











LEE KENNEDY
Let's build on big thinking.

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PROTRAC

PLAYBOOK FOR PROJECT MANAGEMENT

Table of Contents

	Accessing ProTrac	3
	Job Numbers	4
	Filling in Required Information: Lead Tab	5
	Filling in Required Information: Players Tab	9
	Final Steps	10
	Email Notifications	11
	Optional: Safety Tab	12
	ProTrac Checklist	13

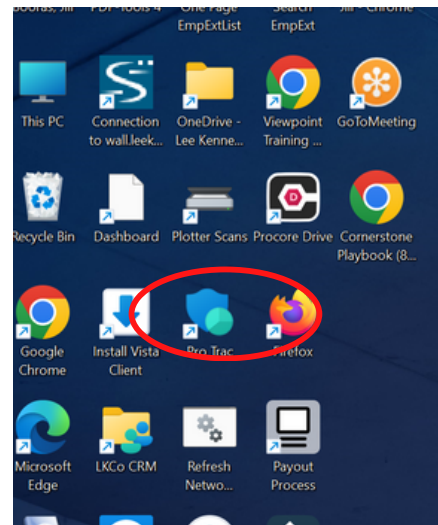
Accessing ProTrac

There are 3 ways to access ProTrac:

Click on the ProTrac icon on your home screen

OR

Click on the ProTrac icon on the LKCO dashboard



OR

via

<https://remote/leekennedy.com/>

Job Numbers

Use the "Search Word" field to find an existing job

***Note: If there isn't a job number created yet, the job number will show up as "00000"

Click on the glasses to search

The screenshot shows the top portion of a web form titled "Project Information Sheet". At the top right, there is a "Job#" field with a dropdown menu currently set to "00" and a red "EXIT" button. Below this is a "Search Word:" field with a magnifying glass icon circled in red. A yellow callout bubble with a blue arrow points to this icon, containing the text "Click on the glasses to search". The form includes various input fields for project details like "Project Name", "Street Address", "Floor(s) / Suite", "City", "State", and "Zip". There are also sections for "Market Sector(s)" and "Project Type(s)" with multiple checkboxes.

This screenshot shows the same "Project Information Sheet" form, but with the "Job#" field highlighted by a red circle. The "Job#" field now displays "00000" instead of "00". The "Search Word:" field now contains the value "186789.00". The "Project Name" field is filled with "One Beacon Street - Multi Tenant Lobby/Corridor". Other fields like "Street Address" (One Beacon Street), "Floor(s) / Suite" (21st Floor), "City" (Boston), "State" (MA), and "Zip" (02108) are also populated. The "Market Sector(s)" and "Project Type(s)" sections remain visible at the bottom.

Filling in Required Information: Lead Tab

- Complete all blue fields (see following pages for step-by-step instructions)
 - *****NOTE: Square footage can be found on the bid sheet from the Preconstruction Department**
 - **"Permitting Description" should be brief**

It is important to update values and dates across tabs in ProTrac monthly.

The screenshot shows the 'Project Information Sheet' form in the 'Lead' tab. The 'Job#' field is highlighted with a red box and contains '00000 - 00'. The 'EXIT' button is also highlighted. The 'Project Name' field is highlighted with a blue box. The 'Permitting Description' field is highlighted with a blue box. The 'Lead/Sales Contact' field is highlighted with a blue box. The 'Project Status' field is highlighted with a blue box. The 'Bid/Proposal Type' field is highlighted with a blue box. The 'Interview Date' field is highlighted with a blue box. The 'Walk-Thru Date' field is highlighted with a blue box. The 'RFP' field is highlighted with a blue box. The 'CM' field is highlighted with a blue box. The 'Prevailing Wage' field is highlighted with a blue box. The 'O.C.I.P.' field is highlighted with a blue box. The 'Green/LEED' field is highlighted with a blue box. The 'Builder's Risk' field is highlighted with a blue box. The 'Bond Required' field is highlighted with a blue box. The 'Cert.PR/MWBE' field is highlighted with a blue box. The 'Tax Exempt' field is highlighted with a blue box. The 'Market Sector(s)' field is highlighted with a blue box. The 'Project Type(s)' field is highlighted with a blue box. The 'Construction Type' field is highlighted with a blue box. The 'Permit Type' field is highlighted with a blue box. The 'Contract Type' field is highlighted with a blue box. The 'Billing Format' field is highlighted with a blue box. The 'Value to Base the Permit on' field is highlighted with a blue box. The 'Initial Value' field is highlighted with a blue box. The 'Current/Final Contract Value' field is highlighted with a blue box. The 'Project Start Date' field is highlighted with a blue box. The 'Project Completion Date' field is highlighted with a blue box. The 'Substantial Compl. Date' field is highlighted with a blue box. The 'Trades' field is highlighted with a blue box. The 'Detailed Marketing Description' field is highlighted with a blue box.

Filling in Required Information: Lead Tab (continued)

Step 1: Change Yes/No boxes as necessary

*****NOTE: Yes/No section will default to "No"**

The screenshot shows a software interface with a 'Yes/No' section. The section is divided into two columns. The left column contains four rows: 'CM', 'O.C.I.P.', 'Builder's Risk', and 'Cert.PRIMWBE'. The right column contains four rows: 'Prevailing Wage', 'Green/LEED', 'Bond Required', and 'Tax Exempt'. Each row has a dropdown menu with 'No' selected. The dropdown menus are highlighted with red boxes. Below the 'Yes/No' section is a 'Project Team:' section with a text input field for 'Project Executive' and a search icon.

Step 2: Make sure that the "Market Sector(s)" section is completed

*****Note: There is typically only one sector per job**

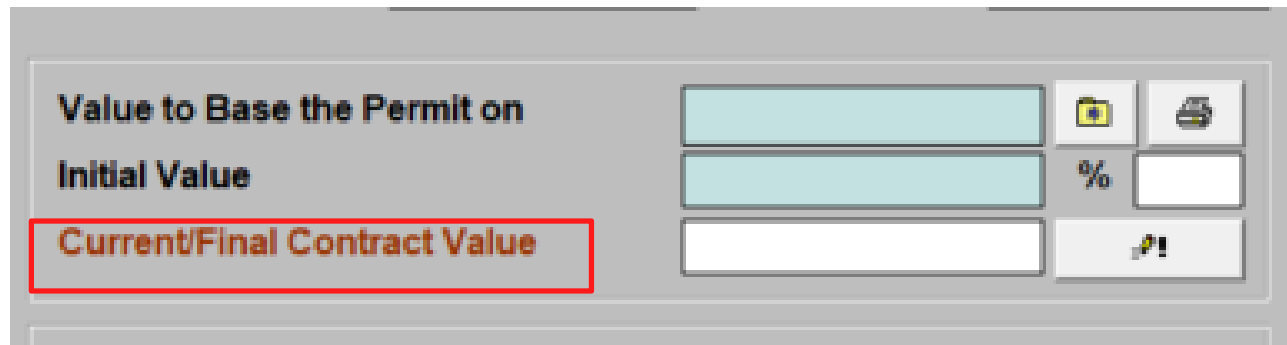
The screenshot shows a software interface with a 'Market Sector(s)' and 'Project Type(s)' section. The 'Market Sector(s)' dropdown is highlighted with a red circle. The 'Project Type(s)' dropdown is also highlighted with a red circle. Below the dropdowns is a list of checkboxes for various project types and sectors. The list includes: Interiors/Sp. Project, Academic, Commercial/Developer, Government, Healthcare/Sciences, Historic, Residential, Retail, M.Fldr, Apt/Condo, Assist. Living, Athletic, Bank, Classroom, Dining/Restaurant, Dorm, Garage/Parking, Lab/Research, Theater/Entertainment, Hotel, Law Firm, Library, Medical, Museum, Nonprofit, Offices, Religious, Retail, and Other ...

Step 3: Complete "Project Type(s)" section. Select all that apply.

Filling in Required Information: Lead Tab (continued)

Step 4: Permit cost will not always match initial value. Permit costs are typically only direct costs.

*****Note: Current/final contract value should be updated monthly**



A screenshot of a software interface showing three input fields for permit cost calculation. The first field is labeled "Value to Base the Permit on" and has a light blue background. The second field is labeled "Initial Value" and also has a light blue background. The third field is labeled "Current/Final Contract Value" and has a white background; this label and field are enclosed in a red rectangular box. To the right of each field are icons for a camera, a printer, and a percentage sign.

Step 5: Once your project starts, go in and update your start date

*****NOTE: Project completion date may need to be updated throughout the life of the project**



A screenshot of a software interface showing three input fields for project dates. The first field is labeled "Project Start Date" and has a light blue background; this label and field are enclosed in a red rectangular box. The second field is labeled "Project Completion Date" and has a light blue background. The third field is labeled "Substantial Compl. Date" and has a white background. To the left of the third field is a small globe icon.

Filling in Required Information: Lead Tab (continued)

Step 6: Complete the "Detailed Marketing Description". This should be very detailed. It can include:

- **Anything that is unique about the job (i.e. finishes, design, building)**
- **Anything that is challenging about the job (i.e. site logistics)**
- **Types of spaces**
- **Unique aspects to highlight the project**
 - ***NOTE- This box is not limited on space. It will get bigger with more text. The more detail for marketing, the better.**

The screenshot shows a software interface with a 'Trades' section containing the following checkboxes: Sitework, Concrete, Masonry, Metals, Doors, Glass, Ceiling, Drywall, Flooring, Paint, Plumbing, HVAC, Sprinkler, and Electrical. There is also an 'Other:' field. Below the trades section is a large light blue text area labeled 'Detailed Marketing Description:', which is circled in red.

Filling in Required Information: Players Tab

- Only sections/lines with asterisk (*) are required.
 - This section may need to be updated once the project is started
 - If the billing contact information is the same as the client, click on billing and then select "Same as Client"

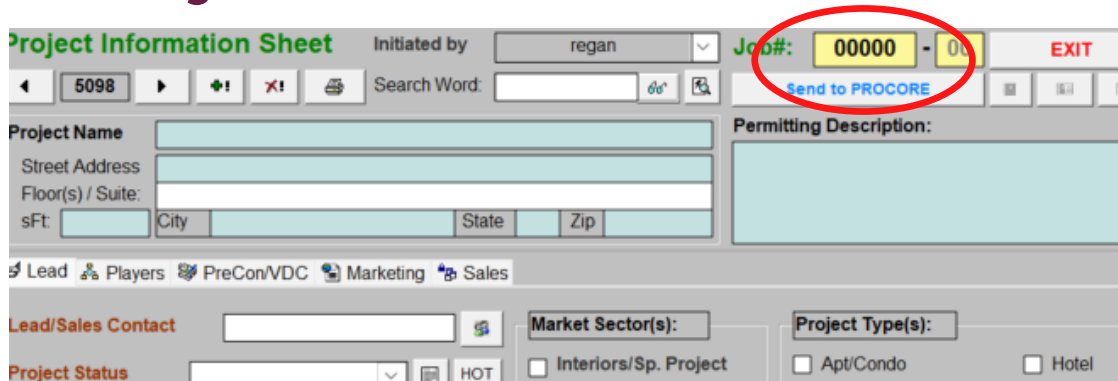
In order to fill these fields, click title to be able to input information

Although they are not required, we encourage you to fill in the remaining fields

The screenshot displays a software interface for project management. The main window shows project details for '7-9 Hamilton Place' in Boston, MA. The 'Players' tab is selected, showing contact information for various roles: Client, Billing, Architect, Owner Rep/CM, RE/Developer, Electrical Eng., Mechanical Eng., Structural Eng., Referred By/Other, Additional Insureds, Competition, and Job FollowUps. The 'Billing' section is highlighted with a red box. A 'Choose Contact... (Billing)' dialog box is open, showing contact information for 'City Realty/CRM Property Corp.' and a 'Same As Client' button circled in red. The dialog box also includes fields for company name, department/location, address, city, state, zip, phone, fax, web site, and comments. There are also checkboxes for 'Repeat Client', 'Requires Approval', 'Approved', and 'Active'.

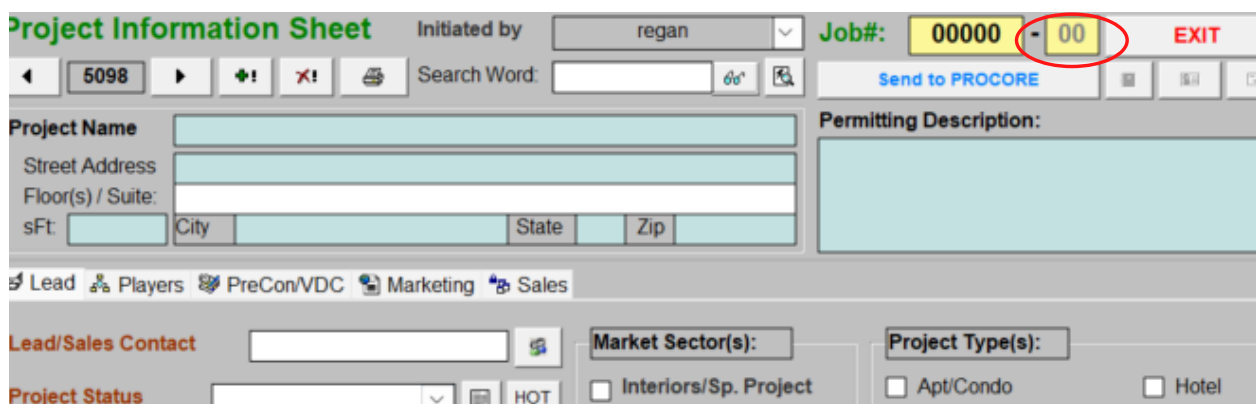
Final Steps

- **Once all information is complete, double-click on the job number (00000)**
- **Click through the prompts**
 - **Is this an interiors job?**
 - **Do you want to generate permit documentation?**
 - **Do you want to send it to Viewpoint?**
 - **Do you want to send it to Procure?**



The screenshot shows the 'Project Information Sheet' form. At the top right, the 'Job#' field contains '00000 - 00', with the '00' part circled in red. Below this, there are various input fields for project details, including 'Project Name', 'Street Address', 'Floor(s) / Suite', 'sFt', 'City', 'State', and 'Zip'. There are also checkboxes for 'Interiors/Sp. Project', 'Apt/Condo', and 'Hotel'. The form is titled 'Project Information Sheet' and 'Initiated by regan'.

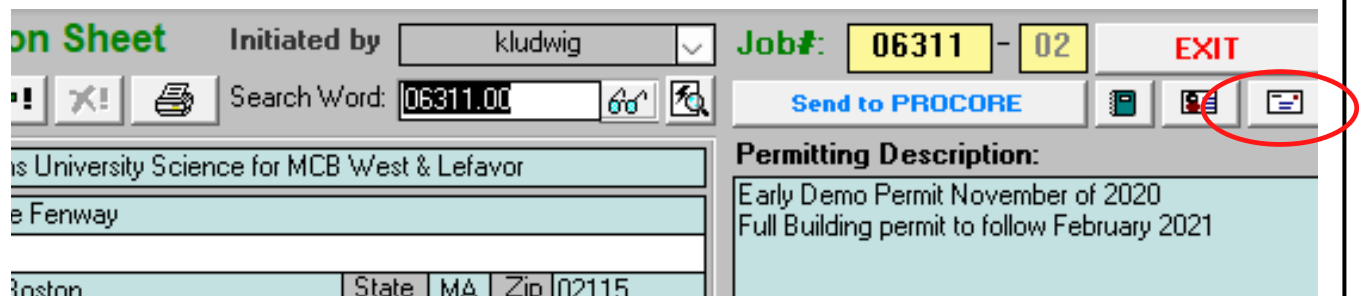
*****NOTE: To create a sub job, make sure that you are in the main job and click on the 00**



This screenshot is identical to the one above, showing the 'Project Information Sheet' form. The 'Job#' field '00000 - 00' is circled in red, highlighting the '00' part. The form includes fields for project name, address, and various checkboxes for project types.

Email Notifications

Usually an email will automatically pop up to notify the team, but if you want to email people manually at another time, click on the email button to send a notification that the new project has been created



The screenshot shows a software interface for a project sheet. At the top, it displays 'Initiated by' as 'kludwig' and 'Job#:' as '06311 - 02'. There is an 'EXIT' button in red. Below this, there is a 'Search Word:' field containing '06311.00'. To the right of the search field is a 'Send to PROCORE' button and a toolbar with several icons. The email icon, which depicts an envelope, is circled in red. The main area of the interface is divided into two sections: a table on the left and a 'Permitting Description' box on the right. The table contains project details, and the description box contains text about permit dates.

is University Science for MCB West & Lefavor				
e Fenway				
Boston	State	MA	Zip	02115

Permitting Description:
Early Demo Permit November of 2020
Full Building permit to follow February 2021

Optional: Safety Tab

- **Once you have created a job number, a Safety, Safety 2, and NFPA tab will appear**

The screenshot displays a software interface for a 'Project Information Sheet'. At the top, it shows 'Initiated by' as 'kludwig' and 'Job#' as '06311 - 02'. Below this is a search bar with '06311.00' and a 'Send to PROCORE' button. The main section contains a form with the following fields: 'Project Name' (Simmons University Science for MCB West & Lefavor), 'Street Address' (300 The Fenway), 'Floor(s) / Suite:' (empty), 'sFt:' (142,829), 'City' (Boston), 'State' (MA), and 'Zip' (02115). To the right, a 'Permitting Description:' box contains the text 'Early Demo Permit November' and 'Full Building permit to follow Fe'. At the bottom, a navigation bar includes icons for 'Lead', 'Players', 'PreCon/VDC', 'Marketing', 'Sales', 'Safety', 'Safety2', and 'NFPA'. The 'Safety', 'Safety2', and 'NFPA' tabs are highlighted with a red box.

- **You can complete, edit, and revise any information in the Safety and Safety 2 tabs**
 - **This information will allow you to generate the NFPA documentation in a Word Document**

*****NOTE: The NFPA document that is generated is used only on projects that we DO NOT hire Code Red. Code Red is hired for complex projects.**

ProTrac Checklist

It is important to update ProTrac throughout the lifecycle of the project. Both Preconstruction and Marketing use this historical data when benchmarking pricing on similar future projects.

- **Update current/ final value monthly**
- **Update start date**
- **Update project completion date**
- **Make sure that the detailed marketing description is, in fact, detailed**