



STATE OF NEW JERSEY

SCHOOLS DEVELOPMENT AUTHORITY

Section 14

Telephone Logs



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I. CREATING A TELEPHONE LOG

Important project information is often communicated via telephone conversations. For example, follow-up calls that clarify the work billed on a Payment Requisition or that discuss problems that may later result in Change Management. Contract Management provides a Telephone Log for you to record the date, content, and parties involved in each call. Once entered, these documents can be printed or e-mailed as required.

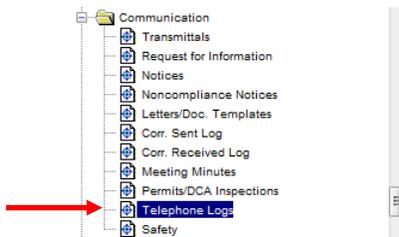
1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).



2. Select your desired project.



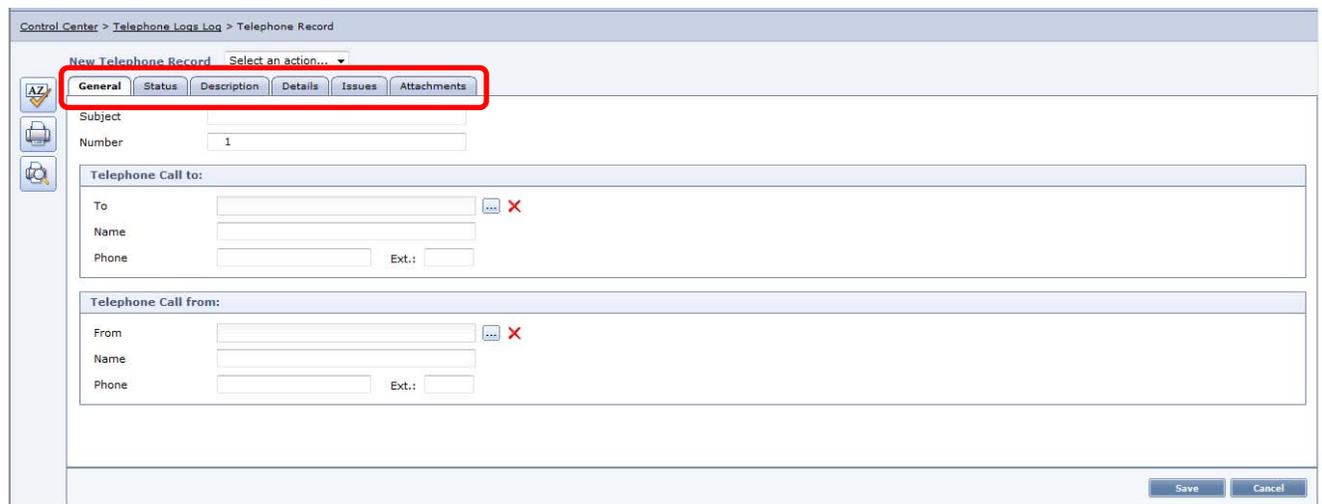
3. Open the **Communication** folder (a list of modules will display) and select **Telephone Logs**.



4. The **Telephone Logs** log view will display. Click the **Add Document** button to create a new Telephone record.



5. A blank **Telephone Record** displays. Click the applicable tab to enter information on one of the sections of the document.



A. General Section

Control Center > Telephone Logs Log > Telephone Record

New Telephone Record Select an action...

General Status Description Details Issues Attachments

Subject

Number

Telephone Call to:

To ... X

Name

Phone Ext.:

Telephone Call from:

From ... X

Name

Phone Ext.:

Save Cancel

- **Subject** – Enter the subject of the telephone call (33 character limit).
- **Number** – Contract Management will supply the next available number. Do not change this number.
- **(Telephone Call To) To** – Click the **select button** to choose the company from the Contact list or type in the name of the company.
- **(Telephone Call To) Name** – Will automatically populate if the name was chosen from the Contact list or type in the name of the contact.
- **(Telephone Call To) Phone** – Will automatically populate if the name was chosen from the Contact list or type in the number.
- **(Telephone Call From) From** – Click the **select button** to choose the company from the Contact list or type in the name of the company.
- **(Telephone Call From) Name** – Use the select link to choose the name from the Contact list or type in the name of the contact.
- **(Telephone Call From) Phone** – Will automatically populate if the name was chosen from the Contact list or type in the number.

NOTE: Use the **x clear** option available on the **Telephone Call To** and **Telephone Call From** fields to delete the contact information and select another.

An example of a completed General tab section is shown.

Control Center > Telephone Logs Log > Telephone Record

New Telephone Record Select an action...

General Status Description Details Issues Attachments

Subject Underground Storage Tank

Number 1

Telephone Call to:

To DandK Construction Co, Inc

Name Dilip Verghese

Phone (732) 560-5600 Ext.:

Telephone Call from:

From New Jersey Schools Development Auth

Name Aaron Goss

Phone (609) 722-2194 Ext.:

B. Status Section

Control Center > Telephone Logs Log > Telephone Record

New Telephone Record Select an action...

General Status Description Details Issues Attachments

Ball in Court <none selected>

Priority Normal

- **Ball in Court** – Click the **select button** to choose the desired contact name
- **Priority** – Default is **Normal**, can be changed to High or Low if necessary

C. Description Section

Control Center > Telephone Logs Log > Telephone Record

New Telephone Record Select an action...

General Status Description Details Issues Attachments

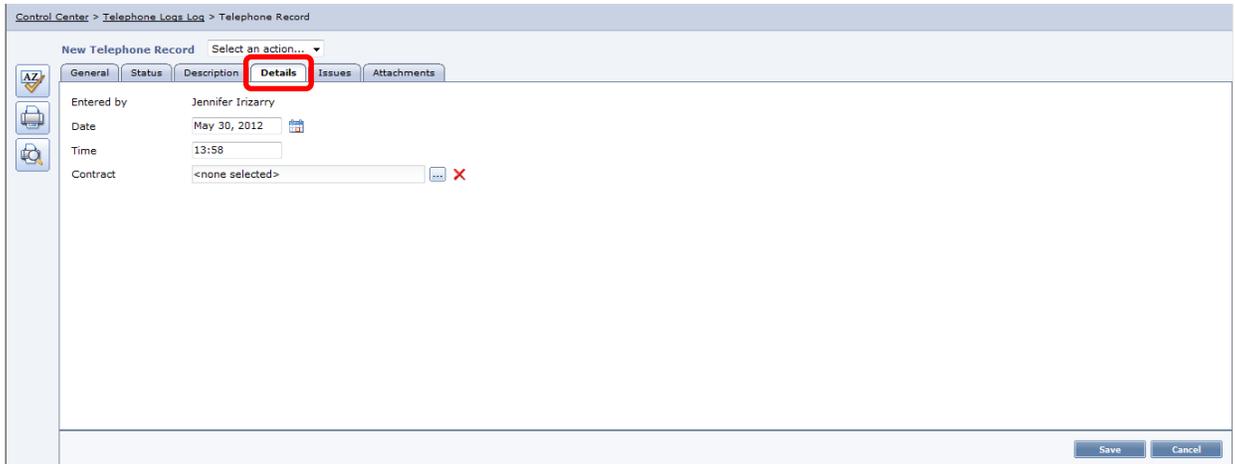
Description

Called to discuss remediation of discovered underground storage tank

Save Cancel

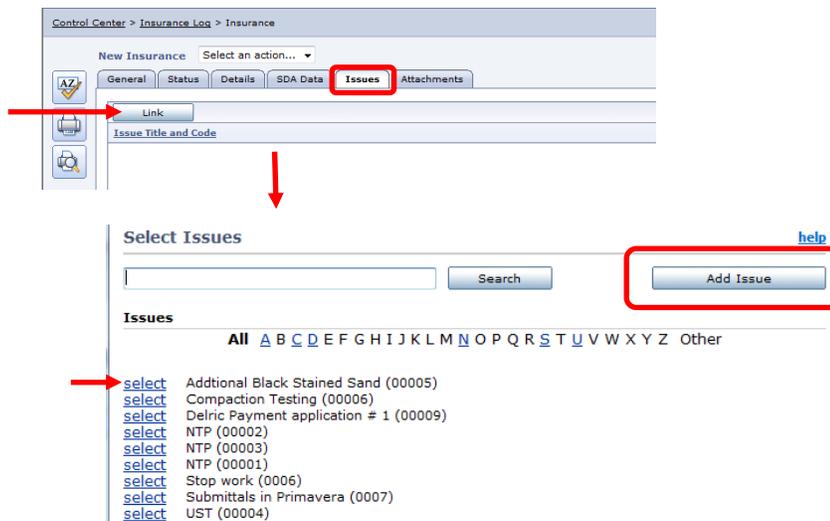
- Enter a detailed **Description** for this phone call.

D. Details Section



- **Entered by** – Contract Management automatically enters the login name of the user.
- **Date** – 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.
- **Contract** – Select an appropriate Contract using the select button.

E. Issues Section



The 'Select Issues' dialog box contains the following list of issues:

select	Issue Title and Code
select	Additional Black Stained Sand (00005)
select	Compaction Testing (00006)
select	Delric Payment application # 1 (00009)
select	NTP (00002)
select	NTP (00003)
select	NTP (00001)
select	Stop work (0006)
select	Submittals in Primavera (0007)
select	UST (00004)

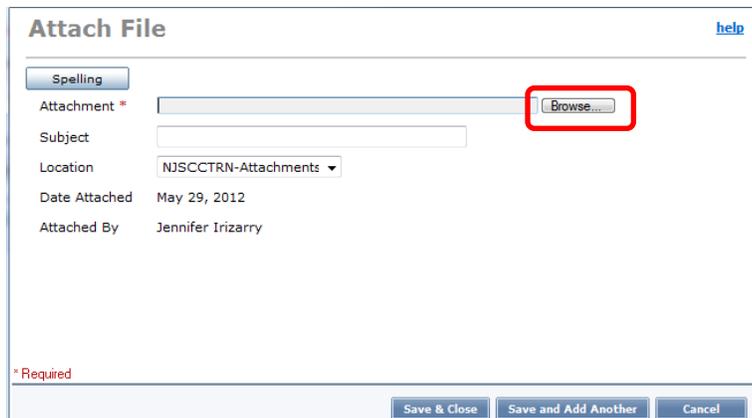
- If this phone call relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button and choose the desired issue from the dialog box. You can also click the **Add Issue** button to create a new issue, however, you will need to return to the Issues module to populate additional fields relating to the Issue.

F. Attachments Section

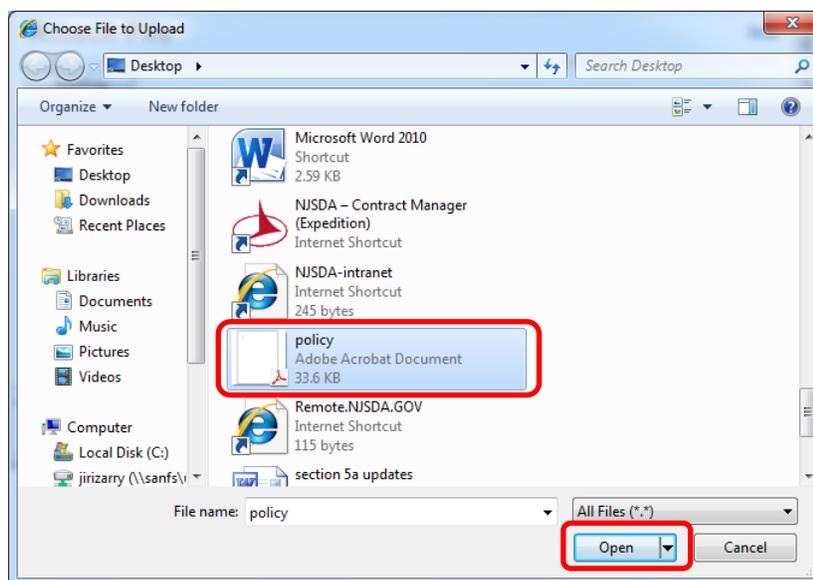
- To attach supporting documentation, click the **Attach File** button.



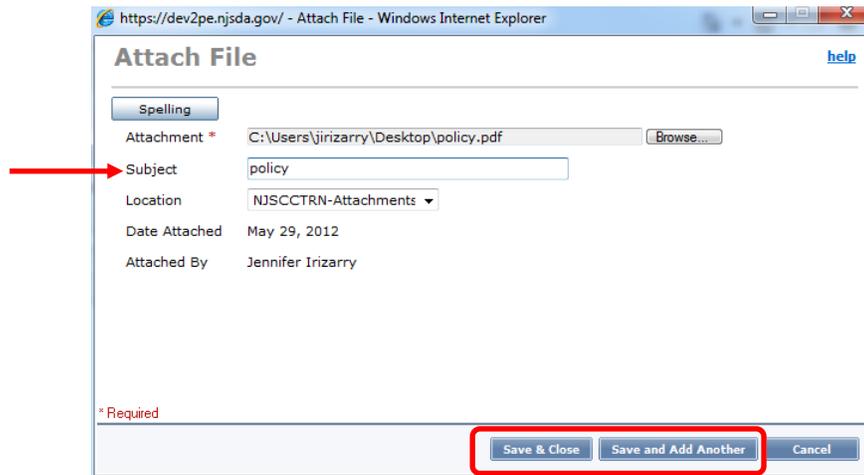
- Click the **Browse** button to navigate to the document you wish to attach.



- Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



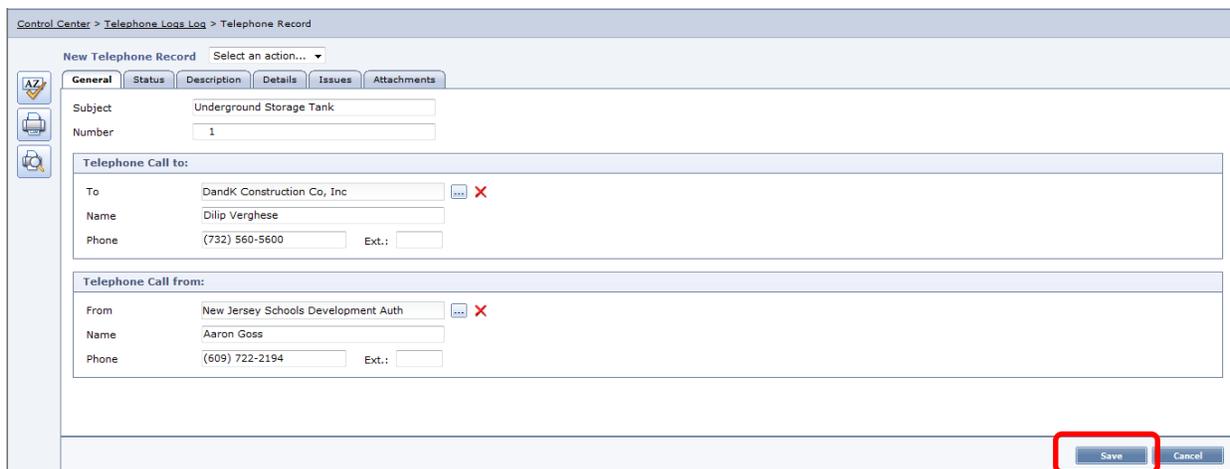
- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



- The attached file will display in the **Attachments** section.



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



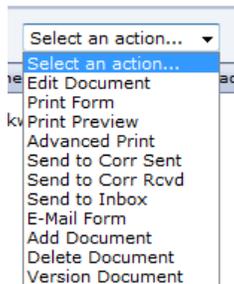
II. Version Document

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.

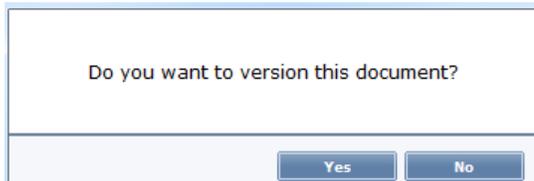
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

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.

