Contract Documents System
CDS

Help Document

University of Illinois
Office for Facilities Planning and Programs
January 2006
# Contract Documents System CDS

## Table of Contents

### General Information
- Website ....................................................................................................................................... i
- Help ............................................................................................................................................ i
- Software Requirements .............................................................................................................. i

### PRZM™ Registration
- Obtain PRZM™ login and password ......................................................................................... ii

### CCU Administrator
- Accessing Project Binders ........................................................................................................ 1
- Setting Up a New Project Binder ................................................................................................ 1
- Selecting Single or Multiple Contracts ....................................................................................... 3
- Editing the Project Binder ......................................................................................................... 5

### PSC Writer
- Accessing the Project Binder .................................................................................................... 6
- Preparing the Professional Services Agreement Attachments ................................................ 6
- Preparing Documents 100 – 900 ............................................................................................... 8
  - Preparing Document 300 ............................................................................................ 10
  - Printing Documents .................................................................................................... 10

### CCU Writer
- Accessing the Project Binder ................................................................................................... 11
- Preparing the Professional Services Agreement (PSA) .......................................................... 11
- Reviewing PSA Attachments and Preparing Attachment C .................................................... 13
- Reviewing Documents 100 – 900 ............................................................................................ 13
- Submitting Document 250 – Project Specific Prequalification Statement For Approval .......... 14
- Preparing the Contractor Agreement ..................................................................................... 14
- Archiving the Project Binder ................................................................................................... 15

### UOFP&P Management
- Accessing the Project Binder .................................................................................................. 16
- Review / Approve /Reject the PSA and Document 250 ............................................................. 16

### CCU Management
- Accessing Project Binders ........................................................................................................ 17
- Accessing Project Forms and Documents ............................................................................. 17

### Appendix A – CDS Flowchart
### Appendix B – PSA Approval Process Flowchart
### Appendix C – Contract Divisions
### Appendix D – Security Matrix (Roles and Permissions)
GENERAL INFORMATION

CDS Website:

https://przm.apps.uillinois.edu/usdcc/usdccv12.nsf

Use Internet Explorer (IE) Version 5.0 or higher

Help

Email: helpdesk2@uillinois.edu

Software Requirements

Use Adobe Acrobat Reader Version 5.1 or 6.0

Acrobat Reader Version 5.1 can be downloaded at

http://www.uofpp.uillinois.edu/docs/Tools/AcrobatReaderv51/AcroReader51_ENU_full.exe

Updates: January 2006 System and Help Document
PRZ M Registration
To obtain a PRZM login and password

1. To begin your registration, go to https://przm.apps.uillinois.edu/prism/profiles.nsf

2. The Registration site opens. Click on New User Registration.

3. The Registration Form opens. Use the User Type drop-down menu, select the type of user you are:
4. If your firm is already registered, select the firm name in the drop down list. If your firm is not registered, go to step 6.

5. After doing so, a form will open where you can provide your personal information. Click on “Submit User Registration” after you are complete.
6. If your firm is not registered, select your user type: contractor or professional services. In the section Firm Name, select “Company Not Listed.” The button “Go To The Vendor Registration Form” will appear, click on it.

7. Fill in the form accordingly. Click on “Submit Vendor Registration”.

8. After registering your firm, each person needs to register individually, GO TO STEP 4. Select the firm that you just registered.
Campus Construction Unit Administrator – CCU ADMIN

RESPONSIBILITIES:
- Set up “Project Binder” for new projects
- Provide oversight for the campus

ACCESSING PROJECT BINDERS

After logging in, the CCU Admin can access current, published, and in progress projects for their campus by clicking on the project number for the project, and set up a new project binder.

SETTING UP A NEW PROJECT BINDER

Click on “Set up a new project.” To set up a new project binder, the following information is needed:

- Project Name
- Project Number
- Professional Services Consultant Firm Name
- Professional Services Consultant Address (Auto-populates from PRZM registration database)
- Campus Location
- Campus Construction Unit Address
- Campus Construction Unit Writer (CCU Writer)
- Professional Services Consultant Writer (PSC Writer)

1. Fill out the first half of the form with the appropriate information.
2. Select the Campus Construction Unit (CCU) Writer(s) and the Professional Services Consultant (PSC) Writer(s) using the drop down list. (Hint: Press the first letter of the first name and it will take you to the letter.) To select more than one CCU Writer or PSC Writer, keep the CTRL key pressed and click on the Writers.

CCU Writer’s responsibilities are to prepare the Professional Services Agreement (PSA), review the PSA Attachments, review Documents 100 – 900, prepare the contractor agreements, and provide oversight for the project binder.

PSC Writer’s responsibilities are to prepare the PSA Attachments and Documents 100 – 900 for the Project Manual.
3. Select the PSA forms for the project.

Select **Professional Services Agreement (PSA)**, PSA Attachments, and MAFBE Certification.

4. Uploading project information like spreadsheets, documents, etc. to the project binder can be accomplished by using the “Upload File Attachments” option. This option is available to enable team members to upload any outside information that may affect the project binder.

5. Click on Create Forms in “4. Save the information and generate the forms:”

Here’s an example of the project binder after clicking on “Create Forms”:

**1. Project Binder Information:**

- **Project Name**: Roger Adam Lab - Renovations of 194 & 294
- **Project #**: 00C15
- **Professional Services Consultant**: Isaksen Gierum / Urbana

**2. Forms in this Project Binder:**

- **000001** New Professional Services Agreement
- **000002** New PSA Attachment A, B, C, D, (Summary) E
- **000003** New PSA Attachment D - MAFBE Certification

Created By Date/Time: Jay Smith - 01/13/2004 10:40:20 AM
Modified By Date/Time: Jay Smith - 01/13/2004 10:40:21 AM
SELECTING SINGLE OR MULTIPLE CONTRACT DIVISIONS FOR CONSTRUCTION DOCUMENTS

The following will guide the user in creating the construction documents (00100 – 00900) and contractor agreements.

1. In the project binder, click on Edit Project Binder

2. Click on Single or Multiple Contract Divisions

For Single, click on the contract division(s). List of Contract Divisions is available in Appendix C.

For Multiple, select the Prime Contract Division. Then select the contract divisions that will be assigned to the prime contract division. List of Contract Divisions is available in Appendix C.

4. Select the forms and documents for the project.

Select all documents; they are all mandatory except for 250 – Project-Specific Prequalification Statement. (Select Document 250 – Project-Specific Prequalification Statement only if the project manager plans to use it). Documents 100, 200, 300, 700, 810, 820, 830, and 900 should be included in the Project Manual.
Select the **Contractor Agreements** used in the project. For single, select Contractor Agreement – No Assignment and for multiple, select both Contractor Agreement with Assignment and Assigned Subcontractor.

Enter the number of additional forms you want to add to this Project Binder.

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Professional Services Agreement</td>
</tr>
<tr>
<td>0</td>
<td>PSA Attachment A B C D (Summary) E</td>
</tr>
<tr>
<td>0</td>
<td>PSA Attachment D (MAFBE Certification)</td>
</tr>
<tr>
<td>1</td>
<td>00100 - Notice to Bidders (Single)</td>
</tr>
<tr>
<td>1</td>
<td>00200 - General Instructions to Bidders (Single and Multiple)</td>
</tr>
<tr>
<td>1</td>
<td>00250 - Project-Specific Prequalification Statement (Single and Multiple)</td>
</tr>
<tr>
<td>1</td>
<td>00300 - Proposal (Single)</td>
</tr>
<tr>
<td>1</td>
<td>00700 - General Conditions</td>
</tr>
<tr>
<td>1</td>
<td>00810 - Standard Contract Execution Forms (Single)</td>
</tr>
<tr>
<td>1</td>
<td>00820 - Standard Contract Administration Forms (Single and Multiple)</td>
</tr>
<tr>
<td>1</td>
<td>00830 - Contractor Annual Prequalification Statement</td>
</tr>
<tr>
<td>1</td>
<td>00900 - Addenda and Modifications (Single and Multiple)</td>
</tr>
<tr>
<td>1</td>
<td>Agreement No Assignment (1 per contract division)</td>
</tr>
</tbody>
</table>

5. Click on Submit Changes in “5. Save your modifications” to create the construction documents and agreements.
EDITING THE PROJECT BINDER

1. Select the project to edit. Towards the bottom of the page, click on Edit Project Binder.

Then the Project Binder becomes editable.

2. Make the necessary changes and click on Submit Changes in “5. Save your modifications.”
Professional Services Consultant Writer – PSC Writer

RESPONSIBILITIES:
- Prepare Professional Services Agreement Attachments B, D Summary, D Certifications, and E
- Prepare Documents 100 – 900
  - Preparing Document 300
  - Printing Documents

ACCESSING THE PROJECT BINDER

1. After the project binder is created by the Campus Construction Unit Administrator, the PSC Writer(s) will receive an autogen email from the system. The email contains a link to the project binder.

2. Access the project binder through this website: https://przm.apps.uillinois.edu/usdcc/usdccv12.nsf
   Select the project binder.

PREPARING THE PROFESSIONAL SERVICES AGREEMENT ATTACHMENTS B, D SUMMARY, D CERTIFICATIONS, and E

BASIC FUNCTIONALITY – There are six control buttons on top right hand corner of the form. They are Save Changes, Save as Draft, Save as Complete, Publish, Print, and Close. The control buttons are used to keep track of the document status and for navigation.

- Save Changes – Allows the user to save changes without exiting to the project binder
- Save as Draft – Save when not complete
- Save as Complete – Complete and ready for CCU Writer review
- Publish – Used by the CCU Writer as a sign of approval. Documents and forms are not editable after when published

TEXT BOXES - There are text boxes to fill in throughout the document. Go through the PSA Attachments and fill in all necessary information.

COMPLETING THE ATTACHMENTS

1. After the Attachments are complete, click on “Save As Complete.” (The system will autogen an email to the CCU Writer(s) when the Attachments are complete so the CCU writer can begin their review process).

2. The CCU Writer will review the form and click on “Publish” as a sign of approval. In Published mode, the Attachments are not editable. The five control buttons are reduced to two buttons: “Close” and “Display Print Friendly Form.”

3. If the CCU Writer rejects the Attachments, the Attachment will be changed to Draft mode, the CCU Writer will contract the PSC Writer outside of the system to discuss any changes.
PSA ATTACHMENTS

Fill in the necessary information in each Attachment.

- Informational: Attachment A – Reimbursable Expenses Guidelines
- PSC Writer Prepares: Attachment B – Hourly Rate Schedule
- CCU Writer Prepares: Attachment C – Time of Completion
- PSC Writer Prepares: Attachment D – MAFBE Summary
- PSC Writer Prepares: Attachment D – MAFBE Certification (one per consultant)
- PSC Writer Prepares: Attachment E – Financial Interests and Potential Conflict of Interests

Example: Attachment B – Hourly Rate Schedule

```
ATTACHMENT B

HOURLY RATE SCHEDULES

In accordance with Article F.4. of the Agreement, the following hourly rates apply to all services procured on an hourly basis, commencing [October 1, 2000] and ending on a date to be determined by a written amendment to the Agreement.

<table>
<thead>
<tr>
<th>Position</th>
<th>$/hr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal</td>
<td>150</td>
</tr>
<tr>
<td>Professional Services Consultant</td>
<td>N/A</td>
</tr>
<tr>
<td>Project Manager</td>
<td>110</td>
</tr>
<tr>
<td>Senior Staff Engineer</td>
<td>110</td>
</tr>
<tr>
<td>Technician IV</td>
<td>90</td>
</tr>
<tr>
<td>Clerk</td>
<td>65</td>
</tr>
</tbody>
</table>
```

ADDING ADDITIONAL ATTACHMENT D MAFBE CERTIFICATION FORMS

1. To create additional Minority and Female Business Enterprise (MAFBE) certification, click on “Edit Project Binder” in the project binder homepage.

2. In “3. Add additional forms,” use the drop down list to select the number of additional forms.

3. Click on “Submit Changes”
PREPARING DOCUMENTS 100 - 900

BASIC FUNCTIONALITY – There are six control buttons on top right hand corner of the form. They are Save Changes, Save as Draft, Save as Complete, Publish, Print, and Close. The control buttons are used to keep track of the document status and for navigation.

- **Save Changes** – Allows the user to save changes without exiting to the project binder
- **Save as Draft** – Save when not complete
- **Save as Complete** – Complete and ready for CCU Writer review
- **Publish** – Used by the CCU Writer as a sign of approval. Documents and forms are not editable after when published

TEXT BOXES - There are text boxes to fill in throughout the document. Go through each Document and fill in all necessary information. Fill in the field boxes highlighted in light blue-green.

COMPLETING DOCUMENTS 100 – 900

1. After each document is complete, click on “Save As Complete.” (The system autogens an email to the CCU Writer(s) when the Documents are all complete so the CCU writer can begin their review process).

2. The CCU Writer will review the form and click on “Publish” as a sign of approval. In Published mode, the Document is not editable. The five buttons are reduced to two buttons: “Close” and “Print.”
3. If the CCU Writer rejects the Document, the Document will be changed to Draft mode; the CCU Writer will contract the PSC Writer outside of the system to discuss any changes.

**DOCUMENTS 100 – 900**

Fill in the necessary information in each document.

<table>
<thead>
<tr>
<th>Draft</th>
<th>00100 - Notice to Bidders (M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>00200 - General Instructions to Bidders (S &amp; M)</td>
</tr>
<tr>
<td>Draft</td>
<td>00250 - Project-Specific Prequalification Statement (S &amp; M)</td>
</tr>
<tr>
<td>New</td>
<td>00300 - Proposal (M)</td>
</tr>
<tr>
<td>New</td>
<td>00700 - General Conditions</td>
</tr>
<tr>
<td>Informational</td>
<td>03810 - Standard Contract Execution Forms (M)</td>
</tr>
<tr>
<td>Informational</td>
<td>03820 - Standard Contract Administration Forms (S &amp; M)</td>
</tr>
<tr>
<td>Informational</td>
<td>03830 - Contractor Annual Prequalification Statement</td>
</tr>
<tr>
<td>Informational</td>
<td>03900 - Addenda and Modifications (S &amp; M)</td>
</tr>
</tbody>
</table>

The documents labeled **New** should be filled out and the documents labeled **Informational** need to be printed and made part of the project manual.

Example: Document 100 – Notice to Proceed

---

**THE BIDDING AND CONTRACT PROVISIONS**

Document 00100 - Notice to Bidders

(Standard Single Contract Set)

NOTICE TO BIDDERS

The Board of Trustees of the University of Illinois, hereinafter referred to as the “Owner,” furnishes the following information and special instructions to prospective bidders desiring to submit proposals for the work on the following project:

**1.0 PROJECT INFORMATION**

1.1 Project Name: Helen Test Two

1.2 Project Number: 01-13-03

1.3 Project Description: [Blank]
PREPARING DOCUMENT 300 – PROPOSAL – SECTION 6

Section 6 allows user to add information up to ten pages for Multiple and Single.

In order to access the next blank page, the previous page must have data in the text field.

The blank pages will not print out and the page numbers will re-calculate itself to match up with the number of pages used.

6.0 PROPOSED PRICES

The Bidder hereby proposes to furnish all labor, materials, equipment, transportation, construction plant and facilities necessary to complete, in a workmanlike manner and in accordance with the Contract Documents, the Contract Division work bid upon herein for compensation in accordance with the following prices:

6.1 General Work
A. Base Bid

All Division I (General) Base Bid Work for the fixed sum of: _______________________ Dollars ($ ____________).

Once information is filled out on the first page, there will be another blank page for user to work with.

PRINTING DOCUMENTS 100 – 900

PSC Writers – ENSURE FORMS AND DOCUMENTS ARE MARKED PUBLISHED BEFORE PRINTING

To print, be sure to unclick the “Comments” option. There are comments in the documents, make sure to unclick “Comments” because the comments will print out.
**Campus Construction Unit Writer – CCU WRITER**

**RESPONSIBILITIES**
- Prepare the Professional Services Agreement (PSA)
- Review the PSA Attachment B,D Summary, D Certifications, and E
- Prepare PSA Attachment C – Time of Completion
- Review Documents 100 – 900
- Prepare the Contractor Agreements

**ACCESSING THE PROJECT BINDER**

1. After the project binder is created by the Campus Construction Unit Administrator, the CCU Writer(s) will receive an autogen email from the system. The email contains a link to the project binder.

2. Access the project binder through this website: https://przm.apps.uillinois.edu/usdcc/usdccv12.nsf
   Select the project binder.

**PREPARING THE PROFESSIONAL SERVICES AGREEMENT (PSA)**

To promote discussion between the Professional Services Consultant and Campus Construction Unit, the PSC Writer can access the PSA in read mode and review the PSA.

**BASIC FUNCTIONALITY** – There are six control buttons on top right hand corner of the form. They are Save Changes, Save as Draft, Save as Complete, Submit for Approval, Print, and Close.

- **Save Changes** – Allows the user to save changes without exiting to the project binder
- **Save as Draft** – Save when not complete
- **Save as Complete** – Complete but not ready to submit for approval
- **Submit for Approval** – Approval process outlined is Appendix One

**TEXT BOXES** - There are text boxes to fill in throughout the document. Go through the PSA and fill in all necessary information.

**SELECTING PHASES AND SERVICES** - In the Sections A.1 to A. 8, all the pre-approved services are selected. Click on the services to unselect, a “N/A” will replace the service. To unselect the entire phase, click on the box next to the phase, a “N/A” will appear under the phase name.

```
1. CONCEPTUALIZATION PHASE

   N/A

2. SCHEMATIC DESIGN PHASE
   a. Based upon an approved conceptualization phase, Professional Services
      architectural, mechanical and electrical schemes leading to a recommend
      description of the Project.
   b. N/A
```
**ADDING SERVICES** - To add services to phases, enter the service(s) in the text box below the phase.

<table>
<thead>
<tr>
<th>Service</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schematic Design Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Design Development Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Construction Documents Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Bidding Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Construction Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Post Construction Phase</td>
<td>$0</td>
</tr>
</tbody>
</table>

**FILLING OUT F. COMPENSATION** - In F. Compensation, the phases that are selected in Section A will appear. For each phase, fill in the cost in either section a (hourly) or b (fixed fee). Only one value for each phase is accepted. (In the screen shot below, the Conceptualization and Interior Design Phase is not click (N/A), therefore they do not show up in the Compensation section).

1. **Fees for Professional Services** - Professional Services Consultant shall receive as compensation, subject to additions and deductions provided for herein, for professional services required herein, including services performed by professional subconsultants, a fee, plus authorized reimbursables (described in F.2 below), on the following basis:

   a. For the following services, on an hourly basis in accordance with Article F.4. of this Agreement provided however the total amount(s) payable shall not exceed $__________

<table>
<thead>
<tr>
<th>Phase</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schematic Design Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Design Development Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Construction Documents Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Bidding Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Construction Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Post Construction Phase</td>
<td>$0</td>
</tr>
</tbody>
</table>

   b. For the following services, a fixed fee of $__________. The fixed fee is payable in accordance with the following breakdown of the total compensation:

<table>
<thead>
<tr>
<th>Phase</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schematic Design Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Design Development Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Construction Documents Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Bidding Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Construction Phase</td>
<td>$0</td>
</tr>
<tr>
<td>Post Construction Phase</td>
<td>$0</td>
</tr>
</tbody>
</table>

**STANDARD AND NON-STANDARD PSA APPROVAL PROCESS** – Flowchart in Appendix B
REVIEWING PSA ATTACHMENTS AND PREPARING ATTACHMENT C

After the PSA Writer is finished with the PSA Attachments, the PSC writer will mark it as “Complete.”

CCU Writer reviews Attachments B, D Summary, D Certification(s), and E.
CCU Writer prepares Attachment C – Time of Completion.

- Informational: Attachment A – Reimbursable Expenses Guidelines
- PSC Writer: Attachment B – Hourly Rate Schedule
- CCU Writer: Attachment C – Time of Completion
- PSC Writer: Attachment D – MAFBE Summary
- PSC Writer: Attachment D – MAFBE Certification (one per consultant)
- PSC Writer: Attachment E – Financial Interests and Potential Conflict of Interests

If you approve the PSA Attachment, click Publish
If you reject any parts of the PSA Attachment, click on Draft. (Contact PSC Writer outside of the system and discuss the rejection).

The PSA Attachments should be in published mode before submitting the PSA for approval. Click “Submit for Approval” in the PSA.

REVIEWING DOCUMENTS 100 - 900

1. After the PSC Writer marks the Documents “complete,” (the CCU Writer will receive an autogen email from the system). Review each document and click on “Publish” if approve. In Published mode, the document is not editable.

2. Click on “Save as Draft” if rejected. (Contact PSC Writer outside of the system and discuss the rejection).
**SUBMITTING DOCUMENT 250 – PROJECT SPECIFIC PREQUALIFICATION STATEMENT FOR APPROVAL**

1. Click on “Submit for Approval,” the system autogens an email to UOFP&P Management.

2. If UOFP&P Management approves, the document will change to Published mode. If rejected, UOFP&P Management will leave comments for improvement. Resubmit after making changes.

**PREPARING THE CONTRACTOR AGREEMENTS**

1. To add additional contractor agreements - Click on “Edit Project Binder” in the project binder.

2. In “3. Add additional forms,” use the drop down list to select the number of additional forms.

3. Click on “Submit Changes” to go to back to the project binder.

4. Click on the Contractor Agreement.

5. Fill out the fields with the blue-green borders. Some of the fields will auto-populate, such as the Contractor Name and Address, Contract Amounts, and information in the Performance and Payment Bonders.

6. Click on “Publish” when complete. In Publish mode, the borders in the text fields do not appear and the agreement is ready for printing.
ARCHIVING THE PROJECT BINDER

Click on “Publish Project Binder” in the project binder and all forms and documents will change to the Published Mode and the Project Binder is Published and archived. Make sure that the project binder is complete before clicking on the “Publish Project Binder.”
University Office for Facilities Planning and Programs
Management – UOFP&P Management

RESPONSIBILITIES
- Review / Approve / Reject the Professional Services Agreement (PSA)
- Review / Approve / Reject Document 250 – Project Specific Prequalification Statement

ACCESSING THE PROJECT Binder

1. After CCU Writer submits the PSA or Document 250 for approval, UOFP&P Management will receive an autogen email from the system. The email contains a link to the project binder.

2. Access the project binder through this website: https://przm.apps.uillinois.edu/usdcc/usdcv12.nsf Select the project binder.

REVIEW / APPROVE / REJECT THE PSA AND DOCUMENT 250

1. Review the form or document.

   - If approve, click on “Approve by UOFP.”

   - If reject, leave comments (the UOFP&P Management can leave comments in the form or document themselves, just make sure the CCU Writer is aware of the comments into the form or document). Click on “Reject” after leaving comments. The system autogens an email to the CCU Write about rejection.
**Campus Construction Unit Management - CCU MANAGEMENT**

**ABILITIES:**
- Access all project binders for their campus
- Read/View all documents and forms in new, draft, pending approval, complete, and published modes

**ACCESSING PROJECT BINDERS**

After logging into the system, select the project binder by clicking on the project number.

In the Project Binder, basic project information and project forms and documents are provided.

**ACCESSING PROJECT FORMS AND DOCUMENTS**

Select the form or document to read/view. In the form or document, use the Close button to return to the binder. Click Close to return to the Project Homepage to access another project binder.
Appendix B – PSA Approval Process Flowchart

CCU Prepares the PSA* [Electronically]

PSA Standard or Non-Standard [Electronically]

CCU Prints PSA and Routes for Signatures - Vendor Side [Hard Copy]

UOFPP Management for Review** [Electronically]

UOFPP Management to review

Autogen Email to CCU Writer about rejection

CCU Prints out the PSA and Prepares the Routing Sheet with Comments of Change [Hard Copy]

CCU Routes for Signatures - Vendor Side [Hard Copy]

CCU Routes to Legal Counsel for Approval [Hard Copy]

PSA is locked in Published Mode

Approve

Routes for Appropriate Signatures - BOT: Compr & Secr (President & Legal Counsel as needed) [Hard Copy]

Approve or Reject PSA [Hard Copy]

Reject - Back to UOFPP Management

Approve

*CCU - Prior to preparing a non-standard PSA, any conversation with Legal Counsel should include UOFPP

** UOFPP Management to discuss modifications with Legal Counsel for concurrence.

Autogen email to UOFPP Management to review

Reject with Comments
Appendix C – Contract Divisions

Division 1 - General Work
Division 2 - Plumbing Work
Division 3 - Heating A/C Temp Control Work
Division 4 - Ventilation Work
Division 5 - Electrical Work
Division 6 - Sprinkler Work
Division 7 - Temperature Control Work
Division 8 - Test/Balance Work
Division 9 - Elevator Work
Division 10 - Access Flooring Work
Division 11 - Building Signage-Interior Work
Division 12 - Carpentry Work
Division 13 - Carpet/Resilient Flooring Work
Division 14 - Ceiling Work
Division 15 - Concrete Work
Division 16 - Demolition Work
Division 17 - Drywall Work
Division 18 - Excavation Work
Division 19 - Fire Protection Work
Division 20 - Flooring Work
Division 21 - Hardscape Work
Division 22 - Landscaping Work
Division 23 - Masonry Work
Division 24 - Miscellaneous Metals Work
Division 25 - Painting Work
Division 26 - Roofing Work
Division 27 - Site Work
Division 28 - Structural Steel Work
Division 29 - Utility Site Work-Electrical
Division 30 - Utility Site Work-Gas
Division 31 - Utility Site Work-Heating
Division 32 - Utility Site Work-Plumbing
Division 33 - Utility Site Work-Water
Division 34 - Utilities Site Work
Division 35 - Windows/Entrances Work
Division 36 - Telecommunications Work
Division 37 - Telecomm Copper Media Ex
Division 38 - Telecomm Emergency Phone
Division 39 - Telecomm Networking
Division 40 - Telecomm Underground Infrastructure
Division 41 - Telecomm Wiring-Exterior
Division 42 - Telecomm Wiring-Interior
Division 43 - Other Telecommunications Work
Division 44 - Other Work
Division 45 – Environmental/Asbestos Abatement Work
## Appendix D – Security Matrix (Roles and Permissions)

<table>
<thead>
<tr>
<th>User Roles</th>
<th>UOFP&amp;P Admin</th>
<th>UOFP&amp;P Man</th>
<th>CCUMan</th>
<th>CCUAdmin</th>
<th>CCU Writer</th>
<th>PSC Writer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Create New Projects</strong></td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td><strong>Edit Project Binder</strong></td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes, only for their own Campus</td>
<td>When Name Specified</td>
<td>When Name Specified</td>
</tr>
<tr>
<td><strong>Read Project Binder</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Only for their own Campus</td>
<td>Only for their own Campus</td>
<td>When Name Specified</td>
<td>When Name Specified</td>
</tr>
<tr>
<td><strong>Read Project Documents</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Only for their own Campus</td>
<td>Only for their own Campus</td>
<td>When Name Specified</td>
<td>When Name Specified</td>
</tr>
<tr>
<td><strong>Edit Project Documents</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Only PSA &amp; 250 during approval process</td>
<td>Can only read, changes will not be saved</td>
<td>Yes, only for their own campus</td>
<td>When Name Specified</td>
</tr>
<tr>
<td><strong>Read PSA</strong></td>
<td>Yes</td>
<td>Yes</td>
<td>Only for their own Campus</td>
<td>Only for their own Campus</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Edit PSA</strong></td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes, when PSA has a status of &quot;Pending UOCP Approval&quot; only this role has permission approve and edit the PSA</td>
<td>No, form opens in Read Mode</td>
<td>Yes, when status is not &quot;Pending UOCP Approval&quot; or &quot;Published&quot;</td>
</tr>
<tr>
<td><strong>Permission to ADD the following docs to Project Binder</strong></td>
<td>UOFP&amp;P Admin</td>
<td>UOFP&amp;P Man</td>
<td>CCUMan</td>
<td>CCUAdmin</td>
<td>CCU Writer</td>
<td>PSC Writer</td>
</tr>
<tr>
<td>250</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>When Name Specified</td>
<td>When Name Specified</td>
</tr>
<tr>
<td>Agreement No Assignment</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>When Name Specified</td>
<td>No</td>
</tr>
<tr>
<td>Agreement - Assigned Subcontractor</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes, for Multiple Contract Divisions</td>
<td>Yes, when Name Specified and Multiple Contract Divisions</td>
<td>No</td>
</tr>
<tr>
<td>Attachment D - MAFBE Certification</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>When Name Specified</td>
<td>When Name Specified</td>
</tr>
<tr>
<td><strong>EDIT / READ the following docs to Project Binder</strong></td>
<td>UOFP&amp;P Admin</td>
<td>UOFP&amp;P Man</td>
<td>CCUMan</td>
<td>CCUAdmin</td>
<td>CCU Writer</td>
<td>PSC Writer</td>
</tr>
<tr>
<td>Edit - 250</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Only for their own Campus</td>
<td>When Name Specified</td>
<td>When Name Specified</td>
</tr>
<tr>
<td>Read - 250</td>
<td>Yes</td>
<td>Yes</td>
<td>Only for their own Campus</td>
<td>Only for their own Campus</td>
<td>When Name Specified</td>
<td>When Name Specified</td>
</tr>
<tr>
<td>Edit - Agreements (No Assign, Assign Sub, With Assigned Sub)</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes, Only for their own Campus</td>
<td>When Name Specified</td>
<td>No</td>
</tr>
<tr>
<td>Read - Agreements (No Assign, Assign Sub, With Assigned Sub)</td>
<td>Yes</td>
<td>Yes</td>
<td>Only for their own Campus</td>
<td>Only for their own Campus</td>
<td>When Name Specified</td>
<td>No</td>
</tr>
<tr>
<td>Edit - Attachment ABCDE &amp; D - MAFBE Certification</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes, Only for their own Campus</td>
<td>When Name Specified</td>
<td>When Name Specified</td>
</tr>
<tr>
<td>Read - Attachment ABCDE &amp; D - MAFBE Certification</td>
<td>Yes</td>
<td>Yes</td>
<td>Only for their own Campus</td>
<td>Only for their own Campus</td>
<td>When Name Specified</td>
<td>When Name Specified</td>
</tr>
<tr>
<td><strong>Publish/ Unpublish</strong></td>
<td>UOFP&amp;P Admin</td>
<td>UOFP&amp;P Man</td>
<td>CCUMan</td>
<td>CCUAdmin</td>
<td>CCU Writer</td>
<td>PSC Writer</td>
</tr>
<tr>
<td>Reset Project Documents Button</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes, only for their own campus</td>
<td>Yes when Name Specified</td>
<td>No</td>
</tr>
<tr>
<td>Publish Project Binder Button</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes, only for their own campus</td>
<td>Yes when Name Specified</td>
<td>No</td>
</tr>
<tr>
<td>UnPublish Project Binder Button</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>