



Section 11

Correspondence Sent and Received

ORACLE Primavera

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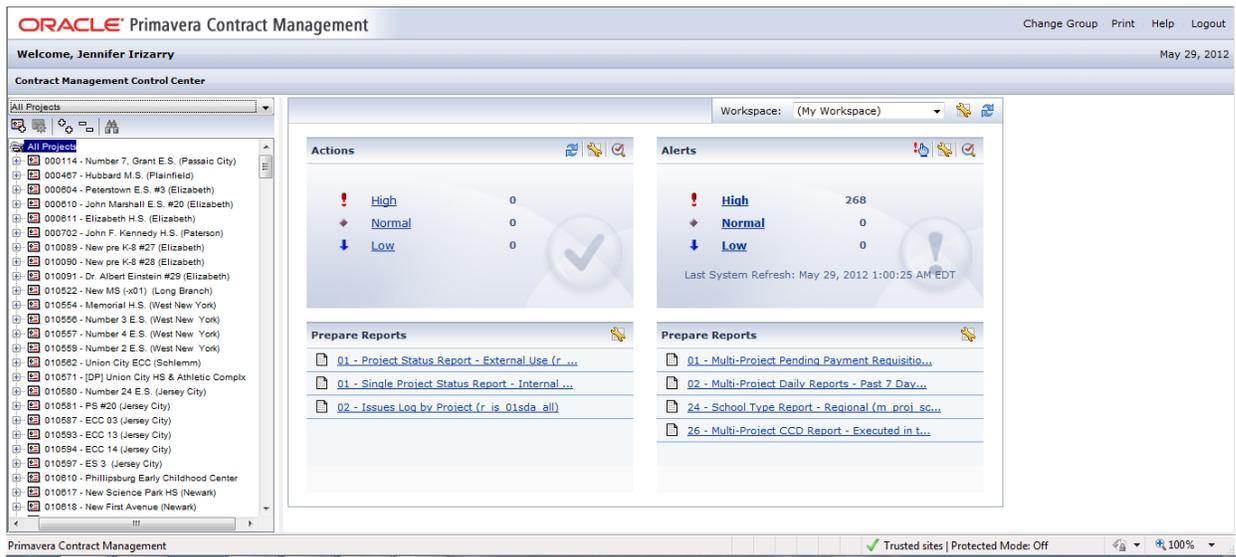
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I. CREATING A DOCUMENT IN THE CORRESPONDENCE SENT LOG

E-mail sent from Contract Management automatically creates an entry in the Correspondence Sent log. The Correspondence Sent log is also used to track outgoing correspondence not generated in Contract Management. Examples include project email sent from outside Contract Management and faxes.

IMPORTANT: Contract Management *will automatically* load documents that have been e-mailed through the system into this module. They can also be manually loaded into the module, or be populated through the Select an Action menu option.

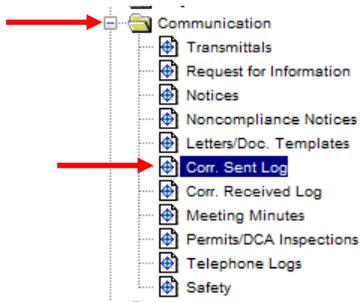
1. Once logged into Primavera, the Contract Management Control Screen displays (as shown).



2. Select your desired project.



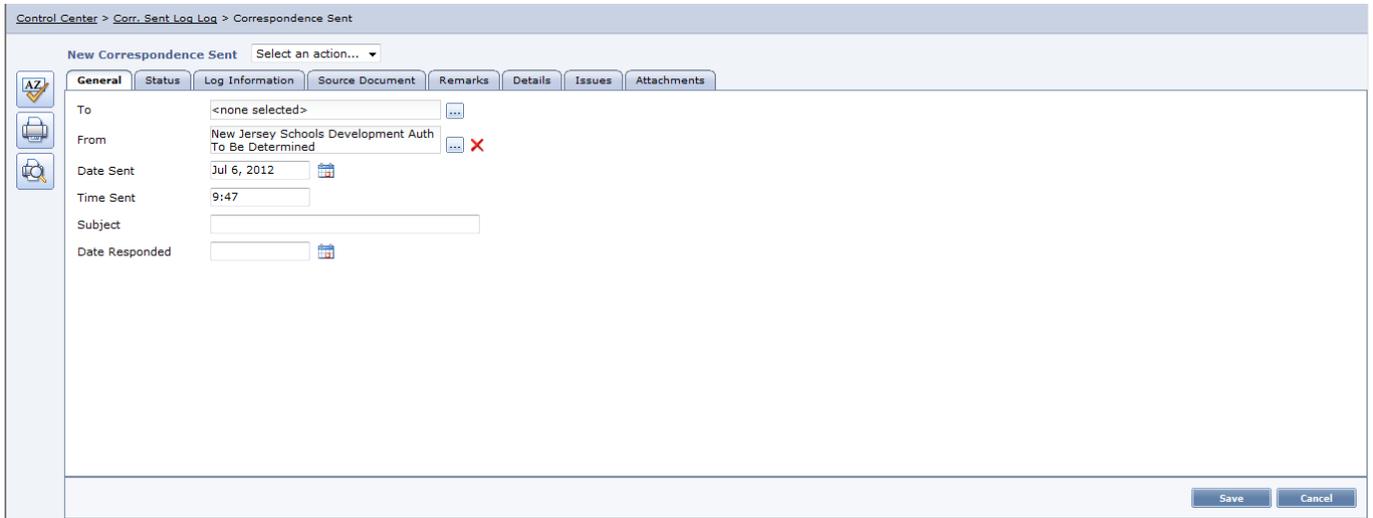
3. Open the **Communication** folder (a list of modules will display) and select the **Corr. Sent log**.



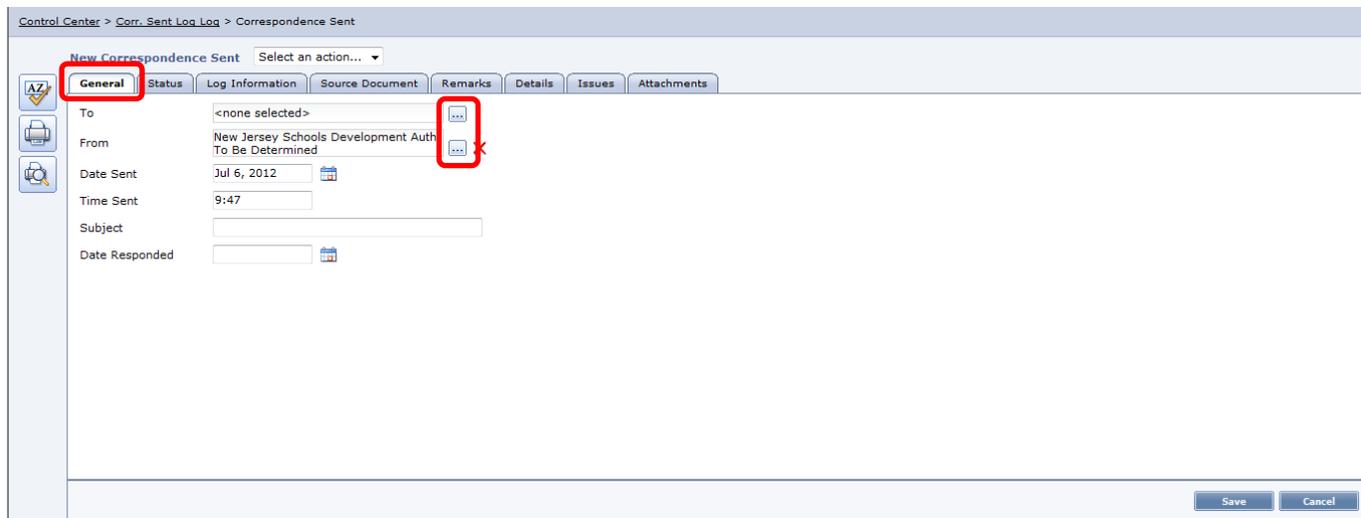
4. The **Correspondence Sent Log** displays. Select the **Add Document** button.



5. A **Correspondence Sent** document displays. It is divided into several sections:



A. General Tab



- **To/From** – Click the **select** button to choose the **To** and **From** parties for the document.
- **Date Sent** – The default value is the current date. Edit as needed using the **calendar** icon.
- **Time Sent** – The default value is the time the document was created. Edit as needed by entering a new time. This field is optional.

- **Subject** - Enter a subject or brief description (36 character limit).
- **Date Responded** – Enter a response date if applicable using the **calendar** icon.

An example of a completed section is shown.

Control Center > Corr. Sent Log Log > Correspondence Sent

New Correspondence Sent Select an action... ▼

General Status Log Information Source Document Remarks Details Issues Attachments

To Epic Management, Inc.
William Costello

From New Jersey Schools Development Auth
Aaron Goss

Date Sent Jul 6, 2012

Time Sent 9:47

Subject Fax sent

Date Responded

Save Cancel

B. Status Tab

Control Center > Corr. Sent Log Log > Correspondence Sent

New Correspondence Sent Select an action... ▼

General Status Log Information Source Document Remarks Details Issues Attachments

Ball in Court

Priority Normal

Status New Item

- **Ball in Court** – If desired, an overall responsible party for the Transmittal can be chosen by clicking the **select** button.
- **Priority** – **Normal** is the default, but can be changed to **High** or **Low** as necessary.
- **Status** – **New Item** is the default. Use the pull down list to choose another option as needed. For example, when the item is complete, the Status should be changed to **Closed**.

C. Log Information Tab

The screenshot shows the 'Log Information' tab selected in the 'Correspondence Sent' form. The 'Number' field is 00005, 'Entered by' is Jennifer Irizarry, and 'Manually Entered' is yes. The 'Log Information' tab is highlighted with a red box.

- **Number** - Contract Management automatically provides the next available number when the document was generated. Do not change this number.
- **Entered by** – Contract Management automatically enters the login name of the user.
- **Manually entered** – **Yes** indicates that the entry was created directly from the Correspondence Sent Log. If the document is electronically created by Contract Management, the entry will be **No**.

D. Source Document tab

The **source document** is the document from which this Correspondence Sent entry was created. The source document can be a document *within* Contract Management, such as a Request for Information that was e-mailed from Contract Management, or it can be a document that was created *outside* of Contract Management, such as a Word or PDF document.

The screenshot shows the 'Source Document' tab selected in the 'Correspondence Sent' form. The 'Type' field is a drop-down menu, 'Item Number' is empty, 'Date' is empty, 'Item Status' is a drop-down menu, 'Description' is empty, 'Spec Section' is a drop-down menu, and 'Cost' is 0.00. The 'Source Document' tab is highlighted with a red box.

- **Type** - The classification for the document that was sent. If this is a new document, select its type from the drop-down list. This field can be modified if the document was entered manually. It cannot be modified if the document was created from within Contract Management.

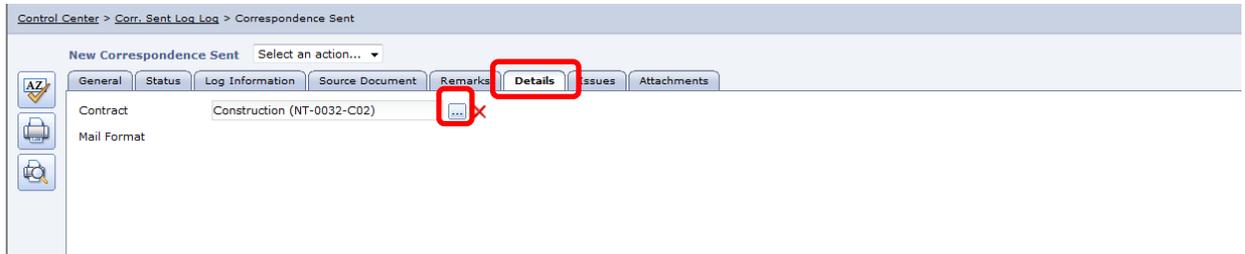
- **Item Number** - For documents created by another document, Contract Management uses the number that identifies the source document, such as the meeting number or contract number. You can edit this number if needed.
- **Date** - The date the source document was created. This can be changed by clicking the **calendar** icon.
- **Item Status** - Use the drop-down list to select a status for the document.
- **Description** - Enter a brief description of the correspondence item sent (80 character limit).
- **Spec Section** – If applicable, select the specification section that best describes this document from the drop-down list.
- **Cost** – If applicable, enter the cost associated with the subject of this document. This field cannot be modified if the document originated in change management.

An example of a completed section is shown.

E. Remarks Tab

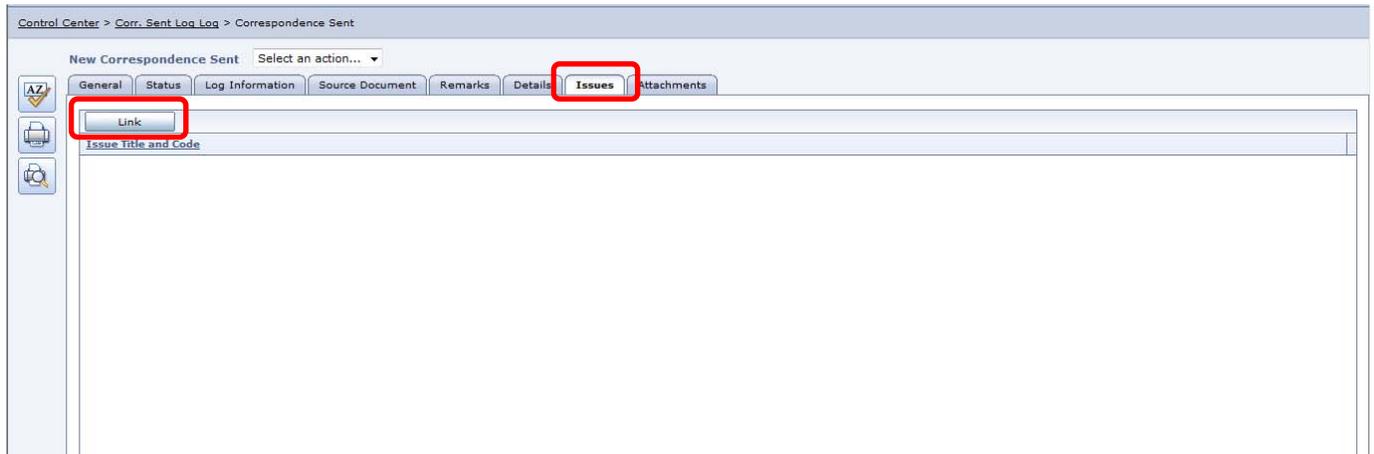
- **Remarks** - Enter any applicable details about the correspondence sent in this field (4000 characters).

F. Details Tab



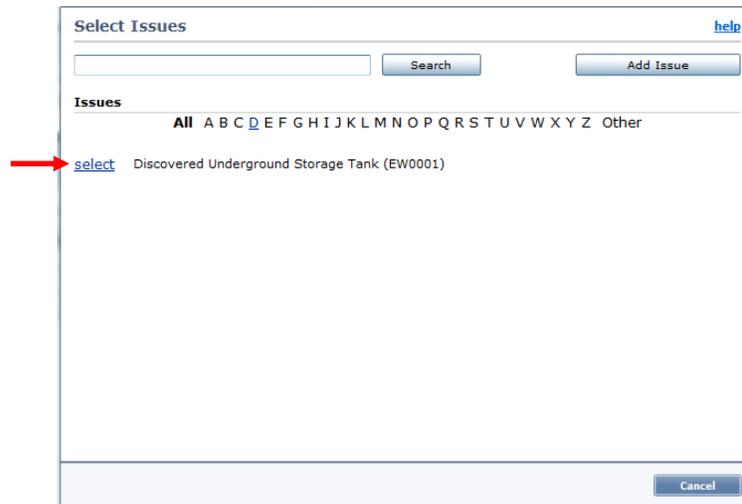
- **Contract** – If applicable, select a Contract using the **select** button.
- **Mail Format** – If this document was generated in Contract Management, this field will be automatically entered and will reflect the original format of the source document. It cannot be manually entered.

G. Issues Tab



- If this Correspondence relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button.

- The **Select Issues dialog box** displays. Locate your desired issue and click the **select** link to the left of the issue title to link it to the Correspondence. Once you click the select link, you will return to the Correspondence document.

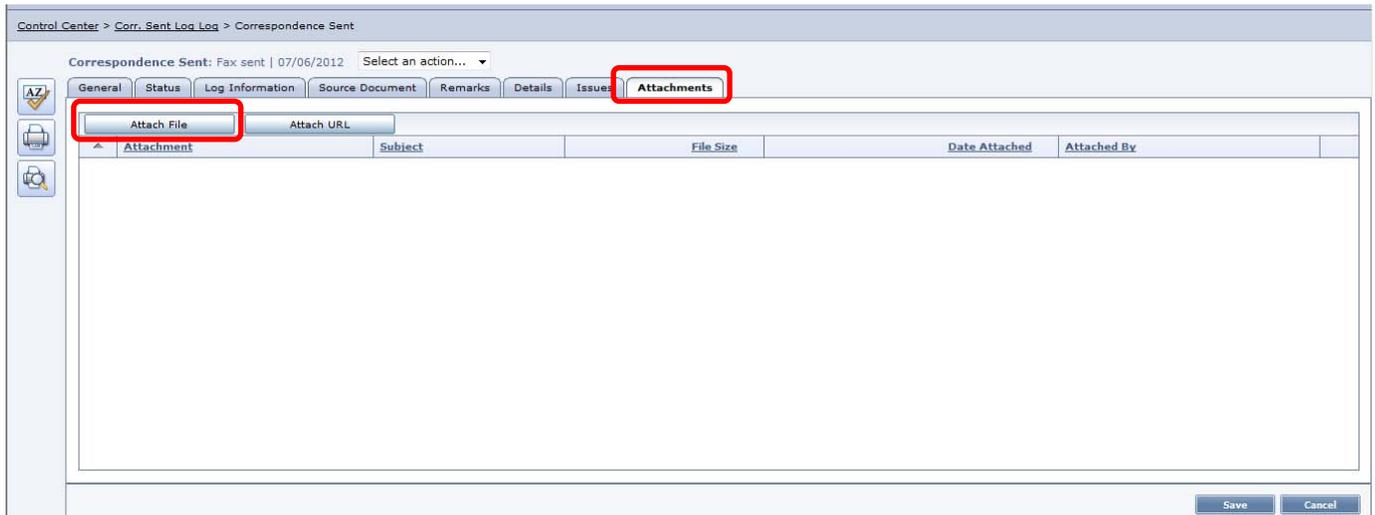


An example of a completed section is shown:

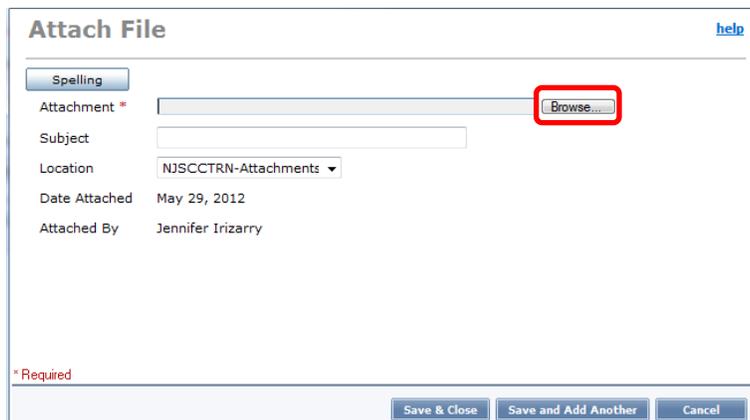


H. Attachments Tab

- To attach supporting documentation, click the **Attach File** button.



- Click the **Browse** button to navigate to the document you wish to attach.

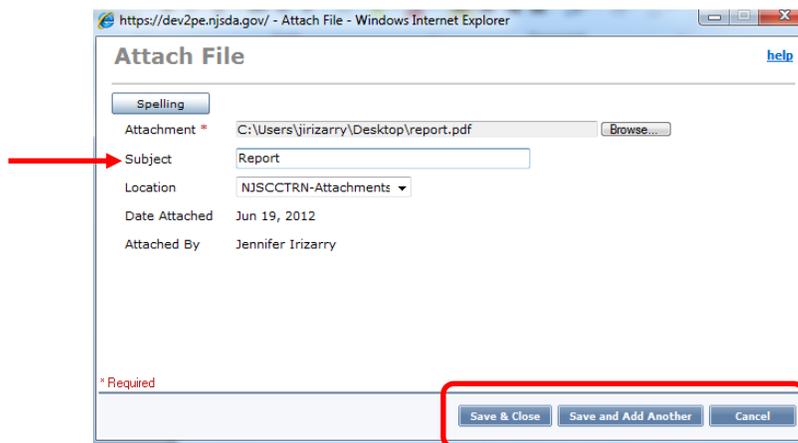


The 'Attach File' dialog box is shown. It has a 'Spelling' button at the top left and a 'help' link at the top right. The 'Attachment *' field is empty and has a 'Browse...' button next to it, which is highlighted with a red box. Below this are fields for 'Subject', 'Location' (set to 'NJSCTR-Attachments'), 'Date Attached' (set to 'May 29, 2012'), and 'Attached By' (set to 'Jennifer Irizarry'). A red asterisk indicates that the 'Attachment' field is required. At the bottom, there are three buttons: 'Save & Close', 'Save and Add Another', and 'Cancel'.

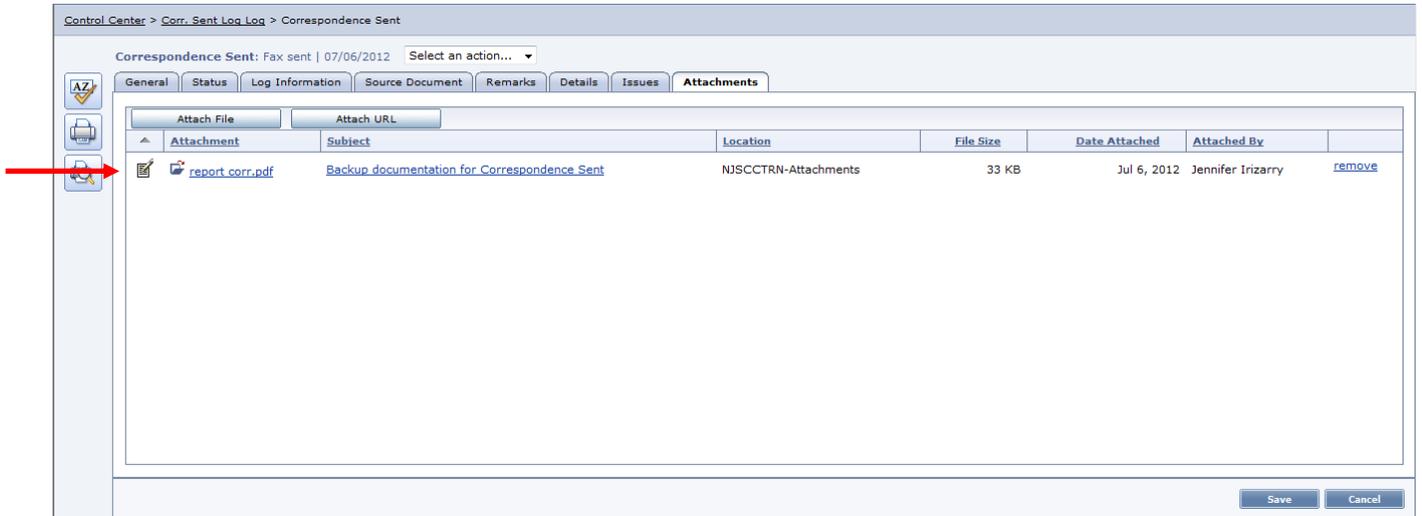
- The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



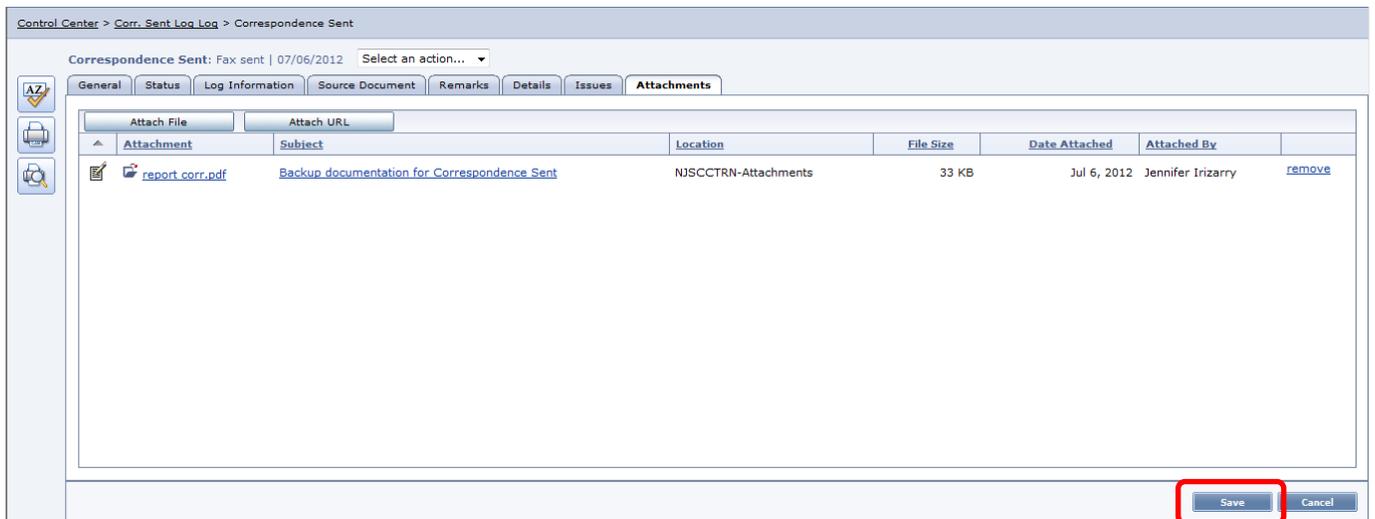
- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



- The attached file displays in the **Attachments** section.



When all fields are completed, click the **Save** button at the bottom of the document window.



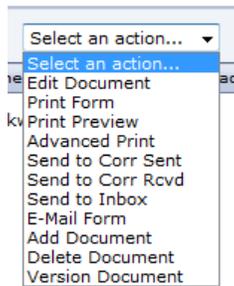
II. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

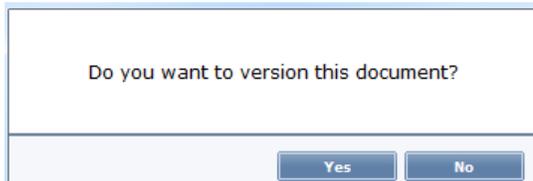
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

A. Create a Document Version

1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.



3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.



III. SENDING A DOCUMENT TO THE CORRESPONDENCE SENT LOG FROM WITHIN CONTRACT MANAGEMENT

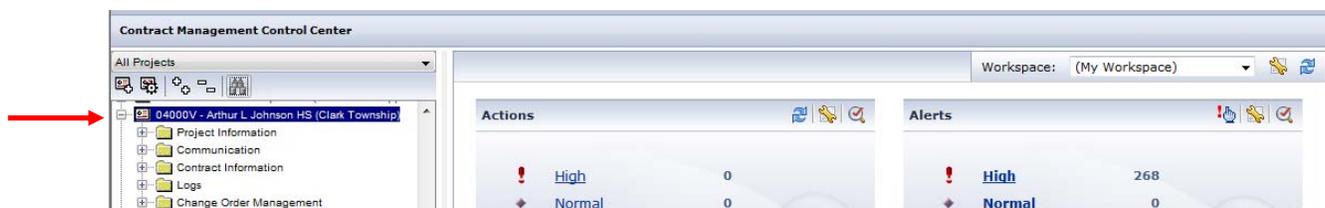
Contract Management allows you to manually send any document to the Correspondence Sent log.

IMPORTANT: Remember that any document e-mailed from Contract Management will be automatically logged in the Correspondence Sent Log.

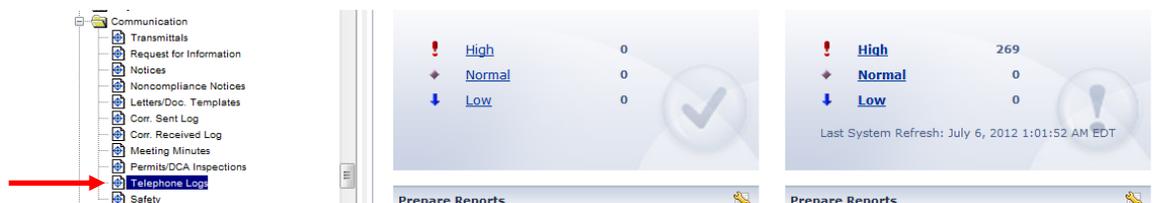
1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



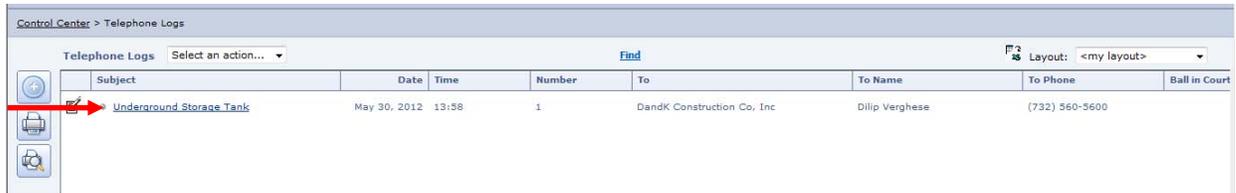
2. Select your desired project.



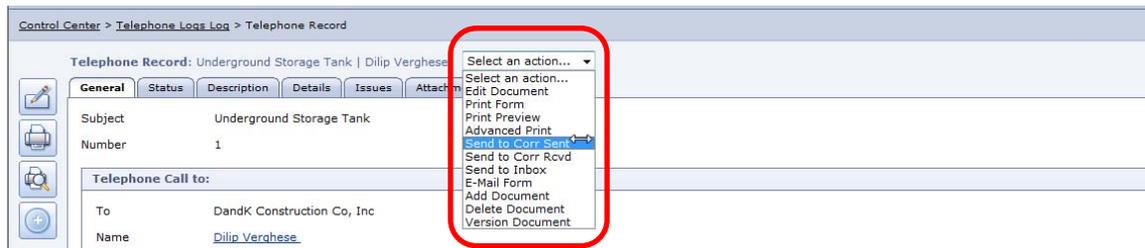
3. Open the desired folder (a list of modules will display) and select the desired folder. The Telephone Logs module has been selected in the example shown.



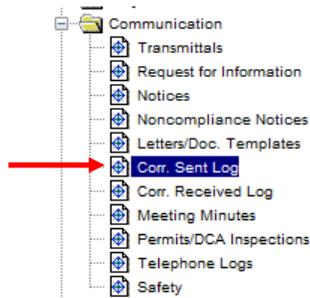
- Select the desired document from the log view by clicking the **blue document** link.



- With the desired document open, choose **Send to Corr Sent** from the drop down list on the **Select an ACTION** menu on the top of the screen. You will not see a message to indicate that the document has been sent to the Correspondence Sent log.



- To verify that the document has been sent, return to the **Control Center**. Open the **Communication** folder (a list of modules will display) and select the **Corr. Sent log**.



- When the **Correspondence Sent log** displays, the document will be listed. In the example shown, the telephone log now shows as part of the Correspondence Sent log.



IV. CREATING A DOCUMENT IN THE CORRESPONDENCE RECEIVED LOG

The Correspondence Received module will be used to track all incoming documents that are not logged in other areas of Contract Management. Examples of these documents include:

- Email
- Letters
- Faxes

Text of email and other documents originating outside of Contract Management can be cut and pasted into the body of the Correspondence Received document. The actual document can also be included as an attachment.

IMPORTANT: Contract Management *will not* automatically load documents into this module. They can either be manually loaded into the module, or be populated through the Select an Action menu option.

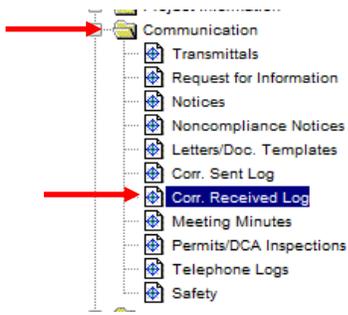
1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



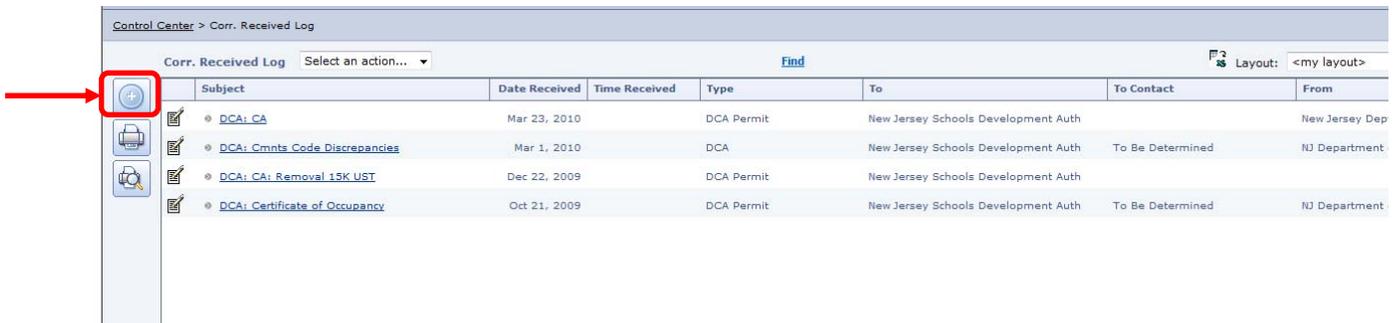
2. Select your desired project.



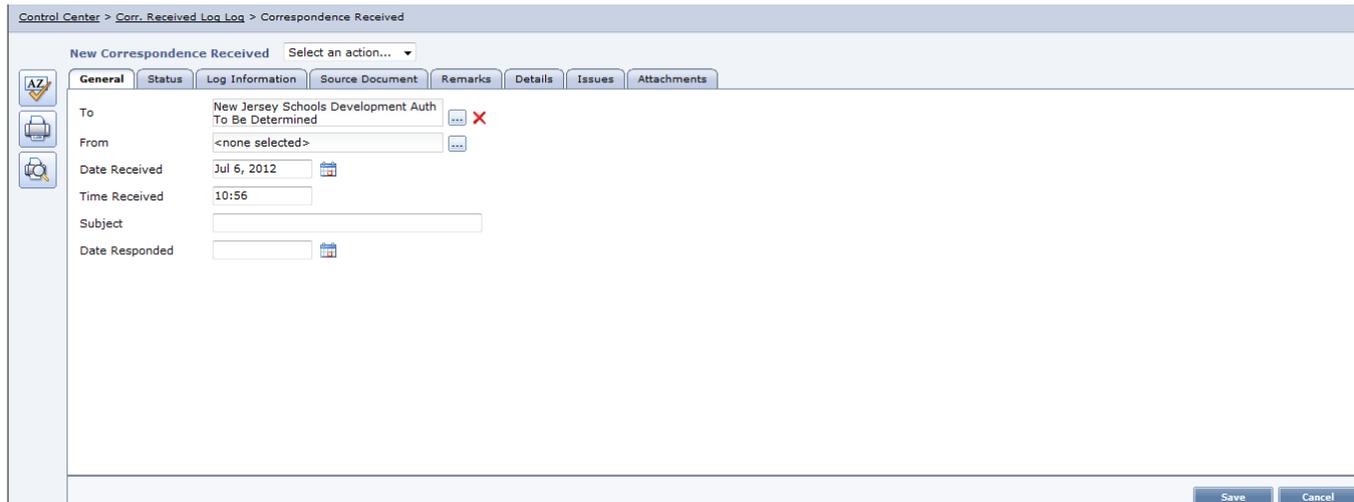
3. Open the **Communication** folder (a list of modules will display) and select the **Corr. Received Log**.



4. The **Correspondence Received Log** displays. Click the **Add Document** button to add a new document.



5. A new **Correspondence Received** document displays. It is divided into several sections:



A. General Tab

Control Center > Corr_Received_Log_Log > Correspondence Received

New Correspondence Received Select an action...

General Status Log Information Source Document Remarks Details Issues Attachments

To New Jersey Schools Development Auth To Be Determined

From <none selected>

Date Received Jul 6, 2012

Time Received 10:56

Subject

Date Responded

Save Cancel

Primavera Contract Management Trusted sites | Protected Mode: Off 100%

- **To/From** – Click the **select** button to choose the **To** and **From** parties for the document.
- **Date Received** – The default value is the current date. Edit as needed using the **calendar** icon.
- **Time Received** – The default value is the time the document was created. Edit as needed by entering a new time. This field is optional.
- **Subject** - Enter a subject or brief description (36 character limit).
- **Date Responded** – Enter a response date if applicable using the **calendar** icon.

An example of a completed section is shown.

Control Center > Corr_Received_Log_Log > Correspondence Received

New Correspondence Received Select an action...

General Status Log Information Source Document Remarks Details Issues Attachments

To New Jersey Schools Development Auth Aaron Goss

From Epic Management, Inc. William Costello

Date Received Jul 6, 2012

Time Received 10:56

Subject Memo received from contractor

Date Responded

Save Cancel

Primavera Contract Management Trusted sites | Protected Mode: Off 100%

B. Status Tab

The screenshot shows the 'Status' tab of the 'New Correspondence Received' form. The 'Status' tab is highlighted with a red box. The form contains the following fields:

Ball in Court	<none selected>	...
Priority	Normal	
Status	New Item	

- **Ball in Court** – If desired, an overall responsible party for the Transmittal can be chosen by clicking the **select** button.
- **Priority** – **Normal** is the default, but can be changed to **High** or **Low** as necessary.
- **Status** – **New Item** is the default. Use the pull down list to choose another option as needed. For example, when the item is complete, the Status should be changed to **Closed**.

C. Log Information Tab

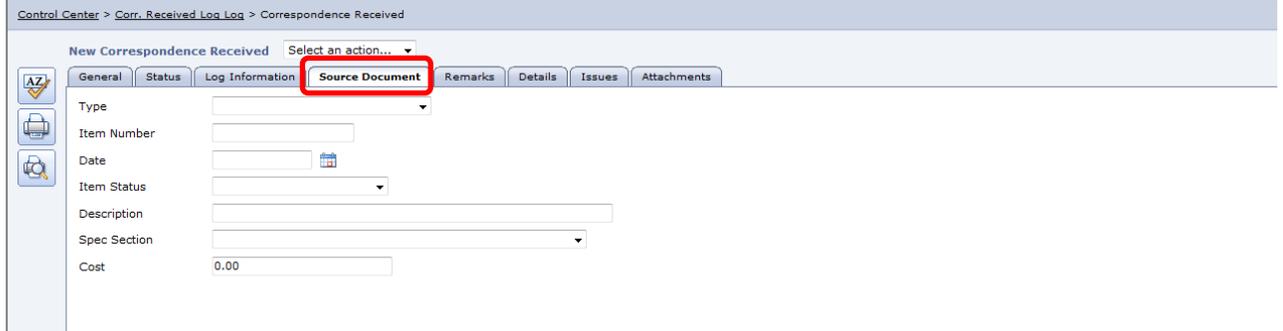
The screenshot shows the 'Log Information' tab of the 'New Correspondence Received' form. The 'Log Information' tab is highlighted with a red box. The form contains the following fields:

Number	00005
Entered by	Jennifer Irizarry
Manually Entered	yes

- **Number** - Contract Management automatically provides the next available number when the document was generated. Do not change this number.
- **Entered by** – Contract Management automatically enters the login name of the user.
- **Manually entered** – **Yes** indicates that the entry was created directly from the Correspondence Received Log. If the document is electronically created by Contract Management, the entry will be **No**.

D. Source Document Tab

The **source document** is the document from which this Correspondence Received entry was created. The source document can be a document *within* Contract Management, such as a Request for Information that was e-mailed from Contract Management, or it can be a document that was created *outside* of Contract Management, such as a Word or PDF document.



The screenshot shows the 'New Correspondence Received' form with the 'Source Document' tab selected. The form includes fields for Type, Item Number, Date, Item Status, Description, Spec Section, and Cost. The 'Source Document' tab is highlighted with a red box.

- **Type** - The classification for the document that was sent. If this is a new document, select its type from the drop-down list. This field can be modified if the document was entered manually. It cannot be modified if the document was created from within Contract Management.
- **Item Number** - For documents created by another document, Contract Management uses the number that identifies the source document, such as the meeting number or contract number. You can edit this number if needed.
- **Date** - The date the source document was created. This can be changed by clicking the **calendar** icon.
- **Item Status** - Use the drop-down list to select a status for the document.
- **Description** - Enter a brief description of the correspondence item sent (80 character limit).
- **Spec Section** – If applicable, select the specification section that best describes this document from the drop-down list.
- **Cost** – If applicable, enter the cost associated with the subject of this document. This field cannot be modified if the document originated in change management.

An example of a completed section is shown.



The screenshot shows the 'New Correspondence Received' form with the 'Source Document' tab selected. The form is filled with the following data:

Field	Value
Type	Correspondence Received
Item Number	24
Date	Jul 3, 2012
Item Status	Approved as Noted
Description	Documents returned for review
Spec Section	02100 (Site Remediation)
Cost	0.00

E. Remarks Tab

The screenshot shows the 'Correspondence Received' interface with the 'Remarks' tab selected. The breadcrumb path is 'Control Center > Corr. Received Log Log > Correspondence Received'. Below the breadcrumb, there is a dropdown menu 'New Correspondence Received' and a 'Select an action...' dropdown. The 'Remarks' tab is highlighted with a red box. Below the tabs, there is a section titled 'Additional Remarks' with the text 'Documents returned for review.' On the left side, there are three icons: a checkmark, a printer, and a magnifying glass.

- **Remarks** - Enter any applicable details about the correspondence received in this field (4000 characters).

F. Details Tab

The screenshot shows the 'Correspondence Received' interface with the 'Details' tab selected. The breadcrumb path is 'Control Center > Corr. Received Log Log > Correspondence Received'. Below the breadcrumb, there is a dropdown menu 'New Correspondence Received' and a 'Select an action...' dropdown. The 'Details' tab is highlighted with a red box. Below the tabs, there are three input fields: 'Contract' with a 'select' button, 'Change Management Number', and 'Reference Log Number' with the value '00005'. On the left side, there are three icons: a checkmark, a printer, and a magnifying glass.

- **Contract** – If applicable, select a Contract using the **select** button.
- **Change Management Number** – If this document was generated from change management, the change management number displays in this field. It cannot be manually entered.
- **Reference Log Number** – Contract Management increments this field when a document is sent to the Correspondence Received log. Do not change this number.

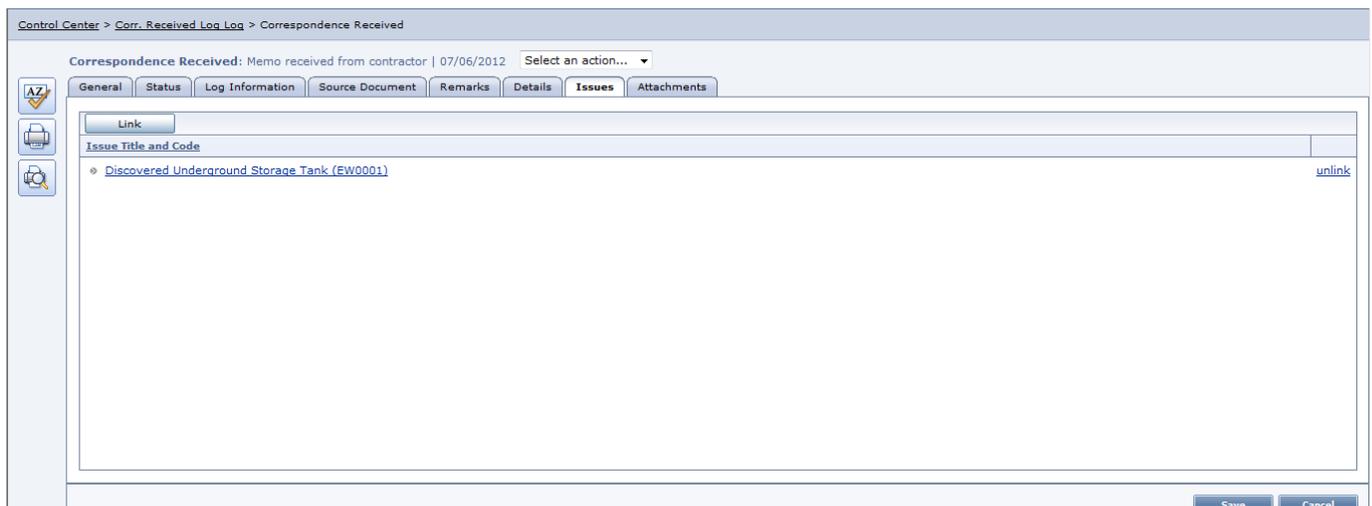
G. Issues Tab



- If this Correspondence relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button.
- The **Select Issues dialog box** displays. Locate your desired issue and click the **select** link to the left of the issue title to link it to the Correspondence. Once you click the select link, you will return to the Correspondence document.

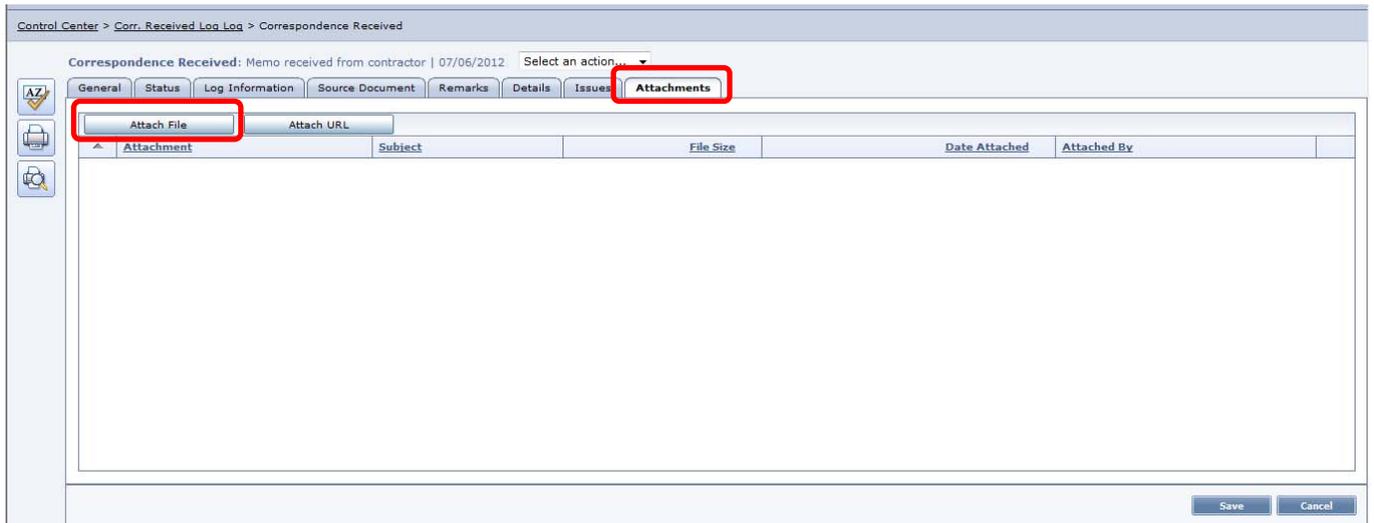


An example of a completed section is shown:

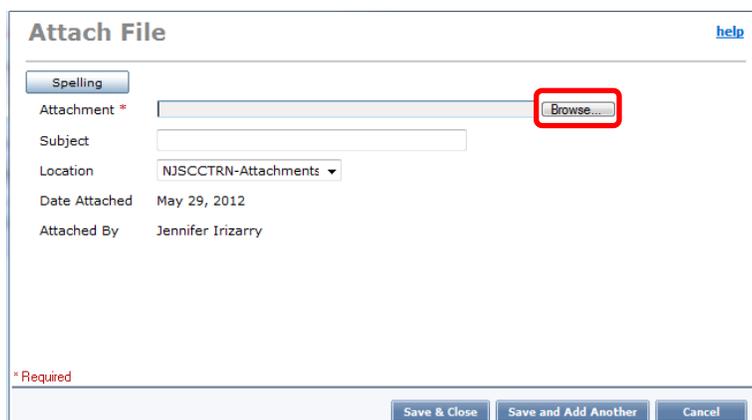


H. Attachments Tab

- To attach supporting documentation, click the **Attach File** button.



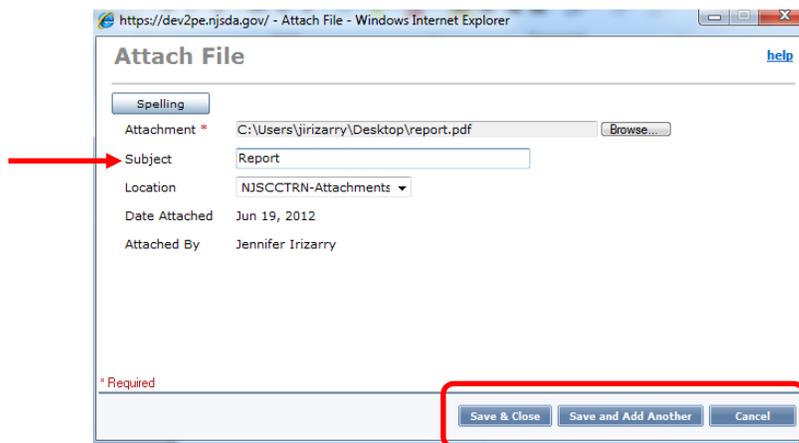
- Click the **Browse** button to navigate to the document you wish to attach.



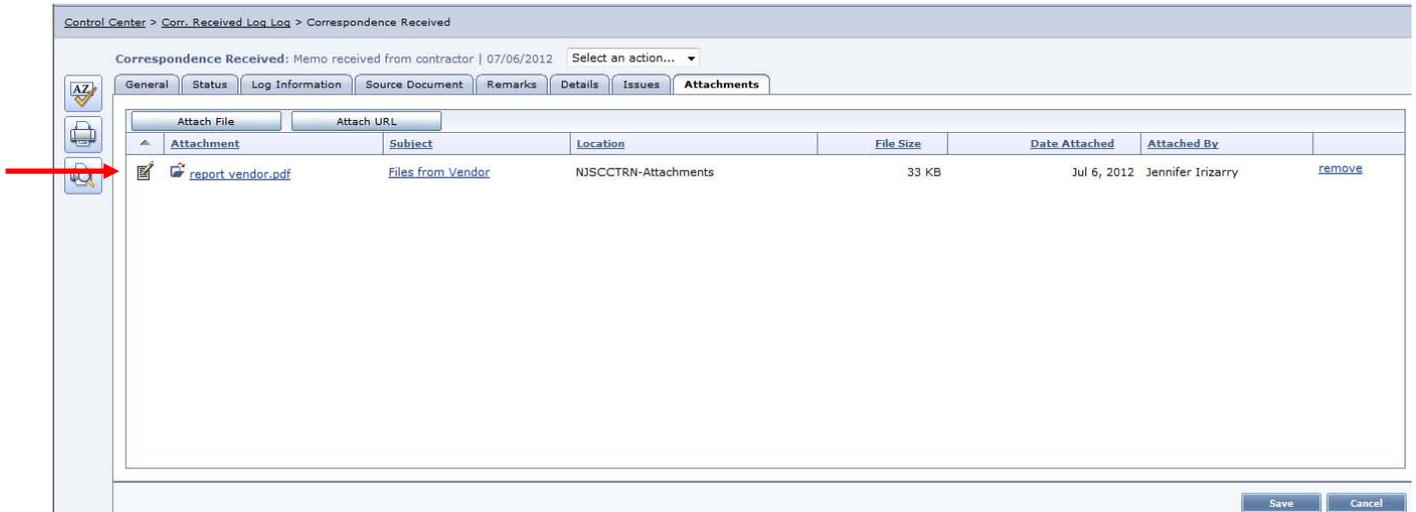
- The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



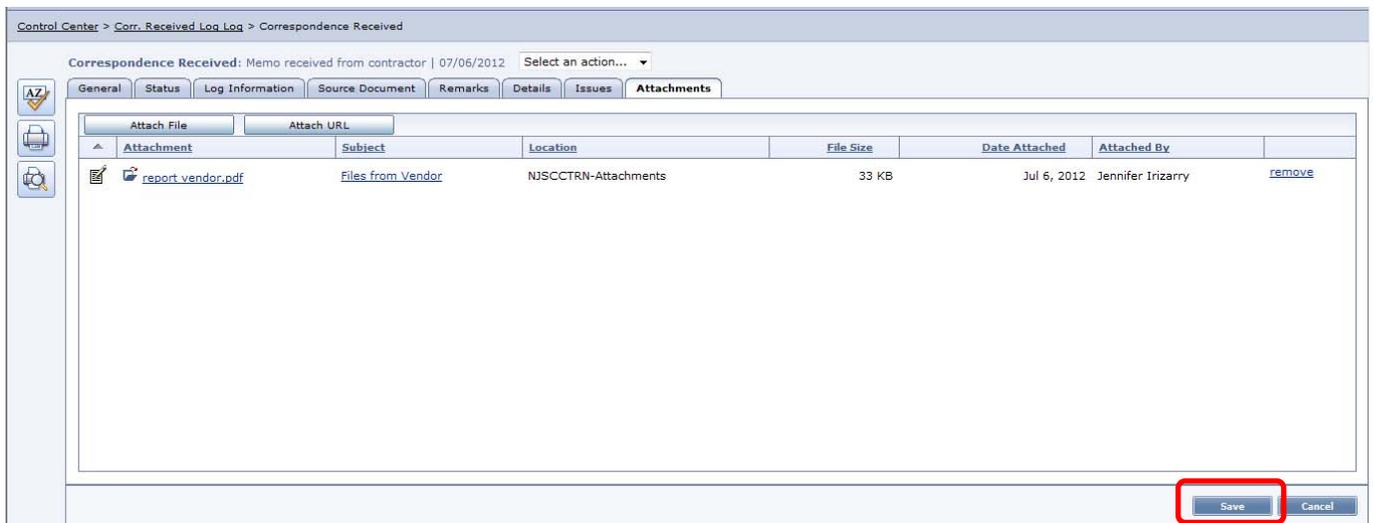
- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



- The attached file displays in the **Attachments** section.



When all fields are completed, click the **Save** button at the bottom of the document window.



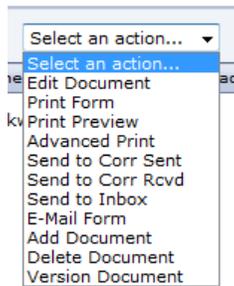
V. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

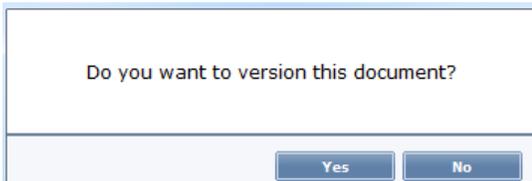
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

A. Create a Document Version

1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.



3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.



VI. SENDING A DOCUMENT TO THE CORRESPONDENCE RECEIVED LOG FROM WITHIN CONTRACT MANAGEMENT

Contract Management allows you to manually send any document to the Correspondence Received log.

1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



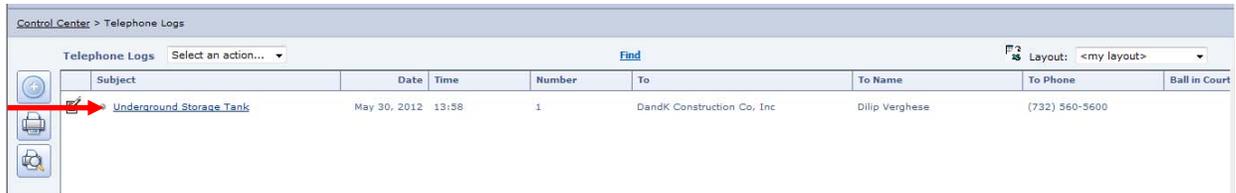
2. Select your desired project.



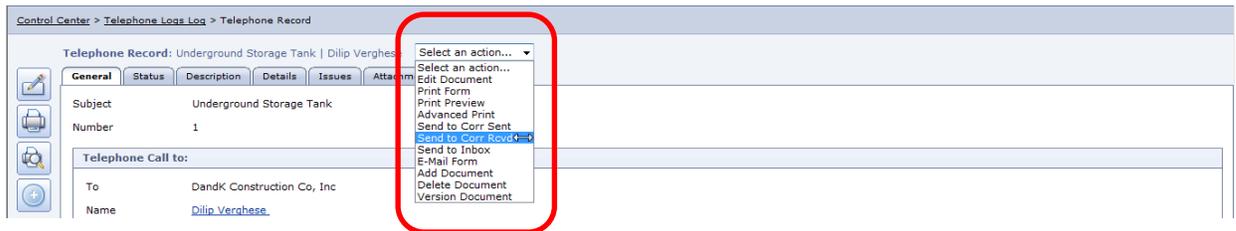
3. Open the desired folder (a list of modules will display) and select the desired folder. The Telephone Logs module has been selected in the example shown.



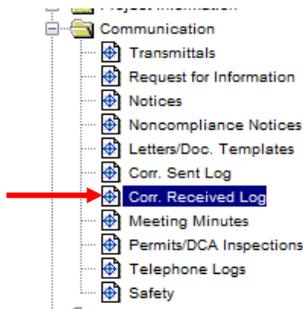
- Select the desired document from the log view by clicking the **blue document** link.



- With the desired document open, choose **Send to Corr Rcvd** from the drop down list on the **Select an ACTION** menu on the top of the screen. You will not see a message to indicate that the document has been sent to the Correspondence Received log.



- To verify that the document has been sent, return to the **Control Center**. Open the **Communication** folder (a list of modules will display) and select the **Corr. Received Log**.



- When the **Correspondence Received Log** displays, the document will be listed. In the example shown, the telephone log now shows as part of the Correspondence Received log.

