Table of Contents

Quick Reference (start here)

1 Adding a new College (or modifying an existing one)

1.1 To add a College to Prompt, go to **Administration** beneath the navigation tree → Click **Maintain Colleges** → click **Add New** in the upper right hand corner. To modify an existing college, click on the **College** → Click the **edit** button in the upper right hand corner of the screen.

- See **College Edit** for further instructions

2 Adding a Project (or modifying an existing one)

2.1 To add a project click on the **College** in the navigation tree → click the **New Project** link. To modify an existing Project click on the **Project** → click the **edit** button in the upper right hand corner of the screen.

- See **Project Edit screen** for further instructions

3 Adding a new Contract (or editing an existing one)

3.1 To add a contract click on the **Project** in the navigation tree → click the **New Contract** link. To modify an existing contract click on the contract in the navigation tree → click the **Edit** button in the upper left hand corner of the screen

- See **Contract Edit screen** for further instructions

4 Entering Change Orders and Amendments

4.1 To enter a change order click on the **Contract** in the navigation tree → In the **Contract** Tab (the default tab) click the **Amendments** sub-tab → click the **Add New** link in the upper right hand corner of the screen.

- See **Contract Amendment Edit** for further instructions

5 Modifying a Change Order or Amendment

5.1 To modify an existing **Change Order** navigate to the **Change Order** (click on the **Project** → click on the **Contract** → click on the **Contract tab** → click on the **Amendments sub-tab** → click on the date for the **Amendment** to be edited

- See **Contract Amendment Edit** for further instructions

6 Entering Regular Transactions

6.1 To enter a transaction navigate to the Contract ((click on the **Project** → click on the **Contract** → click the **Transaction Tab** → Click **Add Transaction**)

- See **Adding a Transaction** for further instructions

7 Entering Reimbursables Transactions

7.1 To enter a reimbursables transaction navigate to the Contract ((click on the **Project** → click on the **Contract** → click the **Transaction Tab** → Click **Add Transaction**) In the **Transaction Detail window**, click the checkbox for **Reimbursable**.

- See **Adding a Transaction for Reimbursables** for further instructions

8 Releasing Retention

8.1 To release retention on a contract, navigate to the Contract ((click on the **Project** → click on the **Contract** → click the **Transaction Tab** → Click **Add Retention**)

- See **Adding a Retention Transaction** for further instructions

9 Reporting

9.1 From any point in Prompt, the user can click **Reports** on the top menu to generate any number of reports.

- See **Reports** for further instructions

User Manual

Colleges

Edit College Information

9.2 This page lists the College(s) on the left side. Clicking on the College will take you to the **College Info Screen**.

9.2.1 Projects

- Click on the + sign next to a College to see all of the Projects for that College.
  - Yellow icons indicate active projects
  - Blue icons indicate pending projects
  - Grey icons indicate completed projects
  - Red icons indicate suspended projects
- Clicking on the Project will direct you to the **Project Info Screen**

9.2.2 Contracts

- Click the + sign next to a project to see the contracts for that project.
  - Green arrows indicate open contracts
  - Red arrows indicate closed contracts
  - Yellow arrows indicate pending contracts
- Clicking on the Contract will direct you to the **Contract Info Screen**

9.3 Beneath the left navigation tree, there are certain Administration tools. These will vary according to the security level of the user.

College Info

9.4 This screen shows College level information. In the main part of the page, there are three tabs, College, Notes and Attachments. Beneath the left navigation tree, there are Administration tools. These vary depending on the user's security level.

9.4.1 College

- This is the **default tab**. It shows information about the overall bond program. The Green Box shows summary information about the contracts and transactions for this College. The bar charts show real-time date regarding the project.
- **Modifying College Info:** Near the upper right corner there is an **Edit Link**. This is to edit College level information shown on this page.
- **Adding a New Project:** Beneath the **College Tab**, there is a **New Project Link**. Click this link to **add a new project** within this College.

9.4.2 Notes

- This tab accesses College level **notes**.

9.4.3 Attachments

- This tab accesses college level attachments (uploaded files).

College Edit

9.5 This screen contains important setup information for the college.

- Enter the Name and type for the college.
- The **check box for Allow Project Mgmt** must be checked in order to have projects, contracts and transactions associated with the college. You might not check this box if you are only using the college as a document file storage site (utilizing the document upload capability of Prompt).
- Click **Update** to enter the new information.
- To **delete** the college click the **delete link** on the right side.

College Info Edit

9.6 The page displays tabs for College Level information.

- The College Info tab includes detailed information about the bond program. This information is important for generating certain **reports**. It is also important that the current **series number** is correct. This will insure that transactions are properly coded according to **bond series**.
- **Save**: Click Save to save changes
- To **exit without saving** changes, click the **X** at the upper right hand corner of the popup window.

College View Page

9.7 The page displays tabs for College Level information.

9.8 The **College Info tab** includes detailed information about the bond program.

9.9 The box at the right provides dollar totals for all projects and contracts related to the College. The **Edit Button** on the right allows this information to be edited.

College Notes Log

9.10 On this page you can enter an unlimited number of notes. These notes should be limited to those pertaining to the **College**. These are sorted in reverse date order and include the name of the author.

- **Entering Notes**: Click on the **Add Note link** near the upper right corner.

- **Reading Notes**: To read a note, click on the **Date** for the note and it will open in a new window.

9.11 There are also **Notes** areas within **Projects**, Contracts and **Submittals**.

Projects

Project Edit Screen

9.12 This screen is where users can enter or modify project detail information.

- **Global Project Checkbox:** Checking this box indicates that this is a campus-wide project that will be allocated by Prompt across multiple projects. Global Projects often include Master Planning, Environmental Impact Reports, Underground Studies, etc.
- **Project Name:** Name of the project
- **PM:** The PM. This list is populated in the **System Administration area** by a user with the proper access rights.
- **Status:** The project Status. This will affect how the project is displayed and on some reports.
- **GC/Arch:** The General Contractor or Architect leading the project team. If the firm isn't on the list, click the **Add New** link to add a new firm.
- **GC/Arch Proj#:** The project number that the lead architect or GC uses.
- **Project Number:** The district's project number
- **Start Date** & **Est Complete Date:** These dates will be used in reports that show expenditures and/or budgets over the life of the project.
- **Org Code:** This field can be used by the District if they have some other internal code applied to the project.
- **Bond Fund Category:** The drop-down list should contain a list of **Bond Fund Categories** that were originally specified in the General Obligation Bond White paper. This list is populated in the **System Administration area** by a user with the proper access rights.
- **Original Budget:** The original project budget
- **Escalation:** Enter a number here that represents an annual percentage increase in the projected project budget. This field is used when running reports that look into the future. Pending projects estimated cost will be adjusted according to this Escalation amount.
- **State/Bond Split:** The ratio of funding sources (e.g., 40/60 indicates a 40% State - 60% Bond project funding split).
- **Bond Series:** This is the current series that the bond program is in. This helps drive some of the Bond Program summary **reports**.
- **Description:** Description of the project.
- **Save:** Click here to save any changes made to the project details.

- **Delete:** Click the Delete Button to delete the project. ***Note, Prompt will not allow a project to be deleted that contains any contracts.***

Project Info Page

9.13 The page displays tabs for Project Level information.

9.13.1 Tabs:

- **PROJECT**: This is the default tab. This tab contains information about the project. The Project Tab has two choices (right below the Project Tab, **Information** and **Schedule**.
  - **Schedule**: The Schedule Page contains information about the project schedule.
  - **Information**: This page includes a lot of important information about the project.
    - **New Contract**: Click New Contract to add a new contract for this project.
    - **Edit Project Info**: Click this link to modify the project information.
    - **Project Summary Box**: This box contains summary data for the project. Several of the numbers in the Project Summary Box will bring up reports for that item.
    - **Total Contracts**: This number is the sum of all Total Contract Amounts for all contracts within the project. Click on the amount to see the Project Summary Report.
    - **Total Amend/CO's**: This shows the total of all Amendments and Change Orders for the project. Click the amount to see the Change Order Log Report.
    - **Total Transactions**: This shows the total of all transactions (pay requests) from contractors. Click on this amount to see the Check Run Report - All which shows all payments made to contractors on the project, sorted by Contract.
    - **Balance**: This is the remaining balance on all contracts. It is a simple calculation, Total Contracts + Amendments & CO's - Transactions.
- **NOTES**: Click this tab to log **notes** regarding the project
- **ATTACHMENTS**: Click this tab to upload and **attach files** to the project
- **BUDGETS**: Click this tab to view or modify the detailed **budget** for the project.
- **SUBMITTALS**: Click this tab to view or update information regarding **submittals** to the board or regulatory bodies.
- **APPRISE**: Click this tab to update or modify the Apprise Construction Website.

View Submittals

9.14 This page contains important information related to the project submittals.

9.15 There are 6 sub-tabs within the submittals Tab.

- **Chancellor**: This section contains details regarding submittals to the Chancellor's office. Click the edit button on the right side to edit this information.

  NOTE: It is very important to indicate when 14D releases have been received from the Chancellor's Office. Prompt will not allow transactions to be processed that involve state funds that have not yet been released.

- **Others**: The other sub-tabs are for other types of regulatory submittals (DSA, Board, Hazmat, EIR and Geotech). Under each is a Notes Log in which an unlimited number of notes can be entered. This area is intended to help the project team track all submittals related to each particular entity (e.g., DSA).

Edit Chancellor's Office submittals

9.16 This screen allows users to enter and update the information regarding **submittals to the Chancellor's Office**.

- **Initial Submittal:** The date the Submittal was submitted to the Chancellor's Office
- **For each of the four Construction categories** (Preliminary, Working Drawings, Construction and Equipment)**:**
  - **14D:** Check the box when the appropriate 14D release is received from the Chancellor's Office
  - **Budget #:** Enter the Budget # from the 14D
  - **Release Date:** Enter the Date from the 14D
  - **Release Amount:** Enter the amount released by the Chancellor's Office to-date.
- **Save:** Click the **Save** button to save your changes. To **exit without saving** changes, click the **X** in the upper right hand corner of the popup window.

Project Notes Log

9.17 On this page you can enter an unlimited number of notes. These notes should be limited to those pertaining to a specific project. There are Notes Tabs at the College level and the Contract Level as well. Notes are sorted in reverse date order and include the name of the author.

- **Editing a Note**: To **edit a note**, click the Date of the note.
- **Adding a Note**: To **add a note**, click the Add Note link.

Budgets

Budget Reporting Edit

9.18 This screen contains monthly budget projections. These figures are used in certain reports that list or graph monthly budget vs. actual expenditures.

- **No Fields Show Up**: If no fields show up here for data entry, it is because no start or end date has been specified for the project. Go to the Project (Project Tab) and click the Edit Project button. Enter a start and end date for the project. Now return to the Budget Tab and click on Budget Reporting. Now the fields should appear.

9.19 Entering data:

- **Budget Column**: Enter the Budget amount in each of the fields. Many projects expend money over time in a bell-curve trend. Expenditures begin small then grow as the project progresses, tapering off toward the end.
- **Actual Column**: This column is optional. In these fields the user can enter actual amounts from the District accounting system. This can be useful if there are timing discrepancies between Prompt and the District's books.

Edit Budget Item

9.20 This screen allows the entry or modification of a **budget amount**.

- **Amount:** Enter the amount in the Amount field. The screen shows the Total current allocations. This is the total of all transaction amounts that have been allocated to this budget item. The budget amount can not be less than this amount.
- **Notes:** A note can be attached to any budget amount. Just type it in the Notes text box. A yellow sticky graphic will appear next to any budget amount that has an attached note.
- **Budget Allocation Detail:** This link will open the **Budget Allocation Detail report**. This report shows the detail of all transactions that have been allocated to this budget item.
- **Save**: Click the **Save button** to save changes. To **exit without saving** changes, click the **X** in the upper right hand corner of the popup window.

JCAF Budget Screen

9.21 This page contains the detailed budget for the project. This budget is two dimensional containing funding sources across the top and expense categories down the left side. A small ""sticky note"" appears next to any budget amount for which a note or comment has been entered. To see the note, click on the amount and a popup will appear.

9.22 Creating a new budget: To quickly create a new project budget, Prompt has a proprietary feature called the JCAF Generator. Click the JCAF Generator link at the upper left corner of the budget. Fill in the information in the popup window and Prompt will create a budget for the project.

Note: This will permanently overwrite all amounts in the budget.

- This is a hypothetical budget based on typical project cost breakdowns. You will likely have to tweak the budget to fit your particular circumstances or to match the Form JCAF-32 that was submitted to the Chancellor's Office for this project.

9.23 Entering/modifying budget amounts: Click on the amount to be modified and change the amount in the popup window.

9.24 Budget Reporting Information: The Budget Reporting link in the upper right corner of the budget opens a page on which the user can enter monthly budget amounts for a project. This tells Prompt how funds are likely to be spent on the project over time. This information is used in some project-level reports.

Edit "Other Funded" Budget Item

9.25 This screen allows the user to add or modify budget items for projects funded by **Other Funded sources** (**Grant, Hazmat, Scheduled Maintenance, Donation).**

- **Amounts:** Enter the amount in the Amount field for each of the four funding sources. The screen shows the Total current allocations for each funding source. This is the total of all transaction amounts that have been allocated to each budget item. The budget amount can not be less than this amount.
- **Total:** This shows the total of the four numerical fields.
- **Notes:** A note can be attached to any budget amount. Just type it in the Notes text box. A yellow sticky graphic will appear next to any budget amount that has an attached note.
- **Budget Allocation Detail:** This link will open the Budget Allocation Detail report. This report shows the detail of all transactions that have been allocated to any of these budget items.
- **Save:** Click the Save button to save changes. To **exit without saving** changes, click the X in the upper right hand corner of the popup window.

Edit Budget Assumptions

9.26 This screen allows users to enter assumptions made in creating the Project Budget. Fill in the text and Click the **Save button**.

9.27 To **exit without saving** your work, click the **X** in the upper right hand corner of the popup window.

JCAF Generator

9.28 Creating a new budget: To quickly create a new project budget, Prompt has a proprietary feature called the JCAF Generator. Fill in the information ion this screen and Prompt will create a budget for the project.

Warning: This will permanently overwrite all amounts in the budget.

9.29 The budget created will be a hypothetical budget based on typical project cost breakdowns. You will likely have to tweak the budget to fit your particular circumstances or to match the Form JCAF-32 that was submitted to the Chancellor's Office for this project.

9.29.1 New Construction - Re-Construction: The allocation of the budget is slightly different for New Construction vs. Re-Construction. Select the one that best fits the project in question.

9.29.2 Funding Sources: In the Funding Sources lines, enter a number in each that is relevant. The total of the percentages entered must total 100.

9.29.3 E.g., if your project will be funded as follows: (40% State, 50% Bond, and 10% Hazmat funds) you would enter 40 in the State line, 50 in the Bond line and 10 in the Hazmat line.

9.29.4 Note: Prompt will not allow the use of this tool when there are existing transactions that have amounts allocated to the existing budget. Changing these budget items could

Attachments

Create Attachment Folder

9.30 **Adding an Attachment Folder:** To add a folder, type in the name of the folder. If this folder will be nested within an existing folder, click the radio button next to that folder. Click the + sign to open existing folders. Click the **Save Button** to create the folder.

Attachment Upload

9.31 This page is where you upload attachments. These can be any file type and virtually any file size.

- **Selecting a file to upload**: Click on the Browse Button and find the file you wish to upload.

- **Multiple files**: To upload multiple files simultaneously, click the Add Button. This will add additional Browse File boxes.
- **Select Destination**: The default location for uploaded files is the root directory. If you want these attachments to be inside of an existing folder, simply select the destination folder from the folder structure at the bottom of the screen.
- **Description and Comments (Optional)**: Optionally you can enter a description and comments for the file. If you upload multiple files, all files will be assigned the same description and comments. These can be edited later on the individual files.
- **Uploading**: Once all files have been selected for upload, click the Upload Button. A progress bar will let you know when the upload is complete.

Delete Attachments Folder

9.32 Click on the radio button next to the folder you would like to delete. Click the + sign next to a folder to open it. Click the **Delete Button** to delete the folder.

Note: Prompt will not let you delete a folder that contains attachments. You will first have to delete the attachments or move them to another folder before deleting the folder.

Get Attachment

9.33 This screen gives the user information about the attachment including the **filename**, **description**, **file size**, **date last updated**, **by whom it was updated** and **comments** on the file.

9.34 **Download:** To download the file, click the **Download button**

Edit Attachment

9.35 This screen is used to add or modify the **Description** and/or **Comments** for an attachment. modify the text in the two text boxes and click **Save**.

9.36 To **delete the description and comments**, click the **Delete button**.

9.37 To **exit without making any changes**, click the **X** in the upper right hand corner of the popup window.

Attachments Area

9.38 **Attachments** are files that are uploaded to Prompt that can be accessed by team members. There are Attachments areas at various levels of Prompt: **College**, **Project** and **Contract**. For best organizational practice, **upload** each attachment to the area that makes the most sense.

- For example, a College Master Plan document would be uploaded at the College Level whereas; a Notice of Completion from a contractor would be uploaded at the Contract Level.

9.39 **Accessing a File:** In the Attachments area, users can store files inside of folders. Folders can also be nested within folders.

- **Opening a Folder:** Click the + sign next to the folder.
- **Downloading a Document:** Click on the file name. In the popup window, click the Download button**.**
- **Deleting an Attachment or Modifying the File Description:** Click on the **Edit Icon** just to the right of the file upload date and time. In the popup window, you can modify the description, comments or click the **Delete Button** to delete the file.
- **Moving the File to a Different Folder:** You can drag and drop attachments into folders within the project. Click on the file you want to move and hold the mouse button down. Drag the file to the destination folder and release the mouse button.

9.40 **Adding a Folder:** Click on the Add Folder icon, then type in the folder name and click Create. If you want the new folder to reside within another folder, click the radio button next to the parent folder before clicking **Create**.

9.41 **Deleting a Folder:** click on the **Del Folder icon**, and then select the folder to be deleted. Click the **Delete Button**

9.42 **Uploading Files:** To upload a file, click on the Upload File icon, then browse to the file on your computer or network to be uploaded. **To upload multiple files at one time** click the **Add button.** Each time this button is clicked it adds another **Browse field** so that multiple files can be uploaded at one time. Optionally the user can enter a description and comments. (If uploading multiple files, each file will have the same Description and Comments. After uploading the files, you can **modify the file descriptions** individually as described above.) You can also specify a destination folder if necessary. Then click Upload.

9.43 **Moving a File to a Project, Contract or to another College:** Click the Move File button. Select all of the files to be moved on the left side. (Click + signs next to folders to open them). On the right side select the destination for the files. Note: you will see **College level folders** as well as folders within **Projects** and within **Contracts**.

Move File(s)

9.44 This screen is used to move files from their current location to another location. Moving a file from one folder to another, within the same College can be done here or more simply by simply dragging and dropping the attachment on the **Attachments Tab**.

9.45 This Move File feature allows attached files to be moved to other Colleges, other Projects and/or other Contracts. Files can be moved to any folder within any college, project or contract within the same District.

- Note on the Organization of Attached Files: You can attach files at the level of a college, project, bid or contract. This helps keep documents organized.

  For example, master plans can be kept at the college level. Notices of completion might be kept at the contract level.

9.46 Moving one or more files:

- On the left side select the file or files that you wish to move to a new location.
- On the right, select the college, project, Bid, or contract to which you would like to move the attachment.

  Click the + sign next to an item to see nested items within it

Transactions

Transaction Tab

9.47 This page shows all of the transactions for the contract. The transactions are listed in reverse date order. The summary data for each transaction appears on this page:

- **Date**: This is the invoice date for the transaction
- **Type**: This is the type of invoice
- **Status**: The status can be Open, Paid or Pending
- **Invoice #**: self explanatory
- **R**: A Pink "R" in this column indicates that the transaction is for reimbursables.
- **Total Amount**: This is the total amount of the transaction.
- **Payable Amount**: This is the amount of the transaction to be paid to the contractor (net of retention)
  - o Note: When a contractor submits a pay application for retention, the transaction will appear on Prompt with a $0.00 amount in the Total Amount and the amount of the retention to be paid in the Payable amount column.

9.47.1 **View details of a transaction:** Click on the date of a transaction to **view its details**

9.47.2 **Add New Transaction:** Click the **Add Transaction button**

9.47.3 **Add a Retention transaction**: Click the Add Retention button. Fill in the details. This will create a transaction in Prompt that merely reduces the amount of retention due to the contractor. The system will not allow a retention transaction to exceed the amount of retention that has been withheld on the contract, to date.

Transaction Detail

9.48 **This is a critically important screen in Prompt. This page contains all of the detail for a transaction. The upper section includes details about the transaction and the lower section is where the transaction is allocated to the proper budget fields and funding sources. This allocation drives most of the reports and budget tracking features of the system.**

9.49 **Transaction Details (Upper Portion of the Screen):** This section of the page includes detail regarding the transaction.

- **Invoice Date:** Invoice date on the invoice (payment application) from the vendor/contractor.
- **Date Received:** The date the district received the invoice.
- **Type:** The type of invoice received.
- **Contractor:** The name of the contractor. If the contractor isn't on the dropdown list, they can be added by clicking the **Add New** link. Check for close spellings first to avoid duplicate contractors on your **Contractor List**.
  - *For example: you receive an invoice from Smith Glazing Inc. They are not on your contractor list, but there is a contractor called, "John Smith Glazing, Inc."*
- **Reimbursable:** Check this box if this is an invoice for reimbursables. If a contractor submits an invoice/pay application that combines reimbursables with regular billings, you will need to enter the invoice as two separate transactions in Prompt. This will insure that reimbursables are tracked separately from regular billings.
- **Description:** Description of the invoice, usually specified by the contractor (e.g., Phase 1, January Billings, etc.)
- **Invoice #:** The contractor's invoice number.
- **Fund Code:** This is an internal code that can be defined and used by the district.
- **Status:** The status of the invoice. It is important to change this code to Paid, once the district pays the invoice.
- **Date Paid:** The date the district paid the invoice.
- **Check #:** The check number for the district's payment of the invoice.
- **Internal Inv#:** This is an optional invoice number assigned by the district.
- **Bond Series:** The bond series that is being used to pay this invoice. The default is set on the **College Edit** screen. This is important for certain mandatory bond reporting.
- **PO Number:** The district's PO number.
- **Comments:** Any comments regarding this transaction.

9.50 **Transaction Allocation (Lower Portion of the Screen):** Here, you must allocate the invoice amount to the line items and funding sources that have budget amounts for this project. You can split the invoice between as many of these lines as you like. These lines include any field on the Project's **Budget screen** that has an amount greater than zero. If there is an allocation line (that you think should be available) missing on this screen, it is because no amount was allocated to that **Budget Item** on the **Project Budget Screen**.

9.51 Following are descriptions of the data contained in each of the columns in the **Allocation Section** of the screen.

- **Budget Line:** The **Budget Line** information is simply the line on the description from the line item on the **Budget Screen.**
- **Source:** This is the funding source from the project **Budget screen**. These include 8 different funding sources:
    - State Funded
    - District Funded (State-Supportable)
    - District Funded (Non State-Supportable)
    - Bond Funded
    - Grant
    - Hazmat
    - Scheduled Maintenance
    - Donation Amount
- **Amount:** This is the column in which you enter amounts. You can allocate a transaction to as many line items as appear on the screen.
- **Budget Balance:** the last column let's you know the balance remaining in a particular budget for the project. Prompt will not allow you to allocated funds to a budget item if all of those funds have been used up (or if your allocation would exceed the remaining balance).
    - *Click the* **Budget Balance** *amount to see a report of all previous allocations to that* **budget item**.

9.52 **14D Restriction:** In some cases an **Allocation Amount field** will be grayed out and not allow entry of any number. In these cases there will be a note next to the **Budget Balance Amount** that says (14D!). This will only happen for State funded **Budget Line Items** for which a 14D has not yet been received from the Chancellor's Office. Once the 14D has been received, entry will be allowed in these fields. This feature is to prevent the District from expending state funds before receiving the 14D release from the Chancellor's Office.

9.53 **Retention:** The retention amount will automatically be calculated at the percentage that was set on the **Contract Edit** page. If for some reason you need to edit this percentage for this transaction, you can do so by checking the **Override checkbox** and then entering the **Retention Amount** in the number field. Hit **the Tab key** (or click on another number field) to have Prompt recalculate the totals.

9.54 **Save:** Click the **Save button** to save your information

9.55 **Delete:** This will permanently delete the transaction from Prompt.

Notes

Note Edit

9.56 Enter a date and the text of the note, then click Save. To delete a note simply click the delete button.

DSA Notes Log

9.57 This is an area to record notes regarding DSA relative to the project.

- **Adding a Note**: Click the Add Note link and enter the information in the popup window.
- **Editing a Note**: Click on the date for a given note and edit the information in the popup window.
- There are also **Notes** areas within Colleges, Projects and Contracts.

Hazmat Notes Log

9.58 This is an area to record notes regarding Hazardous Materials issues relative to the project.

- **Adding a Note**: Click the Add Note link and enter the information in the popup window.
- **Editing a Note**: Click on the date for a given note and edit the information in the popup window.
- There are also **Notes** areas within Colleges, Projects and Contracts.

EIR Notes Log

9.59 This is an area to record notes regarding the EIR for to the project.

- **Adding a Note:** Click the **Add Note** link and enter the information in the popup window.
- **Editing a Note:** Click on the date for a given note and edit the information in the popup window.
- There are also **Notes** areas within Colleges, Projects and Contracts.

Geotech Notes Log

9.60 This is an area to record notes regarding the Geotech for to the project.

- **Adding a Note:** Click the **Add Note** link and enter the information in the popup window.
- **Editing a Note:** Click on the date for a given note and edit the information in the popup window.
- There are also **Notes** areas within Colleges, Projects and Contracts.

Board Notes Log

9.61 This is an area to record notes regarding Board decisions or directives relative to the project.

- **Adding a Note:** Click the **Add Note** link and enter the information in the popup window.
- **Editing a Note:** Click on the date for a given note and edit the information in the popup window.

Contracts

Contract Amendments

9.62 This page shows a list of all Amendments to the contract. They are sorted in reverse date order.

- **Viewing details of a change order:** Click on the date for a change order to view or modify its details.
- **Deleting a change order:** Open the change order and click the delete button.
- **Adding a new change order:** Click the Add New button in the upper right corner of the screen.

Contract Amendment Edit

9.63 This page contains the detail for an amendment or change order.

- **Date**: Enter the date for the change order
- **Entry Type**: Select the type of amendment. This list can
- **Description**: Description of the item
- **PO Number**: PO number associated with the change order
- **Fund Code**: An optional field to be used by the district
- **Increased Contract Days**: The number of days that the change order adds to the project.
- **Arch Approve Date**: Date change order approved by architect
- **FDO Approve Date**: Date change order approved by facilities development office
- **Dist Approve Date**: Date change order approved by the District

- **Completion Date**: Date work completed
- **Board Approval Date**: Date change order approved by the Board
- **Amount**: Amount of the change order
- **Comments**: Miscellaneous comments
- **Save**: Click the Save button to save your changes.
- **Delete**: Click the Delete button to permanently delete the amendment.

Contract Notes Log

9.64 On this page you can enter an unlimited number of notes. These notes should be limited to those pertaining to a specific contract. There are Notes Tabs at the College level and the Project Level as well. Notes are sorted in reverse date order and include the name of the author.

- **Editing a Note**: To edit a note, click the Date of the note.
- **Adding a Note**: To add a note, click the Add Note link.
- There are also **Notes** areas within Colleges, Projects and Submittals.

New Contract

9.65 This page is used to create a new contract or to edit an existing one. There are several fields on this screen. Following is a description as to what each field contains and how it is used by Prompt.

- **Contractor**: Use the pull-down menu to select a contractor. Click Add new if the contractor is not already on the list.
- **Contract Date**: Date fields on Prompt have a calendar tool attached. Click the calendar icon for a graphical calendar. Optionally, the user can type in a date (1/12/06) or (1/12). If the year is omitted, the system will automatically insert the current year. The following shortcut keys are also available:
- **Pay Status**: This pull-down menu sets the pay status for the contract.
- **Contract Amount**: The contract amount.
- **Reimb Amount**: If a reimbursable amount is specified in the contract, the amount is entered here.
- **Description**: A brief description of the work being done in the contract.
- **Status**: The status of the contract, **open**, **Pending** or **Closed**.
- **Retention %**: The percent of retention specified in the contract.
- **Bid Pak #:** This field can be used for the District's tracking number for the contract. Many districts use the **Bid Package Number**.
- **Signed Copy Rec'd**: The date the signed contract was received by the District.
- **Blanket P.O. #**: District issued PO number for the contract.
- **Comments**: Miscellaneous comments pertaining to the contract. There is also a **Notes Tab** within the contract where a chronological notes log can be kept.

- **Save:** Click the **Save Button** to save changes.
- **Delete:** Click the **Delete Button** to delete the contract.

  Note on deleting a contract: Prompt will not allow the deletion of a contract containing any transactions. In order to delete the contract, all transactions must first be deleted.

Contract Info

9.66 The page displays tabs for Contract Level information.

9.67 There are four Tabs on this screen:

9.67.1 **CONTRACT**: This is the default tab. This tab contains information about the contract. The Contract Tab has two sub-tabs (right below the Contract Tab, Information and Amendments).

- Amendments: The Amendments Page is where one can find, modify or enter change orders and contract amendments.
- Information: This page includes a lot of important information about the contract.
  - o Edit Contract Info: Click this link to modify the contract information.
  - o Contract Summary Box: This box contains summary data for the contract. Several of the numbers in the Contract Summary Box will bring up reports for that item (feature not currently available).
    - **Original Contract: The contract amount entered in the contract edit screen.**
    - **Amendments/CO's: This shows the total of all Amendments and Change Orders for the contract.**
    - **New Revised Contract Amount: Original Contract amount + Amendments**
    - **Reimbursables: Reimbursables amount stipulated in the contract, entered on the Contract Edit Page.**
    - **Total Transactions: All transactions entered for this contract. The gross amounts are used for this calculation (i.e., the total invoiced amount from the contractor - retention is NOT deducted here).**
    - **Total Trans Reimb: Total transactions flagged as reimbursables.**
    - **Contract Balance Remaining: This is a calculation: Total Contracts + Amendments & CO's - All Transactions (including reimbursables transactions) + retention withheld (still due to contractors).**
    - **Current Balance Due: Same as the previous item but with withheld (unpaid) retention added in. This is the amount that is still due to contractors.**

9.67.2 **NOTES**: Click this tab to log notes regarding the Contract

9.67.3 **ATTACHMENTS**: Click this tab to upload and attach files to the contract

9.67.4 **TRANSACTIONS**: Click this tab to Browse, modify or enter transactions for this contract.

Edit Contractor

9.68 This is where users can set up and modify the details about each contractor.

- **Name:** Enter the Name of the Contractor (**required**)
- **Type:** Select a **Contractor type** from the pull-down menu. If the **Contractor Type** is not on the list, click **Add New...** to add a **Contractor Type** to the system. (Check the list carefully as the **Contractor Type** may have been worded or spelled slightly differently from what you expect.
- **Other fields:** The other fields are optional. Users can maintain contractor contact information here or in some other application.
- **Save:** To save your changes, click the **Save button**. To **exit without saving** changes, click the **X** at the upper right hand corner of the popup window.
- **Delete:** To delete the **Contractor** click the **Delete button**.

Add Contractor Type

9.69 Enter the new **Contractor Type** in the text box. Click the **Save button** to save the new **Contractor Type**. To delete this new **Contractor Type** click the **Delete button**.

Apprise – Construction Website

Apprise Information

9.70 **Apprise** is a component of **Prompt**. **Apprise** makes creating a construction website simple and easy. This website can be viewed by **anyone with internet access**, even if they do not have credentials for accessing **Prompt**.

Note: This is a public website.

9.71 For each Project, there is a **Tab** for **Apprise**. There are two **Sub-Tabs**: **Information** and **Photos**.

9.71.1 Information Sub-Tab: This is the default Sub-Tab which shows information for the project that will be displayed on the **Apprise Construction Website**. The user can edit this information (solely for use on the Construction Website) by clicking on the **Edit link** in the upper right hand corner of the screen.

- **Project Title:** Title of the project
- **Description:** Description of the project

- **Funding Src:** Funding Source(s) for the project
- **Funding Descr:** Additional description of the funding
- **Est Complete:** Estimated completion date
- **Current Cost:** Expenditures to date
- **% Complete:** % of completion
- **Post To Web:** **Yes** indicates that this project will show up on the **Apprise Construction Website**. **No** indicates that the project will not show up on the **Apprise Construction Website**.
- **Public Site:** This is the link to view the construction website. This is handy to confirm what the live site shows as you edit/enter data.

9.71.2 **Photos Sub-Tab:** This **Sub-Tab** allows the user to upload photos to the live site.

Apprise Information Edit

9.72 This screen allows the user to edit the information that will appear on the **Apprise Construction Website**.

- **Project Title:** Click the **Use Prompt** checkbox to use the **Project Title** from Prompt. Otherwise, uncheck the box and enter a new title in the text field.
- **Description:** Click the **Use Prompt** checkbox to use the **Project Description** from Prompt. Otherwise, uncheck the box and enter a new description in the text box.
- **Funding Src:** Funding Source(s) for the project
- **Funding Descr:** Additional description of the funding
- **Est Complete:** Estimated completion date
- **Current Cost:** Expenditures to date
- **% Complete:** % of completion
- **Post To Web checkbox:** Click the checkbox to include this project on the **Apprise Construction Website**. If the checkbox is not checked, this will hide the project from the **Apprise Construction Website**.
- **Public Site:** This is the link to view the construction website. This is handy to confirm what the live site shows as you edit/enter data. Note: your entered data will not be fed to the construction website until you click the **Save button.**
- **Save:** Click the **Save button** to save your work. To exit without saving your work, click the **X** in the upper right hand corner of the popup window.

Apprise Photos Edit

9.73 This screen allows the user to edit the information associated with a photo, or to add information for a new photo.

- **Phase:** Select one of the **Phases** (photo groupings) from the pull down list or **Enter a New Phase Name** in the text field.
- **Post to Web:** This checkbox determines whether or not this particular photo will appear on the Construction Website.
- **Title:** This is an optional title for the photo.
- **Description:** This is an optional description for the photo.
- **Save:** Click the **Save button** to save your work. To **exit without saving your work**, click the **X** in the upper right hand corner of the popup window.
- **Delete Photo:** Click the **Delete button** to delete this Photo from Apprise

Apprise Photos – Main Page

9.74 This screen allows users to **Add** and **Delete** photos from the **Construction Website**.

9.75 **Main Photo:** At the top of the screen, the system shows the Main Photo (if one has already been uploaded). The Main Photo is the one that displays on the Project's page on the construction website.

9.76 **Additional Photos:** The lower section of the page shows all of the other photos that have been uploaded for the project. For each photo there are four pieces of information:

- **Photo:** A thumbnail image of the photo
- **Title:** An optional title for the photo
- **Description:** An optional description of the photo
- **Phase:** An optional phase for the image. This is helpful if many photos will be uploaded for a project. It allows the photos to be organized into groups (e.g., Demolition, Site Preparation, Framing, Electrical, Etc.)

9.77 **Add a Photo:** To add a photo to the site, click the **Add New button** in the upper right hand corner of the page.

9.78 **Edit an Existing Photo's Information:** To modify the information (**Title**, **Description**, **Phase,** or **Visibility on Apprise)** for a photo already uploaded, click on the **Title** for that photo.

Apprise - Upload Photo

9.79 This screen allows users to upload photos to Apprise.

Apprise has an upload feature that automatically optimizes your photos when you upload them. Even if your photo file is very large (2 or 3 MB) Prompt will resize the image when you hit upload. This will prevent large images from making the Construction Website load very slowly.

9.80 Click the **Browse button** and navigate to the image file you wish to upload

9.81 Click the **Save button** to upload the photo. To exit without uploading the photo, click the **X** in the upper right hand corner of the popup window.

Administration Tools

These administrative tools are only available to certain users. If you do not have access to a function listed below, contact your system administrator.

Maintain Colleges

9.82 This is where new Colleges can be added (Click **Add New** in the upper right hand portion of the screen) – enter the information in the popup window

9.83 College information can also be modified here (Click on the **name of the college**). Use the popup window to modify the following:

- The College Name
- The logo (can be uploaded here)
- The College home page URL
- Apprise page title – this is the title that is displayed at the top of the Apprise, Construction Website Pages
- Lock transactions before a given date (this prevents users from modifying or deleting a transaction before a certain date)

Maintain Lookup Tables

These lookup tables populate the choices in drop-downs on various screens in the system. This gives you the flexibility to customize Prompt to match your current coding systems and terminology. You may populate these tables or choose not to use them for the time being.

9.84 Projects

- **Bond Fund Category** – This is a list of the bond fund categories for the college. This list is usually attached to the Bond document white paper. Each project can be assigned to one of these categories. A General Obligation Bond Fund Report can be generated to show activity by Bond Fund Category.
- **Category examples**:
  - Infrastructure Improvements
  - Health and Safety Upgrades
  - Classroom Modernization

9.85 Contractors

- **Contractor Type** – this is a list of contractor types (e.g., Architect, General Contractor, Roofer, Plumber, etc.)

9.86 Transactions

- **Fund Code** – This is a list of fund codes. These codes are assigned at the transaction level.
- **Status** – This is a list of possible Transaction Status indicators (e.g., open, paid, etc.)
- **Type** – This is a list of transaction types (e.g., Invoice, Credit, etc.)

9.87 Contract Detail

- **Entry Type** – This list contains various types of amendments to a contract (e.g., Change Order, Change Directive, Amendment, etc.)

Maintain Contractors

- **Maintain Contractors** – This is your master list of Contractors. You can add new contractors here or delete or modify existing ones.
- To sort the list of contractors by Name click the **Name** heading. Click again to reverse the sort order. To sort by Type, click the **Type** heading. Click again to reverse the order.
  - **Add a Contractor** – Click the **Add New** link in the upper right hand portion of the screen.
  - **Modify a Contractor** – Click the name of the contractor and edit the details.
  - **Delete a Contractor** – Click the name of the contractor → click the **Delete button**

  (Note: Prompt will not allow you to delete a contractor if the contractor is being used for any contract or transactions.)

Reports

Reports

9.88 This page lists all the reports available to you, depending on your access rights.

Bond Program Reports

- **General Obligation Bond Fund**
  - Displays the budget totals by Bond Fund categories from the white paper as well as the contracts applied towards it and the amounts expended.
- **Projected Facility Project Budget Plan**
  - Shows a projected facility project budget plan. Includes; Funding Sources for Overall Program Budget, Current Facilities Program Budget, Current Expenditures, and Current Balances.

College level reports

- **State Reimbursement Report**
  - Creates the State Reimbursement Report. This is sent to the state to claim monies spent towards a capital outlay project. You are able to print it by date range.

Contractor reports

- **Projects/Contracts for Contractor**
  - This report shows all projects a contractor is contracted for and their contract amounts.

Project level reports

- **Budget Status Report**
  - This report shows the up to date budget balances for a given project.
- **Budget-JCAF Report**
  - Shows the remaining budget balances for a given project.
- **Change Order Log**
  - This report shows all changes made to a contract per project and contractor. You can show all contractors for all dates or you can filter for one contractor on the project within a certain date range.
- **Check Run Report-All**
  - This report shows all transactions on a selected project and by date range whether they have been paid or not.
- **Check Run Report-Paid**
  - Shows all transactions that are recorded as paid per project and per date range.

- **Check Run Report-Unpaid**
  - Shows all transactions with outstanding balances per project and per date range.
- **Fund Source Tracking Detail Report**
  - Shows a breakdown of allocation by funding source on a transaction level by contract and contractor for a given project.
- **Fund Source Tracking Summary Report**
  - Shows a breakdown of allocation by funding source per contractor with a remaining balance.
- **Project Detail Cost Breakdown**
  - Shows all amendments and transactions by contract/contractors for a selected project. You can also filter the report to show for only one contractor.
- **Project Detail Report**
  - Shows all Amendments and Transactions by Contract for a selected project
- **Project Summary Report**
  - Shows all contracts, contract amounts, changes (total only), expenditures (total only), and balances by contract for the selected project.
- **Transaction Detail Report**
  - Shows all contracts, contract amounts, changes, expenditures, and balances by contract for the selected project.
- **Retention Detail Report**
  - This report shows all contractors on a given project, transactions (payable amount and total amount requested), and outstanding retention. When retention is paid, the amount in the 'Retention' column will be reduced.
- **Project Notes Report**
  - Shows all the Notes associated with a selected Project, and all Contracts and Bids under that Project.