STRATUS | CM

CONSTRUCTION MANAGEMENT WEB APPLICATION

USE CASES

Updated: November 17, 2015

Intent:

This set of use cases along with the Stratus CM wire frames are meant to be used together in order to provide a general functionality and layout to the Programmer. It should be anticipated that further discussions between the Programmer and Stratus CM team (Lance Laven | Philip Shehadeh) will be required to convey intent which may not be covered in the Use Cases ("UC") and Wire Frames ("WF").

About the Wire Frames:

The background of the WF slides have been color coded to help identify to the Programmer who the user is at each slide.

Blue	Owner / Construction Manager
Red	Contractor
Orange	Designer (Engineer)
White	Summary / Log page viewable by all parties

Red text within red and white boxes are instructions/directions/notes for the Programmer to help convey functionality.

Purple text are notes for further considerations by the Stratus CM team. Where such notes are present, the Programmer should plan on following up with the Stratus CM team to confirm whether or not additional functionality should be considered prior to starting this section, or if said notes will be a feature added at a later stage.

List of Use Cases:

1.a	User Registers for Account
1.b	User Logs In
1.c	User forgets username
1.d	User forgets password
1.e	User selects existing project
1.f	User creates new project
2.	User views specific project dashboard page / User can select any item from here
2.b.1	User creates project description
2.b.2.1	User views project contacts summary
2.b.2.2	User creates project contacts
2.b.3	User uploads project standards & specifications
2.b.4	User uploads geotechnical reports

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2.b.5	User uploads SWPPP/WPCP
2.b.6	User uploads bid documents
2.b.7	User enters/confirms contract items
2.b.8.a	User creates Notice of Award
2.b.8.b	User uploads Notice of Award
2.b.9	User uploads contractor's Certificate(s) of Insurance
2.b.10	User Creates/Uploads Contract
2.b.11	User uploads contractor's bonds
2.b.12.a	User creates Notice to Proceed
2.b.12.b	User uploads Notice to Proceed
2.b.13.a	User creates Preconstruction Meeting documents
2.b.13.a.1	User uploads preconstruction meeting minutes
2.b.13.b	User uploads Preconstruction Meeting documents
2.b.14	User views Submittal Log Page
2.b.14.1	User grants access to Contractor's Project Manager to upload submittals (esign setup)
	Define Contractors submittal and resubmittal use cases
2.b.14.2	User grants access to Engineer to Review & Approval Submittals (esign setup)
	Define Engineers use case
2.b.15	User views Request for Information (RFI) Summary Page
2.b.15.1	User grants access to Contractor's Project Manager to upload / create RFIs (esign setup)
	Define Contractors RFI use cases
2.b.15.2	User grants access to Engineer to Review & Respond to RFIs (esign setup)
	Define Engineers use case
2.b.16	User views Survey Log
2.b.16.1	User grants access to Contractor's Project Manager to create Survey Requests (esign)
	Define Contractors Survey use case
2.b.16.2	User grants access to Survey to receive survey requests and upload cut sheets (esign)
2.b.17	User views Underground Service Alert (USA) Page
2.b.17.1	User grants access to Contractor's Project Manager to enter USA ticket numbers

Define Contractors USA use case

2.b.18.1 User views Daily Construction Management Report Summary

2.b.19.2 User creates Daily Construction Management Report

2.b.19.1 User views Test Results Summary

2.b.19.2 User creates new test result

2.b.20.1 User views Weekly Statement of Contract Days Summary

2.b.20.2 User creates Weekly Statement of Contract Days

2.b.21 User views Payment Quantity Verification Page (ability to Print/Export)

2.b.22 User views Draft Payment Application page (adjustments made here, forwarded to contractor for acceptance).

XXXXX POTENTIAL IMPACTS PAGE

XXXXX DESIGNER DASHBOARD

XXXXX CONTRACTOR DASHBOARD

XXXXX OWNER DASHBOARD

XXXXX SURVEYOR DASHBOARD

Use Case 1.a User Registers for Account

1. Brief Description
    a. This use case describes how a user registers for an account.
2. Actors
    a. Anyone
3. Preconditions
    a. User's Email is not currently associated with an account
        i. If User's email is associated with an account System will notify User that they are unable to register for another account with provided email
4. Basic Flow of Events
    a. User goes to website home page
    b. User clicks "register for account" or "signup" (button language to be determined)
    c. User enters info into required fields (First Name, Last Name, Company Name, Email Address, username, and password) and optional fields (phone number)
    d. User submits
    e. System sends verification email to user's email address
    f. User opens email and clicks "verify" button
    g. User is routed to account dashboard page and notified that their account is now active
5. Alternate Flows
    a. User does not verify account through email
        i. System notifies user that their account has not yet been verified and is not active after XX hours. Notice is provided via email and when user attempts to login in with previously entered username and password. Notice includes customer service email address and phone number.
6. Post Conditions
    a. Successful Verification
        i. User is permitted to begin using the system
    b. Incomplete Verification
        i. User receives an email once per day for X days until account is verified. If user fails to verify account within X days system will unassociated email address with account

Use Case 1.b User Log In

1. Brief Description
   a. This use case lets anyone with an account log in.
2. Actors
   a. Anyone that has a registered account.
3. Preconditions
   a. User must successfully register to make an account.
4. Basic Flow of Events
   a. User goes to website home page
   b. User enters in username
   c. User in password.
   d. User clicks “sign in”
   e. System verifies the username and password is registered to an account.
   f. User is allowed to access account and routed to the account dashboard.
5. Alternate Flows
   a. User password and username are incorrect.
      i. System notifies user that their username and password are incorrect.
6. Post Conditions
   a. Successful log in
      i. User is permitted to begin using the system

<u>Use Case 1.c User Forgets Username</u>

1. Brief Description
   a. This use case is if user forgets username.
2. Actors
   a. Anyone that has a registered account.
3. Preconditions
   a. User must have an active/verified account.
4. Basic Flow of Events
   a. User goes to website home page
   b. User enters in username
   c. User enters in password.
   d. User clicks “sign in”
   e. System notifies user username or password is incorrect or user does not do steps 4.b and 4.c above and instead clicks “Forgot Username”
   f. System requires all of the following:
      i. User to enter recovery email address OR User to enter recovery phone number
      ii. User to enter name on account (First and Last)
      iii. Click “I’m not a robot” reCAPTCHA
   g. User submits required information
   h. User is routed to page stating “The email address xxxxx@email.com (or The phone number (XXX) XXX-XXXX; depending on what is entered above) is an existing account. Try signing in with this username (where signing in is a hyperlink and username is not actually provided).
   i. After clicking link user is allowed to enter password.
   j. If entered correctly user is shown username.
5. Alternate flow
   a. User does not enter correct password.
      i. User is able to click forgot password (See Use Case 1.d)
6. Post Condition
   a. User is permitting to begin using the system.

Use Case 1.d User Forgets Password

1. Brief Description
    a. This use case is if user forgets password.
2. Actors
    a. Anyone that has a registered account.
3. Preconditions
    a. User must have an active/verified account.
4. Basic Flow of Events
    a. User goes to website home page
    b. User enters in username
    c. User enters in password.
    d. User clicks "sign in"
    e. System notifies user username or password is incorrect or user does not do steps 4.b and 4.c above and instead clicks "Forgot Password"
    f. System requests email address associated with account
    g. User enters email address
    h. System sends recovery password to email address associated with account
    i. User is required to click link within email and enter password after being rerouted to the signin page
5. Alternate flow
    a. After receiving recovery password user does not click on link to signin page within the system generated email. Instead user opens webpage and signs in with recovery password.
6. Post Condition
    a. User is required to reset password.
        i. User is permitting to begin using the system.

Use Case 1.e User Selects Existing Project

1. Brief Description
   a. This use case allows user to enter into an existing project
2. Actors
   a. Anyone that has a registered account (CM / Owner)
3. Preconditions
   a. User must be logged in to their account (and have EDITING PRIVILEGES)
4. Basic Flow of Events
   a. User has successfully logged in to account
   b. User is viewing dashboard of projects with overall statuses
   c. User Clicks on Any Project
5. Alternate flow
   a. Not Applicable
6. Post Condition
   a. User is taken to specific project dashboard (different than dashboard of projects)

Use Case 1.f User Creates New Project

1. Brief Description
    a. This use case allows user to create a new project
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account (and have EDITING PRIVILEGES)
4. Basic Flow of Events
    a. User has successfully logged in to account
    b. User is viewing dashboard of projects with overall statuses
    c. User Clicks on (+) symbol to add new project ("Add New Project" appears when hovering mouse over (+) symbol)
5. Alternate flow
    a. Not Applicable
6. Post Condition
    a. User is taken to specific project dashboard (different than dashboard of projects)

<u>Use Case 2 User views specific project dashboard page</u>

1. Brief Description
    a. This use case allows user to view specific project dashboard page
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing project or clicked to create new project
4. Basic Flow of Events
    a. User is viewing project specific dashboard and may click on any of the headings to either view the information within the heading (and see why the status percentage is what it is), or add and edit the information within the heading.
        i. Examples of headings: Project Description, Contacts, Standards & Specifications, Soil Report, Etc.
5. Alternate flow
    a. User can logout
    b. User can “go back to all projects”
    c. User can go to “Account Profile” (depending on level of access, user may make changes to account profile)
6. Post Condition
    a. User is taken to the page for whichever heading section they click

Use Case 2.b.1 User creates project description

1. Brief Description
   a. This use case describes how a user goes about entering/editing/viewing a project description
2. Actors
   a. Anyone that has a registered account
3. Preconditions
   a. User must be logged in to their account
   b. User must have clicked on existing project (works for editing exiting project description ONLY as creation of a project description is the first required step to "create new project"), or clicked "create new project"
4. Basic Flow of Events
   a. User can enter Project Number
   b. User can enter project name
   c. User can enter project location (address, closes major intersection, or eventual option drop pin on map for coordinates)
   d. User can select type of improvement from drop down menu (drop down menu options controlled with dashboard on backend)
   e. User can add additional improvements
   f. Heading status is updated as information for fields 4.a thru 4.d above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
   a. User can perform basic flow of events 4.a thru 4.d above in any order.
6. Post Condition
   a. Entered data for 4.a thru 4.d above is saved
   b. User may perform any of the following:
      i. User can logout
      ii. User can "go back to all projects"
      iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
      iv. User can click "next" which will take user to project contacts page

Use Case 2.b.2.1 User creates project contacts

1. Brief Description
    a. This use case describes how a user goes about entering/editing/viewing project contacts
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on “Contacts”
4. Basic Flow of Events
    a. User views screen with minimum required contact classes
        i. Owner
        ii. Contractor
        iii. Designer (Engineer or Architect who will be responsible for reviewing/responding/approving RFIs and Submittals
    b. User can enter information for any one of these three contacts in any order
        i. Minimum required information per contact is:
            1. Type (User selects from dropdown list; dropdown list options controlled by with dashboard on backend, which will be a different list per contact class)
            2. Company
            3. Address
            4. Contact (First & Last Name)
            5. Contact’s Position/Title
            6. Contact’s Email
            7. Phone Number
        ii. Option to Add Phone and Add Email buttons
        iii. Option to add another contact for each class (Owner, Contractor, Designer)
        iv. User must click “create contact” to save entered data
    c. User can click “Add Custom Contact”
        i. Allows User to define class and opens up ability to add information 4.b.i and 4.b.ii above
    d. Heading status is updated as information for fields 4.b.i thru 4.b.ii above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of 3 classes of contacts (Owner, Contractor, Designer; 7 fields per each (type, company, address, contact, position/title, email, phone number). Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. User can perform basic flow of events above in any order.
    b. If Contacts information has already been entered user may print contacts or export list to PDF or Excel
6. Post Condition

a. Entered data above is saved and stored in an available project contact lists, company contact list, and global backend list.
b. Email invites are sent to each of the required contacts with unique temporary passwords (emails become usernames).
   i. Owners will be given access to view Owner Related Pages
   ii. Contractors will be given access to <u>view</u> Contractor <u>Related</u> Pages and <u>Enter/Edit</u> Contractor <u>Controlled</u> Pages (DISCUSS WITH TEAM: Is contractor required to be pay at this point? What happens if contractor is already a user of the software on other projects where he has been invited by the CM? What happens if Contractor is already a user of the Contractor Version / how does this interface with the CM invite version?)
   iii. Designers will be given access to <u>view</u> Designer <u>Related</u> <u>Pages</u> <u>and</u> <u>Enter/Edit</u> Designer <u>Controlled</u> Pages (DISCUSS WITH TEAM: Is Designer required to be pay at this point? What happens if Designer is already a user of the software on other projects where he has been invited by the CM? What happens if Designer is already a user of the <u>Designer Version</u> / how does this interface with the CM invite version?)
c. User may perform any of the following:
   i. User can logout
   ii. User can "go back to all projects"
   iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
   iv. User can click "next" which will take user to project standards and specifications page

<u>**Use Case 2.b.3 User uploads project standards & specifications**</u>

1. Brief Description
    a. This use case describes how a user goes about entering/editing/viewing/uploading information associated with project standards & specifications
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "Standards & Specifications"
4. Basic Flow of Events
    a. User views screen with minimum required Standards and Specifications classes
        i. Standards
        ii. Specifications
    b. User can enter information for either of these two classes in any order
        i. Minimum required information per class is:
            1. Agency Name
            2. Standards Name / Specification Name
            3. Standards Date / Specification Name
        ii. Option to add url for standards available online
        iii. Option to click "Not Applicable" OVERRIDES minimum required fields entry
        iv. User Clicks "Upload Standard" or "Upload Specification"
    c. User can click "Add Another Standard" or "Add Another Specification"
    d. Heading status is updated as information for fields 4.b.i thru 4.b.iv above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of 2 classes of contacts (Standards, Specifications; 3 required fields per each (Agency Name, Standard/Spec Name, Standard/Spec Date). Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. User can perform basic flow of events above in any order.
    b. If Standards & Specs information has already been entered user may print View Documents, Print Documents, and Share Documents
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. Entered data above is saved and stored in project standards & specs page, company library of standards and specifications, and global backend library of standards and specifications.
    b. User may perform any of the following:
        i. User can logout

ii. User can “go back to all projects”
iii. User can go to “Account Profile” (depending on level of access, user may make changes to account profile)
iv. User can click “next” which will take user to project geotechnical reports page

Use Case 2.b.4 User uploads geotechnical reports

1. Brief Description
    a. This use case describes how a user goes about entering/editing/viewing/uploading information associated with project geotechnical reports
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "Geotechnical Reports"
4. Basic Flow of Events
    a. User views screen with minimum required fields for One Geotechnical Report
    b. User can enter information into required fields in any order
        i. Minimum required information per class is:
            1. Date of Report
            2. Name of Report
            3. Firm that Created Report (Autofill if Geotechnical Firm was entered into contacts, but allow for override/manual entry; if Firm was not previously entered into contacts then add to contact listing and require additional contact fields to be entered)
        ii. Option to Click "Not Applicable" OVERRIDES minimum required fields entry
        iii. Option to click "Not Available" PROMPTS owner to provide (DEFINE HOW) and displays Disclaimer/Warning regarding risks associated in proceeding without soils report (DEFINE)
        iv. User Clicks "Upload Geotechnical Report"
    c. User can click "Add Another"
    d. Heading status is updated as information for fields 4.b.i thru 4.b.iii above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of 1 geotechnical report; 3 required fields per each (Date, Name, Firm that generated). Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. User can perform basic flow of events above in any order.
    b. If Geotechnical Report information has already been entered user may print View Documents, Print Documents, and Share Documents
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. Entered data above is saved and stored in Geotechnical Reports page, company library of geotechnical reports, and global backend library of geotechnical reports.
    b. User may perform any of the following:

i. User can logout
ii. User can “go back to all projects”
iii. User can go to “Account Profile” (depending on level of access, user may make changes to account profile)
iv. User can click “next” which will take user to project SWPPP/WPCP page

Use Case 2.b.5 User uploads SWPPP/WPCP

1. Brief Description
    a. This use case describes how a user goes about entering/editing/viewing/uploading information associated with project SWPPP/WPCP (Storm Water Pollution Prevention / Water Pollution Control Plans)
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "SWPPP/WPCP"
4. Basic Flow of Events
    a. User views screen with minimum required fields for One SWPPP/WPCP
    b. User can enter information into required fields in any order
        i. Minimum required information per SWPPP/WPCP is:
            1. Select if Document is SWPPP or WPCP using dropdown list
            2. Date of SWPPP / Date of WPCP
            3. Name of SWPPP / Name of WPCP
            4. Firm that Created SWPPP / Firm that Created WPCP (Autofill if SWPPP/WPCP Firm was entered into contacts, but allow for override/manual entry; if Firm was not previously entered into contacts then add to contact listing and require additional contact fields to be entered)
        ii. Option to Click "Not Applicable" OVERRIDES minimum required fields entry
        iii. Option to click "Not Available" PROMPTS owner to provide (DEFINE HOW) and displays Disclaimer/Warning regarding risks associated in proceeding without SWPPP / WPCP (DEFINE)
        iv. User Clicks "Upload SWPPP" / "Upload WPCP"
    c. User can click "Add Another"
    d. Heading status is updated as information for fields 4.b above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of 1 SWPPP / WPCP report; 4 required fields per each (Type (SWPPP or WPCP), Date, Name, Firm that generated). Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. User can perform basic flow of events above in any order.
    b. If SWPPP/WPCP information has already been entered user may print View Documents, Print Documents, and Share Documents
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition

a. Entered data above is saved and stored in SWPPP/WPCP page, company library of SWPPP/WPCP reports, and global backend library of SWPPP/WPCP reports.
b. User may perform any of the following:
    i. User can logout
    ii. User can "go back to all projects"
    iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
    iv. User can click "next" which will take user to project SWPPP/WPCP page

Use Case 2.b.6 User uploads Bid Documents

1. Brief Description
    a. This use case describes how a user goes about entering/editing/viewing/uploading information associated with project Bid Documents
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on “Bid Documents”
4. Basic Flow of Events
    a. User views screen with required fields for One Bid
    b. User can enter information into required fields in any order
        i. Minimum required information per Bid is:
            1. Type of Improvement (Autofill with Project Name from Project Description Page; allow for override)
            2. Lead Agency (Autofill with Agency Name from Standards and Specs Page; allow for override)
            3. Bid Advertisement Date (DEFINE how info will later be used to set wage determination for prevailing wages for labor compliance)
                a. User may click “Not Applicable” (OVERRIDES minimum required fields entry)– Disclaimer displayed and sent to owner notifying importance of tracking bid advertisement date for public bids
            4. Notice Inviting Bids Date
                a. User may click “Not Applicable” (OVERRIDES minimum required fields entry)
            5. Date of Bid Opening
            6. Number of Addenda Issued (user must select # from dropdown list beginning with 0)
                a. User must entered issuance date for each addenda
                b. User must attach/upload each addenda
            7. If Advertisement Date is entered then user must upload copies of all bid advertisements (AS PUBLISHED or PROOF OF PUBLICATION??????)
            8. If Notice Inviting Bids Date is entered above then user must upload copies of all notices inviting bids
            9. Detailed Bid Results by Item
                a. User may upload Bid Results / Bid Analysis / Bid Spread which is a comparison of all bids
                b. User may create bid analysis / bid spread (DEFINE / ADD FEATURE LATER)
            10. ~~Low~~ Successful Bidder’s Name (Autofill Contractor’s Company Name NO ABILITY TO OVERRIDE)
            11. Upload Successful Bidder’s proposal
            12. Enter Successful Bidder’s Total Bid Price

c. Heading status is updated as information for fields 4.b above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering all above required information; 8 required fields for data entry (Type of Improvement, Lead Agency, Bid Advertisement Date, Notice Inviting Bids Date, Date o Bid Opening, Addenda, Successful Bidder's Company Name, Successful Bidder's Total Bid Price) and 5 required uploads (Addenda, Advertisement for Bids, Notice Inviting Bids, Detailed Bid Results, Successful Bidders proposal). Percent value also feeds to appropriate section within specific project dashboard.

5. Alternate flow
   a. User can perform basic flow of events above in any order.
   b. If Bid Documents information has already been entered user may print View Documents, Print Documents, and Share Documents
      i. Sharing allows user to:
         1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
         2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
   a. Entered data above is saved and stored in Bid Docs page, company library of Bid Docs, and global backend library of Bid Documents.
   b. User may perform any of the following:
      i. User can logout
      ii. User can "go back to all projects"
      iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
      iv. User can click "next" which will take user to project Contract Items page (Bid Items Page)

Use Case 2.b.7 User Enters/Confirms Contract Items

1. Brief Description
   a. This use case describes how a user goes about entering/editing/viewing information associated with project Contract Items
2. Actors
   a. Anyone that has a registered account (CM / Owner)
3. Preconditions
   a. User must be logged in to their account
   b. User must have clicked on existing specific project dashboard and clicked on "Contract Items"
4. Basic Flow of Events
   a. User is required to enter number of bid items
   b. Upon entering number of bid items user is required to enter an item description, unit of measurement, quantity, and unit price for each item
      i. System Generates Extended Price (Quantity multiplied by Unit Price)
      ii. System Generates Bid Item numbers (System allows for manual override to allow system generated item numbers to match those of actual bid)
      iii. System generates total contract amount
      iv. User clicks button to "Save" or "Complete"
         1. "Save" allows user to complete remaining data entry later
         2. "Complete" prompts system to crosschecks total contract amount against Successful Bidder's Total Bid Price in Bid Documents Page
            a. If Different ???????????
   c. Heading status is updated as information for fields 4.b above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering required information (item description, unit of measurement, quantity, and unit price) for all bid items. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
   a. User can perform basic flow of events above in any order.
   b. If Contract Items Information has already been entered and confirmed user may View, Print, and Share
      i. Sharing allows user to:
         1. Enter email address of party they wish to share document thru system generated email OR
         2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
   a. Entered data above is saved and stored in Contract Items page, company library of Contract Items, and global backend library of Contract Items.
      i. Later - CONSIDER EXPORT TO ACCOUNTING SOFTWARE SDK/API
   b. User may perform any of the following:
      i. User can logout
      ii. User can "go back to all projects"

iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
iv. User can click "next" which will take user to project Notice of Award Page

Use Case 2.b.8 User uploads/creates Notice of Award

1. Brief Description
    a. This use case describes how a user goes about entering/editing/viewing/uploading information associated with project Notice of Award
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "Notice of Award"
4. Basic Flow of Events
    a. User answers Question: Would you like to create a notice of award or has one already been created (USER SELECTS ONE)
        i. User clicks "Create Notice of Award"
            1. User enters Contractor's Name (Autofill from contacts with ability to override)
            2. User enters Contract Amount (Autofill from Contract Total in Contract Items Page)
            3. User Enters Notice of Award Date
            4. User Clicks "Create Notice of Award"
                a. Notice is generated and emailed sent to Owner prompting/linking Owner to Electronically Sign Notice of Award within System (Verify Laws Governing Electronic Signatures)
                    i. After Owner Electronically signs Notice of Award System prompts Contractor to E-Sign/Accept
        ii. User clicks "Already have Notice of Award"
            1. User clicks "Upload Notice of Award"
    b. Heading status is updated as information for fields 4.a above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of all required fields including completion of e-signatures for Notices of Award created within system. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. If Notice of Award information has already been entered user may print View Document, Print Document, and Share Document
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. Entered data above is saved and stored in Notice of Award page, company library of NOIs, and global backend library of NOIs reports.
    b. User may perform any of the following:

i. User can logout
ii. User can "go back to all projects"
iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
iv. User can click "next" which will take user to project Certificate of Insurance (COI) page

Use Case 2.b.9 User uploads Contractor's Certificate(s) of Insurance

1. Brief Description
    a. This use case describes how a user goes about entering/editing/viewing/uploading information associated with project Certificate of Insurance
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "Certificates of Insurance"
4. Basic Flow of Events
    a. User Enters General Liability Information
        i. User enters General Liability Limit
        ii. Does this meet contract required minimum
            1. User clicks "yes"
            2. User clicks "no"
                a. System prompts Contractor and Owner
        iii. User enters Expiration Date
        iv. User clicks "Upload General Liability Certificate"
            1. Alternatively User may click "Not Included" (Define Disclaimer / Warning)
    b. User enters Works Compensation Information
        i. User enters Workers Comp Limit
        ii. Does this meet contract required minimum
            1. User clicks "yes"
            2. User clicks "no"
                a. System prompts Contractor and Owner
        iii. User enters Expiration Date
        iv. User clicks "upload Workers Compensation Certificate"
            1. Alternatively User may click "Included in General Liability Certificate" **OR**
            2. User may click "Not Included" (Define Disclaimer / Warning)
    c. User enter Auto Liability Info
        i. User enters Auto Liability Limit
        ii. Does this meet contract required minimum
            1. User clicks "yes"
            2. User clicks "no"
        iii. User enters Auto Liability Expiration Date
        iv. User clicks "upload Auto Certificate"
            1. Alternatively User may click "Included in General Liability Certificate" **OR**
            2. User may click "Not Included" (Define Disclaimer / Warning)
    d. User can click "Add Another Certificate" to add custom Cert Requirements

e. Heading status is updated as information for fields 4 above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of all required fields including completion of upload of all required certificates. Percent value also feeds to appropriate section within specific project dashboard.

5. Alternate flow
    a. If Insurance Certificate information has already been entered user may View Documents, Print Documents, and Share Documents
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. Entered data above is saved and stored in Certificates of Insurance page, company library of COIs, and global backend library of COIs.
    b. User may perform any of the following:
        i. User can logout
        ii. User can "go back to all projects"
        iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
        iv. User can click "next" which will take user to project Contractor's Bonds page

Use Case 2.b.10 User uploads Contractor's Bonds

1. Brief Description
    a. This use case describes how a user goes about entering/editing/viewing/uploading information associated with project Contractors Bond
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "Contractors Bonds"
4. Basic Flow of Events
    a. User is asked if the following bonds are required and must check boxes for all that apply
        i. Performance Bond
            1. User checks "Performance Bond"
                a. User must enter Amount of Performance Bond (autofill contract amount with ability to override)
                b. User must enter Date of Executed Bond
                c. User must enter Bond Number
                d. User is asked if all required signatures fields are signed by authorized representatives and notarized
                    i. User Checks "yes" or "No"
                        1. If No system prompts Owner & Contractor
                e. User clicks "Upload Performance Bond"
        ii. Payment Bond
            1. User checks "Payment Bond"
                a. User must enter Amount of Payment Bond (autofill contract amount with ability to override)
                b. User must enter Date of Executed Bond
                c. User must enter Bond Number
                d. User is asked if all required signatures fields are signed by authorized representatives and notarized
                    i. User Checks "yes" or "No"
                        1. If No system prompts Owner & Contractor
                e. User clicks "Upload Payment Bond"
        iii. Maintenance Bond
            1. User checks "Maintenance Bond"
                a. User must enter Amount of Maintenance Bond (autofill contract amount with ability to override)
                b. User must enter Date of Executed Bond
                c. User must enter Bond Number
                d. User is asked if all required signatures fields are signed by authorized representatives and notarized
                    i. User Checks "yes" or "No"
                        1. If No system prompts Owner & Contractor

        e. User clicks “Upload Maintenance Bond”

   b. Heading status is updated as information for fields 4.a above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of all required fields including completion of upload of all required certificates. Percent value also feeds to appropriate section within specific project dashboard.

5. Alternate flow
   a. If Contractor Bond information has already been entered user may View Documents, Print Documents, and Share Documents
      i. Sharing allows user to:
         1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
         2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
   a. Entered data above is saved and stored in Contractor Bonds page, company library of Contractor Bonds, and global backend library of Contractor Bonds.
   b. User may perform any of the following:
      i. User can logout
      ii. User can “go back to all projects”
      iii. User can go to “Account Profile” (depending on level of access, user may make changes to account profile)
      iv. User can click “next” which will take user to project Contractor’s Bonds page

Use Case 2.b.11 User uploads/creates Contract

1. Brief Description
   a. This use case describes how a user goes about entering/editing/viewing/uploading information associated with project Contract
2. Actors
   a. Anyone that has a registered account (CM / Owner)
3. Preconditions
   a. User must be logged in to their account
   b. User must have clicked on existing specific project dashboard and clicked on "Contract"
4. Basic Flow of Events
   a. User answers Question: Would you like to create a contract or has one already been created (USER SELECTS ONE)
      i. User clicks "Create Contract"
         1. User enters Contractor's Name (Autofill from contacts with ability to override)
         2. User enters Contract Amount (Autofill from Contract Total in Contract Items Page)
         3. User enters Date of Contract (Autofill with today's date; allow for override)
         4. User clicks "Create Contract"
            a. Notice is generated and email sent to Owner prompting/linking Owner to Electronically Review and Sign Contract within System (Verify Laws Governing Electronic Signatures)
               i. After Owner Electronically signs Contract System prompts Contractor to E-Sign
      ii. User clicks "Already have Contract"
         1. User clicks "Upload Contract"
   b. Heading status is updated as information for fields 4.a above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of all required fields including completion of e-signatures for Notices of Award created within system. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
   a. If Contract information has already been entered user may print View Document, Print Document, and Share Document
      i. Sharing allows user to:
         1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
         2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
   a. Entered data above is saved and stored in Contract page, company library of Contracts, and global backend library of Contracts.
   b. User may perform any of the following:

i. User can logout
ii. User can "go back to all projects"
iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
iv. User can click "next" which will take user to project Notice to Proceed page

Use Case 2.b.12 User uploads/creates Notice to Proceed

1. Brief Description
    a. This use case describes how a user goes about entering/editing/viewing/uploading information associated with project Notice to Proceed
2. Actors
    a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "Notice to Proceed"
4. Basic Flow of Events
    a. User answers Question: Would you like to create a Notice to Proceed or has one already been created (USER SELECTS ONE)
        i. User clicks "Create Notice to Proceed"
            1. User enters Date of Notice (Autofill today's date with ability to override)
            2. User enters Start Date (Autofill today's date with ability to override)
            3. User enters Duration of Contract in days
            4. User clicks "Calendar Days" or "Working Days"
                a. DEFINE USE FOR Tracking Time
            5. User enters Liquidated Dames in $ per day
            6. User clicks "Create Notice to Proceed"
                a. Notice is generated and email sent to Owner prompting/linking Owner to Electronically Review and Sign NTP within System (Verify Laws Governing Electronic Signatures)
                    i. After Owner Electronically signs NTP System prompts Contractor to E-Sign
        ii. User clicks "Already have Notice to Proceed"
            1. User clicks "Upload Notice to Proceed"
        iii. User clicks "Add Revised Notice to Proceed"
            1. System Allows user to add revised notice to proceed and repeats 4.a above
    b. Heading status is updated as information for fields 4.a above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of all required fields including completion of e-signatures for Notices of Award created within system. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. If Notice to Proceed information has already been entered user may print View Document, Print Document, and Share Document
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email OR
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User

6. Post Condition
    a. Entered data above is saved and stored in NTP page, company library of NTPs, and global backend library of NTP.
    b. User may perform any of the following:
        i. User can logout
        ii. User can "go back to all projects"
        iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
        iv. User can click "next" which will take user to project Preconstruction Meeting page

<u>Use Case 2.b.13 User Create and Upload Preconstruction Meeting Documents</u>

1. Brief Description
    - a. This use case describes how a user goes about entering/editing/viewing/uploading information associated with project Preconstruction Meeting
2. Actors
    - a. Anyone that has a registered account (CM / Owner)
3. Preconditions
    - a. User must be logged in to their account
    - b. User must have clicked on existing specific project dashboard and clicked on "Preconstruction Meeting"
4. Basic Flow of Events
    - a. User enters Date of Preconstruction Meeting
    - b. User Enters Project Description (Autofill project name from Project Description Page with ability to override)
    - c. User enters Special Considerations
    - d. User may click "Add Another" to enter additional Special Considerations
    - e. Information provided from 4.a thru 4.d above is fed into form fields within the following documents
        - i. Agenda
        - ii. Sign-In Sheet
        - iii. Meeting Minutes
    - f. User can click "create Agenda" and "Create Sign-In Sheet"
        - i. Agenda is saved to project Preconstruction Meeting Page
        - ii. User may print Agenda and Sign-in Sheet
    - g. User can click "upload sign-in sheet" following meeting
        - i. Sign-in sheet is saved to project Preconstruction Meeting Page
    - h. User can click "enter meeting minutes"
        - i. System opens blank meeting minutes document for user to enter meeting notes
            1. User clicks "Meeting Minutes Complete"
                - a. Notice is generated and emailed to all parties involved that preconstruction meeting minutes have been completed and are available. (Include language that if not contested within XX days then all parties agree to the information therein)
    - i. Heading status is updated as information for fields 4 above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of all required fields including completion of e-signatures for Notices of Award created within system. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    - a. If Preconstruction Meeting information has already been entered user may print View Document, Print Document, and Share Document
        - i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>

2. Generate a link where document is stored to be copied and pasted into email sent directly from User

6. Post Condition
    a. Entered data above is saved and stored in Preconstruction Meeting page, company library of Preconstruction Meetings, and global backend library of Preconstruction Meetings.
    b. User may perform any of the following:
        i. User can logout
        ii. User can "go back to all projects"
        iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
        iv. User can click "next" which will take user to project Submittal Log page

Use Case 2.b.14 User Views Submittal Log Page

1. Brief Description
    a. This use case describes how a user goes about viewing the project Submittal Log Page
2. Actors
    a. Anyone that has a registered account (CM / Owner, Contractor, Designer)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "Submittal Log"
4. Basic Flow of Events
    a. User Views Submittal which includes the following fields for each submittal:
        i. Submittal Number (Generated by System when Contractor creates a Submittal)
        ii. Description (Entered by Contractor when Contractor Creates a Submittal)
        iii. Date of Submittal (Generated by System when Contractor Creates a Submittal)
        iv. Date Submittal Returned by Reviewer (Generated by System on Date Reviewing Party (Most Likely Designer) Completed Review)
        v. A check mark for any one of the following Current Submittal Review State (As selected by Reviewer)
            1. No Exceptions
            2. Make Corrections Noted
            3. Revise & Resubmit
            4. Rejected
        vi. Status (which provides the following options for all submittals with a current state that does not match 4.a.v.1 (No Exceptions) above:
            1. Resubmittal Below (Font will display in Yellow)
            2. Expedite Review Requested (Font will display in Red)
            3. Past Due (Font will display in BOLD RED)
        vii. Responsible Party
            1. System will list responsible party which will depend on state of submittal from 4.a.v above
                a. If "Make Corrections Noted" responsible party will be contractor
                    i. If contractor does not resubmit or respond within in XX days then Status will show as Past Due
                b. If "Revise & Resubmit" responsible party will be contractor
                    i. If contractor does not resubmit or respond within in XX days then Status will show as Past Due
                c. If "Rejected" responsible party will be contractor
                    i. If contractor does not resubmit or respond within in XX days then Status will show as Past Due
                d. If NO review states are checked then responsible party will be Designer or CM/Owner defined Alternate Reviewer
                    i. If Reviewing Party hasn't completed review of submittal within XX days then Status will show as Past Due

b. Heading status is updated as information for fields 4 above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of all required fields including completion of e-signatures for Notices of Award created within system. Percent value also feeds to appropriate section within specific project dashboard.

5. Alternate flow
    a. User may View, Print, and/or Share Log
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email OR
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. User may perform any of the following:
        i. User can logout
        ii. User can "go back to all projects"
        iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)
        iv. User can click "next" which will take user to project Request for Information (RFI) Log page

Use Case 2.b.14.1 Contractor's Submittal Page

1. Brief Description
    a. This use case describes how a CONTRACTOR user goes about entering/editing/viewing/uploading information associated with project Contractor Submittals page
2. Actors
    a. Anyone Registered as Contractor for the project
3. Preconditions
    a. User must have received an invitation from the CM/Owner and registered for their project account
    b. User must be logged in to their account
    c. User must have clicked on existing specific project dashboard and clicked on "Contractor Submittals"
4. Basic Flow of Events
    a. User is asked if this is a new submittal or resubmittal?
        i. User Checks "New Submittal"
            1. System Generated Submittal Number based on last used/supplied
            2. System Generates Submittal Date based on today's date
            3. User enters Description of Submittal
            4. User enters Applicable Spec Section
            5. User enters Additional Comments
            6. User may check box to "Request Expedited Review"
                a. User must enter brief Reason for Expedited Request
            7. User may Attached Additional Documents
            8. User Must click "Upload Submittal" which requires user to attached cut sheet
                a. User may browse to select document(s) to attach
                    i. Includes option to browse previous submittals within the CONTRACTOR users library of submittals (ONLY WORKS IF CONTRACTOR HAS A CONTRACTOR ACCOUNT)
        ii. User Checks "Resubmittal"
            1. User is asked to select the original submittal number from a drop down list (list will autofill with options from submittals that have a current status as either: make corrections noted, revise & resubmit, rejected)
                a. User Selects Number and system generates resubmittal number (adds R plus the resubmittal number behind original submittal number)
                    i. Repeats process of 4.a.i.1 thru 4.a.i.8 above
        iii. User clicks to "Add Another Submittal"
            1. Repeats process of 4.a above
    b. After Submittal or Resubmittal is uploaded Notice is generated and emailed to all parties involved that a new submittal has been added for review and states that response must be provided by XX days of this notice which can be accessed thru the Submittal Log Page

    c. Heading status is updated as information for fields 4 above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of all required fields including completion of e-signatures for Notices of Award created within system. Percent value also feeds to appropriate section within specific project dashboard.

5. Alternate flow
    a. If Submittal information has already been entered user may print View, Print, and Share Submittals
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. Entered data above is saved and stored in SUBMITTAL LOG page, company library of SUBMITTALS (CONTRACTOR'S ACCOUNT), and global backend library of SUBMITTALS.
    b. User may perform any of the following:
        i. User can logout
        ii. User can "go back to all projects"
        iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

Use Case 2.b.14.2 User Reviews & Responds to Submittal

1. Brief Description
   a. This use case describes how a DESIGNER user goes about Reviewing, Commenting On, and Responding to Submittals
2. Actors
   a. Anyone Registered as DESIGNER/Submittal Reviewing Party for the project
3. Preconditions
   a. User must have received an invitation from the CM/Owner and registered for their project account
   b. User must be logged in to their account
   c. User must have clicked on existing specific project dashboard and clicked on "Review Submittals"
4. Basic Flow of Events
   a. User views list of all project submittal descriptions with current status
      i. All submittals that are not currently the responsibility of the Designer/Reviewing Party are displayed with bold green font. Example: if Designer has responded to a submittal and issued any of the following Review States:
         1. No Exceptions
         2. Make Corrections Noted
         3. Revise & Resubmit
         4. Rejected
      ii. All submittals that are awaiting review and are within the allotted XX days from the date of Contractor's Submission are displayed with a status of "PENDING" in bold yellow font
      iii. All submittals that are awaiting review and are past the allotted XX days from the date of Contractor's Submission are displayed with a status of "PAST DUE" in bold Red font
         1. System Notifications are sent to Designer every XX hours prior to receiving a "PAST DUE" status
         2. System Notifications are sent to Designer and CM / Owner every X hours after receiving a "PAST DUE" status
      iv. All submittals that are awaiting review and were requested as "expedited review" by the Contractor are displayed with a status of "PENDING – EXPEDIATED REVIEW" in bold orange font until the point the submittal becomes past due. In such case status is displayed as "OVERDUE – EXPEDITED REVIEW" in bold red font. Follow all system notifications for "OVERDUE – EXPEDITED REVIEW" as above (4.a.iii.1 and 4.a.iii.2)
   b. User can click on any submittal to review, markup document, and set review state.
      i. A markup menu will be displayed and available to user while submittals are being viewed.
         1. DEFINE SUBMITTAL MARKUP FEATURES (Clouding, Arrows, Circles, Text, Font Choice, Stamps, Seals) – HOW DO WE MAKE THIS A TOOL ENGINEERS WANT TO USE?????????
      ii. Designers will be able to set one of the following states:

                    1. No Exceptions
                    2. Make Corrections Noted
                    3. Revise & Resubmit
                    4. Rejected
            iii. Designer clicks “Review Complete”
                    1. Upon designer clicking “Review Complete” system generates notices to project team (Owner / CM, Contractor).
                        a. Notice provides status of submittal
                            i. Submittal Number, Description, and State (ex.: No Exceptions, Make Corrections Noted, Revise & Resubmit, Rejected)
        c. Heading status is updated based on percent of submittals that have received a No Exception (and Make Corrections Noted???) State. Status is displayed in upper right corner and expressed as a percentage. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. If there are no open submittals user may View, Print, and Share Documents
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email OR
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. Entered data above is saved and stored in Review Submittals page, company library of Reviewed Submittals (DESIGNER'S account), and global backend library of Reviewed Submittals.
    b. User may perform any of the following:
        i. User can logout
        ii. User can “go back to all projects”
        iii. User can go to “Account Profile” (depending on level of access, user may make changes to account profile)

<u>Use Case 2.b.15 User Views Request For Information (RFI) Log Page</u>

1. Brief Description
    a. This use case describes how a user goes about viewing the project RFI Log Page
2. Actors
    a. Anyone that has a registered account (CM / Owner, Contractor, Designer)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "RFI Log"
4. Basic Flow of Events
    a. User Views RFI Log Page which includes the following fields for each RFI:
        i. RFI Number (Generated by System when Contractor creates a RFI)
        ii. Generated by (In most cases this will be the contractor. CONSIDER ADDING FEATURE that allows contractor's subcontractors to submit RFIs once they've been approved by the Contractor)
        iii. Description (Entered by Contractor (or Subcontractor) when Contractor Creates a RFI)
        iv. Approval/Responding Authority – ONLY EDITABLE FIELD in the RFI Log; EDIT rights below to Owner / CM only (Further Define)
        v. Date of RFI (Generated by System when Contractor Creates a RFI)
        vi. Date Responded (Generated by System on Date Reviewing Party (Most Likely Designer) Completed Review)
        vii. Status – System will generate the number of days and hours left to respond, which will be based on XX days from Contractor's submission of RFI. If within allowed time font will be bold yellow. If past due status will be displayed as "PAST DUE) in bold red font. If responses has been provided (response date) then Status will be default to blank with an option for CM/Owner to select following from dropdown menu
            1. Change Order Pending
                a. WHAT DOES THIS AUTOMATE???
            2. Additional Contract Time Required
                a. WHAT DOES THIS AUTOMATE???
            3. ??????????
            4. ???????????
    b. Heading status is updated based on percent of RFIs that have received a Response. Status is displayed in upper right corner and expressed as a percentage. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. User may View, Print, and/or Share Log
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition

a. User may perform any of the following:
    i. User can logout
    ii. User can “go back to all projects”
    iii. User can go to “Account Profile” (depending on level of access, user may make changes to account profile)

<u>Use Case 2.b.15.1 Contractor's Request For Information (RFI) Page</u>

1. Brief Description
    a. This use case describes how a CONTRACTOR user goes about entering/editing/viewing/uploading information associated with project Contractor RFI page
2. Actors
    a. Anyone Registered as <u>Contractor</u> for the project
3. Preconditions
    a. User must have received an invitation from the CM/Owner and registered for their project account
    b. User must be logged in to their account
    c. User must have clicked on existing specific project dashboard and clicked on "Requests for Information"
4. Basic Flow of Events
    a. User clicks "Create RFI"?
        i. System Generates RFI number (sequentially based on previous RFI #)
        ii. System Generates RFI date (Autofill today's date)
        iii. System asks User "What is your request?" – User is able to enter information into blank field
        iv. System asks User "What is your proposed/preferred solution?" – User is able to enter information into blank field
        v. System asks User "Will this request result in additional costs?" – User is able to check "Yes" or "No". If User checks "Yes" then User must enter estimated dollar value
        vi. System asks User "Will this request result in additional days added to the contract?" – User is able to check "Yes" or "No". If User checks "Yes" then User must enter estimated value
        vii. User may use "Attach Additional Documents" button to attach pertinent documents, which allows user to browse for documents
        viii. User must click "Request Information" for RFI to be saved
    b. After "Request Information is clicked Notice is generated and emailed to all parties involved that a new RFI has been added for review and states that response must be provided within XX days of this notices, which can be accessed thru the RFI Log Page
    c. Heading status is updated as information for fields 4 above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of all required fields including completion of e-signatures for Notices of Award created within system. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. If RFI information has already been entered user may print View, Print, and Share RFI
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>

2. Generate a link where document is stored to be copied and pasted into email sent directly from User

6. Post Condition
   a. Entered data above is saved and stored in RFI LOG page, company library of RFIs (CONTRACTOR'S ACCOUNT), and global backend library of RFIs.
   b. User may perform any of the following:
      i. User can logout
      ii. User can "go back to all projects"
      iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

Use Case 2.b.15.2 User Reviews & Responds to Requests For Information (RFI)

1. Brief Description
   a. This use case describes how a DESIGNER (or Owner / CM) user goes about Reviewing and responding to RFIs
2. Actors
   a. Anyone chosen/selected by Owner / CM as defined in 2.b.15.4.a.iv above for the project
3. Preconditions
   a. User must have received an invitation from the CM/Owner and registered for their project account
   b. User must be logged in to their account
   c. User must have clicked on existing specific project dashboard and clicked on "Review Requests For Information"
4. Basic Flow of Events
   a. User views list of all project RFI descriptions with current status
      i. All RFIs that are not currently the responsibility of the Reviewing Party are displayed with bold green font. Example: if Designer has responded to a RFI and issued any of the following Review States:
         1. Response Provided
         2. Additional Information Requested
      ii. All RFIs that are awaiting review and are within the allotted XX days from the date of Contractor's submission are displayed with a status of "RESPONSE PENDING" in bold yellow font
      iii. All submittals that are awaiting review and are past the allotted XX days from the date of Contractor's submission are displayed with a status of "PAST DUE" in bold Red font
         1. System Notifications are sent to Reviewing Party every XX hours prior to receiving a "PAST DUE" status
         2. System Notifications are sent to Reviewing Party and CM / Owner every X hours after receiving a "PAST DUE" status
   b. User can click on any RFI to review, markup document, and respond to.
      i. A markup menu will be displayed and available to user while submittals are being viewed.
         1. DEFINE SUBMITTAL MARKUP FEATURES (Clouding, Arrows, Circles, Text, Font Choice, Stamps, Seals)
         2. Reviewing Party will be able to request additional information, XXXX, and XXXX
         3. Reviewing Party and Owner / CM will be able to check boxes to add both potential change order dollar values and additional contract time. If used this information will feed to a Potential Impacts Page
         4. Reviewing Party clicks "Respond to RFI"
            a. Upon designer clicking "Respond to RFI" system generates notices to project team (Owner / CM, Designer?, Contractor).
               i. Notice provides status of RFI

            1. RFI Number, Description, and State (ex.: additional information requested, XXXX, and XXXX)

    c. Heading status is updated based on percent of RFIs that have received a response. Status is displayed in upper right corner and expressed as a percentage. Percent value also feeds to appropriate section within specific project dashboard.

5. Alternate flow
    a. If there are no open RFIs user may print View, Print, and Share Documents
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. Entered data above is saved and stored in Review RFIs page, company library of Reviewed RFIs (DESIGNER'S/Reviewing Party's account), and global backend library of Reviewed RFI.
    b. User may perform any of the following:
        i. User can logout
        ii. User can "go back to all projects"
        User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

Use Case 2.b.16 User Views Survey Log Page

1. Brief Description
    a. This use case describes how a user goes about viewing the project Survey Log Page
2. Actors
    a. Anyone that has a registered account (CM / Owner, Contractor, Designer, Surveyor)
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "Survey Log"
4. Basic Flow of Events
    a. User Views Survey Log Page which includes the following fields for each Survey Request:
        i. Survey Request Number (Generated by System when Contractor creates a Survey Request)
        ii. Description (Entered by Contractor when Contractor Creates a Survey Request)
        iii. Date of Request (Generated by System when Contractor Creates a Survey Request)
        iv. Date Survey Completed (Entered by Surveyor or Owner/CM when survey cut sheet is uploaded)
        v. Survey Request (PDF of Document that accompanies request when Contractor submits Survey Request)
        vi. Survey Cut Sheet (PDF (or ACAD) of Document generated by Surveyor and uploaded by either Surveyor or Owner/CM)
        vii. Status (Field will display time remaining to perform Survey and Provide Cut Sheets to the Contractor. If within XX days field will display Days and Hours left to respond in bold yellow font (NOTICES). If past XX days field will display PAST DUE in bold red font (NOTICES). Nothing will be displayed for requests that have been completed).
    b. Heading status is updated based on percent of Survey Requests that have been completed. Status is displayed in upper right corner and expressed as a percentage. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. User may View, Print, and/or Share Log
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. User may perform any of the following:
        i. User can logout
        ii. User can "go back to all projects"
        iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

Use Case 2.b.16.1 Contractor's Survey Request Page

1. Brief Description
   a. This use case describes how a CONTRACTOR user goes about Requesting Survey for a Project
2. Actors
   a. Anyone Registered as Contractor for the project
3. Preconditions
   a. User must have received an invitation from the CM/Owner and registered for their project account
   b. User must be logged in to their account
   c. User must have clicked on existing specific project dashboard and clicked on "Survey Requests"
4. Basic Flow of Events
   a. User views Survey Request Page
      i. User can see all survey requests that have already been created (by number and date submitted) with a status of each. Statuses include: Complete, Pending, Partially Complete
         1. User can click on each previously requested survey to view
   b. User clicks "Add Survey Request"
      i. System Generates Survey Request Number number (sequentially based on previous Survey Request #)
      ii. System Generates Date of Request (Autofill today's date)
      iii. User inputs a Description of Survey Requested (User is encouraged to separate Survey Requests to segments they would like to receive cuts sheets in)
      iv. User enters date they are Requesting Completion by
      v. User may check box to Request Expedited Review
      vi. User clicks "Request Survey" button; Survey Request is saved and sent
   c. After "Request Survey" is clicked Notice is generated and emailed to all parties involved that a new Survey Request has been added and must be completed within XX days of this notices, which can be accessed thru the Survey Request Log Page
   d. Heading status is updated as survey requests are completed. Status is displayed in upper right corner and expressed as a percentage. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
   a. If Survey Request has already been entered user may print View, Print, and Share Survey Requests
      i. Sharing allows user to:
         1. Enter email address of party they wish to share document thru system generated email OR
         2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition

a. Entered data above is saved and stored in Survey Request Log page, company library of Survey Requests (CONTRACTOR'S ACCOUNT), and global backend library of Survey Requests.
b. User may perform any of the following:
    i. User can logout
    ii. User can "go back to all projects"
    iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

Use Case 2.b.16.2 User Reviews & Responds to Survey Requests with Cut Sheets

1. Brief Description
    a. This use case describes how an Owner/CM or Surveyor user goes about Reviewing Survey Requests and Uploading Cut Sheets
2. Actors
    a. Anyone Registered as SURVEYOR or in some cases Owner/CM for the project
3. Preconditions
    a. User (If Surveyor) must have received an invitation from the CM/Owner and registered for their project account (Same As Contractor & Designer Registers)
    b. User must be logged in to their account
    c. User must have clicked on existing specific project dashboard and clicked on "Survey Requests"
4. Basic Flow of Events
    a. User (Owner/CM) is asked "Who is responsible for Survey"
        i. User must check box that applies "Owner" or "Contractor"
        ii. If "Owner" is checked then the following
            1. User selects Survey Request Number of Open Survey Request
            2. System Generates Date of Cut Sheet
            3. User clicks "Attach Cut Sheet" to browse and attach file
            4. User clicks "Upload Cut Sheet" button
                a. All Data is saved and Status is shown as complete Survey Log
        iii. All Survey Requests that are that are completed by the Surveyor uploading a cut sheet are displayed with bold green font.
        iv. All Survey Requests that are awaiting completion and are within the allotted XX days from the date of Contractor's submission are displayed with a status of "PENDING" in bold yellow font
        v. All Survey Requests that are awaiting review and are past the allotted XX days from the date of Contractor's submission are displayed with a status of "PAST DUE" in bold Red font
            1. System Notifications are sent to Surveyor every XX hours prior to receiving a "PAST DUE" status
            2. System Notifications are sent to Surveyor and CM / Owner every X hours after receiving a "PAST DUE" status
        vi. All Survey Request that are awaiting review and were requested as "expedited review" by the Contractor are displayed with a status of "PENDING – EXPEDIATED REVIEW" in bold orange font until the point the Survey Request becomes past due. In such case status is displayed as "OVERDUE – EXPEDITED REVIEW" in bold red font. Follow all system notifications for "OVERDUE – EXPEDITED REVIEW" as above (4.a.iii.1 and 4.a.iii.2)
    b. User can click on any Survey Request to review
    c. Heading status is updated based on percent of Survey Requests that have been COMPLETED (Cut Sheets Uploaded). Status is displayed in upper right corner and expressed as a percentage. Percent value also feeds to appropriate section within specific project dashboard.

5. Alternate flow
    a. If there are no open Survey Requests user may View, Print, and Share Documents
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email OR
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. Entered data above is saved and stored in Survey Cut Sheets page, company library of Survey Cut Sheets (DESIGNER'S account), and global backend library of Survey Cut Sheets
    b. User may perform any of the following:
        i. User can logout
        ii. User can "go back to all projects"
        iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

Use Case 2.b.17 User Inputs Underground Service Alert (USA) Tickets & Views USA Log Page

1. Brief Description
    a. This use case describes how a user goes about inputting Underground Service Alert (USA) ticket numbers and Viewing the USA Log Page
2. Actors
    a. Anyone that has a registered account can view the page (Owner/CM, Contractor, Designer)
    b. ONLY Owner/CM has ability to input USA ticket numbers
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "Dig Alert Log"
4. Basic Flow of Events
    a. User Views USA Log Page which includes the following fields for each USA ticket:
        i. Date Called In (Generated by System Interface with Dig Alert's Website IF POSSIBLE)
        ii. Date Ticket is Valid (Generated by System Interface with Dig Alert's Website IF POSSIBLE)
        iii. Ticket Number (Entered by Owner/CM as provided by CONTRACTOR)
        iv. Location (Generated by System Interface with Dig Alert's Website IF POSSIBLE)
        v. Expiration Date (Generated by System Interface with Dig Alert's Website IF POSSIBLE)
        vi. Status (Three Options: Not Yet Valid, Active, Expired)
            1. If "Not Yet Valid" – display bold red font
            2. If "Active" – display bold green font
                a. Include days until expiration ("Expires In XX Days")
            3. If "Expired" – display bold red font
        vii. Associated Work Complete – User may click box if associated work is complete
    b. Heading status is updated based on percent of USA tickets with associated work that has been completed (METHOD PRESENTS PROBLEM FOR TICKETS THAT HAVE YET TO BE CALLED IN. DEFINE ANTOHER METHOD). Status is displayed in upper right corner and expressed as a percentage. Percent value also feeds to appropriate section within specific project dashboard.
5. Alternate flow
    a. User may View, Print, and/or Share Log
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email OR
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    a. User may perform any of the following:
        i. User can logout
        ii. User can "go back to all projects"

iii. User can go to “Account Profile” (depending on level of access, user may make changes to account profile)

__**Use Case 2.b.18 User Views & Enters Daily Construction Management (CM) Report**__

1. Brief Description
    a. This use case describes how an Owner/CM user goes about viewing listing of all CM Daily information associated with project Contractor RFI page
2. Actors
    a. Anyone Registered as <u>an Owner/CM</u> for the project
3. Preconditions
    a. User must be logged in to their account
    b. User must have clicked on existing specific project dashboard and clicked on "CM Daily Reports"
4. Basic Flow of Events
    a. User views screen with all CM Daily Reports to Date. Reports are automatically generated by the system on each day. Reports are number sequentially and dated. Report status is displayed in bold red font as "Incomplete" until report is completed
    b. User clicks on any Daily Report and is taken to screen with the following:
        i. Information displayed at top left of report:
            1. Daily Report Number (Number generated by system based on day)
            2. Date of Report (System generated)
            3. Weather (System generated through NOAA interface (IF POSSIBLE))
            4. Ability to Add Custom Field (Ex.: Work Order/Purchase Order #)
        ii. User clicks "Yes" or "No" to answer "Did the General Contactor perform work this day?
            1. If User clicks "Yes" the following questions are fields are displayed
                a. "What contract items were worked on? (select all that apply"
                b. "How many quantities were completed for each?"
                c. "What resources were used for each contract item?"
                d. "Was any material delivered to the site?"
                e. "Were any schedule milestones completed this day?"
                f. "Did any of the following occur?"
                g. "General Notes section"
            2. If User clicks "No" is checked the following question is displayed:
                a. "Did Subcontractors perform any work this day?" – "Yes" or "No"
                    i. If "Yes" is selected dropdown menu appears with Subcontractors to choose from (define where/when subcontractor information is collected comes from;)
                    ii. If "No" is selected then User is asked "Was material delivered to the site this day?"

User is

iii. System Generates RFI number (sequentially based on previous RFI #)
iv. System Generates RFI date (Autofill today's date)
v. System asks User "What is your request?" – User is able to enter information into blank field
vi. System asks User "What is your proposed/preferred solution?" – User is able to enter information into blank field
vii. System asks User "Will this request result in additional costs?" – User is able to check "Yes" or "No". If User checks "Yes" then User must enter estimated dollar value
viii. System asks User "Will this request result in additional days added to the contract?" – User is able to check "Yes" or "No". If User checks "Yes" then User must enter estimated value
ix. User may use "Attach Additional Documents" button to attach pertinent documents, which allows user to browse for documents
x. User must click "Request Information" for RFI to be saved

c. After "Request Information is clicked Notice is generated and emailed to all parties involved that a new RFI has been added for review and states that response must be provided within XX days of this notices, which can be accessed thru the RFI Log Page
d. Heading status is updated as information for fields 4 above are entered. Status is displayed in upper right corner and expressed as a percentage. Percent Value is weighted based on entering a minimum of all required fields including completion of e-signatures for Notices of Award created within system. Percent value also feeds to appropriate section within specific project dashboard.

5. Alternate flow
   a. If RFI information has already been entered user may print View, Print, and Share RFI
      i. Sharing allows user to:
         1. Enter email address of party they wish to share document thru system generated email OR
         2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
   a. Entered data above is saved and stored in RFI LOG page, company library of RFIs (CONTRACTOR'S ACCOUNT), and global backend library of RFIs.
   b. User may perform any of the following:
      i. User can logout
      ii. User can "go back to all projects"
      iii. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

Use Case 2.b.XX Labor Compliance (Tim)

Wage determination date is coming off of the bid advertisement date (Refer to Bid Documents). Wage determination is automatically linked to this section. Fringe Benefit statement. Hover over the pdf icon and have the image come up. The contractor screen will give access to upload all of the various forms / pdfs. Drop down menu will allow the contractor to make multiple uploads to the contractor dashboard. All files will be labeled as YYYY-MMDD (i.e. January 1, 2015 – "2015-0101"). This is a file name as well as a searchable field (i.e. – person can search by year for a document, a month and / or specific day). Make this a "drag and drop" option.

1. Brief Description
    a. This use case describes how an Owner/CM user goes about uploading and viewing a list of all Labor Compliance uploads in a summary format to see what is completed or still needed to fulfill Labor Compliance requirements.
2. Actors
    a. Anyone that has a registered account can view the page (Owner/CM, Contractor, Designer)
    b. ONLY Owner/CM has ability to upload or make changes to documents.
3. Preconditions
    a. User must be logged into their account.
    b. User must have clicked on existing specific project dashboard and clicked on "Labor Compliance Uploads".
4. Basic Flow of Events
    a. User views screen with all labor compliance forms needed for the different subs and has the ability to upload those forms into the different selection options and see a summary of progress and completed actions that do not require attention.
    b. Once PDF is uploaded with correct forms, it will show as uploaded and be clickable to view the PDF.
    c. Labor Compliance Summary page shows all forms uploaded and their "status"
    d. The forms needed include Form 140, 142, Fringe Benefit Statement, CAC2, CPR reports and statement of compliance.
    e. Will have the ability to upload directly to DIR's website.
    f. When uploading Fringe Benefit statement, user will be required to save the file names as YYYY-MMDD
    g. 142 forms must be uploaded prior to release of Final Payment
    h. Must have drag and drop function to upload docs.
    i. Will have a drop-down of all document upload option.
5. Alternate flow
    i. If all uploads have been completed, the owner/CM have the ability to upload to DIR website.
    ii. There is also the ability to share, email, and print this information.
    iii. Sharing allows user to:

    1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
    2. Generate a link where document is stored to be copied and pasted into email sent directly from User

6. Post Condition
   i. Upload are saved and stored in Labor Compliance Uploads
   ii. User may perform any of the following functions:
      a. User can logout
      b. User can "go back to all projects"
      c. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

<u>Use Case 2.b.XX Unconditional Finals (Tim)</u>

This is sync'd to the prelim notice sheet.

1. Brief Description
   a. This use case describes how an Owner/CM user goes about uploading and viewing a list of all Unconditional Finals in a summary format to see what is completed or is still needed.
2. Actors
   a. Anyone that has a registered account can view the page (Owner/CM, Contractor, Designer)
   b. ONLY Owner/CM has ability to make adjustments to the documents.
3. Preconditions
   a. User must be logged into their account.
   b. User must have clicked on existing specific project dashboard and clicked on "Unconditional Final Uploads".
4. Basic Flow of Events
   a. User views screen with all Unconditional Finals needed and has the ability to upload those forms into different selections options and then see a progress summary of all forms submitted.
   b. Once the files are uploaded, you can see the PDF upload and click on the PDF to open the document and review it.
   c.
5. Alternate flow
   a. If Unconditional Final has already been entered user may print View, Print, and Share the Unconditional Final.
      i. Sharing allows user to:
         1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
         2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
      i. Upload are saved and stored in Labor Compliance Uploads
      ii. User may perform any of the following functions:
         a. User can logout
         b. User can "go back to all projects"
         c. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

Use Case 2.b.XX As Builts (Tim)

1. Brief Description
   a. This use case describes how an Owner/CM user goes about uploading and viewing a list of all as-builts in summary format to see what is completed
2. Actors
   a. Anyone that has a registered account can view the page (Owner/CM, Contractor, Designer)
   b. ONLY Owner/CM has ability to …
3. Preconditions
   a. User must be logged into their account
   b. User must have clicked on existing specific project dashboard and clicked on "As-Builts".
4. Basic Flow of Events
   a. (insert)
5. Alternate flow
   i. (insert)
6. Post Condition
   i. Uploads are saved and stored in As-Built uploads.
   ii. User may perform any of the following functions:
      a. User can logout
      b. User can "go back to all projects"
      c. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

<u>Use Case 2.b.XX Notice of Completion (Tim)</u>

1. Brief Description
    a. This use case describes how an Owner/CM user goes about uploading and viewing the Notice of Completion.
2. Actors
    a. Anyone that has a registered account can view the page (Owner/CM, Contractor, Designer)
    b. ONLY Owner/CM has ability to make adjustments to the NOC.
3. Preconditions
    a. User must be logged into their account
    b. User must have clicked on existing specific project dashboard and clicked on "Notice of Completion".
4. Basic Flow of Events
    a. User views screen with Notice of Completion needed and has the ability to upload those forms into different selections options and then see a progress summary of all forms submitted.
    b. Once the NOC files are uploaded, you can see the PDF upload and click on the PDF to open the document and review it.
5. Alternate flow
    a. If NOC information has already been entered user may print View, Print, and Share NOC
        i. Sharing allows user to:
            1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
            2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
    i. Uploads are saved and stored in NOC uploads.
    ii. User may perform any of the following functions:
        a. User can logout
        b. User can "go back to all projects"
        c. User can go to "Account Profile" (depending on level of access, user may make changes to account profile)

<u>Use Case 2.b.XX Agency Acceptance Letters (Tim)</u>

1. Brief Description
   a. This use case describes how an Owner/CM user goes about uploading and viewing the Agency Acceptance Letters.
2. Actors
   a. Anyone that has a registered account can view the page (Owner/CM, Contractor, Designer)
   b. ONLY Owner/CM has ability to modify/change Agency Acceptance Letters.
3. Preconditions
   a. User must be logged into their account
   b. User must have clicked on existing specific project dashboard and clicked on “Agency Acceptance Letters.”
4. Basic Flow of Events
   a. User views screen with Agency Acceptance Letters needed and has the ability to upload those forms into different selections options and then see a progress summary of all forms submitted.
   b. Once the Letter of Acceptance files are uploaded, you can see the PDF upload and click on the PDF to open the document and review it.
5. Alternate flow
   a. If Agency Acceptance Letter information has already been entered user may print View, Print, and Share Agency Acceptance Letters.
      i. Sharing allows user to:
         1. Enter email address of party they wish to share document thru system generated email <u>OR</u>
         2. Generate a link where document is stored to be copied and pasted into email sent directly from User
6. Post Condition
      i. Uploads are saved and stored in Letters of Acceptance uploads.
      ii. User may perform any of the following functions:
         a. User can logout
         b. User can “go back to all projects”
         c. User can go to “Account Profile” (depending on level of access, user may make changes to account profile)