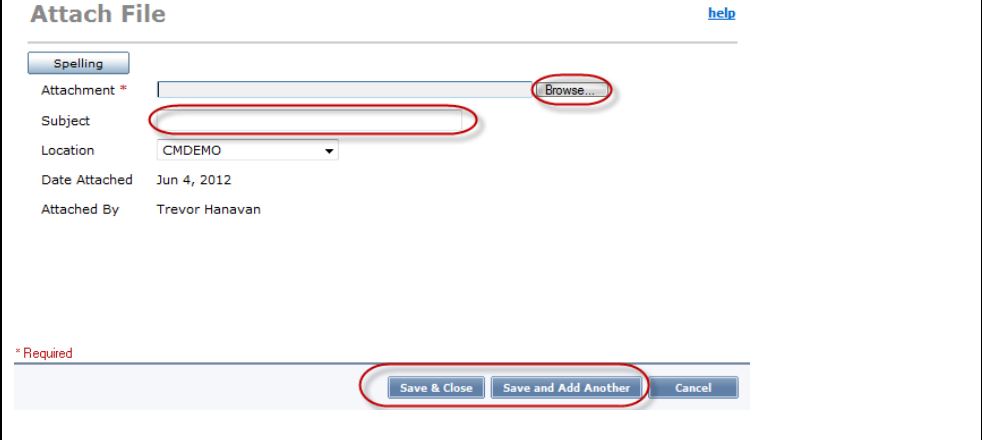
3-19-2014  
Date

Michael A. Melodyre - TBA AOR  
(Print Architect Name and Title)

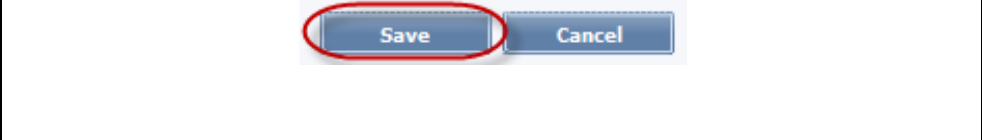
12) The Attachments pop up window will appear.

- Browse: Locate the file within your machines drive and select it to attach.
- Subject: Title the document.
- Location: Ignore this, it can't be changed.

Click Save & Close or Save and Add Another if you have multiple attachments.

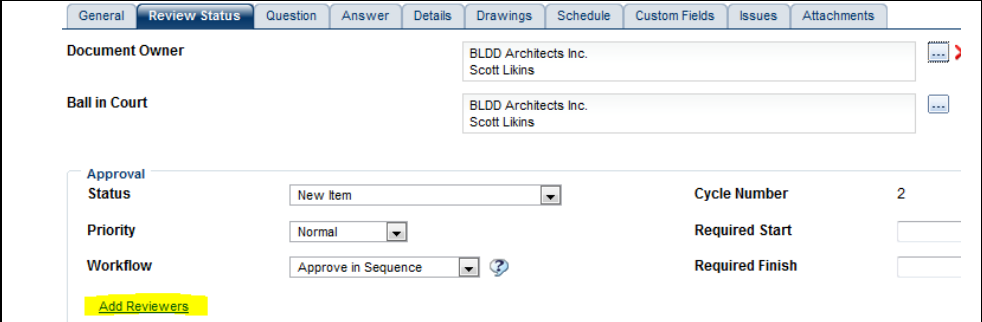


13) After you have finished filling in all required fields click on "Save" in the bottom right hand part of the screen.



14) After you have saved your Preliminary Acceptance browse to the "Review Status" tab.

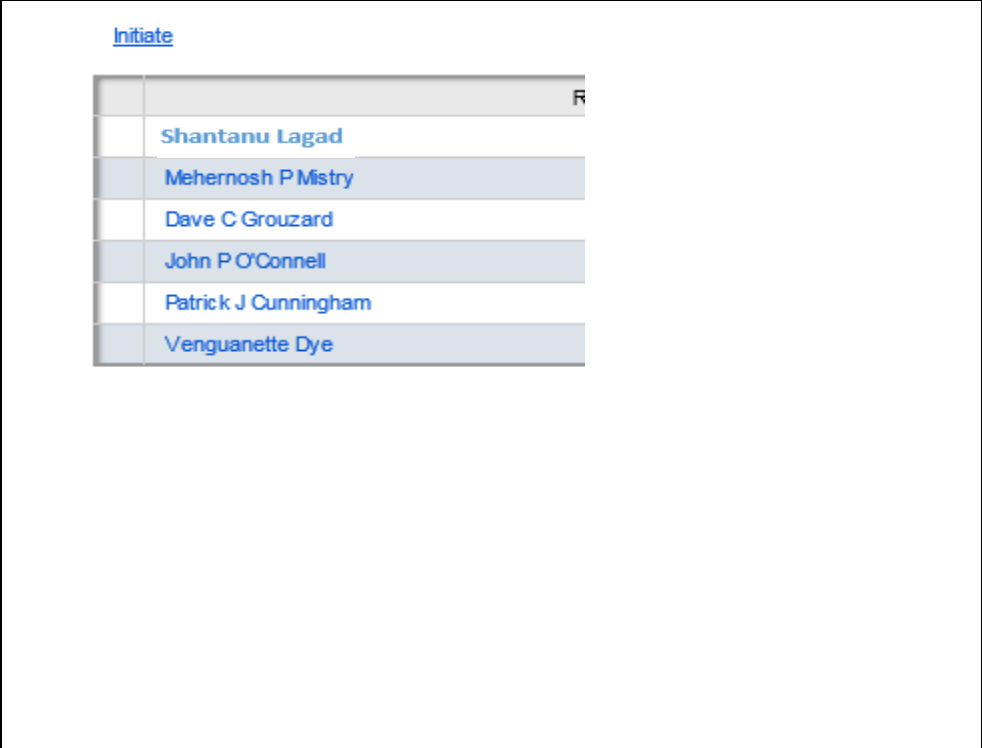
15) Click on the "Add Reviewers" button.



16) Once the Select Contacts window pops up select:

- Shantanu Lagad from Jacobs (reviewing for accuracy), the DM, the PM, Jack O'Connell, the BM/OM, then the QM
- \*Please refer to the school list of OMs/BMs/QMs for correct selection. For the current listing, please contact Shantanu Lagad at [sslagad@cps.edu](mailto:sslagad@cps.edu) OR find it within: [cps.edu/cipsupport](http://cps.edu/cipsupport)

**If you don't find the correct person to add as a reviewer, PLEASE contact Shantanu and he'll add them.**



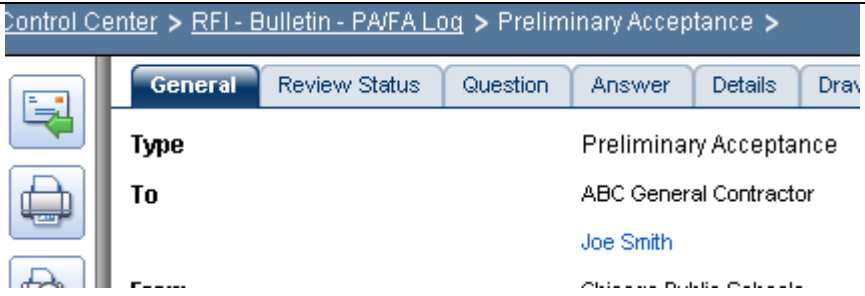
SAVE

<p><b>17) Change the Document Owner to the Project Manager.</b></p> <p>a) Click on the arrow next to the company. Click "Select" next to the PM.</p> <p><b>DO NOT CLICK SAVE</b></p> <p>Make sure the Workflow is : <b>Approve in Sequence</b></p> <p>Click on the "Initiate" button to begin the Approval Process. This will automatically email the first Reviewer notifying them that they need to review and approve the PA.</p>	
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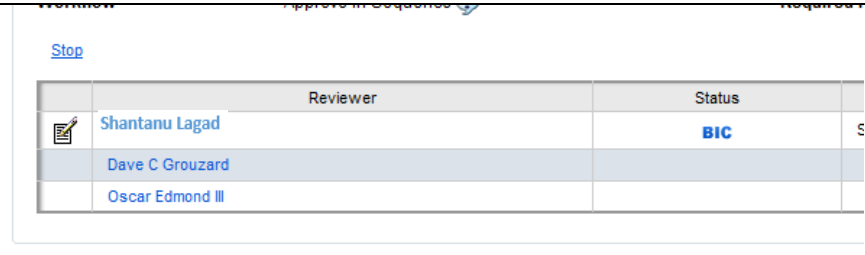
**PM, DM & Jack: Approves or Rejects PA**

<p>1) After receiving the email notification from Contract Management, you will either click on the link within the email notification and log into CM, or copy the link from the notification by right clicking on it and select "Copy Link Address" and paste it into your open session of CM in the browser bar and Enter.</p> <p>2) OR log into Primavera, click on your Action Box, select the item and it'll take you right into the General tab of the PA.</p>	

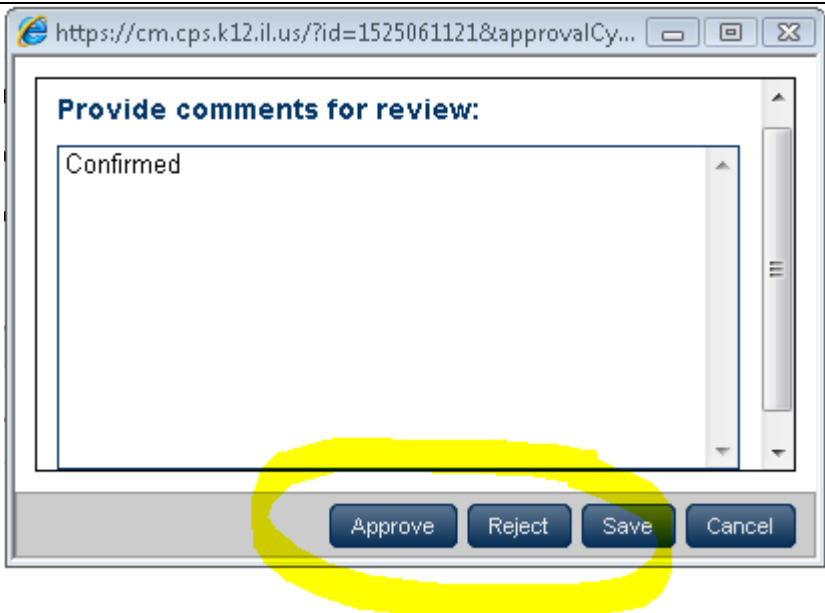
3) You will be brought into the "General" tab of the PA requiring your review.  
 a) Click on the "Attachments" tab and review the documents attached.



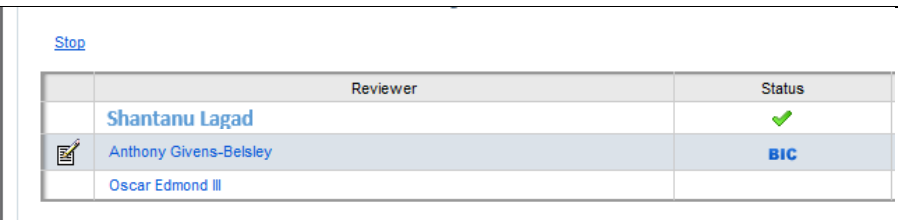
4) Browse to the "Review Status" tab and click on the "Edit" document button left of your name.



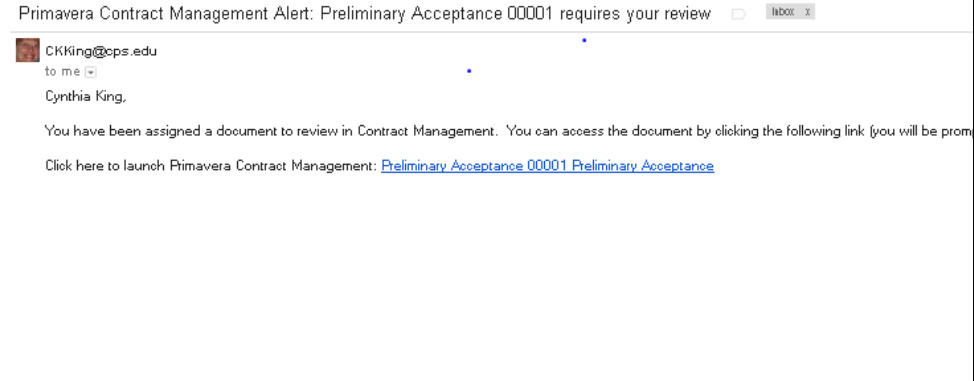
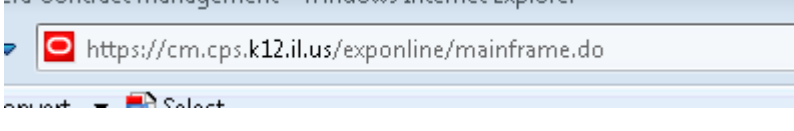

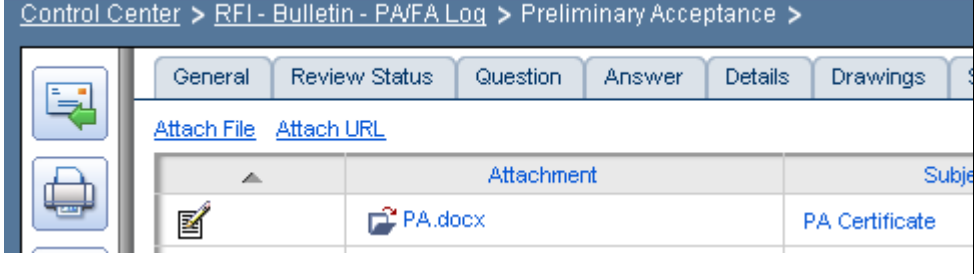
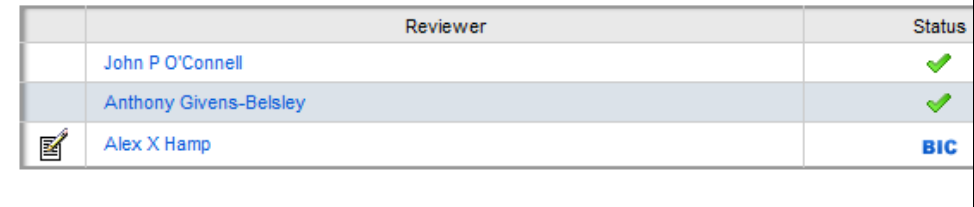
5) The review window will pop up.  
 a) Provide comments for review pertaining to the PA.  
 b) Click on "Approve" or "Reject".  
 c) If Approved, it will be passed onto the next reviewer in sequence. If Rejected it will go back to the PM.



6) You will notice that the BIC has changed to the next reviewer in sequence after Approval. An automatic email notification is sent to the DM to review and so on.

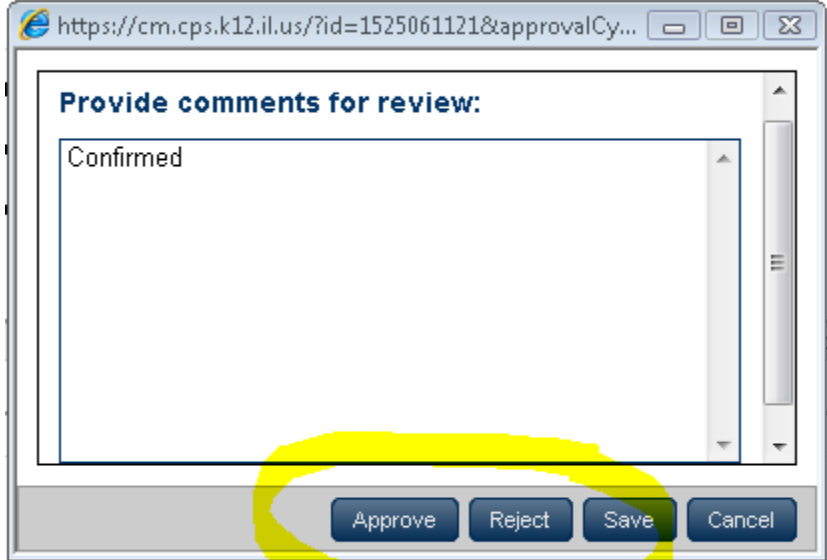


**DM: Approves or Rejects PA - the same instructions apply to the OM/BM/QM as to the PM, DM & Jack.**

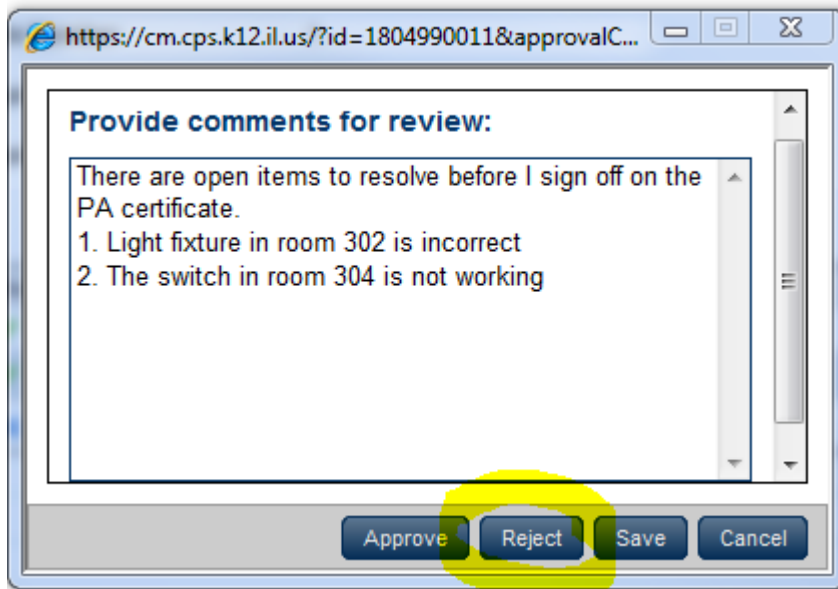
<p>1) After receiving the email notification from Contract Management, you will either click on the link within the email notification and log into CM, or copy the link from the notification by right clicking on it and select "Copy Link Address" and paste it into your open session of CM in the browser bar and Enter.</p>									
									
<p>2) You will be brought into the "General" tab of the PA requiring your review.</p>									
<p>a) Click on the "Attachments" tab and review the attached documents.</p>	 <table border="1"> <thead> <tr> <th>Attachment</th> <th>Subject</th> </tr> </thead> <tbody> <tr> <td>PA.docx</td> <td>PA Certificate</td> </tr> </tbody> </table>	Attachment	Subject	PA.docx	PA Certificate				
Attachment	Subject								
PA.docx	PA Certificate								
<p>3) Browse to the "Review Status" tab and click on the "Edit" document button left of your name.</p>	 <table border="1"> <thead> <tr> <th>Reviewer</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>John P O'Connell</td> <td>✓</td> </tr> <tr> <td>Anthony Givens-Belsley</td> <td>✓</td> </tr> <tr> <td>Alex X Hamp</td> <td>BIC</td> </tr> </tbody> </table>	Reviewer	Status	John P O'Connell	✓	Anthony Givens-Belsley	✓	Alex X Hamp	BIC
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Alex X Hamp	BIC								



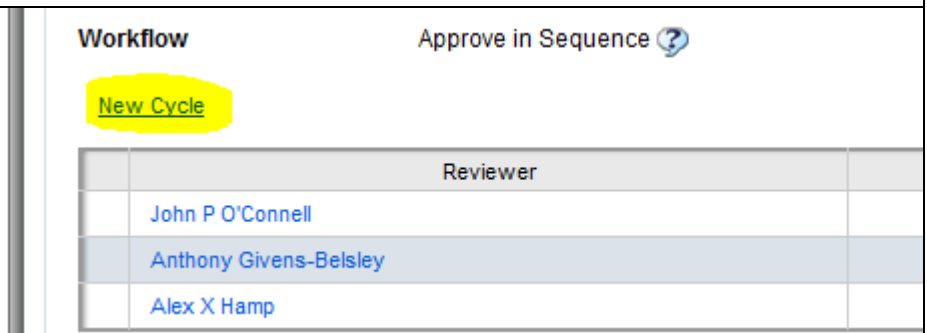
- 4) The review window will pop up.
- a) Provide comments for review pertaining to the PA.
  - b) Click on "Approve" or "Reject".
  - c) If Approved, a notification will be sent to the PM.



- d) If Rejected, please note your reasons for rejection, click REJECT and it will go back to the PM.



- 5) After the item(s) have been addressed the PM will click on New Cycle, remove the PM from the reviewers, which leaves the FM. Click Initiate.



6) Once the QM signs off, the PM will receive a notification that it's been approved. The PM will notify the necessary parties via Email Form.

Primavera Contract Management Alert: Preliminary Acceptance 00001 has been approved

**CKKing@cps.edu**  
to ckking ▾  
Cynthia K King.

A document in which you are the document owner has been approved. You can access the document by clicking the following link (you will need a password).

Click here to launch Primavera Contract Management: [Preliminary Acceptance 00001 Preliminary Acceptance](#)

7) The approval process is complete and has Saved and Closed as a result. This document cannot be edited after process has been initiated.

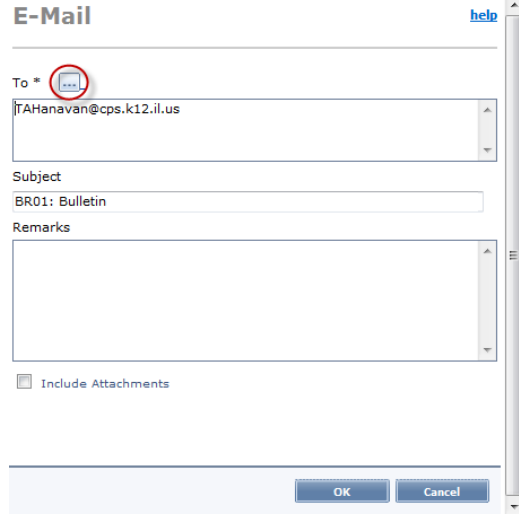
- a) The PM will "Select an action", click Email Form and send the Approved **PA** to the GC, PM, AOR, Jamal Quinn [jwquinn@cps.edu](mailto:jwquinn@cps.edu), Dan Moore [drmoore3@cps.edu](mailto:drmoore3@cps.edu) (Jacobs), and Shantanu Lagad [sslagad@cps.edu](mailto:sslagad@cps.edu) (Jacobs).
- b) The PM will "Select an action", click Email Form and send the Approved **FA** to the GC, PM, AOR, Jamal Quinn [jwquinn@cps.edu](mailto:jwquinn@cps.edu), Dan Moore [drmoore3@cps.edu](mailto:drmoore3@cps.edu) (Jacobs), Shantanu Lagad [sslagad@cps.edu](mailto:sslagad@cps.edu) (Jacobs), and Poly Haritos-Makris (CPS)

The screenshot shows the Primavera Contract Management interface for document 00004. The document is in 'Approved' status. A dropdown menu is open, showing 'E-Mail Form' as the selected action. Below the menu, a table lists reviewers and their status:

Reviewer	Status	Received	Forwarded
<a href="#">Christine M Johnson</a>	✓	Jun 5, 2012	Jun 5
<a href="#">Jeff W Strauts</a>	✓	Jun 5, 2012	Jun 5
<a href="#">Chris W Scott</a>	✓	Jun 5, 2012	Jun 5

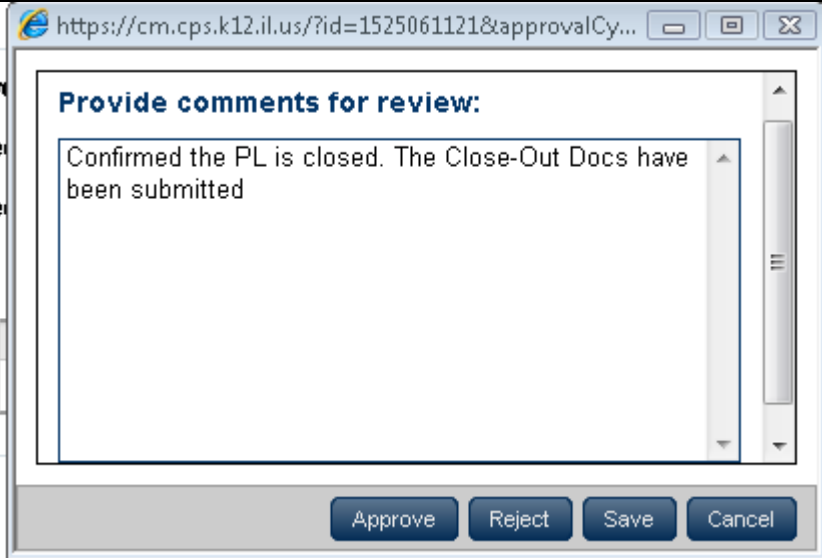
At the bottom, the 'Closed?' checkbox is checked, with the value 'yes' displayed.

- 7) An email window will pop up.
- a) To\*: Click on the ellipses button and select the GC, PM, and the AOR for your project, along with the previously mentioned parties. Click OK to send.



The same instructions apply to the Final Acceptance, although the AOR should attach the FA certificate and Closed Punchlist.

The PM should verify and comment as shown.



Updated 11/19/19