

February 12, 2020

## Adding Projects

A How to Guide

Contractor Certification DIVISION OF CAPITAL ASSET MANAGEMENT AND MAINTENANCE

Sections and Documentation		
Certification Type	🗭 Fill In	Incomplete: 0 completed of 1 required; 0 completed of 0 optional
Section 1: Contact Information	🗭 Fill In	Incomplete: 0 completed of 4 required; 0 completed of 2 optional
Section 2: Business and Historical Information	🗭 Fill In	Incomplete: 1 completed of 9 required; 0 completed of 0 optional
Section 3: Personnel	🔶 Fill In	Incomplete: 0 completed of 4 required; 0 completed of 0 optional
Section 4: Project Requirements and Affiliation Questions	🗭 Fill In	Incomplete: 0 completed of 2 required; 0 completed of 0 optional
Section 5: General Performance	🗭 Fill In	Incomplete: 0 completed of 10 required; 0 completed of 0 optional
Section 6: Compliance with Laws	🔶 Fill In	Incomplete: 0 completed of 12 required; 0 completed of 0 optional
Projects	Fil In	Incomplete: <mark>O projects listed - O records complete; O records incomplete</mark>
Document List	🗭 Fill In	Incomplete: 0 attached of 8 mandatory; 0 attached of 6 required

It's the Project Table section where you will list your completed and in progress jobs.

This will walk you through adding your jobs to the Projects Table.

As you can see from this view you can see how many projects you have listed before going into the table.

ection Status					
TATUS EQUIREMENTS		1         Incomplete: 0 projects listed - 0 record           A maximum of 40 records are permitted	ls complete; 0 records incomplete 🕕 ed.		
ojects	3	4	5	6	7
•	Project Details	Work Categories	Contacts	Sub-trade Categories	
Project title		Work Category 1	Public Authority or Private Owner	Sub-trade Work Category 1	Notes
		- Amo	Authority/owner name	Sub-trade Work Category 1 Amoun	
Project number		Work Category 2	Contact full name (first & last)	Sub-trade Work Category 2	
Total Contract Amount	% Complete	✓ Amo	unt	Sub-trade Work Category 2 Amoun	£
Numbers only	Numbers only	Work Category 3	Contact email	Sub-trade Work Category 3	
Contract Start mm/dd/yyyy	- mm/dd/yyyy	✓ Amo	Organization Name	Sub-trade Work Category 3 Amoun	t
			Evaluator full name (first & last)		
			Evaluator email		
Project title		Work Category 1	Public Authority or Private Owner	Sub-trade Work Category 1	Notes
		- Amo	Authority/owner name	Sub-trade Work Category 1 Amoun	
Project number		Work Category 2	Contact full name (first & last)	Sub-trade Work Category 2	
Total Contract Amount	% Complete	✓ Amo	punt	Sub-trade Work Category 2 Amoun	
Numbers only	Numbers only	Work Category 3	Contact email	Sub-trade Work Category 3	
Contract Start mm/dd/yyyy	- mm/dd/yyyy	- Amo	Evaluator Organization Name	Sub-trade Work Category 3 Amoun	
			Evaluator full name (first & last)		

This is what you will see when you access the project section of the application.

2

- 1. The table will keep track of the number of projects you enter. If you have to leave and are unable to finish entering the information for a project, the table will flag that record as incomplete <sup>①</sup>
- 2. You can list a total of 40 projects and this can be any combination of completed and in progress projects
- 3. Here is where you enter the project details. Completed projects will be 100%, your in-progress project "% complete" will vary depending on the state it's at.
- 4. You will list the categories of work you performed on this project here along with the dollar amount per category.
- 5. In this section you will list the owner of the property/project and their contact person, and the evaluator of the project (the one who can best evaluation your performance on the job) and their contact person.
- 6. This section is only used for General Building Construction (GBC). Here you will list your highest 3 subtrades on the project (each one must total a minimum of 5% of the Total Contract Amount). You may list your self-performed subtrades from section 4 again, if applicable.
- 7. If you have any notes on a project you would like to share with your compliance officer, you can write it in this notes section



8. At the bottom of the projects listing you will find your Save button (Remember to save often as the table doesn't auto save) The Save button will also add lines for additional projects, if needed.

The Export List button lets you transfer the projects listed to an Excel spreadsheet

9a

Delete Selected Projects button removes projects by checking the checkbox at the beginning of the project

9. After saving your progress, if you missed information, the background of the project table will turn slightly red and the areas you missed will be highlighted in red.

9a. In this example we selected General Building Construction, didn't fill in the sub-trade work categories, and saved our work. The missing sections are highlighted.

3	Project Status: Finished Project		Work Category 1		Public Authority or Private Owner	Sub-trade Work Category 1	
	Record Status:      Record Incomplete		General Building Construction 🗸	450,000	Happy Home Owner	Sub-trade Work Category 1	Amount
	Two Story House Addition		Work Category 2		Blu Cream	Sub-trade Work Category 2	
	753 Main Street Anytown		~	Amount		Sub-trade Work Category 2	Amount
		N Complete	Work Category 3		cupcake@pretend.com	Sub-trade Work Category 3	
	I otal Contract Amount	% Complete		American	Evaluator	Sub-trade Work Category 3	Amount
	450,000	100.00	Ľ	Amount	Mind Altering Construction		
	Contract Start Contract E	End					
	6/4/2018 - 1/2/202	20			Patrice Clearwater		
					pcwater@mac.com		

Project Status: Finished Project		Work Category 1		Public Authority or Private Owner	Sub-trade Work Category 1	
Record Status: 🕲 Record Complete		General Building Construction 🗸	450,000	Happy Home Owner	sitework	22,500
Two Story House Addition		Work Category 2		Blu Cream	Sub-trade Work Category 2	
752 Main Streat Anutown		~	Amount		framing	100,000
Total Contract Amount	% Complete	Work Category 3		cupcake@pretend.com	Sub-trade Work Category 3	
450.000	100.00	×	Amount	Evaluator	roofing	95,000
	100.00		1	Mind Altering Construction		
Contract Start Cor	a (2020			Patrice Clearwater		
- 1	21 2020			newster@mac.com		

Fill in the missing information, save it again and the record is now complete

9b. In the example below we did not enter the amount of our category of work, saved it and the record is flagged as incomplete

Project Status: Finished Project		Work Category 1		-
Record Status:      Record Incom	ecord Status: 🕕 Record Incomplete		~	Amoun
Never Stopping Service Contra	ct	Work Category 2		
SVC#15			~	Amoun
Total Contract Amount	% Complete	Work Category 3		
250,000	100.00		~	Amoun
Contract Start	Contract End			
1/1/2015	- 12/2/2019			

2	Project Status: Finished Project		Work Category 1	
	Record Status: 🞯 Record Complete		Masonry	× 85,000
	Never Stopping Service Contract		Work Category 2	
	SVC#15			✓ Amount
	Total Contract Amount	% Complete	Work Category 3	
	250,000	100.00		✓ Amount
	Contract Start Contract E	nd	-	
	1/1/2015 - 12/2/20	19		

Fill in the missing information, save it again and the record is now complete

Project [	Details	Work Categories		Contacts	Sub-trade Categor	ies	
Ashmont Station Renovation		Work Category 1		Public Authority or Private Owner	Sub-trade Work Category 1		Notes
DOT 1330 FC1		Masonry ~	Amount	Authority/owner name	Sub-trade Work Category 1	Amount	
001 1229 PC1		Work Category 2		Contact full name (first & last)	Sub-trade Work Category 2		
Total Contract Amount	% Complete	· · · · · · · · · · · · · · · · · · ·	Amount		Sub-trade Work Category 2	Amount	
375,000	100	~		Contact email	Sub-trade Work Category 3		
Contract Start Ci	ontract End	Alarm Systems	Amount	Evaluator	Sub-trade Work Category 3	Amount	
12/2/2019 - 2	2/11/2020	Asbestos Removal	J	Organization Name			
		Deleading		Evaluator full name (first & last)			
		Demolition		Evaluator email			
		Doors and Windows					
Project title		Electrical		Public Authority or Private Owner	Sub-trade Work Category 1		Notes
-		Electronic Security Systems	Amount	Authority/owner name	Sub-trade Work Category 1	Amount	
Project number		Elevators		Contact full name (first & last)	Sub-trade Work Category 2		
	% Complete	Entergy Management System	Amount		Sub-trade Work Category 2	Amount	
Total Contract Amount				Constant consul			
Total Contract Amount Numbers only	Numbers only	Fire Protection Sprinkler System		Contact email	Sub-trade Work Category 3		
Total Contract Amount Numbers only Contract Start C	Numbers only	Fire Protection Sprinkler System	Amount	Evaluator	Sub-trade Work Category 3 Sub-trade Work Category 3	Amount	
Total Contract Amount           Numbers only           Contract Start         C           mm/dd/yyyy         -         I	Numbers only ontract End mm/dd/yyyy	Fire Protection Sprinkler System Floor Covering General Building Construction	Amount	Evaluator Organization Name	Sub-trade Work Category 3 Sub-trade Work Category 3	Amount	
Total Contract Amount Numbers only Contract Start C mm/dd/yyyy -	Numbers only ontract End mm/dd/yyyy	Fire Protection Sprinkler System Floor Covering General Building Construction Historical Building Restoration	Amount	Evaluator Organization Name Evaluator full name (first & last)	Sub-trade Work Category 3 Sub-trade Work Category 3	Amount	
Total Contract Amount Numbers only Contract Start Contract Start Comm/dd/yyyy -	Numbers only ontract End mm/dd/yyyy	Fire Protection Sprinkler System Floor Covering General Building Construction Historical Building Restoration Historical Mascary	Amount	Contact email  Contact email  Conganization Name  Evaluator full name (first & last)  Evaluator email	Sub-trade Work Category 3 Sub-trade Work Category 3	Amount	
Total Contract Amount Numbers only Contract Start Comm/dd/yyyy -	Numbers only onrac End mm/dd/yyyy	Fue Protection Sprinkler System Floor Covering General Building Construction Historical Building Restoration Historical Masony Historical Painting	Amount	Evaluator Grganization Name Evaluator full name (first & last) Evaluator email	Sub-trade Work Category 3 Sub-trade Work Category 3 Sub-trade Work Category 3	Amount	
Total Contract Amount Numbers only Contract Start C mm/dd/yyyy -	Numbers only	Fire Protection Sprinkler System Floor Covering General Building Construction Historical Building Restoration Historical Masonry Historical Painting Historical Roofing	Amount	Evaluator  Grganization Name  Evaluator full name (first & last)  Evaluator email  Public Authority or Private Owner	Sub-trade Work Category 3 Sub-trade Work Category 3 Sub-trade Work Category 1	Amount	Notes
Total Contract Amount Numbers only Contract Start Contract Start Project title	Numbers only	Fire Protection Sprinkler System Fior Covering General Building Construction Historical Building Restoration Historical Masonry Historical Painting Historical Roofing HVAC	Amount	Contact email Evaluator Organization Name Evaluator full name (first & last) Evaluator email Public Authority or Private Owner Authority/owner name	Sub-trade Work Category 3 Sub-trade Work Category 3 Sub-trade Work Category 1 Sub-trade Work Category 1 Sub-trade Work Category 1	Amount	Notes

The Work Category section of the record is a drop-down menu The Sub-trade section can be entered by typing directly in the box

Now, let's look at a very nice and handy feature of our projects table.

Are you ready?

Being able to add both in-progress and completed projects on the same table you may want to see just the completed projects to make sure you have them all listed.

Now, there is a way!

10. Once you start entering in your projects this wonderful little box will appear and you will be able to uncheck the projects you don't want to see (yes, they are still there!)

Sele	ect All Show Projects: 🗹 Finished 🗹 I	In-Progress					Sort By: Order/	Date Entered
Proj	ects							
	Project Deta	ils	Work Categories		Contacts	Sub-trade Categorie	es	
1	Project Status: In-Progress Project		Work Category 1		Public Authority or Private Owner	Sub-trade Work Category 1		Notes
	Record Status: 🕐 Record Complete	Masonry ~	25,000	The T	Sub-trade Work Category 1	Amount		
	Ashmont Station Renovation		Work Category 2		Tap Red	Sub-trade Work Category 2		
	DOT 1229 fcc1			Amount		Sub-trade Work Category 2	Amount	
	Total Contract Amount	% Complete	Work Category 3		redT@email.net	Sub-trade Work Category 3		
	375.000	85.00	<b>~</b>	Amount	Evaluator	Sub-trade Work Category 3	Amount	
	Contract State	and End			AEGWSW 2			
	12/2/2019	6/2010			Coco Black			
		0/2019			blackCoco@nomail.com			
2	Project Status: Finished Project		Work Category 1		Public Authority or Private Owner	Sub-trade Work Category 1		Notes
	Record Status: 🖉 Record Complete		Masonry 🗸	75,000	Mind Altering Construction	Sub-trade Work Category 1	Amount	
	Never stopping service contract		Work Category 2		sue laurel	Sub-trade Work Category 2		
	\$1/0#15			Amount		Sub-trade Work Category 2	Amount	
	Total Contrast Amount	0 Camalata	Work Category 3		slaurel@MAC.com	Sub-trade Work Category 3		
	250.000	100.00	~	Amount	Evaluator	Sub-trade Work Category 3	Amount	
	250,000	100.00			Mind Altering Construction			
	1/1/2015 1/1	(2010			sue laurel			
		2019						

11. If you want to see only the In-Progress projects, you have entered so far, make sure the Show Projects: In-Progress box is checked, and the Finished box is unchecked

Sec	tion Status		
STA REQ	TUS UIREMENTS ect All Show Projects:  Finished  In-Progress	Complete: 4 projects listed - 4 records con A maximum of 40 records are permitted.	ıplete; 0 records incomplete
Pro	Project Details	Work Categories	Contacts
	Project Status: <b>In-Progress Project</b> Record Status: ② <b>Record Complete</b>	Work Category 1 Demolition  V 150,135	Public Authority or Private Owner  SmallTown MA
	Smalltown Town Hall Renovation AVN1502 233	Work Category 2 Historical Building Restoration	Petunia Cumberpott PCumberpott@smalltown-MA.gov
	Total Contract Amount         % Complete           1,000,000         50,00	Work Category 3	Evaluator Rafter Construction
	S/6/2019         -         8/14/2020		Beam Steady Bsteady@nosmoke.com

12. If you want to see only the finished projects, you have entered so far, make sure the Show Projects: Finished box is checked and In-Progress is unchecked

	Project Details		Work Categories		Contacts	Sub-trade Categori	es
Project Statu	us: Finished Project		Work Category 1		Public Authority or Private Owner	Sub-trade Work Category 1	
Record Statu	us: 🕲 Record Complete		Masonry	25,000	The T	Sub-trade Work Category 1	Amou
Ashmont S	Station Renovation		Work Category 2		Tap Red	Sub-trade Work Category 2	
DOT 1229 F	EC1		Demolition ~	175,000		Sub-trade Work Category 2	Amou
Total Contract A	Amount	% Complete	Work Category 3		RedT@email.net	Sub-trade Work Category 3	
375 000	PRIMARK.	100.00	-	Amount	Evaluator	Sub-trade Work Category 3	Amour
Contract Stort	Contract	Ford		1	AEGWSW2		
12/2/2010	2/11/	2020			Coco Black		
12/2/2019	- 2/10	1020			BlackCoco@nomail.com		
Project Statu	us: Finished Project		Work Category 1		Public Authority or Private Owner	Sub-trade Work Category 1	
Record Status: 📀 Record Complete		Masonry	85,000	вна	Sub-trade Work Category 1	Amou	
Never Stopping Service Contract		Work Category 2	Work Category 2		Sub-trade Work Category 2		
SVC#15			~	Amount		Sub-trade Work Category 2	Amour
Total Contract A	Amount	% Complete	Work Category 3		Sunshine@endlessdays.com	Sub-trade Work Category 3	
250.000	consens.	100.00		Amount	Evaluator	Sub-trade Work Category 3	Amour
1	Contract	End			Mind Altering Construction		
Contract Start	- 12/2/	2019			Sue Laurel		
Contract Start							
Contract Start 1/1/2015					slaurel@mac.com		
Contract Start 1/1/2015 Project Statu	us: Finished Project		Work Category 1		slaurel@mac.com Public Authority or Private Owner	Sub-trade Work Category 1	
Project Statu Record Statu	us: Finished Project us: 🕲 Record Complete		Work Category 1 General Building Construction	450,000	slaurel@mac.com Public Authority or Private Owner Happy Home Owner	Sub-trade Work Category 1	22,50
Project Statu Record Statu	us: Finished Project us: ⓒ Record Complete House Addition		Work Category 1 General Building Construction Work Category 2	450,000	slaurel@mac.com Public Authority or Private Owner Happy Home Owner Blu Cream	Sub-trade Work Category 1 sitework Sub-trade Work Category 2	22,50
Contract Start 1/1/2015 Project Statu Record Statu Two Story I 753 Main S	us: Finished Project us: @ Record Complete House Addition		Work Casegory 1 General Building Construction Work Casegory 2	450,000	slaurel@mac.com Public Authority or Private Owner Happy Home Owner Blu Cream	Sub-trade Work Category 1 sitework Sub-trade Work Category 2 framing	22,50
Contract Start 1/1/2015 Project Statu Record Statu Two Story I 753 Main S Total Contract A	us: Finished Project us: @ Record Complete House Addition Street Anytown	% Complete	Work Category 1 General Building Construction Work Category 2 Work Category 3	450,000	slaurel@mac.com Public Authority or Private Owner Happy Home Owner Blu Cream cupcake@pretend.com	Sub-trade Work Category 1 sitework Sub-trade Work Category 2 framing Sub-trade Work Category 3	22,50
Contract Start 1/1/2015 Project Statu Record Statu Two Story I 753 Main Si Total Contract A 450 000	us: Finished Project us: @ Record Complete House Addition Street Anytown Amount	% Complete	Work Casegory 1 General Building Construction Work Casegory 2 Work Casegory 3	450,000 Amount	slaurel@mac.com Public Authority or Privase Owner Happy Home Owner Blu Cream cupcake@pretend.com Evaluasor	Sub-trade Work Category 1 sitework Sub-trade Work Category 2 framing Sub-trade Work Category 3 roofing	22,50 100,00 95,00

One last thing that will make you smile -

You can export the projects list to an Excel document or print it to a PDF (perfect for the update statement!)

## Are YOU as excited as WE are?