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Let's build on big thinking.

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PROTRAC

PLAYBOOK FOR
PRECONSTRUCTION
/VDC

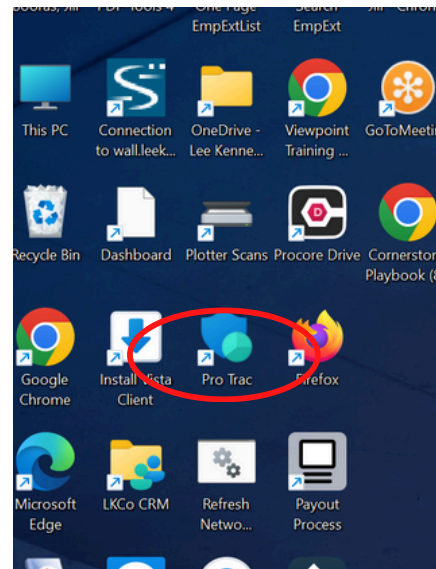
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Accessing ProTrac

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

Determine if a job exists or if you need to create a new job!

Use the "Search Word" field to find an existing job. 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 'Project Information Sheet' interface. At the top, there is a 'Search Word' field with a magnifying glass icon circled in red. A blue arrow points from the text 'Click on the glasses to search' to this icon. The 'Job#' field is set to '00'. Below the search bar, there are various form fields for project details like 'Project Name', 'Street Address', and 'City'. On the right side, there are sections for 'Market Sector(s)' and 'Project Type(s)' with several checkboxes.

This screenshot shows the same 'Project Information Sheet' interface. The 'Job#' field is now set to '00000', which is circled in red. The 'Search Word' field contains '186789.00'. The project name is 'One Beacon Street - Multi Tenant Lobby/Condo'. The address is 'One Beacon Street, 21st Floor, Boston, MA 02108'. The 'Market Sector(s)' and 'Project Type(s)' sections are also visible.

If the job does not already exist as Precon or opportunities, you need to create a new project form. Click on the green "+!" button.

This screenshot shows the 'Project Information Sheet' interface. The 'Job#' field is set to '00000'. The 'Search Word' field is empty. The project name is 'Vedere' and the address is '1 Design Center Place'. A green '+!' button is circled in red, and a tooltip 'Add New Project' is visible over it.

Creating a New Job: Lead Tab

After clicking on the green “+!” button, a blank form will open.

Step 1: Fill out the following required fields in blue:

- **Project Name**
- **Address**

The screenshot shows a web-based form titled "Project Information Sheet". At the top, it includes fields for "Initiated by" (jbooras), "Job#" (00000 - 00), and an "EXIT" button. Below this is a navigation bar with a green "+!" button circled in red, a search field, and a "Send to VISTA / PROCORE" button. The main form area contains several sections: "Project Name" (with a red circle around the input field), "Street Address", "Floor(s) / Suite:", "City", "State", and "Zip". To the right is a "Permitting Description:" field. Below these are tabs for "Lead", "Players", "PreCon/VDC", "Marketing", and "Sales". The bottom section contains "Lead/Sales Contact", "Project Status" (with a "HOT" button), "Bid/Proposal Type", "Interview Date", "Walk-Thru Date", "RFP", and "RFQ" fields. On the right side of this section are two columns of checkboxes for "Market Sector(s)" and "Project Type(s)".

Creating a New Job: Lead Tab (continued)

Step 2: Fill out the Bid/Proposal Type.

The screenshot shows a software interface with a top navigation bar containing tabs for 'Lead', 'Players', 'PreCon/VDC', 'Marketing', and 'Sales'. The 'Lead' tab is selected and circled in red. Below the navigation bar, there are several input fields: 'Lead/Sales Contact', 'Project Status' (with a 'HOT' button), and 'Bid/Proposal Type' (circled in red). The 'Bid/Proposal Type' dropdown menu is open, showing options: 'Competitive Bid', 'Conceptual Estimate', 'Fee & General Conditions', 'GMP', 'Interview', 'Negotiated', 'Preconstruction', 'Public Bid', 'RFP/Q', and 'VDC'. To the right of these fields are two columns of checkboxes under the headings 'Market Sector(s):' and 'Project Type(s):'. The 'Market Sector(s):' column includes options like 'Interiors/Sp. Project', 'Academic', 'Commercial/Developer', 'Government', 'Healthcare/Sciences', 'Historic', 'Residential', and 'Retail'. The 'Project Type(s):' column includes options like 'Apt/Condo', 'Assist. Living', 'Athletic', 'Bank', 'Classroom', 'Dining/Resturant', 'Dorm', 'Garage/Parking', 'Lab/Research', and 'Theater/Entertainment'. At the bottom, there are two dropdown menus for 'Construction Type' and 'Permit Type'.

Creating a New Job: Lead Tab (continued)

Step 3: Fill out the Market Sector. This should be Academic, Commercial/Developer, Government, or Healthcare.

The screenshot shows a software interface for creating a new job. The 'Lead' tab is selected and circled in red. The 'Market Sector(s)' section is also circled in red and contains the following options:

- Interiors/Sp. Project
- Academic
- Commercial/Developer
- Government
- Healthcare/Sciences
- Historic
- Residential
- Retail

The 'Project Type(s)' section contains the following options:

- Apt/Condo
- Assist. Living
- Athletic
- Bank
- Classroom
- Dining/Resturant
- Dorm
- Garage/Parking
- Lab/Research
- Theater/Entertainment
- Hotel
- Law Firm
- Library
- Medical
- Museum
- Nonprofit
- Offices
- Religious
- Retail
- Other ...

Other visible fields include 'Lead/Sales Contact', 'Project Status', 'Bid/Proposal Type', 'Interview Date', 'Walk-Thru Date', 'RFP', 'CM', 'Builder's Risk', 'M/WBE', 'Cert.PR\BJRP', 'Construction Type', and 'Permit Type'.

Creating a New Job: Lead Tab (continued)

Step 4: Select the Project Team. Fill out the Project Executive, the Project Manager, the Chief Estimator (always Allan Fiddes), and the Head Estimator (always Ryan Kennedy).

The screenshot displays a software interface for creating a new job, with the 'Lead' tab selected. The interface is divided into several sections:

- Lead/Sales Contact:** A text input field.
- Project Status:** A dropdown menu with a 'HOT' button.
- Bid/Proposal Type:** A dropdown menu.
- Interview Date:** A date input field.
- Walk-Thru Date:** A date input field.
- RFP:** A text input field.
- RFQ:** A text input field.
- CM:** A dropdown menu with 'No' selected.
- Builder's Risk:** A dropdown menu with 'No' selected.
- M.A.C.E.:** A dropdown menu with 'No' selected.
- Cert PR/BJRP:** A dropdown menu with 'No' selected.
- Prevailing Wage:** A dropdown menu with 'No' selected.
- Green/LEED:** A dropdown menu.
- Bond Required:** A dropdown menu with 'No' selected.
- Tax Exempt:** A dropdown menu with 'No' selected.
- Market Sector(s):** A list of checkboxes including Interiors/Sp. Project, Academic, Commercial/Developer, Government, Healthcare/Sciences, Historic, Residential, and Retail.
- Project Type(s):** A list of checkboxes including 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 ...
- Construction Type:** A dropdown menu.
- Permit Type:** A dropdown menu.
- Contract Type:** A dropdown menu.
- Billing Format:** A dropdown menu.
- Value to Base the Permit on:** A text input field.
- Initial Value:** A text input field with a '%' button.
- Current/Final Contract Value:** A text input field with a '!' button.
- Project Start Date:** A date input field.
- Project Completion Date:** A date input field.
- Substantial Compl. Date:** A date input field.
- Trades:** A list of checkboxes including Sitework, Masonry, Doors, Ceiling, Flooring, Plumbing, Sprinkler, Other, Metals, Glass, Drywall, Paint, HVAC, and Electrical.
- Detailed Marketing Description:** A large text input field.

The 'Project Team' section is highlighted with a red oval and contains the following roles and names:

- Project Executive: [Redacted]
- Project Manager: [Redacted]
- Superintendent: [Redacted]
- General Super.: [Redacted]
- Assistant PM: [Redacted]
- Chief Estimator: [Redacted]
- Head Est./VDC: [Redacted]

Creating a New Job: Players Tab

Required: In the Players tab, fill out the following by clicking on them:

- **Client**
- **Billing**
- **Architect**

****Note: The Client and Billing are usually the same person, and you can click “Same as Client” for this information.**

Click the bolded names to edit

The screenshot displays a software interface for managing project players. The 'Players' tab is active, showing a table with columns for role, company, and contact information. The 'Client', 'Billing', and 'Architect' rows are highlighted with a red box. A yellow callout bubble points to the bolded names in these rows. A 'Choose Contact.. (Billing)' dialog box is open, showing contact details for 'City Realty/CRM Property Corp.' and a 'Same As Client' button circled in red.

Role	Company	Contact Name (First/Last)
*Client	City Realty/CRM Property Corp.	Josh Fetterman
*Billing	City Realty/CRM Property Corp.	Josh Fetterman
Architect	Rode Architects Inc.	Kevin Deabler

Choose Contact.. (Billing)

Company: City Realty/CRM Property Corp. Market Type: [Dropdown]

Department/Location: Main Office

Address 1: 320 Washington Street

Address 2: Suite 3FF

Address 3: [Blank]

City: Brookline State: MA Zip: 02445

Main Phone: 617-751-5119

Main Fax: [Blank]

Web Site: [Blank]

Comments: [Text Area]

Contact: Fetterman, Josh

Prefix: [Dropdown] Title: [Text]

Work Phone: [Text] Ext: [Text]

Mobile: [Text]

Fax: [Text]

Other Phone: [Text]

E-Mail Address: josh@cityrealtyboston.com

Comments: [Text Area]

Repeat Client:

Requires Approval:

Approved:

Active:

Mailing:

Buttons: Add to Outlook, Remove From Project, Add New Company, Add Location, Add Contact, Same As Client, Send to Viewpoint, Apply to Job

Creating a New Job: Precon/ VDC Tab

Step 1: Fill out the Contract Type (always TBD unless otherwise directed).

The screenshot displays a software interface for creating a new job. At the top, there are input fields for 'Project Name', 'Street Address', 'Floor(s) / Suite', 'sFt.', 'City', 'State', and 'Zip'. To the right is a 'Permitting Description' field. Below these is a navigation bar with tabs for 'Lead', 'Players', 'PreCon/VDC', 'Marketing', and 'Sales'. The 'PreCon/VDC' tab is active. In the main area, the 'Contract Type' dropdown menu is open, showing options: 'Cost Plus', 'GMP', 'Time & Materials', 'TBD', 'Lump Sum', and 'Design-Build'. The 'TBD' option is circled in red. To the right, the 'Type' dropdown is set to '(Select Type)'. Below it, the 'Initial value' field shows '00000.00'. There are also buttons for 'Dbi-Clk for Job# ->', a trash icon, an envelope icon, and a 'Send to VISTA-PROCORE' button. At the bottom, there is a 'Notes / Scope of work:' field.

Creating a New Job: Precon/ VDC Tab (continued)

Step 2: Fill out Reimbursable (yes or no).

The screenshot shows a software interface for a 'Project Information Sheet'. At the top, it displays 'Initiated by: regan' and 'Job#: 00000 - 00' with an 'EXIT' button. Below this is a search bar with '5098' and a 'Send to PROCORE' button. The main form area includes fields for 'Project Name', 'Street Address', 'Floor(s) / Suite', 'sFt', 'City', 'State', and 'Zip'. A 'Permitting Description' field is also present. A navigation bar at the bottom of the form area includes 'Lead', 'Players', 'PreCon/VDC' (highlighted with a red circle), 'Marketing', and 'Sales'. The 'Contract Type' is set to 'Pre-Construction' with a 'Type: Pre-Construction' dropdown. The 'Initial Value' is '70015.21'. The 'Reimbursable?' field is set to 'Yes' (highlighted with a red circle). The 'Start Date' and 'Completion Date' fields are empty. A 'Notes / Scope of work:' section is at the bottom.

Creating a New Job: Precon/ VDC Tab (continued)

Step 3: Fill out the start and completion date (both are today's current date).

The screenshot shows a web-based form titled "Project Information Sheet". At the top, it includes fields for "Initiated by" (regan), "Job#" (00000 - 00), and an "EXIT" button. Below this is a navigation bar with "5098", a search bar, and a "Send to PROCORE" button. The main form area is divided into several sections: "Project Name" with fields for Street Address, Floor(s)/ Suite, sFt, City, State, and Zip; "Permitting Description:" with a large text area; a tabbed interface with "Lead", "Players", "PreCon/VDC" (highlighted with a red circle), "Marketing", and "Sales"; "Contract Type" (dropdown), "Initial Value" (text), "Reimbursable?" (No/Yes dropdowns), and "Type: Pre-Construction" (dropdown) with "Dbl-Cik for Job# -> 70015.21"; "Start Date" and "Completion Date" (both highlighted with red circles); and "Notes / Scope of work:" with a large text area. A "Send to VISTA-PROCORE" button is also visible.

Creating a New Job: Precon/ VDC Tab (continued)

Step 4: Fill out the Type.

The screenshot shows a software interface for creating a new job. The 'PreCon/VDC' tab is selected and circled in red. The 'Type' dropdown menu is open, showing options: (Select Type), (Select Type), Competitive Bid, Pre-Construction, and VDC. The 'PreCon/VDC' tab and the 'Type' dropdown are circled in red.

Project Name:
Street Address:
Floor(s) / Suite:
sFt: City: State: Zip:

Permitting Description:

Lead Players **PreCon/VDC** Marketing Sales

Contract Type:
Initial Value: \$0
Reimbursable?: No PreCon
Start Date:
Completion Date:

Notes / Scope of work:

Type: (Select Type)
(Select Type)
Competitive Bid
Pre-Construction
VDC

Creating a New Job: Precon/ VDC Tab (continued)

Step 5: Once everything is all filled out, double click the yellow box below “Type” for job number.

Select if it’s an interiors vs. general building (this will appear after you have double clicked for job number).

The screenshot shows a software interface for creating a new job. The title is "Project Information Sheet". At the top, it shows "Initiated by: regan" and "Job#: 00000 - 00" with an "EXIT" button. Below this are navigation buttons (back, forward, add, delete) and a "Search Word:" field. The form is divided into several sections: "Project Name" with fields for Street Address, Floor(s)/ Suite, sFt, City, State, and Zip; "Permitting Description:" with a large text area; a tabbed interface with "PreCon/VDC" selected; "Contract Type" (dropdown), "Initial Value" (text field), "Reimbursable?" (No/Yes dropdowns), "Start Date" and "Completion Date" (text fields); and "Notes / Scope of work:" (large text area). A red circle highlights the "PreCon/VDC" tab. Another red circle highlights a yellow box containing the number "70015.21" under the "Type: Pre-Construction" dropdown. A blue arrow points from a yellow callout box to this number. The callout box contains the text "This is the Precon number".

Creating a New Job: Precon/ VDC Tab (continued)

Step 6: Send out automatic email with the link to the folder tree in the L-Drive. This will generate automatically.

The screenshot shows a software interface titled "Project Information Sheet". At the top, it displays "Initiated by: regan" and "Job#: 00000 - 00" with an "EXIT" button. Below this is a navigation bar with "5098" and a "Search Word:" field. The main form is divided into several sections: "Project Name" with fields for "Street Address", "Floor(s) / Suite", "sFt", "City", "State", and "Zip"; "Permitting Description:" with a large text area; a tabbed interface with "Lead", "Players", "PreCon/VDC" (circled in red), "Marketing", and "Sales"; "Contract Type" (dropdown), "Initial Value" (text field), "Reimbursable?" (No/Yes dropdown), "Start Date" (text field), and "Completion Date" (text field); "Type:" (Pre-Construction dropdown) and "Dbl-Clk for Job# -> 70015.21" (yellow box); and a "Send to VISTA-PROCORE" button. At the bottom, there is a "Notes / Scope of work:" section with a large text area.

Creating a New Job: Precon/ VDC Tab (continued)

**Step 7: Select the printer button to print.
Print the hardcopy and save the PDF.**

The screenshot shows a software interface titled "Project Information Sheet". At the top, it displays "Initiated by: regan" and "Job#: 00000 - 00" with an "EXIT" button. Below this is a navigation bar with "5098", a search field, and a "Send to PROCORE" button. The main form area includes fields for "Project Name", "Street Address", "Floor(s) / Suite:", "sFt", "City", "State", and "Zip". A "Permitting Description:" field is also present. A navigation bar below the form shows "Lead", "Players", "PreCon/VDC" (circled in red), "Marketing", and "Sales". The "PreCon/VDC" section contains fields for "Contract Type", "Initial Value", "Reimbursable?" (with "No" and "PreCon Yes" options), "Start Date", and "Completion Date". A "Type:" dropdown is set to "Pre-Construction" with a value of "70015.21" and a "Dbi-Clk for Job# ->" label. A printer icon button (circled in red) and a "Send to VISTA-PROCORE" button are located to the right of the "Reimbursable?" field. At the bottom, there is a "Notes / Scope of work:" section with a large text area.

Creating a New Job: Precon/ VDC Tab (continued)

Step 8: Send to VISTA-PROCORE and click yes through pop-up screens (determine yes or no for interiors vs. general building)

Once the job is sent to Procore, set up the project in CMIC.

**** Note: If creating a job from scratch (before Preconstruction), do not fill in/double-click for estimating number.**

The screenshot displays the 'Project Information Sheet' form. At the top, it shows 'Initiated by: regan' and 'Job#: 00000 - 00'. Below this are navigation buttons and a search field. The main form area includes fields for 'Project Name', 'Street Address', 'Floor(s) / Suite', 'City', 'State', and 'Zip'. A 'Permitting Description' field is also present. The navigation bar at the bottom of the form includes tabs for 'Lead', 'Players', 'PreCon/WDC', 'Marketing', and 'Sales'. The 'PreCon/WDC' tab is highlighted with a red circle. Below the navigation bar, there are fields for 'Contract Type', 'Initial Value', 'Reimbursable?' (with 'PreCon' and 'Yes' options), 'Start Date', and 'Completion Date'. The 'Type' dropdown is set to 'Pre-Construction'. The 'Dbi-Clk for Job# ->' field shows '70015.21'. A 'Send to VISTA-PROCORE' button is highlighted with a red circle. At the bottom, there is a 'Notes / Scope of work:' section with a large text area.