

HELIXproject for the Web

This guide is not intended to replace in-person training of HELIXproject with your project team. It is, however, intended to be a reference how a particular feature works and provide clarification on the chosen terminology. If you have not reviewed HELIXproject with your project team, please request a working session with the team as soon as possible. Our goal is to make your introduction to HELIXproject as smooth and efficient as possible, and to provide your project with a management system with real time project information.

We are continually looking for ways to improve our software and your feedback is crucial in the improvement of the systems. We need your input to tell us what is and is not working. If we don't know something is wrong or inefficient we can't make it better. If you find yourself thinking "That's just the way HELIXproject works," or "I will manage this differently because HELIXproject is inefficient," then you should let us know your suggestions for improvement. We can make HELIXproject whatever we want, so keep the feedback coming and be a part of making your project more efficient.

Here are the items covered in this document:

- [Accessing HELIXproject](#)
- [General Layout / Functionality / Views](#)
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- [Projects](#)
- [Dashboard](#)
- [Directory](#)
- [Pending Items](#)
- [Plan Room / HELIXproject Sync](#)
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- [RFIs](#)
- [Submittals](#)
- [Warranty](#)

Accessing

In order to be able to access HELIXproject you will need to have an account enabled.

- It is highly recommended you use [Google Chrome](#) as your internet browser to ensure all the features work properly. Firefox and Safari are acceptable alternates if you do not have access to Google Chrome. Other internet browsers may not give you full functionality of HELIXproject. It is not recommended to use Internet Explorer due to known issues with logging in, saving views, uploading, downloading files, etc.
- To access HELIXproject use the following link <https://project.helixteam.com/>

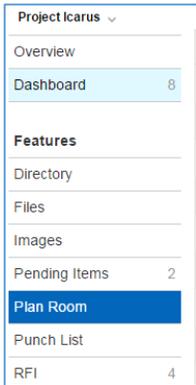


If you don't have an account created, please contact your Holder Construction contact for your project and they will enable your account. You will receive an email welcoming you to HELIXproject. This email will have your temporary password, but you can change your password at any time by clicking the "forgot it?" link on the login screen. The "forgot it?" link will send you an email that contains the link to the password reset page. Your username will be your main company email (if you are on a JV team, your login will still be your main email).

If you are not receiving these emails, please check your spam folder. Your companies spam filter may be sending these emails straight to your junk folder.

General

You can navigate through the features by clicking on the items on the left side of the screen. The number associated with a feature denotes a required /upcoming / optional actions for an item for that feature.



Single clicking on any item in a feature will pull up more information about that item. When in an item on a feature, you can advance to the next, go to the previous, go to the first or go to the last item by clicking on the arrows in the top right corner

In order to advance an item in a feature, a ready button will appear in the status section (for trade partners) or the review and notification section (for design partners and clients). In some features, there is the option to edit information related to that item by clicking the Actions dropdown and selecting edit.



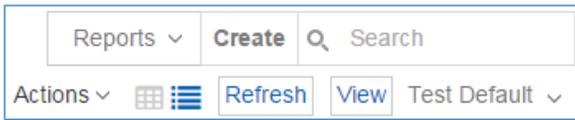
Use the search bar at the top right of every feature to help narrow down the list.

When complete editing an item in applicable features, be sure to click the save button in the upper right corner.

Views

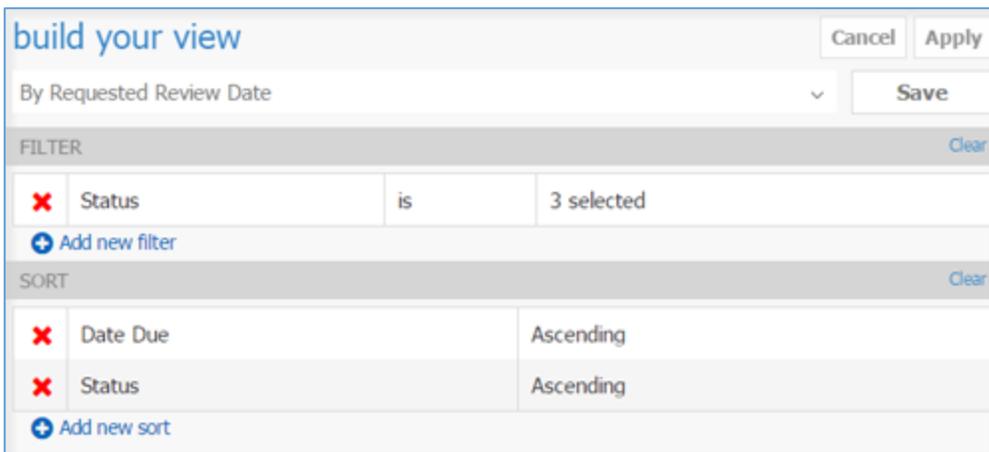
Accessing Views

The view picker is located in the same location on every page if it is available in the feature. If you go to the top right hand side of the page next to the search bar you will see a couple of different buttons. The view picker will have a name of a view already selected (that is the view you are currently looking at) like the image below that has "Punch List Review" selected. If you left click on the view you will see the list of available views.



Creating Views

The view control is located in the same location on every page if it is available in that particular feature. If you go to the top right hand side of the page next to the search bar you will see a couple of different buttons. The view control has a menu of different options associated with it when you left click on that button. The image below shows you what your view control looks like.



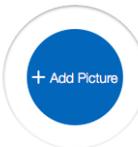
You can create new views, rename delete, make a view your default and save new views from this location.

Contact System

In the top left, when you click the contacts tab, you are able to view, add and alter information pertaining to people, offices and companies related to your company.

Contact Views

edit contact profile Cancel Save Changes ✕

 Active Prefix Suffix

Bob Preferred Name Drywall

Company HELIX & Subcontractors, Inc.

Office Location Atlanta, GA ▾

Title Vice President

Email Disable Account bdrywaller@helix.com ⓘ

Work Phone Work Phone

Mobile Phone Mobile Phone

Home Phone Home Phone

Time Zone Central Time (UTC - 6 / UTC - 5) ▾

Markets ▾

Trades Performed ▾

Under the contact edit screen, individuals are able to update information about the contact including their name, office locations, titles and phone number(s).

Individuals are able to enable and disable accounts for their company in HELIXproject.

Additionally, in the contact system, individuals are able to add contacts within their company to any project that they are assigned to, click here for information on add to project.

Offices View

edit office profile Cancel Validate Save Changes ✕

 Active

Debuque, IA

Phone Phone

Type of Firm Corporation Partnership Individual Other Enter other firm type

Parent Company Parent Company

Markets ▾

Regions ▾

Roles ▾

Date Established 2014 📅

Trades Performed ▾

Trades Subcontracted ▾

Under the offices edit screen, companies are able to update information about the offices such as trades performed, regions worked, address information, licenses and contacts at that office. Additionally, prequalification information for trade partners are stored in this edit screen which includes project, bonding and safety information. It is recommended that trade partners provide up to date prequalification information as often as possible.

Company View

edit company profile Save Changes ✕

 HELIX & Subcontractors, Inc.

Financials Financials uploaded on 01 22 2015 ▼

Date Effective 1/22/2015 Add/Update

Attachments ▼

Offices ▼

Add Office

View 	Debuke, IA	Debuke, IA
View	Atlanta, GA	Atlanta, GA

People ▼

Add Contact

View	null	null	
View	Bill Painter	Engineer	Debuke, IA
View	Bob Drywall	Vice President	Atlanta, GA

Under the companies view, companies are able to add a company image / logo, upload current financial information for subguard evaluation, view and add offices and finally view and add people associated with the company.

Adding People to Projects

You can add a single person to a project or you can multiple people to projects at one time. To add a person, you will want to find that person in the contact list and then select that person in the list. Once you select the person a button will appear in the top right hand side of the screen called "Add to Project." The image below has the location of the button outlined in red.

HELIX project

projects contacts Adam Bauman

people offices companies Merge Add To Project

Refresh View -- default ▼

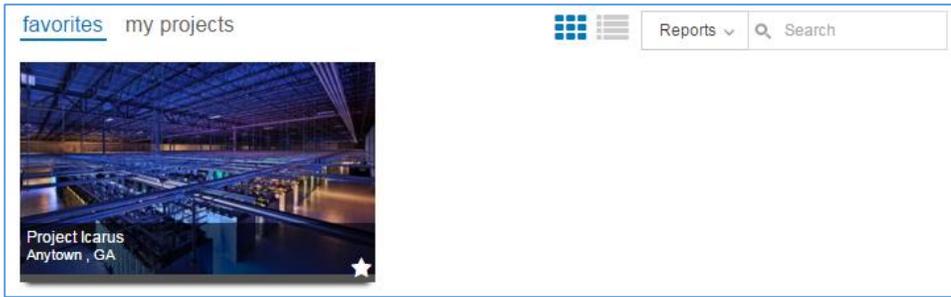
First Name	Last Name	Company	Work City	Title
Jay	Collins	ASM	Ladson	
Jay	Cullinan	Industrial Floor Coating, Inc.	Cumming	
Jay	Derepentigny	Siemens Industry, Inc.	Phoenix	Security Sales Executive

Once you left click on the "Add to Project" button the screen will slide down showing you the projects that you can select from. Left click on the project you want to add the person too and then you can select the appropriate permission level for that person. When selecting a person who will be associated with a scope of work, you will need to pick a contract to associate that person with. Example: A Mechanical Trade contractor may have a contract called Mechanical / Plumbing. The image below shows what that screen looks will look like.

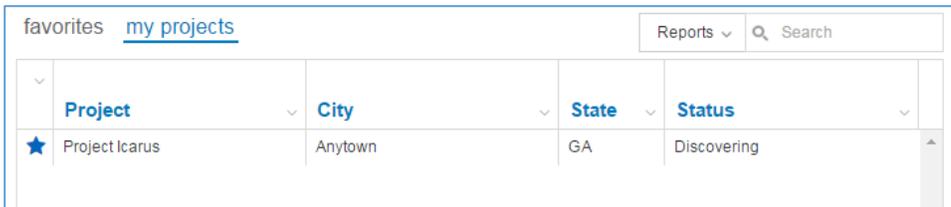
Projects

Once you login with your credentials you will have access to the projects you are associated with. There will be two sections to look at, "favorites" and "my projects."

- **Favorites** is a way to quickly access the projects that you are actively working on. When you are added to a project directory it will automatically show up on your favorites screen. You can left click on star in the favorites section to unfavorite a project.



- **My projects** is a list of all project you have access to. You can double click the Project and it will lead to the Project Overview page for the You can left click on the star in the project list to favorite a project, a blue star means the project is a favorite and white star means it is not a favorite.



	Project	City	State	Status
★	Project Icarus	Anytown	GA	Discovering

If you do not see a project you are working on then please contact your Holder Construction contact for your project and they will add you to the project directory.

Dashboard

The Dashboard feature is a quick reference section allows the user to see everything that is in their court to take action on.

- **Green Items:** Items that have been added or updated in the last 24 hours.
- **Red Items:** Items that are past their due date
- **Black Items:** Items that are on your to do list

	Feature ^	Number	Description	Type	Person Responsible	Status	Date Due
<input type="button" value="View"/>	Pending Items	000215		Optional	Bryant King	Review	
<input type="button" value="View"/>	Pending Items	000216	test	Optional	Bryant King	Review	09-22-14
<input type="button" value="View"/>	Pending Items	000218	Training Item	Optional	Danny Owens	Review	09-17-14
<input type="button" value="View"/>	Pending Items	000219	I need this done.	Required	Adam Bauman	Review	
<input type="button" value="View"/>	RFIs	000002	What color should we paint the walls?	Optional	David Epps	Review	
<input type="button" value="View"/>	RFIs	000042	Test	Optional	John Architect	Review	11-12-14
<input type="button" value="View"/>	RFIs	P000007	Workflow Test #200 345	Optional	Austin Walker	Review	
<input type="button" value="View"/>	RFIs	000002	What color should we paint the walls?	Optional	David Epps	Review	
<input type="button" value="View"/>	RFIs	000002	What color should we paint the walls?	Optional	David Epps	Review	
<input type="button" value="View"/>	RFIs	000018	Created Via All Items by Austin	Optional	John Architect	Review	04-05-14
<input type="button" value="View"/>	RFIs	DRAFT 61	Duplicate Test	Required	Adam Bauman	Review	11-14-14

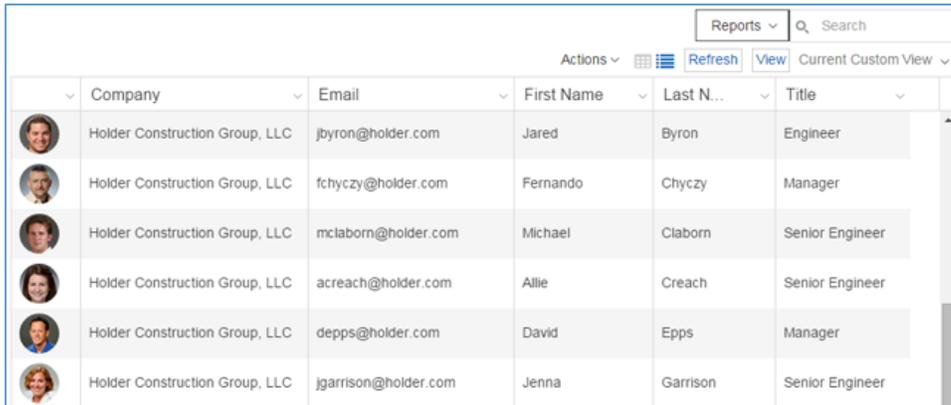
You can left click on the "View" button to display the item in more detail and then take action on the item. When you click the "View" button, Google Chrome will open another tab, bringing you to that feature of HELIXproject and open the item.

There are three types of dashboard items.

- **Required:** You are listed as a required reviewer and the item is waiting on you to advance it.
- **Upcoming:** You are listed as a required reviewer, but it is not yet your turn to review the item. You can go ahead and look at the item to get familiar with it before it is officially in your court.
- **Optional:** You are listed as an optional reviewer, but you are optional and the item is not dependent on you to move forward. If the item gets through the entire Required workflow it will advance and take the item off your dashboard

Directory

The directory contains all the contacts for that project. The HELIXproject Directory on your project page contains the list of people that have access to this project, what level of access and general contact information such as office, title, phone numbers and email addresses. You can left click on the person in the grid to see more information about them.



The screenshot shows a web interface for a directory. At the top right, there is a 'Reports' dropdown and a search bar with a magnifying glass icon and the text 'Search'. Below this, there are 'Actions' and 'Refresh' buttons, and a 'View' button. To the right of these buttons is a 'Current Custom View' dropdown. The main part of the image is a table with the following columns: Company, Email, First Name, Last N..., and Title. The table contains six rows of contact information, each with a small profile picture icon to the left of the company name.

	Company	Email	First Name	Last N...	Title
	Holder Construction Group, LLC	jbyron@holder.com	Jared	Byron	Engineer
	Holder Construction Group, LLC	fchyczy@holder.com	Fernando	Chyczy	Manager
	Holder Construction Group, LLC	mclaborn@holder.com	Michael	Claborn	Senior Engineer
	Holder Construction Group, LLC	acreach@holder.com	Allie	Creach	Senior Engineer
	Holder Construction Group, LLC	depps@holder.com	David	Epps	Manager
	Holder Construction Group, LLC	kgarrison@holder.com	Jenna	Garrison	Senior Engineer

To edit your directory entry, find your name in the list and left click. You will see your more information about yourself pop-up and then you can hover over actions button on the top of the grid and click edit. You can edit information about yourself and others associated with your company, keep in mind it only changes information for this project.

In directory, there is the ability modify email notifications for HELIXproject by editing your contact in the Directory. The options are Immediate and Weekly.

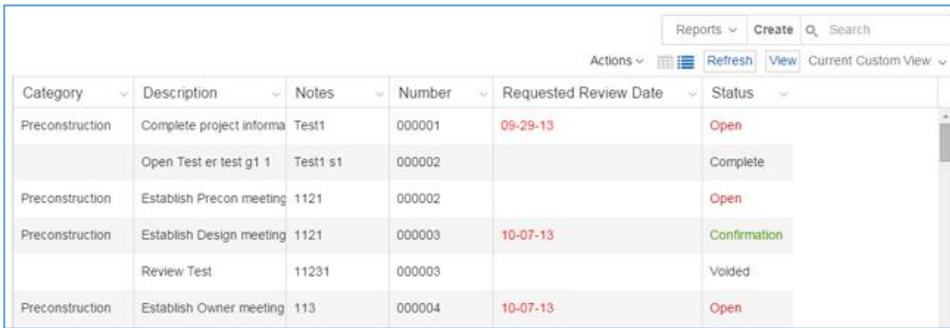


The screenshot shows a form titled 'PROJECT NOTIFICATION PREFERENCES'. It has two radio button options: 'Immediately' and 'Weekly'. The 'Weekly' option is selected, indicated by a blue checkmark in a circle to its right. Below the 'Weekly' option, the text 'Mondays at 3:00PM EST' is displayed.

PROJECT NOTIFICATION PREFERENCES	
Immediately	<input type="radio"/>
Weekly	<input checked="" type="radio"/> Mondays at 3:00PM EST

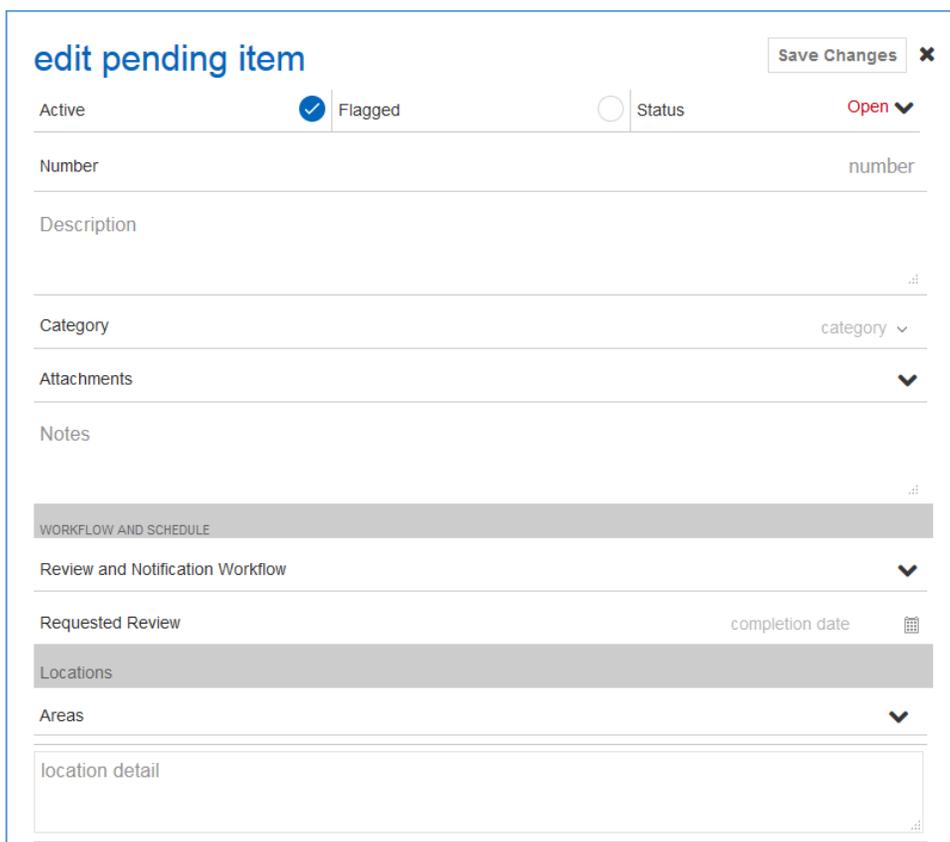
Pending Items

All users can view pending items that are assigned to them, create and manage their pending items in this feature. The image below shows you what the pending items feature looks like. Similar to most of HELIXproject you can left click on an item in the grid to have a pop-up come up with more information about that item.



Category	Description	Notes	Number	Requested Review Date	Status
Preconstruction	Complete project informa	Test1	000001	09-29-13	Open
	Open Test er test g 1 1	Test1 s1	000002		Complete
Preconstruction	Establish Precon meeting	1121	000002		Open
Preconstruction	Establish Design meeting	1121	000003	10-07-13	Confirmation
	Review Test	11231	000003		Voided
Preconstruction	Establish Owner meeting	113	000004	10-07-13	Open

Creating an Item



edit pending item Save Changes ✕

Active Flagged Status Open ▼

Number number

Description ⋮

Category category ▼

Attachments ▼

Notes ⋮

WORKFLOW AND SCHEDULE

Review and Notification Workflow ▼

Requested Review completion date 📅

Locations ▼

Areas ▼

location detail ⋮

There are not mandatory fields to be filled out when entering a pending item in order to save a Pending Item.

Review with your Project team to ensure all necessary fields are completed prior to sending.

Here are a list of the primary fields to enter information:

- Description – description of the pending item.
- Categories – standard categories include Building Information Modeling, Construction, Design, General, Move-in, Permitting and Preconstruction. Additionally, new categories can be created by just typing in a new description.
- Attachments – items can be uploaded to Pending Items
- Review and Notification Workflow
- Requested Review (date)

Statuses

Depending on your current view, the status of an item may be shown in the list view, if not you can left click on the item to pull up its details and then view the item's status. There are four main statuses associated with a pending item.

- **Open:** The item default status when it is created.
- **Review:** The item is currently being reviewed by the people in the review workflow.
- **Confirmation:** It has gone through the review workflow. It is now time for the author to review and confirm that the task is truly complete.
- **Complete:** The item is completely done.
- **Voided:** The item is no longer valid. If an item is voided it will drop of the list and be completed.

Advancing an Item

Left clicking on an item in the grid allows the user to see more information about an item and allows the user to add attachments, discussion items and move the item along in Review and Notification Workflow.

Discussion Section: This is an ongoing thread that people who can see this item can comment on. They may be questions, comments or even general points about the pending item. To add a discussion comment you must expand the discussion section and left click the add button. From here you can type your response and add an attachment to go with that discussion item. Once you are done you will left click the post button. Keep in mind anyone that can view these pending items will see what you just said.

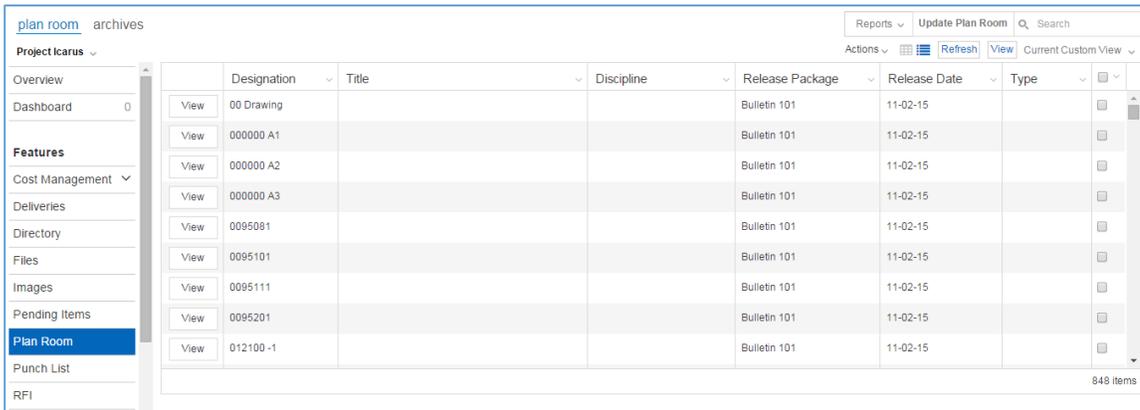
Attachments Section: You can view previous attachments or post new ones from here. You will need to expand the section first, then you click on the View button next to existing attachments or click on Add files to add new ones. When you click on the Add Files button, Windows Explorer will come up and you will need to navigate to your file(s) and select it, then click open. Once this is complete you can change the description of the file if you wish and then left click the Upload Files button.

Review and Notification Workflow Section: In this section you can advance items to the next status after you have taken action on the item. You will need to expand the Review and Notification Workflow section.

- **Required Review:** If the item is in your court or a person who is in the same companies court you can advance the item to the next person in the required workflow then expand the Review and Notification workflow section. You can then left click the ready button next to your name or the name of the person in your company to say that the item has had action taken on it. If you make it ready for someone else in your company, it will say that you marked it ready for them in the system.
- **Optional Review:** If the item is in optional review you can check it off that you reviewed the item by left clicking the item in the grid and then expanding the Review and Notification section. You can then click the ready button next to your name. The status will not advance for people in the optional review section, but you mark it off your list of items to review.

Plan Room

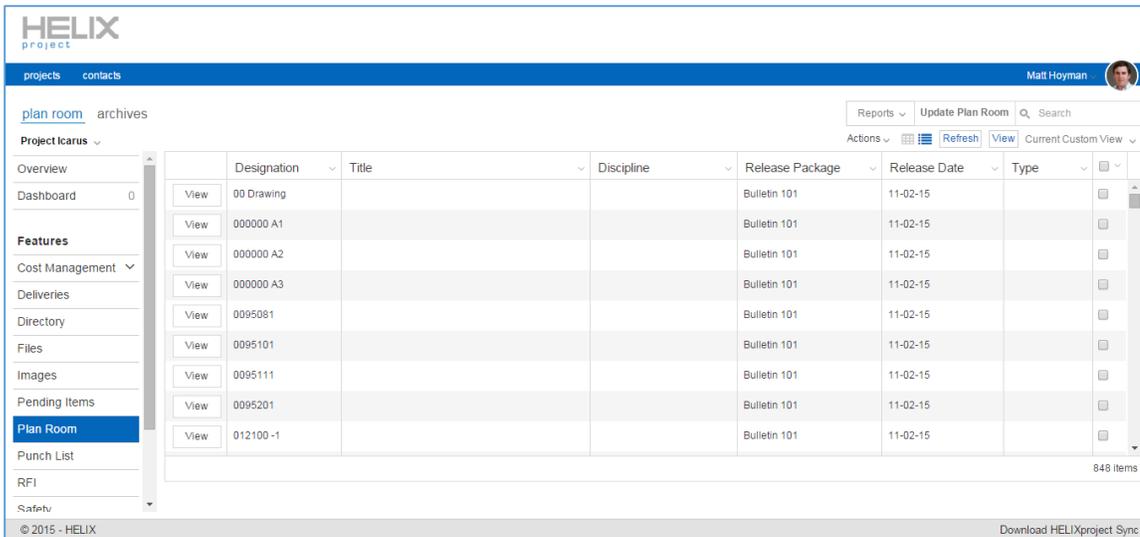
The plan room feature of HELIXproject shows the project team the most current set of approved documents for the project. You will find drawings, specs and models to view and download from here. To view documents in the Plan Room you will want to find the drawing you want to look at and then left click on the view button next to that item in the grid. A new window will open up displaying the document. The image below shows the view button located on the left hand side of the grid next to all the drawings and specs.



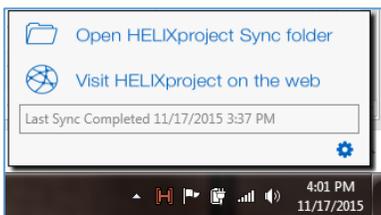
To download multiple files, select the check boxes on the right hand side, then click "Download Selected Files"

HELIXproject Sync

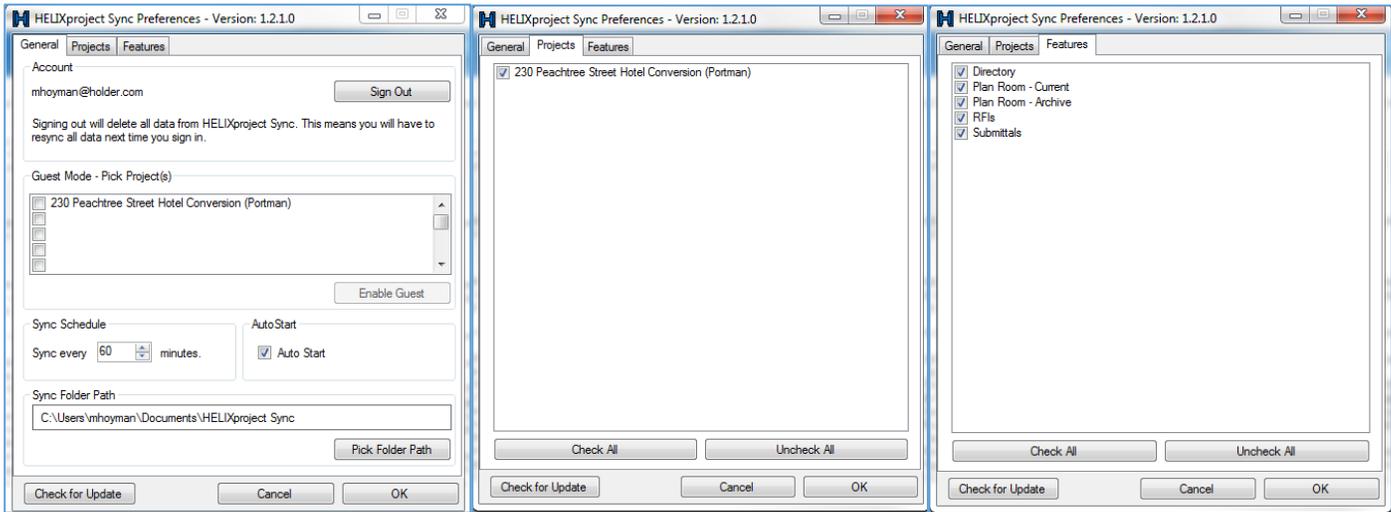
You can also have the full set of documents sync to your desktop by downloading the HELIXproject Sync application. The download can be found on any of feature pages on HELIXproject. Just go to the bottom right hand side of the screen and click on the "Download HELIXproject Sync" button.



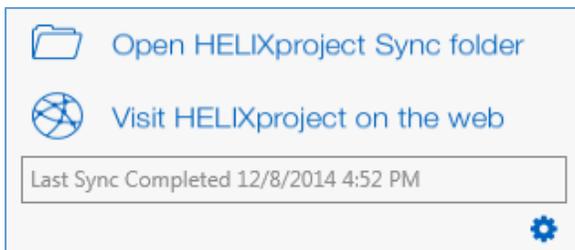
Once you download HELIXproject sync, it will save a file in your downloads folder that you can run to install HELIXproject sync. Once installed an icon will be installed on your desktop. When you double click the icon, the system will ask you to sign in. You will use the same credentials you use to sign into HELIXproject. After signing into the system you should go setup your preferences for the system. You will have a screen similar to the one below.



To Access HELIXproject sync from the click the "H" in the Taskbar on the bottom right of your screen. It will open the pop-up for HELIXproject sync. Click the gear on the bottom right of the pop-up and select "Preferences"



From here you can set the duration of how often the system syncs. Keep in mind the more frequent the system syncs, the more likely the chance you can lose some performance from your internet speed. But the default is set to 60 minutes. It is recommended you keep it at 60 minutes at first to see if it meets your needs and then change it as necessary. There is an option to pick the folder path location on your computer and also the option for Auto Start for HELIXproject sync that will open the program every time you start your computer. The next two tabs will allow you to select the projects you want to sync and the features you want to sync. Check and uncheck the checkboxes to apply or remove the items you want to sync.



Once you click ok you will have an "H" icon in your Windows tool tray. It will flash when a sync is in progress. If you click on the icon it pulls up a dialog similar to the image below. You can see when the last time you sync or the current progress of your sync from this screen. You can also change your HELIXproject sync setting by clicking the gear in the lower right hand side of the screen. You can manually start or stop a sync by clicking the gear as well.

Punch List

The Punch List feature is used to create and manage the punch list process throughout the duration of the project. Items which are tracked in the Punch List feature include formal Punch List items, Completion List items, and Notices to Comply (NTC). Partners can create their own punch list items in HELIXproject via their computer or iPad, allowing everyone to collaborate on the process and expedite completion.

The punch list feature has two different functions depending on the device you are using. You can still do everything on each device, but you will see a major efficiency gain if you use the different devices in the right way. The iPad version is designed for the people that will be walking the job and dropping pins on drawings and then checking them off on walks. The web side is great for producing reports and batch updating items if needed.

Punch list Statuses

- **Open:** This is a newly created item, the item is visible by anyone who has the appropriate permissions, the creator of the item or anyone in the creator's company, and anyone that is associated with the responsible contract.
- **Pending:** The item is now back in the General Contractors court to be signed off on before moving forward to being reviewed by the Design Team or Owner.
- **Review:** The item is going through the Review and Notification workflow, it will have to pass through that workflow before being complete.
- **Complete:** Everyone confirmed the item has been fixed and the item drops off the list of things to do.
- **Voided:** This indicates the item may not have been applicable, or it was a duplicate, or something else like that.

view punch list item Actions

number
000012

status
Open SINCE 1-3-2015 ✓ Ready

description
Fix hole in wall.

contract
Just the gypsum board HELIX Subcontractors, Inc.

author
Danny Owens Holder Construction Group, LLC

type
Punch List

cost impact
0

completion schedule
25 days

review and notification workflow
0 of 0 reviewed

attachments
0 files

discussion
0 comments

location

Advancing an Item

Left clicking on an item in the grid allows the user to see more information about an item and allows the user to add attachments, discussion items and move the item along in Review and Notification Workflow.

Ready Button: When an item is your court you have the ability to left click the ready button to move the status forward. Left click on the item in the grid and the details pop-up will appear, the ready button is located in the status field. The ready button is only available when the status of the Punch List item is in open.

Review and Notification Workflow Section: In this section you can advance items to the next status after you have taken action on the item. You will need to expand the Review and Notification Workflow section.

- **Required Review:** If the item is in your court or a person who is in the same companies court you can advance the item to the next person in the required workflow then expand the Review and Notification workflow section. You can then left click the ready button next to your name or the name of the person in your company to say that the item has had action taken on it. If you make it ready for someone else in your company, it will say that you marked it ready for them in the system.
- **Optional Review:** If the item is in optional review you can check it off that you reviewed the item by left clicking the item in the grid and then expanding the Review and Notification section. You can then click the ready button next to your name. The status will not advance for people in the optional review section, but you mark it off your list of items to review.

RFIs

Requests for Information can be posted by anyone on the project, but they will not be visible to the entire team until the RFI has gone through the general contractor and then answered by the design team. Once this happens the RFI will be visible to anyone on the project team that wants to see the information.

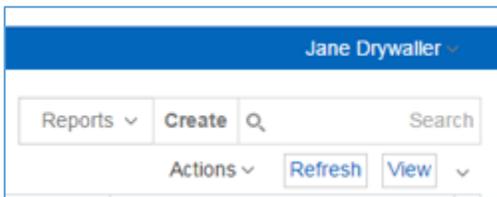
Statuses

There are several different statuses a RFI can currently have.

- **Pending:** This is the default status when you create an RFI. The pending status means that the RFI is in the General Contractors court.
- **Review:** The item is now going through the review and notification workflow. Anyone who is a part of that workflow will start to see they can comment on that item, depending on how the workflow is setup.
- **Confirmation:** The item has completed the workflow and it now has the final markups before being sent to complete. This is where we do our final review before moving it to the next status, where the item will be available for all team members to see.
- **Complete:** The item is finished and everyone on the jobsite has the ability to see the final response to that RFI.
- **Voided:** The item is no longer valid or didn't need to be asked in the first place. If an item is voided it will drop of the list and be completed.

Creating

Trade contractors have the ability to create an RFI by going to the RFI feature and left click the create button in the top right hand side of the screen. From there you will fill out the form that pops up on the screen. You can fill in the description the disciplines it applies to, contracts (you will only be able to pick the contracts you are associated with), any documents it is associated with and attachments.

A screenshot of the 'Create RFI' form. The form is titled 'Create RFI' and has a 'Save' button with a close icon. The form fields include: 'Title' (text input), 'Contract' (dropdown menu with 'Select a contract'), 'Description' (text area), 'Disciplines' (dropdown menu with 'Select disciplines'), 'Type' (dropdown menu), 'Cost Impact' (dropdown menu with 'none set'), 'Schedule Impact' (dropdown menu with 'none'), 'Day(s)' (dropdown menu), 'Attachments' (dropdown menu with a right arrow), 'Notes' (text area), 'Locations' (dropdown menu), 'Areas' (dropdown menu), 'location detail' (text area), 'Plan Room Documents' (dropdown menu with 'Enter plan room designation'), and a table with columns 'designation' and 'title'.

Required Fields

Required information can vary depending on Design Team/Owner preference and jobsite specifics. Review with your Project team to ensure all necessary fields are completed prior to sending.

- Title – Title of RFI, Not the title for person writing the RFI
- Contract – select your contract
- Description – This is the area to write the RFI
- Attachments – adding attachments to RFI to convey the issue is a useful tool, when uploading, combine into as minimal number of files for uploading
- Plan Room Documents – Make sure your RFIs reference the plan room document

view rfi ⏪ ⏩ Actions ▾ ✕

number
Initiated as Draft 9

status
Review SINCE 10/15/2014

title

description
test Contract

response

This is the Response.

Cancel Save ▾

Answering

The design team members will have the ability to answer RFI's that are in their court. The status of these items will be Review. You will have to go to RFI and left click on the item in the grid and then a pop-up box will come up with the details of the RFI. You will go down to the Response field and left click the chevron to expand the field. The response section is a text box that you will type the response. You can also post attachments to the RFI or other useful information.

Once the RFI goes through the workflow, the RFI goes back to the general contractor and they will make the item complete (assuming it is finished) and then it will be available for the entire team to see.

To advance a RFI in the workflow, select the **Review and Notification Workflow** section and click **Ready**.

Submittals

The Submittals Feature of HELIXproject contains two different sections, submittal packages and submittal registers. Submittal packages can be created by trade contractors and general contractors and then are reviewed by design team members.

submittal packages		submittal register				
Project Icarus						
Overview	Num...	Description	Status	Requested ...	Contractua...	Supplier
Dashboard	18	000011	Exhibit A - Final Pay App	Pending	12-15-13	12-15-13
		000012	Exhibit A - Retainage	Review	12-16-13	12-15-13
		000013	Executed Final Change Order	Complete	12-17-13	12-15-13
		000014	Retainage Paid	Complete	12-18-13	12-15-13
		000015	Exhibit B - Final Lien Waiver	Pending	12-19-13	12-15-13
		000016	Final Consent of Surety	Review	12-20-13	12-15-13
		000017	Auger Cast Grout Piles - Project Record Doc...	Review	12-21-13	12-15-13
		000018	Drywall Warranty Contact Sheet	Complete	12-22-13	12-15-13
Pending Items	5					

There are two different section to submittals when you go into the feature.

- **Submittal Packages:** Packages are collection of Registers items, trades can create their own packages and assign registers to them.
- **Submittal Registers:** These are individual submittal items, they should be associated with a package to be submitted.

submittal packages		submittal register				
Project Icarus						
Overview	Num...	Reference	Description	Type	Status	Supplier
Dashboard	18	000173	PLUMBING PUMPS - PRODUCT DATA	Product Data	Open	
		000174	PLUMBING PUMPS - TEST REPORTS	Test Reports	Open	
		000175	PLUMBING PUMPS - SPARE PARTS LIST	Attic Stock	Open	
		000176	RECLAIMED WATER SYSTEMS - PROD...	Product Data	Open	
		000177	RECLAIMED WATER SYSTEMS - TEST ...	Test Reports	Open	
		000178	DRAINAGE SYSTEMS - GENERAL PRO...	Product Data	Open	
		000184	PLUMBING FIXTURES - PRODUCT DATA	Product Data	Open	

Statuses

There are several different statuses a Submittal can currently have.

- **Open:** This is the default status when you create a Submittal. The Open status is in the Trade Contractors court.
- **Pending:** The general contractor has the required information from the trade contractors and the General Contractor is making sure they have the appropriate information to give to the *design* team.
- **Review:** The item is now going through the review and notification workflow. Anyone who is a part of that workflow will start to see they can comment on that item, depending on how the workflow is setup.
- **Confirmation:** The item has completed the workflow and it now has the final markups before being sent to complete. This is where the General Contractor does a final review before moving it to the next status, where the item will be available for all team members to see.
- **Complete:** The item is finished and everyone on the jobsite has the ability to see the approved information.
- **Voided:** The item is no longer valid or didn't need to be there in the first place. If an item is voided it will drop of the list and be finished.

Note: Only Packages can be manually put into the above statuses. Registers only have two statuses that can be set manually. They are Open and Voided. This is because Register items move statuses based on the Packages status.

Creating

Trade contractors can create a Submittal Package by navigating in the Submittal Packages in the top right hand side of the screen left click the create button. A create window will come up where you can start filling your information.

The screenshot shows a 'Create Submittal Package' form with the following sections:

- Description:** A text area for entering the package description.
- Contract:** A dropdown menu labeled 'Select a contract'.
- Plan Room Document:** A dropdown menu labeled 'Enter plan room designation'.
- Reference Detail:** A text area for additional reference information.
- Submittal Register Items:** A table with columns for 'number', 'description', and 'status'. A 'Select register items' button is located above the table.
- Notes:** A text area for adding notes to the package.
- Attachments:** A section with a right-pointing arrow, containing sub-sections for 'Locations' and 'Areas'.
- location detail:** A text area for providing specific location information.

A 'Save' button with a close icon (X) is positioned in the top right corner of the form.

- **Description** – This is the area to write the description of the submittal package. Refer to the Project Contract Administration descriptions set up at the beginning of the project.
- **Supplier** – select your contract
- **Plan Room Documents** – this is the specification section associated with the submittal
- **Submittal Register Items** – assign register items associated with the submittal package.
- **Attachments** – adding attachments to RFI to convey the issue is a useful tool, when uploading, combine into as minimal number of files for uploading

You will see a window similar to the image above. If you are a trade contractor you will only have the ability to add register items that are already associate with your trade (assuming you are creating a submittal package) and you will only be able to select a contract that you are associated with.

Warranty

Warranty Items can be created by the owner and can be viewed by the trade contractor. The general contractor will assign items to trade contractors and ensure that items are completed in a timely manner.

Statuses

There are several different statuses a Submittal can currently have.

- **Open:** This is the default status when you create a Warranty Item. This item is in the trade contractor's court.
- **Pending:** The trade contractor has completed the item and the general contractor is verifying that the item has been corrected.
- **Review:** The item is fixed and it is waiting for the owner to sign off on the item.
- **Complete:** The item is finished.
- **Voided:** The item is no longer valid or didn't need to be there in the first place. If an item is voided it will drop of the list and be finished.

Creating

Owners and general contractors can create warranty items in HELIXproject. To create a warranty item, you will go to the top right hand side of the screen and hit the create button. You can post images, the description of the item and various other information. Once the item is created the general contractor can get with the appropriate trades to correct the warranty item.

view warranty item Actions ▾ ✕

number
000016

status
Open SINCE 1-3-2015 ✓ Ready

description
Testing Create.

author

contract

cost impact

completion schedule
1 weeks

review and notification workflow
0 of 0 reviewed ⓘ

attachments
1 file ⓘ

discussion
0 comments ⓘ

locations
0 location(s)

notes

history
3 histories ⓘ

Advancing an Item

Left clicking on an item in the grid allows the user to see more information about an item and allows the user to add attachments, discussion items and move the item along in Review and Notification Workflow.

Ready Button: When an item is a trade contractor's court you have the ability to left click the ready button to move the status forward. Left click on the item in the grid and the details pop-up will appear, the ready button is located in the status field. The ready button is only available when the status of the Warranty item is in open.

Review and Notification Workflow Section: In this section you can advance items to the next status after you have taken action on the item. You will need to expand the Review and Notification Workflow section.

- **Required Review:** If the item is in your court or a person who is in the same companies court you can advance the item to the next person in the required workflow then expand the Review and Notification workflow section. You can then left click the ready button next to your name or the name of the person in your company to say that the item has had action taken on it. If you make it ready for someone else in your company, it will say that you marked it ready for them in the system.
- **Optional Review:** If the item is in optional review you can check it off that you reviewed the item by left clicking the item in the grid and then expanding the Review and Notification section. You can then click the ready button next to your name. The status will not advance for people in the optional review section, but you mark it off your list of items to review.