University of Northern Iowa

Centric Project Web Site User Guide

Overview

On all projects in excess of $1,000,000 and other select projects, the University of Northern Iowa utilizes an internet based project communication and management system called Centric Project on capital construction projects to share information among team members and tracks project communications. The project web site centralizes project information, provides structure for managing that information, and allows users to easily share that information with other team members. In the project web site, team members can view documents, add comments and markups to documents, send e-mail communications to team members, and track progress on project activities. All project team members are required to participate. There are no fees required for access to the system. Iowa State University will provide project team members with password protected access privileges to the project web site.

The information in this guide is intended to provide instructions for accessing the project web sites and give a brief introduction to some of the features of Centric Project. Centric Project has many features and capabilities that are not covered here. All users are encouraged to utilize the system to its maximum advantage. More detailed information is available in **Centric Project Project Web Site Help**.

Getting Help

Complete project web site documentation is contained in the **Centric Project Project Web Site Help**. To view the Help, use the links on the Project Area Login and Index pages, click the button in the Project toolbar, or click a **Help** button in project web site windows, tabs, and dialog boxes.

Project Web Site Help links

Use the four links at the top left of the Index page to view different sections of Project Web Site Help.

• The **Getting Started** link takes you to a topic in Help written especially for first-time project web site users. It helps guide you to the information in Help that will get you going quickly.

• The **Browser Tools** link takes you to the Browser Tools page, where you can see whether the latest version of Browser Tools are installed on your computer and where you can install them if necessary.

• The **Project Web Site** Help link at the top left of the Index page (and the icon at the top right of the Index page) takes you to Project Web Site Help, where you can get help on any project web site window, feature, or procedure.

• The **Troubleshooting** link takes you to the Troubleshooting page, where you can find solutions to common problems.

If you have any questions about using Centric Project that are not answered in the documentation, contact Framework Technologies technical support at the following phone number or e-mail address:

•Phone: (781) 270-5537 – Calls are accepted between 9:00 AM and 6:00 PM EST

• E-mail: support@frametech.com

For help or questions specific to the Iowa State University web site, contact the project manager on the project or Paul Meyermann

• Phone: (319) 273-3035

• E-mail: Paul.Meyermann@uni.edu

Training Sessions
UNI will conduct training sessions on the use of Centric Project as needed. If you would like to participate in a training session, please call (319-273-3035) to register.

Getting Started

Minimum System and Software Requirements: For the system to be properly utilized, Iowa State University recommends that team members have the following minimum system and software (in some cases, these are required by the agreement with UNI):

- Operating Systems: Microsoft Windows 98, Windows NT 4.0, Windows 2000, Windows ME, or Windows XP
- Minimum 64MB RAM
- Processor: PC Compatible, 233 MHz Pentium II or better
- Minimum 60 MB free hard disk space for application
- Minimum 120 MB of temporary free hard disk space used during installation
- Video Card and display capable of True Color (24-bit)
- Internet connection (high speed connection recommended, 256KB/Sec or better)
- Internet Explorer 5.5, 5.5 SP1, 5.5 SP2, 6.0, or 6.0 SP1.
- Software to create and read Adobe Acrobat files
- Scanner
- MS Word, MS Excel, MS Outlook (Recommended)

Note: Although you can browse to a Centric Project web site using other operating systems such as Macintosh, Unix, and Linux, you cannot install the project web site Browser Tools, so the features that these tools provide will not be available.

Navigating to the Web Site

Access the internet and navigate to the Planning, Design and Construction area on the Iowa State University Facilities Planning web page at **http://fpams010.ats.iastate.edu/UNI.**
If you are a team member on one or more projects, select: **Access the login page**.
A welcome page will then display information about the project web site. Type in your user name and password provided to you by your system administrator. Then click the **"Login"** button.

Installing Browser Tools

To utilize all of the features of Centric Project, it is necessary to install the Browser Tools. For instructions, see "Installing Browser Tools" at the **Browser Tools** link in **Centric Project Project Web Site Help.** You need to install Browser Tools on each client computer that will be accessing a project web site.

Note: When you log in to your project web site, Centric Project checks to make sure that the most current Browser Tools are installed. If they are not, a message appears that tells you that your Browser Tools are out of date and provides a link to install the latest version.

Login and Password

The project web site cannot be accessed without an assigned user name and password.
The system administrator is: **Paul Meyermann**
He can be reached at: **Paul.Meyermann@uni.edu**
Upon entry into the web site, you must change your password by updating your "User Information".

Using the My Dashboard Window

The My Dashboard window is your view of your project information. In the My Dashboard window, you can see, at a glance, the Tracked Activities, Information Items, and events that require your attention. You can view and respond to your tracked activities, you can preview and manage your Information Items, and you can view and edit your user information (including your Centric Project password). In the My Dashboard window, you can view information for all of your projects or you can view information for a specific project. If you have tracked activities in the project that require your attention, the icon for the project on the Project Area Index page, the icon in the project web site window, and the **My Activities** button in the My Dashboard window turn red. The information in the My Dashboard window is automatically updated every 10 minutes or whenever you view or update a tracked activity, meeting, or milestone.

To open the My Dashboard window

On the Project Area Index page, click on the My Dashboard icon to the left of the project's name or in the project web site window, click in the top-left corner of the project web site window. The My Dashboard window appears. The My Dashboard window contains three pages:

• **At-a-Glance** lists Tracked Communications relevant to you or requiring action by you, as well as Information Items added to project elements that you have subscribed to. It also lists comments to Information Items that you have published. The At-a-Glance page also lists important events coming up within a specified number of days. Use this page to see the information that most relates to you, sorted with the most urgent items at the top of the lists.

• **My Activities** lists all Tracked Communications requiring action by you as well as all other Tracked Communications related to the project that meet your specified filter criteria. Use this page to stay on top of your formal project communications. If a red flag appears next to a tracked activity, the tracked activity is new or has been updated since the last time you viewed it and requires your attention. For more information about viewing and sending tracked activities, see "Viewing and Sending Tracked Activities".

• **My Info Items** lists all Information Items owned by you. Use this page when you need view, download, or manage your Information Items.

Viewing and Editing Your User Information

Your user information includes the information that appears about you in the project web site, including your display name, e-mail address, title, company name, address, phone number and other phone numbers (fax, mobile, pager). Your user information also includes the password you use to log in to Project Area and this is where you can change your password. You can view and edit your user information from the My Dashboard window.

To view or edit your user information

Use the following procedure to view or edit your user information:

1. In the My Dashboard window, click the **File** menu, in the upper left corner, and click on "User Information". The User Information window appears and displays your current user information.
2. Make the necessary changes to your user information.
3. When you are finished making changes, click **O**K.

Web Site Access Levels

Four levels of access to a Centric Project web site are available to be assigned on an individual basis to users of the site. Iowa State has initially assigned access levels to all project team members based on default settings for each category of team member. You can only see tabs that you have access to on the project web site. The access levels available to users are:

• No Access – This level allows no access.

• Viewer Access – This level allows the user to change their password and modify their user

information, view and download information items, send and receive tracked communications, and email other project team members.
• Reviewer Access – This level allows the user all of the same privileges as Viewer Access and adds the ability to comment or mark up Information Item documents and view the comments or markups made by others.
• Publisher Access – This level allows the user all of the same privileges as Reviewer Access and adds the ability to publish Information Items to the web site as well as move, modify, and transfer ownership of any Information Items you may “own”. By default, the user that publishes an Information Item becomes its “owner”. Only the owner or the system administrator may transfer ownership of Information Items.

Project Web Site Organization

Information for this project has been organized onto a series of “Tabs” as described below. Access to these tabs may be limited to certain project team members. A listing of “Elements” can be found under each tab described below. All information you publish to the web site needs to be placed under the appropriate element.

Tab-Element Matrix describes what information should be published to each tab and element, who is responsible for posting the information, the file types that should be used, and file naming protocol.

Overview Tab:
The “Overview” Tab contains general project information that is accessible within the web site to all project team members. The Overview Tab is also accessible to the general public via the Guest login. The information on this tab is primarily published and updated by UNI personnel.
The Tab also includes links to the following information:
Tab-Element Matrix
Centric Project Reference Guide
Webcam
Planning Process
Facilities Planning Webpage
Board of Regents Webpage

Design Schedule Tab:
The “Design Schedule” tab is used to communicate overall project schedule information. The official schedule is published by Business Services and the Architect’s schedule is published by the Design Professional. Note - Construction schedules are published on the Construction Tab.

Budget Tab:
Contains initial budget and project update budgets as published by Business Services.

Pre-Design Tab:
The “Pre-Design” tab is for use by the design team (architects, project clients, university support staff and university administration) to facilitate the collaboration of the design process. Access to this tab is generally not required during the construction phase.

·Existing Documentation – published by Design Group.
·Program – including space needs, reference data and review comments. Items published by Design Group or Design Professional.
·Correspondence – published by Design Professional or Design Group.
·Meeting Minutes – published by Design Professional.
·Feasibility Study – published by Design Professional.

Design Tab:
This tab is for use by the Design Team and User Groups and includes the following items:
·Meeting Minutes – published by Design Professional.
·Design Correspondence – published by Design Professional or Design Group.
·Survey – published by Design Group.
·Geotech Reports – published by Design Group.
·Schematic Design – document drawings, review comments, area tabulation, estimate and presentations published by Design Professional.
·Design Development – document drawings, review comments, area tabulation, estimates published by Design Professional.
·Construction Documents – Drawings, project manual, area tabulation, estimates, relocation planning and review comments published by Design Professional.
·Sustainable Design – published by Design Professional.
·Art in State Buildings – Art and Architect Committee.
·Life Cycle Cost Analysis – published by Design Professional.
·Code and Fire Marshal Review Data – published by Design Professional.

Bid Tab:
The “Bid” tab contains project bidding information that is accessible within the web site to all project team members and to the general public via the Guest login. When a project is issued for bid, complete bid documents and plan holders list are available for viewing or download on the particular project site.

The Bid Tab includes the following:
·Advertisement for Bids – published by Business Services.
·Plan Holders List – published by Design Professional.
·Prebid Meeting Minutes – published by Design Professional.
·Bid Tabulation – published by Business Services.
·Bid Documents – published by Design Professional including drawings, project manual and all addendums.

Construction Tab:
The “Construction” tab is for use by the project team (architects, contractors, subcontractors, project clients, university support staff and university administration) to facilitate communication during the construction phase of the project. The information on this tab is published and updated by all members of the project team.

The Construction Tab includes the following:
·Construction Minutes – preconstruction minutes published by OCR. Progress meeting minutes published by Design Professional.
·Construction Correspondence – published by author.
·Construction Schedule – published by contractor.
·Construction Set Documents – drawings (PDF) and project manual (PDF) published by Design Professional.
·Contract Information
    Notice of Award – published by Business Services.
    Subcontractor List – published by Contractor.
    Builders Risk – published by Business Services.
    Signed Contract – published by Business Services.
    State Agency Correspondence – published by Design Professional.
·Project Observation – Design Professional visits, UNI observation, contractor daily reports, punchlists, test reports, photos published by author.
·Owner Furnished Equipment – published by Facilities Planning.

·Closeout – substantial completion, project closeout and final acceptance published by OCR.
·Occupant Correspondence – published by OCR.
·Change Orders – published by OCR.
·Pay Requests – published by Contractor.

Operations Tab:

The Operations Tab is used to accumulate final project documentation that can be used for the daily operation and maintenance of the facility.

The Operations Tab includes the following:
·Record Documents – drawings (DWG), project manuals (PDF), published by Design Professional.
·Operation and Maintenance Manual – final approved copy published by Contractor.
·Training – records of all equipment training published by Contractor.
·Warranties – copies of all warranties published by Contractor.
·UNI Confidential – various project information published by UNI staff.

Dashboard Tab:

The Dashboard Tab contains the logs for the tracked activities utilized by the project web sites. The tracked activities that UNI has defined for use are described below. You will not be able to see logs that you do not have access rights to.
Tmail Log: This is for use by the project team for tracking correspondence between project team members on various issues. The tab functions very much like email but has the advantage of maintaining a record of the correspondence within the Centric Project system, which allows the status of the issue, and the correspondence to be viewed by all team members with access to the tab. Tmails can be transferred back and forth or to other project team members as necessary. This tab used for communications between team members during all phases of the process from preplanning through occupancy. In general, Tmail should be used in lieu of email for all significant project correspondence.
Doc Review Log: This is for use by the project team to record and track review comments on project drawings and specifications during the design phase of the project. Comments published by UNI staff and responded to and republished by Design Professional at each phase.
Design RFI Log: This is for use by the project team to keep track of all "Requests for Information" that require resolution during the design phases of the project. It should not be utilized during the construction phase of the project. The use of the RFI tracked communication function should eliminate the need for any paper RFI's being sent between team members. The Centric Project system automatically numbers the RFI's in the order they are generated.
CDR Log: Tracks CDR's issued and published by the Design Professional and approved and republished by the OCR and Associate Director of Construction.
PR/CCD Log: The Design Professional will publish the PR/CCD issuing to the Contractor with a copy to the OCR. The Contractor prices the PR/CCD and republishes the document with the Design Professional as the responsible party. The Design Professional reviews and provides a recommendation to the OCR by republishing the PR/CCD. The OCR obtains the necessary signatures and the final PR/CCD is republished for all.
RFI Log: This is for use by the project team to keep track of all "Requests for Information" that require resolution during the construction phase of the project. It should not be utilized during the preplanning or design phases of the project. The use of the RFI tracked communication function should eliminate the need for any paper RFI's being sent between team members. The Centric Project system automatically numbers the RFI's in the order they are generated. RFI's are initiated and published by the Contractor and republished by the Design Professional.
ASI Log: As needed the Design Professional shall publish supplemental instructions to the Contractor with the OCR receiving a copy.
Submittal Log: This is for use by the project team to keep track of shop drawings and product

data submittals. The submittal log allows the tracking of project submittals. Submittals shall be published on Centric Project by the Contractor in accordance with the accepted submittal schedule which should be the first submittal. The Design Professional should be the responsible party with a copy to the OCR. The OCR shall forward the notifying email to applicable people in Facilities Planning and Physical Plant. UNI comments should be returned to the OCR within one week. The OCR will forward the applicable comments to the Design Professional. The Design Professional will complete their review and publish a marked up copy on Centric Project with the Contractor as the responsible party and the OCR should be copied.
Warranty Log: This is for use by the project team to keep track of requests for action on warranty work items that occur during the one-year project warranty period
Calendar: The project calendar is used tracking and notifying the project team of date-based events that are associated with your project such as meetings, project milestones, and tracked activities that have due dates.

Subscribing to Areas on the Project Web Site

Certain areas of a project web site are important to specific project team members. You can make sure that you are notified when information in these areas changes by subscribing to the information. You can subscribe to a tab or a project element within a tab. When you subscribe, you receive an e-mail notification when new content is published or modified in the subscribed area. You can also send e-mail to subscribers and receive e-mail from other team members about items to which you are subscribed. Iowa State has initially set the subscriptions to the project web site based on default settings for each category of team member. Each team member may manage the notifications they receive by subscribing to additional tabs or elements that they have access to or unsubscribing to elements or tabs. Use the Subscription Map to subscribe to or unsubscribe from more than one Project Element or tab at once. You can also use the Subscription Map to see which items you are currently subscribed to. **Remember, if you unsubscribe to an element you will no longer be notified when information in these areas changes**.

Viewing Information Items

If you have access to a project tab, you can view any published Information Item on that tab. When you view an Information Item, you can choose to view it either in the Information Item's native viewer/application window with the **Open** command (if the native application is installed on your computer) or in the Centric Project Viewer window with the **Centric Project View** command. You can also **download** an information item by specifying a location on your computer to save it to.

Publishing Information Items

If you have Author or Publisher access to a tab in the project web site, you can add new Information Items (CAD drawings, photos, documents, URLs, and other files) to the Project Elements in the tab. The process of adding an Information Item to a project web site is called publishing. When you publish an Information Item to a project web site, you make that Information Item available to other project web site users so that they can view it, comment on it, mark it up, and download it (depending on the access that they have to the Information Item).

To publish Information Items with the In Box
1. Select the files that you want to publish:
• To publish one or more files, select the files in Windows Explorer.
• To publish a URL, open a browser window to the URL that you want to publish, then select the entire URL in the browser's Address or Location box.
2. Drag the files to the Information frame of the tab to which you want to publish the files and then drop the files on the **In Box** icon. The Publish Confirmation dialog box appears.

3. If necessary, edit the Information Items' properties (display name, description, etc.).
• For file Information Items, edit the properties by clicking the button in the Properties column for the Information Item, making your changes, and then clicking **Change.**
• For URL Information Items, you can edit the properties directly in the Publish Confirmation dialog box.
4. Click **Publish**. Centric Project displays the Publication Status dialog box and publishes the Information Item to the project web site. The Publication Status box appears to tell you the
status of the publication. When the publication is complete, a set of check boxes appear that let you select who you want to notify about the publication. Select the appropriate notification check boxes.
5. Click **O**K. The Notification Message dialog box appears.
6. To add a message to the automatic notification e-mail that will be sent to the recipients you selected, type the message in the Additional Description box.
7. Click **Submi**t.

To publish Information Items using the Add button

1. In the Information frame for the tab to which you want to publish an Item, click the **Add** button. The Publish Confirmation dialog box appears.
2. Specify the display name, description, path, and owner for the Information Item.
3. Click **Publis**h. If the document has not been published previously, the file is published. When the publication is complete, the Publication Status box displays a set of check boxes that let you select who you want to notify about the publication. Go to step 5. If the document looks like it is an update to an existing document, Centric Project displays the Publication Status dialog box, which allows you to choose how you want to publish the file.
4. Select the publishing option that you want to use:
• **Publish as new** – Select this option to publish the Information Item as a new Information Item.
•**Republish –** Select this option to republish this Information Item as a new version of an existing Information Item.
5. A Status page tells you when the publishing or republishing is complete. It includes options to send notifications to subscribers and send a copy to you. Select the appropriate notification check boxes.
6. Click **O**K. The Publish Notification dialog box appears.
7. To add a message to the automatic notification e-mail that will be sent to the recipients you selected, type the message in the Additional Description box.
8. Click **Submit**.

How and When to Use Tracked Activities

Tracked activities are customized online forms that allow team members to request and communicate information about a project.
To initiate a Tracked Activity, select the form you want from the **Send** menu on the project toolbar at the upper left of the project web site or click on the **Send** button at the bottom of the "My Dashboard Window" and select the desired form. Fill in the requested information in the form and click on the "Submit" button. Check the appropriate boxes for notification and then click "OK". (Always notify recipient). The Tracked Activity now has a status of Open in the Tracked Activity Log.
To respond to a Tracked Activity, open the Tracked Activity from the Tracked Activity Log or from the My Dashboard Window. Select the **"Respond**" button at the bottom of the screen. Fill out the fields, add other team members to the cc list, add attachments, etc. When finished, click "done";
check the appropriate boxes for notification and then click "OK". The Tracked Activity now has a

status of Responded in the Tracked Activity Log. If you feel that someone else on the team should be the one to respond, you may click the **"Transfe**r" button. This will transfer the Tracked Activity to another team member. The Tracked Activity now has a status of Responded in the Tracked Activity Log. When a Tracked Activity is transferred, the status of the Tracked Activity Log remains Open but the responsible user will change.

If you originated the Tracked Activity, inmost cases you will be required to confirm or reject the response to close the item in the log. **Confirm** the response if the information provided resolves the issue to your satisfaction and no further information is required. **Reject** the response if you disagree with the response, need further clarification on the response, or the responder needs additional information.

Warranty Work Request:

UNI will transmit requests for warranty work to the prime contractor on the project during the project warranty period. Once the required work has been completed, the contractor should respond indicating the required action has been completed. Warranty work requests are initiated in the system by UNI by selecting "Warranty Work Request" form and filling out with the appropriate information. Responses must include the date work was completed, who performed or supervised the work, and a description of the action taken

Design RFI:

A Design RFI is used much in the same manner as the traditional RFI process is during the construction phase but is focused on answering questions and resolving issues between project team members during the design phase of the project. A Design RFI is initiated, responded to, and confirmed as described for an "RFI" above.

Printing Tracked Activities

To print a copy of a tracked activity (RFI, Tmail, Submittal, etc.), use the following procedure:
Iowa State University Centric Project Reference Guide- March 1, 2003 Page 10.1. Open the tracked activity that you want to print.
2. Click **Actions** at the bottom of the form and then choose **Print from Word** or **Print from Acrobat**. The application you chose will be opened.
3. From the application's File menu, choose **Print.**

If you do not have Word or Acrobat installed on your computer:
1. **Right click** in an open area of the Tracked Activity or Tracked Activity Log.
2. Select **Print** from the pop up menu.