



February 12, 2020

Adding Projects

A How to Guide

Contractor Certification

DIVISION OF CAPITAL ASSET MANAGEMENT AND MAINTENANCE

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

You will see a new section added to our application. It's the project section where you will list your completed and in progress jobs.

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

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

Section Status

STATUS

1 Incomplete: 0 projects listed - 0 records complete; 0 records incomplete

REQUIREMENTS

A maximum of 40 records are permitted.

2

Projects

3

4

5

6

7

#	Project Details	Work Categories	Contacts	Sub-trade Categories	Notes
	<div>Project title</div> <div>Project number</div> <div>Total Contract Amount</div> <div>Numbers only</div> <div>% Complete</div> <div>Numbers only</div> <div>Contract Start</div> <div>mm/dd/yyyy</div> <div>Contract End</div> <div>mm/dd/yyyy</div>	<div>Work Category 1</div> <div></div> <div>Amount</div> <div>Work Category 2</div> <div></div> <div>Amount</div> <div>Work Category 3</div> <div></div> <div>Amount</div>	<div>Public Authority or Private Owner</div> <div>Authority/owner name</div> <div>Contact full name (first & last)</div> <div>Contact email</div> <div>Evaluator</div> <div>Organization Name</div> <div>Evaluator full name (first & last)</div> <div>Evaluator email</div>	<div>Sub-trade Work Category 1</div> <div>Sub-trade Work Category 1</div> <div>Amount</div> <div>Sub-trade Work Category 2</div> <div>Sub-trade Work Category 2</div> <div>Amount</div> <div>Sub-trade Work Category 3</div> <div>Sub-trade Work Category 3</div> <div>Amount</div>	<div>Notes</div> <div></div>
	<div>Project title</div> <div>Project number</div> <div>Total Contract Amount</div> <div>Numbers only</div> <div>% Complete</div> <div>Numbers only</div> <div>Contract Start</div> <div>mm/dd/yyyy</div> <div>Contract End</div> <div>mm/dd/yyyy</div>	<div>Work Category 1</div> <div></div> <div>Amount</div> <div>Work Category 2</div> <div></div> <div>Amount</div> <div>Work Category 3</div> <div></div> <div>Amount</div>	<div>Public Authority or Private Owner</div> <div>Authority/owner name</div> <div>Contact full name (first & last)</div> <div>Contact email</div> <div>Evaluator</div> <div>Organization Name</div> <div>Evaluator full name (first & last)</div> <div>Evaluator email</div>	<div>Sub-trade Work Category 1</div> <div>Sub-trade Work Category 1</div> <div>Amount</div> <div>Sub-trade Work Category 2</div> <div>Sub-trade Work Category 2</div> <div>Amount</div> <div>Sub-trade Work Category 3</div> <div>Sub-trade Work Category 3</div> <div>Amount</div>	<div>Notes</div> <div></div>

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

- 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
- You can list a total of 40 projects and this can be any combination of completed and in progress projects
- 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.
- You will list the categories of work you performed on this project here along with the dollar amount per category.
- 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.
- 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.
- 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

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.

9a

3

Project Status: **Finished Project**

Record Status: **Record Incomplete**

Two Story House Addition

753 Main Street Anytown

Total Contract Amount

450,000

% Complete

100.00

Contract Start

6/4/2018

Contract End

1/2/2020

Work Category 1

General Building Construction

450,000

Work Category 2

Amount

Work Category 3

Amount

Public Authority or Private Owner

Happy Home Owner

Blu Cream

cupcake@pretend.com

Evaluator

Mind Altering Construction

Patrice Clearwater

pcwater@mac.com

Sub-trade Work Category 1

Sub-trade Work Category 1

Amount

Sub-trade Work Category 2

Sub-trade Work Category 2

Amount

Sub-trade Work Category 3

Sub-trade Work Category 3

Amount

3

Project Status: **Finished Project**

Record Status: **Record Complete**

Two Story House Addition

753 Main Street Anytown

Total Contract Amount

450,000

% Complete

100.00

Contract Start

6/4/2018

Contract End

1/2/2020

Work Category 1

General Building Construction

450,000

Work Category 2

Amount

Work Category 3

Amount

Public Authority or Private Owner

Happy Home Owner

Blu Cream

cupcake@pretend.com

Evaluator

Mind Altering Construction

Patrice Clearwater

pcwater@mac.com

Sub-trade Work Category 1

sitework

22,500

Sub-trade Work Category 2

framing

100,000

Sub-trade Work Category 3

roofing

95,000

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

9b

2 Project Status: **Finished Project**

☐ Record Status: **Record Incomplete**

Never Stopping Service Contract

SVC#15

Total Contract Amount: **250,000** % Complete: **100.00**

Contract Start: **1/1/2015** - Contract End: **12/2/2019**

Work Category 1: **Masonry** Amount: **Amount**

Work Category 2: Amount

Work Category 3: Amount

2 Project Status: **Finished Project**

☐ Record Status: **Record Complete**

Never Stopping Service Contract

SVC#15

Total Contract Amount: **250,000** % Complete: **100.00**

Contract Start: **1/1/2015** - Contract End: **12/2/2019**

Work Category 1: **Masonry** Amount: **85,000**

Work Category 2: Amount

Work Category 3: Amount

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

Projects

#	Project Details	Work Categories	Contacts	Sub-trade Categories	Notes
	Ashmont Station Renovation DOT 1229 FC1 Total Contract Amount: 375,000 % Complete: 100 Contract Start: 12/2/2019 Contract End: 2/11/2020 Project title: <input type="text"/> Project number: <input type="text"/> Total Contract Amount: <input type="text"/> % Complete: <input type="text"/> Contract Start: <input type="text"/> Contract End: <input type="text"/> Project title: <input type="text"/> Project number: <input type="text"/>	Work Category 1: Masonry Amount: <input type="text"/> Work Category 2: <input type="text"/> Amount: <input type="text"/> Alarm Systems Asbestos Removal Deledging Demolition Doors and Windows Electrical Electronic Security Systems Elevators Energy Management System Exterior Siding Fire Protection Sprinkler System Floor Covering General Building Construction Historical Building Restoration Historical Masonry Historical Painting Historical Roofing HVAC Masonry	Public Authority or Private Owner Authority/owner name: <input type="text"/> Contact full name (first & last): <input type="text"/> Contact email: <input type="text"/> Evaluator Organization Name: <input type="text"/> Evaluator full name (first & last): <input type="text"/> Evaluator email: <input type="text"/> Public Authority or Private Owner Authority/owner name: <input type="text"/> Contact full name (first & last): <input type="text"/> Contact email: <input type="text"/> Evaluator Organization Name: <input type="text"/> Evaluator full name (first & last): <input type="text"/> Evaluator email: <input type="text"/> Public Authority or Private Owner Authority/owner name: <input type="text"/> Contact full name (first & last): <input type="text"/> Contact email: <input type="text"/> Evaluator Organization Name: <input type="text"/> Evaluator full name (first & last): <input type="text"/> Evaluator email: <input type="text"/>	Sub-trade Work Category 1: <input type="text"/> Amount: <input type="text"/> Sub-trade Work Category 2: <input type="text"/> Amount: <input type="text"/> Sub-trade Work Category 3: <input type="text"/> Amount: <input type="text"/> Sub-trade Work Category 1: <input type="text"/> Amount: <input type="text"/> Sub-trade Work Category 2: <input type="text"/> Amount: <input type="text"/> Sub-trade Work Category 3: <input type="text"/> Amount: <input type="text"/> Sub-trade Work Category 1: <input type="text"/> Amount: <input type="text"/> Sub-trade Work Category 2: <input type="text"/> Amount: <input type="text"/> Sub-trade Work Category 3: <input type="text"/> Amount: <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

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!)

10

☐ Select All Show Projects: ☒ Finished ☒ In-Progress

Sort By: Order/Date Entered

#	Project Details	Work Categories	Contacts	Sub-trade Categories	Notes
1	<div>Project Status: In-Progress Project</div> <div>Record Status: Record Complete</div> <div>Ashmont Station Renovation</div> <div>DOT 1229 fcc1</div> <div>Total Contract Amount: 375,000 % Complete: 85.00</div> <div>Contract Start: 12/3/2019 Contract End: 12/6/2019</div>	<div>Work Category 1: Masonry 25,000</div> <div>Work Category 2: Amount</div> <div>Work Category 3: Amount</div>	<div>Public Authority or Private Owner</div> <div>The T</div> <div>Tap Red</div> <div>redT@email.net</div> <div>Evaluator</div> <div>AEGWSW 2</div> <div>Coco Black</div> <div>blackCoco@nomail.com</div>	<div>Sub-trade Work Category 1: Amount</div> <div>Sub-trade Work Category 2: Amount</div> <div>Sub-trade Work Category 3: Amount</div>	
2	<div>Project Status: Finished Project</div> <div>Record Status: Record Complete</div> <div>Never stopping service contract</div> <div>SVC#15</div> <div>Total Contract Amount: 250,000 % Complete: 100.00</div> <div>Contract Start: 1/1/2015 Contract End: 1/1/2019</div>	<div>Work Category 1: Masonry 75,000</div> <div>Work Category 2: Amount</div> <div>Work Category 3: Amount</div>	<div>Public Authority or Private Owner</div> <div>Mind Altering Construction</div> <div>sue laurel</div> <div>slaurel@MAC.com</div> <div>Evaluator</div> <div>Mind Altering Construction</div> <div>sue laurel</div> <div>slaurel@MAC.com</div>	<div>Sub-trade Work Category 1: Amount</div> <div>Sub-trade Work Category 2: Amount</div> <div>Sub-trade Work Category 3: Amount</div>	

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

Section Status

STATUS

REQUIREMENTS

Complete: 4 projects listed - 4 records complete; 0 records incomplete

A maximum of 40 records are permitted.

☐ Select All

Show Projects:

☐ Finished

☒ In-Progress

Projects

11

#	Project Details	Work Categories	Contacts
1	<div>Project Status: In-Progress Project</div> <div><input type="checkbox"/> Record Status: Record Complete</div> <div>Smalltown Town Hall Renovation</div> <div>AVN1502 233</div> <div>Total Contract Amount: 1,000,000</div> <div>% Complete: 50.00</div> <div>Contract Start: 8/6/2019</div> <div>Contract End: 8/14/2020</div>	<div>Work Category 1: Demolition 150,135</div> <div>Work Category 2: Historical Building Restoration 850,000</div> <div>Work Category 3: Amount</div>	<div>Public Authority or Private Owner: SmallTown MA</div> <div>Petunia Cumberpott</div> <div>PCumberpott@smalltown-MA.gov</div> <div>Evaluator: Rafter Construction</div> <div>Beam Steady</div> <div>Bsteady@nosmoke.com</div>

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

☐ Select All
 ☐ Show Projects
 ☒ Finished
 ☐ In-Progress
 Sort By: [Order/Dat](#)

Projects 12

#	Project Details	Work Categories	Contacts	Sub-trade Categories
1	Project Status: Finished Project Record Status: Record Complete Ashmont Station Renovation DOT 1229 FC1 Total Contract Amount: 375,000 % Complete: 100.00 Contract Start: 12/2/2019 Contract End: 2/11/2020	Work Category 1: Masonry 25,000 Work Category 2: Demolition 175,000 Work Category 3: Amount	Public Authority or Private Owner: The T Tap Red RedT@email.net Evaluator: AEGWSW2 Coco Black BlackCoco@nomail.com	Sub-trade Work Category 1: Amount Sub-trade Work Category 2: Amount Sub-trade Work Category 3: Amount
2	Project Status: Finished Project Record Status: Record Complete Never Stopping Service Contract SVC#15 Total Contract Amount: 250,000 % Complete: 100.00 Contract Start: 1/1/2015 Contract End: 12/2/2019	Work Category 1: Masonry 85,000 Work Category 2: Amount Work Category 3: Amount	Public Authority or Private Owner: BHA Smiley Sunshine Sunshine@endlessdays.com Evaluator: Mind Altering Construction Sue Laurel slaurel@mac.com	Sub-trade Work Category 1: Amount Sub-trade Work Category 2: Amount Sub-trade Work Category 3: Amount
3	Project Status: Finished Project Record Status: Record Complete Two Story House Addition 753 Main Street Anytown Total Contract Amount: 450,000 % Complete: 100.00 Contract Start: 6/4/2018 Contract End: 1/2/2020	Work Category 1: General Building Construction 450,000 Work Category 2: Amount Work Category 3: Amount	Public Authority or Private Owner: Happy Home Owner Blu Cream cupcake@pretend.com Evaluator: Mind Altering Construction Patrice Clearwater pcwater@mac.com	Sub-trade Work Category 1: sitework 22,500 Sub-trade Work Category 2: framing 100,000 Sub-trade Work Category 3: roofing 95,000

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?