PSA FREQUENTLY ASKED QUESTIONS

FOREMEN - PIPE

WHAT IF THERE IS NO SPOOL NUMBER?

If there is no spool number, you can enter the drawing, sheet, and size using the drop down menus. Line number should fill in automatically once you enter the drawing number.

CAN I GET SOMEONE ELSE ON MY CREW TO ENTER MY FOREMAN DAILY REPORT?

No problem, as long as the Foreman signs it. The foreman still must assume responsibility for everything that is entered.

Am I responsible for making sure that the autofill information is correct?

YES. Ultimately, you are responsible for what you claim. Whenever the size, line, or drawing fill in automatically, double check it to make sure it's correct.

How do shared welds work?

If you share the work on a weld with another crew (for example, day shift and night shift) claim the percentage of the weld you finished at the end of each shift so that you can get productivity credit for your crew's work.

If you are NOT sharing a weld, wait to claim the entire weld when it's done.

Only enter partial welds when you are sharing the work with another Foreman (day/night shift)

Should I enter a cut/prep before I enter a weld?

Depends on how the job was estimated.

You *can* claim every cut for every weld.

- If there are hours available for this cut, you'll get credit for them.
- If there are no hours available for the cut, the hours go to the weld.
- If there are hours that you don't claim, you won't get the credit for them until you claim the entire test package as mechanically complete.

Some cuts are in the estimate, some are not. In the estimate, a weld is assumed to be ready to go with minimal prep, and the weld hours cover it. Cuts are generally reserved for field fit ups or situations that require extra preparation.

As a rule of thumb, if you spend significant time on a cut – claim it. Even if you don't receive the credit, it accounts for your time.

NOTE: Demo cuts are a separate activity and are listed under "Demo."

ALWAYS ENTER DEMO CUTS. Demo cuts are always in the estimate.

HOW DO “BROTHER-IN-LAW” WELDS WORK?

If two welders ON THE SAME CREW are working on THE SAME WELD (as in a 24” connection), enter both welder’s stencils, separated by a slash: “/”

Credit rules still apply:

- **Enter the weld when it is 100% complete.**
- **Only enter partial welds when you are sharing the work with another Foreman (day/night shift)**
- **Shared weld means the FOREMAN shared the weld with a second crew. Brother in law welds are not shared!**
- **If you did share the weld enter your percent complete as you go.**

WHY DOES THE PIPE ERECTION ACTIVITY HAVE A PLACE FOR SPOOL 2, SPOOL 3, ETC?

You will often find yourself working on an iso where there is more than one spool of the same diameter. In this case, you can use the prompts for spool 2, spool 3 (up to spool 6) and enter several spools at once.

For example, in the iso below, you could enter all three spools at once, since they're all the same diameter.

NOTE: ONLY enter additional spools when the diameter is the same!

What if a spool I have installed has two different sizes of pipe?

If you have a spool with two different pipe sizes (i.e., with a reducer or swage), you'll need to enter an activity for each pipe size.

Say for example you have spool that includes a reducer. 20 feet of the spool is 8" pipe and 5 feet of the spool is 4" pipe.

1. Create a pipe erection activity for 20' of 8" pipe.
2. Create a pipe erection activity for 5' of 4" pipe.

How do I enter threaded pipe? (No Spool)

Treat threaded pipe as GENERIC pipe with no spool number.

For threaded pipe connections:

1. For each threaded connection, enter a bolt-up
   a. Spool 1: Generic Threaded
   b. Spool 2: Generic Threaded

How do I enter a long run of welded pipe? (No Spool)

Enter pipe as Generic, with no spool number.

For each welded connection:

- Spool 1: Generic Pup
- Spool 2: Generic Pup

How do I enter a valve?

Enter a valve as TRIM.

1. Select VALVE from the list.
2. Select the size and type.
3. Enter the valve tag in the notes.

When do I claim a cut on pipe?

When performing a cut as weld prep, you have the option to include the cut when you enter the weld activity.

Always claim the cut. If there are hours in the tracker for this cut, you will receive credit.

When you're working demo, ALWAYS claim EVERY CUT as a DEMO CUT.

WHAT IS INCLUDED IN TRIM?

- Plugs
- Valve Handles
- Valves
- Steam Traps
- Instrumentation
- Wall Penetrations
- Blinds
- High/Low Point Vents/Drains

There is also an OTHER category for any trim items that aren't on the list. Be sure to use the notes section to add any information that needs clarification.

HOW DO I ENTER A TIE POINT?

1. First, you'll enter the physical connection as a weld or bolt-up.
2. Include in the notes that this is a tie point.
3. Then, to account for the tie point hours in the estimate, enter the tie point as a MISC. activity.
4. Enter the drawing and sheet,
5. Type the tie point number in the notes.

What else is miscellaneous used for?

Miscellaneous is a catch-all for anything that doesn't fit into one of the major categories. Monitors, instruments, "birdcages," etc. all fall into this category.

Miscellaneous can also be used for items that you aren't quite sure how to enter. If you don't know how to enter an item, use a miscellaneous entry and leave a detailed note – a miscellaneous can be applied toward job progress.

But don't abuse miscellaneous entries. If you find yourself using a lot of miscellaneous entries for the same item, talk to your project services contact and find out the standard way to enter the item.

FOREMEN – GENERAL

How do I work in package mode?

[UNDER CONSTRUCTION]

TRAINING AND MANAGING USERS

HOW DO I ADD A USER?

[UNDER CONSTRUCTION]

What if the Foreman doesn't have an email address?

The simplest solution to this is to make one. We recommend using Gmail. The foreman only needs it once, the get to the app store or GooglePlay.

DO I HAVE TO USE THE AUTOMATIC PASSWORD?

No, you can use any password.

When you set up a foreman in the system, a password will be automatically generated for him. If he has a password he always uses and wants to use it for this application too, just type that into the yellow field when you create him as a user.

WHAT'S THE BEST WAY TO TRAIN THE FOREMEN?

Keep it informal and just dive in. Have the foreman report to you when he's ready to enter his progress, and show him how to use the app with the actual progress he made that day. He'll probably need your help for the first few days, but it won't be long before he's entering his own data.

During our testing, when we conducted a formal class and hit the foremen with all training modules at once, the pass rate was near zero. Nobody paid attention, they resisted the change, and they claimed to understand but they really didn't get it (or weren't interested.)

The lesson is: if you make it appear to be a big, complicated affair that requires training, they'll resist. If you show it to them like it's no big deal, they'll ***see*** how much faster and better it is than filling out paperwork.

If you've got a foreman who's sharp with technology (and there *will* be a lot of guys like this), you can probably sit him down and have him watch the video training modules. But not everyone who excels in his craft excels with technology, so be prepared offer hands-on help to get them started.

Finally, if you have a foreman who just can't seem to get it, suggest that he appoint someone from his crew to enter the progress for him. All the foreman has to do is approve and sign it.

SUPERINTENDENTS

Why do I have to accept these activities?

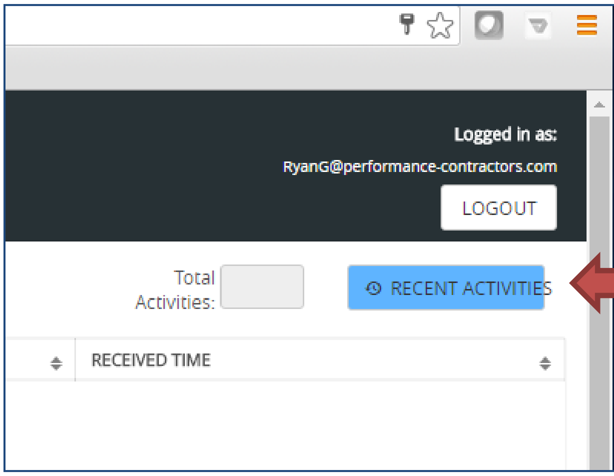
As part of a company-wide initiative to eliminate rework, we expect Superintendents to assume responsibility for all work that their foremen submit.

By accepting the progress your foreman submits BEFORE it's reviewed by project services, you assume responsibility for it.

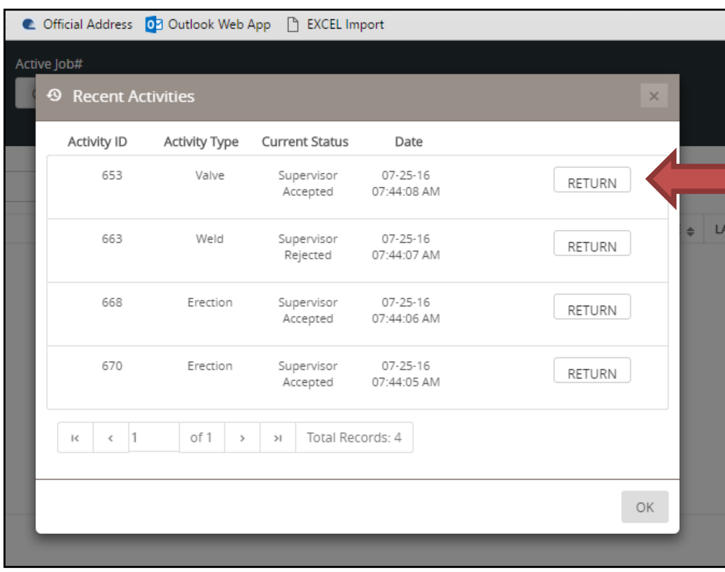
The Superintendent review stage also allows you to review the work in your book and highlight the progress before it's committed to the tracking system.

CAN I RECOVER A SUBMISSION AND DO IT OVER AGAIN?

Yes. Go to RECENT ACTIVITIES at the top right corner of the page. You'll see a list of everything you've done in the last 7 days.



Pick the item you want to re-visit, and click RETURN. It will show up in your que with a status of RETURNED TO LIST.



PROJECT SERVICES

I ASSIGNED AN ACTIVITY TO THE WRONG ITEM. CAN I GET IT BACK AND RE-ASSIGN IT?

Yes you can. There are two ways to do this:

Method #1:

On the Project Services Review or Superintendent Review pages, go to RECENT ACTIVITIES at the top right corner. You'll see a list of everything you've done in the last 2 days.

Pick the item you want to re-visit, and click RETURN. It will show up in your que with a status of RETURNED TO LIST.

This is very helpful when you want to return an item you just assigned. But if it's been longer than a day, you will probably want to use Method #2 in the classic tracker.

Method #2:

1. Go to the classic tracker
2. Find the line associated with the activity and double click it to bring up it's history.
3. Click return
4. The activity shows up again on the Project Services Review Page
   (If you need to send it back to the superintendent, find the activity on the Project Services review page and click RETURN.)

What's the purpose of a note? Why can't I just call the Superintendent if I need to reject an activity?

Superintendents play a key role and we want them involved in the workflow. But we *don't* want to create extra work for them.

Attaching a note to a rejected activity – one with clear and helpful information – will hopefully save a phone call or a trip to the front office.

When you reject an activity, try to include some information in the note which will help the Superintendent resolve the issue quickly. If you are rejecting an activity because the sheet number is wrong, for instance, include the correct sheet number so that the Superintendent doesn't need to dig up the same information you're already looking at.

DO I STILL NEED TO MAKE A TRACKING CHART AT THE START OF THE JOB?

Yes.

Once you’ve made your chart, you can paste it into the import template, and you’re ready to import it into the system

WHAT'S THE DIFFERENCE BETWEEN THE BID EDITOR AND THE CLASSIC TRACKER?

The BID EDITOR allows you to edit **the original scope data.**

The CLASSIC TRACKER allows you to edit the **progress data.**

Think of it this way. You have two data sets on a job:

1. The data you prepare at the **start** of the job, ie, the tracking chart. This is what the BID EDITOR allows you to edit.
2. The data you enter as the job **progresses**. This is what the CLASSIC TRACKER allows you to edit.

We call our progress tracker "tracker" or "tracking chart." The names BID EDITOR and CLASSIC TRACKER were chosen to distinguish the two different ways that we "update the tracking chart."

Can I export this to Excel?

Yes. We have a special Excel desktop set up specifically for this purpose.
[UNDER CONSTRUCTION]

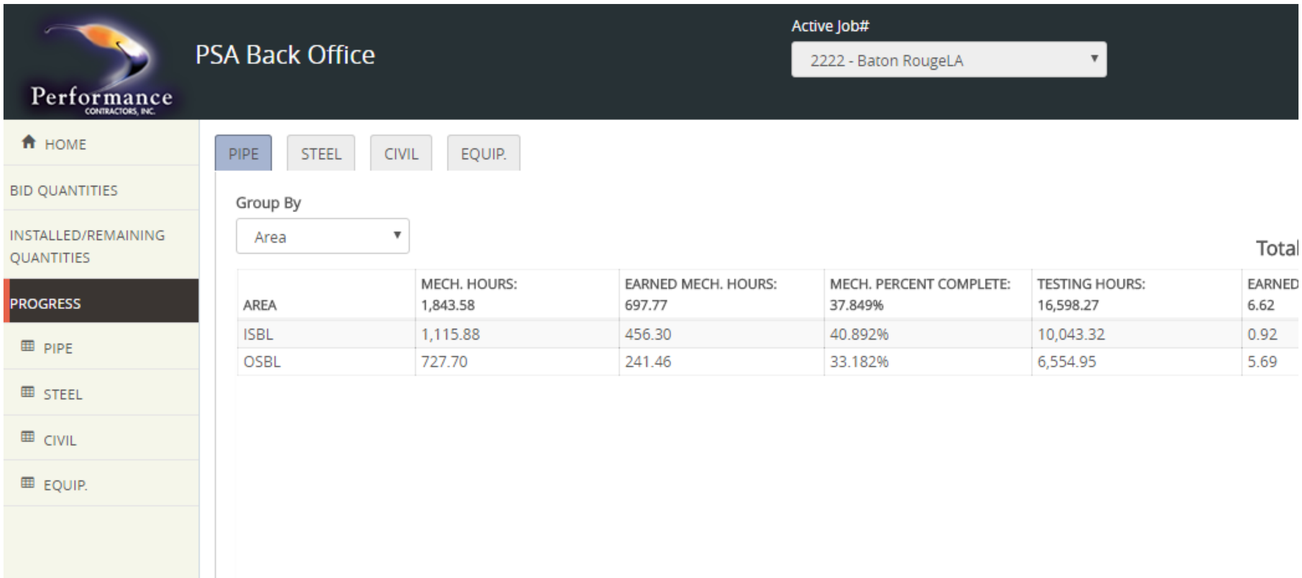
How can I make custom reports for the client?

Make your report template in Excel or PowerPoint. Each week, when you need to update your data, use the excel export function to pull it from the server.

I HAVE TO GET THIS DATA INTO PRIMAVERA. HOW DO I DO THAT?

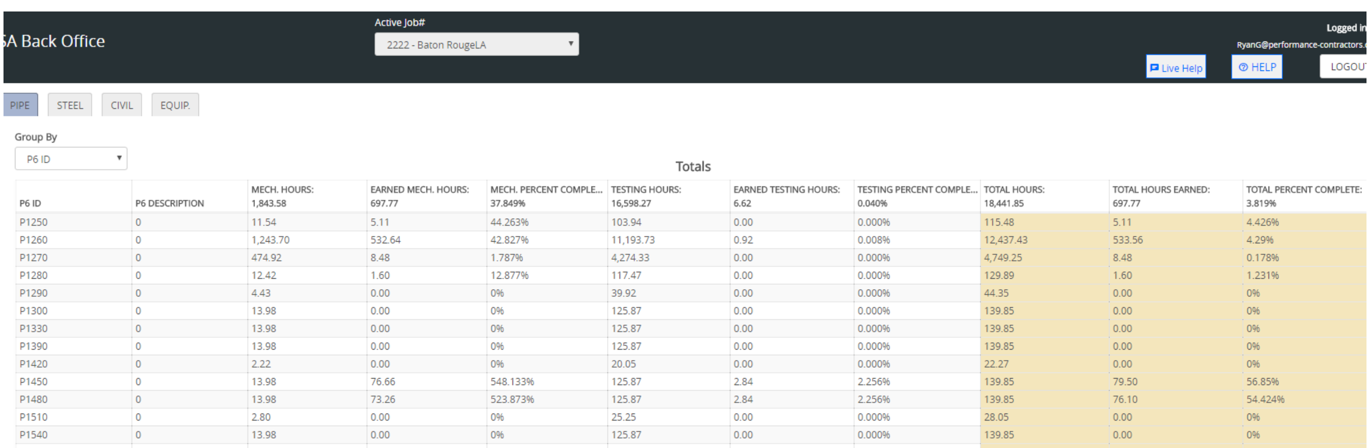
On the PROGRESS page: **HOME->TRACKER->PROGRESS**

1. Select your discipline



AREA	MECH. HOURS: 1,843.58	EARNED MECH. HOURS: 697.77	MECH. PERCENT COMPLETE: 37.849%	TESTING HOURS: 16,598.27	EARNED 6.62
ISBL	1,115.88	456.30	40.892%	10,043.32	0.92
OSBL	727.70	241.46	33.182%	6,554.95	5.69

2. Select P6 ID from the GROUP BY menu.
3. Group by P6 ID



P6 ID	P6 DESCRIPTION	MECH. HOURS: 1,843.58	EARNED MECH. HOURS: 697.77	MECH. PERCENT COMPLE... 37.849%	TESTING HOURS: 16,598.27	EARNED TESTING HOURS: 6.62	TESTING PERCENT COMPLE... 0.040%	TOTAL HOURS: 18,441.85	TOTAL HOURS EARNED: 697.77	TOTAL PERCENT COMPLETE: 3.819%
P1250	0	11.54	5.11	44.263%	103.94	0.00	0.000%	115.48	5.11	4.426%
P1260	0	1,243.70	532.64	42.827%	11,193.73	0.92	0.008%	12,437.43	533.56	4.29%
P1270	0	474.92	8.48	1.787%	4,274.33	0.00	0.000%	4,749.25	8.48	0.178%
P1280	0	12.42	1.60	12.877%	117.47	0.00	0.000%	129.89	1.60	1.231%
P1290	0	4.43	0.00	0%	39.92	0.00	0.000%	44.35	0.00	0%
P1300	0	13.98	0.00	0%	125.87	0.00	0.000%	139.85	0.00	0%
P1330	0	13.98	0.00	0%	125.87	0.00	0.000%	139.85	0.00	0%
P1390	0	13.98	0.00	0%	125.87	0.00	0.000%	139.85	0.00	0%
P1420	0	2.22	0.00	0%	20.05	0.00	0.000%	22.27	0.00	0%
P1450	0	13.98	76.66	548.133%	125.87	2.84	2.256%	139.85	79.50	56.85%
P1480	0	13.98	73.26	523.873%	125.87	2.84	2.256%	139.85	76.10	54.424%
P1510	0	2.80	0.00	0%	25.25	0.00	0.000%	28.05	0.00	0%
P1540	0	13.98	0.00	0%	125.87	0.00	0.000%	139.85	0.00	0%
P1570	0	7.59	0.00	0%	68.31	0.00	0.000%	75.90	0.00	0%

The progress screen will then show a report that contains the same information as a pivot table that you'd create in Excel.

What if I need to edit the tracking chart after it's already in the database?

For a large revision that includes a significant amount of new scope, you'll go to your original tracker, make the changes there, and re-import it.

WHAT IF I NEED TO MAKE EDITS TO THE PROGRESS DATA?

You can do that in the CLASSIC TRACKER. The tutorial “TRACKERS” covers this in detail.

How is rework handled?

You may receive an activity that has the "REWORK" box checked. We cannot claim hours for rework, but we do want to track it.

Handle rework items exactly as you would any other activity by assigning it to the correct entry in the tracker. Note that in the case of rework, it doesn't matter if there are any hours remaining (in fact this might often be the case.)

Remember: with rework, we are not assigning hours to progress. It's just a matter of matching up to the correct item in the tracker.

HOW DO I GET TO FULL SCREEN VIEW?

Press F11.

CAN I VIEW THE APP IN DUAL SCREEN MODE?

Yes and no. You can have two monitors open on two separate pages, for example, you can be in the project services review page and the tracker at the same time. But you can't move things between the pages (not that you would even want to …)

To use dual screen mode:

1. Open a second web browser, and slide it over to your 2nd monitor.
2. Now sign in again on the second browser.
3. Navigate to any page you like.

TROUBLESHOOTING

I CAN'T CHANGE MY JOB NUMBER IN THE WEB APP.

You can only change your job number from the HOME tab.

Click on the HOME tab first. From here, you can change job numbers.

WHAT WEB BROWSER SHOULD I USE?

Google Chrome.

The PSA has been tested for functionality in Internet Explorer, Mozilla Firefox, OSX Safari, and Google Chrome. However, it's impractical to test every browser with every release. We use google chrome and can confirm that all functions work in chrome, therefore we recommend using Google Chrome.

You may use any browser that works for you, but if you have a browser related issue, the first trouble shooting step will be to switch to Chrome.

If you have trouble installing Chrome due to administrative privileges, contact IT.

On the mobile app, I see "XXXXX" where I should see data

A change on the back end is the most likely culprit. Log out of the mobile app, and login as a "New User" to refresh your information.