



**BUILDER  
INFORMATION  
SYSTEM**

**BIS<sup>®</sup>  
Document Manager Module  
Reference Manual**

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## Conventions Used In This Manual

Every effort has been used to try to make this manual as useful and informative as possible. To accomplish that goal, several conventions have been used to assist the reader.

### **Caution**

These boxes contain warnings about things the user **MUST** check or of items the user should be aware before proceeding. In many cases, the advice is to check with the C.P.A. or other tax advisor.

### **Tip**

Tips offer special information, considerations, or other insights when undertaking the task described.

### **Hyperlink**

A hyperlink is shown with an underline as it is shown by default in the program. Hyperlinks may be found in screen forms or in screen previews of reports.

### **Access**

Menu access to selected items is shown in the two or three ways available (depending on the item). Here are examples to access to a functional menu element:

### **Modular Menu Access**

DM | Bid Request

This represents access to Bid Request logs from the Modular menu, irrespective of Reports Group or List.

### **Standard Menu Access**

Job | Documents | Bid Request

This represents access to the Bid Request logs from the Standard menu.

The following an example of access to a report item:

### **Access to Bid Request Report**

#### **Module Menu with Reports Group**

DM | Reports | Bid Request

This represents access to the Bid Request report from the Module menu with Reports Group

#### **Module Menu with Reports List**

DM | Bid Request

This represents access to the Bid Request Reports from the Module Menu with Reports List

### **Standard Menu**

Reports | Document Manager | Bid Request

This represents access to the Bid Request reports and documents from the Standard (legacy) menu.

In some instances, individual screen buttons are shown in the text, such as the Magnifying Glass  icon.





## Section 1 – Overview

The Document Manager module allows production and control of the most common types of construction-related documents online, rather than manually with a paper forms and folders system that is commonly employed. There are thirteen document types that are grouped by typical construction project stages.

In addition to the documents, a wide variety of reports are available that provide specific or general information about the documents that have been created.

Two general document formats are available:

- Legacy: The Legacy formats utilize preset format established in BIS®.
- BIS® Document Editor: This format allows the user to modify existing formats or create new ones using the BIS® Document Editor functionality.

Both document formats permit the user to add company logos to the header to “brand” the resulting document.

## Preparation Stage Documents

<b>Bid Request</b>	Formal bid request for work to be performed for transmission to subcontractors
<b>Plan</b>	Tracks sets of project plans that are loaned to and returned from subcontractors
<b>Insurance</b>	Provides quick and easy entry and access to subcontractor insurance information
<b>Subcontract</b>	Provides quick and easy entry and access to subcontractor information, such as pay schedules, contract amounts, and work descriptions
<b>Submittal</b>	Tracks job submittals, such as operating manual or warranty certificates, which need to be forwarded to the owner

## Performance Stage Documents

<b>Change Order</b>	Two types of Change Orders
<b>General Change Order</b>	Tracks contract change orders between the general contractor and the buyer
<b>Subcontract Change Order</b>	Tracks contract change orders between the general contractor and the subcontractor
<b>Transmittal</b>	Provides a cover letter type form that is usually sent to identify attached paperwork and/or related instructions
<b>Request for Information</b>	Tracks information requests to the project's architects and engineers that is required by the general contractor or subcontractors
<b>Deficiency Notice</b>	Generates professional quality deficiency notices, listing requirements that the subcontractor still needs to complete

<b>Lien Release</b>	Generates release forms to be signed by the subcontractor for partial or final payment for work performed
<b>Meeting Minutes</b>	Records meeting minutes, along with topics discussed and the names of those present, allowing dissemination of these notes to all interested parties

## Completion Stage Documents

<b>Closeout Submittal</b>	Tracks final job submittals, such as operating manual or warranty certificates, which need to be forwarded to the owner
<b>Punchlist</b>	The final list of job completion tasks and touch-up work for a project that must be completed by the subcontractor

For each type of document, there is an online log screen that gives a one line summary of each document that has been entered. From each log screen, documents can be added, edited, viewed, and deleted. The user can also browse all documents, or selectively view documents using searching, sorting, or filtering criteria. Document reports giving summary or detail information can also be printed out from each log screen. For many document types, single page high quality laser printer forms can be printed for transmission to all interested parties.

- **Tracking/Creation**

The Document Manager facilitates both the tracking of existing documents and the creation of new ones.

- **Log format**

The information for all documents of each type is kept in a document log, which appears as a conventional paper log. Each line represents a single document, and each column represents a piece of information about that document.

- **Full-screen edit forms**

Once you decide to Edit, View, or Add a new document to a log, a full-screen representation of that single document appears on the screen.

- **Search, sort, filter**

When looking at a document log, you may search for certain documents, sort the log in one of several ways, or filter out all but a subset of the documents.

- **Individual printed documents**

Some document logs, used for creating documents in addition to tracking them, are able to print a single document on a laser printer in a professional-quality form. No pre-printed forms are necessary.

- **Printed logs**

All logs can print a range of documents in a report. This report can be specified to be a summary, which shows only important columns; or detail, which shows all information about each document.

- **Subject system**

Often a particular issue in a construction project will cause the generation of several documents of different types. When this happens, the subject of that paperwork can be defined formally to the Document Manager as a Subject, and then all the associated documents can be linked together under that name. The Subject list can be viewed just like any other log, and provides a tool for navigating the associated paperwork.

- **Auxiliary contact and company list**

A secondary list with the names of companies and persons with whom you do business is provided. Names may be entered that don't fit the categories of "customer," "vendor," or "employee," and the same pop-up pick list convenience is provided.

- **Tie-in to BIS<sup>®</sup>**

All of the employees, vendors, customers, jobs, and cost codes that are used in the BIS<sup>®</sup> system can be used in the Document Manager where appropriate with the same pop-up pick list operation.

For the remainder of the manual, the Document Manager module may be abbreviated and referred to as DM.



## Section 2 – Menu Access

Use this option to create, edit, and access documents related to jobs. The Document Manager Submenu of the Reports menu displays reports created using the forms found on the Document submenu of the Jobs menu.

### Modular Menu Access

Job | Documents

### Standard Menu Access

DM

A particular issue in a construction project will often cause the generation of several documents of the thirteen different types available in Document Manager. For example, there may be a previously undetected problem related to a building's foundation due to unstable ground. When this happens, a Document Manager Subject could be created to link different document types together that all deal with the foundation problem. A subject could be created called "Foundation Problem", and used to group together all documents related to the problem, such as Change Orders, Meeting Minutes, Request for Information, etc. Then the subject list of all documents related to the foundation problem can be viewed just like any other log, and provide a tool for navigating the associated paperwork.

The Subject System allows documents to be grouped into useful categories. After a subject is created, documents of any type can be associated with that subject. Navigating through the Subject menu, the user can Edit or View each document linked together by the same subject name, or Delete them from the subject.

- Any document may be included in multiple subjects.
- Documents are identified by their reference number and a user-defined label.
- Adding documents to subjects is done with the "Subject" menu option in each Edit screen.

Documents may be viewed, printed, exported, or emailed. For Professional Edition users, the documents can be exported or emailed in the Microsoft® Word® Rich Text Format (RTF) or as a text (TXT) file. Enterprise Edition users can also export or email documents in Hypertext Markup Language (HTML). If users also have the Document Link & Imaging module, data from the document can be exported to Microsoft® Excel.



## Section 3 – Documents

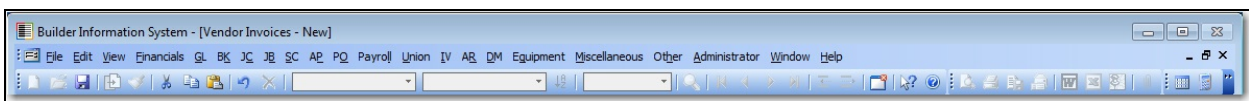
There are 13 basic pre-existing documents in a total of 14 variations.

### Tool Bar Menu

As with almost all Windows programs, the Tool Bar contains icon shortcuts to program functions. In many cases, icons also have keyboard shortcuts. The list of keyboard shortcuts and other Function key abilities are listed in the Help File. Most of these icons and functions are the same as that used in other Microsoft® Windows® programs. Although the tool bar is initially anchored at the top of the screen, it can be moved to any side of the screen.




**Figure: DM-1** The BIS® Standard Menu toolbar and menu.




**Figure: DM-2** The BIS® Modular Menu toolbar and menu.


#### New (Ctrl-N)

 The New icon opens a new document record for the form that is open. If records are shown in the form, they are blanked out, and a fresh form appears.


#### Open (Ctrl-O)

 The Open icon allows the existing record in a form to be edited (unless limited by other audit safeguards.)


#### Save (Ctrl-S)

 The Save icon preserves the data of the current record or form.


#### Clone

 The Clone icon is not available to Document Manger.


#### Clear Button

 The clear button is not available to Document Manager.


#### Cut (Ctrl-X)

 The Cut icon removes the selected item from the current screen and places it on the system clipboard.

#### Copy (Ctrl-C)

 As with other Windows programs the Copy icon places a duplicate of the selected item on the clipboard without removing the original.


#### Paste (Ctrl-V)

 The Paste icon works exactly as it does in other Windows programs. It takes the last item saved to the clipboard and places it in the selected field in the current program.

#### Undo (Ctrl-Z)

 The Undo icon erases the last action done.

**Delete (Ctrl-D)**


 The Delete icon works as it does in other Windows® programs with one important exception. Following good accounting practice, BIS® will not allow deletion of records where their information was used in a subsequent record or transaction.

**Form Listing & Sort**


The next section of the toolbar shows the form opened and selects the sort order for the currently-selected file.

**Figure: DM-3**  
Form Listing & Sort


**Find (Ctrl-F)**

 The Find icon provides a list of existing records for selection.


**“Navigation” Buttons (F5, F6, F7, F8)**

 The Navigation button icons provides tools to move through records. In sequence, they are: the first record (F5), the previous record (F6), the next record (F7), and the last record (F8).


**Insert Line (Ctrl-I)**

 The Insert Line icon on the toolbar is not available to Document Manager.


**Delete Line (Ctrl-J)**

 The Delete Line icon on the toolbar is not available to Document Manager.


**Close (Ctrl-F4)**

 The Close icon closes the current record.


**BIS Help (F1)**

 The BIS® Help icon opens the context sensitive BIS® Help file.


**Preview**

 The Preview icon works with the Document and printing functions, and provides a preview in WYSIWYG mode. As with other screen elements, these document previews can be tiled or layered with the BIS® MSD (Multiple Screen Display) or BIS® TMSD (Tabbed Multiple Screen Display).


**Print (Ctrl-P)**

 The BIS® Print icon causes the current document to be sent to the print spooler so that it can be printed by the default or selected printer accessible to the sending computer.

**Export Report**

 The Export Report icon exports the current document in up to four different formats, depending on the edition of BIS® used. Professional edition users can export in DOS TXT, Adobe® PDF, and Microsoft® Word® formats. Enterprise users can also export in HTML format.

**Email Report**

 The Email Report icon enables Professional and Enterprise edition users to email documents from directly within BIS®. The available formats for these editions are the same as listed for Export above.




**Microsoft® Word®**

 The Microsoft® Word® icon enables the BIS® Mail Merge feature to be used with Microsoft® Word®. A sample mail merge letter is contained with other Demo data in BIS®.


**Microsoft® Excel®**

 The Microsoft® Excel® icon enables setup the BIS® Export Data feature with Microsoft® Excel®.

**Microsoft® MapPoint®**

 The Microsoft® MapPoint® icon is not available with Document Manager.

**Attached Documents (Professional & Enterprise Editions)**

 The Attached Document icon is not available with Document Manager.

### Document Control Features

BIS® Document Manager contains many features common to all of the document input screen forms.

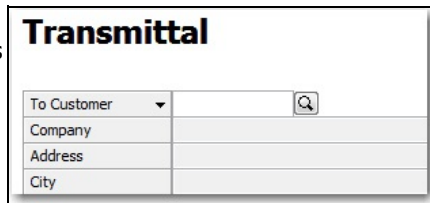
#### Select from Drop-Down List (Hyperlink)

The Select Drop-Down icon allows users to select a category and open (or edit) a new record. For example, from Transmittals, a user may select Customers, Vendors, or Companies, and add a new record, or edit an existing record. This icon is usually contained within the field label, and is not a separate icon as will be shown below.

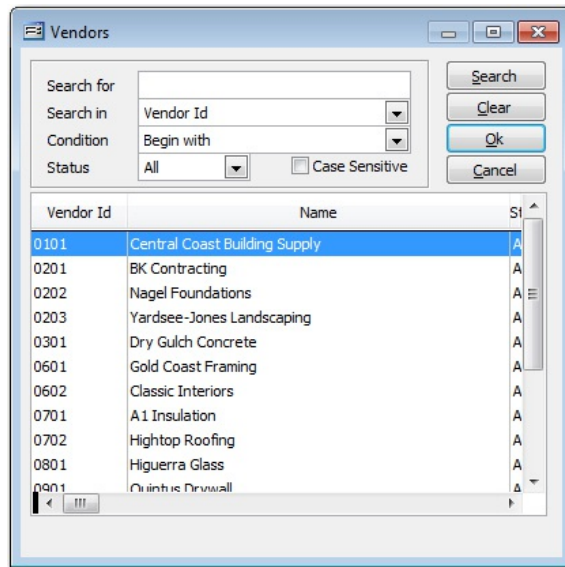
#### Find Button

The Find button is used to select an entry within a category of data. In instances when more than one category is available, the screen will produce a drop-down screen to allow the user to select the category. Once the category is selected, the familiar Find screen opens with the available choices from that category.

**Figure: DM-4**  
Example of data categories available when selecting the Find button in a Transmittal document.



**Figure: DM-5**  
Find List opened from the Find button.



#### Check Boxes

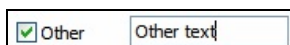
Many documents include check boxes for easy selection of common elements. Such elements could include standard subjects, sent via types, and more.

#### Text Fields

Most documents include text fields of two types:

##### Limited Size Text Box

Used to simply clarify and "other" selection



**Figure: DM-6**  
Limited Text box.

### Unlimited Text Box

Used to contain any amount of text. That text could be entered manually, or copied from another source and pasted into the text field in the document.

**Figure: DM-7**

Unlimited Text box in Document Manger.

Notes

These are notes entered into this Document. The text can be any length.

### Grid/Table Fields

Many documents include grid or table fields that contain several elements.

**Figure: DM-8**

Grid/Table Fields in Document Manager.

Subject	Description	Notes
MORE DATA	More Data needed	More notes about More Data needed.

### Subject

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.


### Description

The Description field is populated from that associated with the selected Subject.


### Notes

The Notes field is populated with manually entered text.

### Insert Line Button

 The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

### Delete Line Button

 The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Bid Request Document

The general contractor sends out bid requests to subcontractors for work to be performed. Typically, the Bid Request describes the work to be performed and the date when the bid is due back from the subcontractor to the general contractor. Once the bid is received, the general contractor notes the bid price and accepts the most desirable bid, which is frequently the one with the lowest price.

- **From/To Section**  
Allows entering the name and title of both the sender and the recipient and much more.
- **Description of Work**  
A scrolling text field is provided solely for describing the work requested.
- **General Notes**  
A second field can be used for general-purpose notes.
- **Bid Tracking**  
The log records date sent, reply due date, and reply received date in addition to the bid amount.
- **Subject**  
A mini-form is provided to indicate subjects, descriptions, and notes.

The Bid Request Log supports creation, modification, tracking and printing of the numerous Bid Request letters typically issued for many jobs. Bid Requests are created using this option, and a formal bid request can be printed for submission to subcontractors.

### Modular Menu Access

Job | Documents | Bid Request

### Standard Menu Access

DM | Bid Request

The BIS® Bid Request Log screen gives a one line summary of each Bid Request that has been entered. This log allows for browsing all documents or selectively viewing documents using searching, sorting, or filtering criteria. From the report query screen, the user can also print out summary or detail reports. Single and multiple page forms can be printed, exported, or emailed, to be sent to subcontractors for bidding.

### Form Fields

#### Vendor

Use this field to select the Subcontractor/Vendor Id from whom a bid is sought. Please note that when the selection is made, BIS® will automatically enter the Company name, Address, City, State, Zip code, and Telephone and Fax numbers from the Vendor master record. Please note that the down arrow in the Vendor title area enables the user to add or edit the list of vendors.

#### To (Contact)

Use this field to select the Contact person of the Vendor that was selected. Please note that when the selection is made, BIS® will automatically enter the person's Title from the Vendor master record. Alternatively, this field's data may be overwritten on the printed form if another selection is made in the To (Optional) field.

#### Title

This field displays the title of the selected To (Contact) person.

## Bid Request Screen Entry Form

The screenshot shows a software window titled "Bid Request - Edit". The main heading is "Bid Request". The form is divided into several sections:

- Vendor Information:** Vendor dropdown (0301), Company (Dry Gulch Concrete), Address (193 Snake Canyon Road), City (Santa Maria), State (CA), Zip Code (93448), Telephone ((805) 543-7000), Fax ((805) 534-1595), To (Contact) dropdown, and Title field.
- Date and Reply Information:** Date Sent (10/11/xxxx), Reply Due (//), Reply Received (//), Reply (//), and Reply Notes field.
- Employee Information:** From Employee dropdown, Name field, and Title field.
- Job Information:** Job dropdown (1000), Description (Pacific View Apartments), Cost Code dropdown (03000), and Description (Concrete).
- To (Optional) Information:** To (Optional) dropdown, Name field, Title field, and Company field.
- Amount:** Bid Amount field (0.00).
- Sent via:** Checkboxes for Mail (checked), Fax (checked), Email, and Other.
- Work to Perform:** Text area containing "Concrete & Paving" and "Start - 10/11/xxxx".
- Notes:** Large empty text area.
- Subject:** Table with columns: Subject, Description, and Notes.

Subject	Description	Notes

**Figure: DM-9** Document Manager Bid Request input screen form with sample data.

### Date Sent

This field is used to records the date that the bid request was sent to the vendor. This date may be typed or entered using the Calendar tool.

### Reply Due

This field is used to records the date that the bid request is due from the vendor. This date may be typed or entered using the Calendar tool.

### Reply Received

This field is used to records the date that a reply was received from the vendor for the bid request. This date may be typed or entered using the Calendar tool.

**Reply**

This field is used to records the date that a reply was sent to the vendor about the bid request. This date may be typed or entered using the Calendar tool.

**Number**

Use this field to enter a number for this record. Please note that this field may be up to 10 characters, based on a setting in the Document Manager tab of the System Wide Parameters. Each document requires a number before it can be saved.

**Date**

Either enter the date manually or use the drop-down tool to open the calendar to select the date to be entered on this document. Each document requires a date before it can be saved.

**From Employee**

The down arrow within the field title enables the user to either add or modify an existing employee, or to add or edit an existing contact person. Use the Find tool to select from either the list of employees or from the list of contacts who is sending the Bid Request. Please note that when the selection is made, BIS<sup>®</sup> will automatically enter the Name and title from the Employee or Contact master record.

**Job**

The down arrow within the field title enables the user to either add or modify an existing job. Use the Find tool to select a jobs from the Job master record list. Please note that when the selection is made, BIS<sup>®</sup> will automatically enter the Description from the Job master record.

**Cost Code**

The down arrow within the field title enables the user to either add or modify an existing Cost Code. Use the Find tool to select a cost code from the Cost Code master record list. Please note that when the selection is made, BIS<sup>®</sup> will automatically enter the Description from the Cost Code master record.

**To (Optional)**

If an entry is made in this field, it will overwrite the To (Contact) selection made in the Vendor To (Contact) on the printed form. The down arrow within the field title enables the user to either add or modify an existing Contact. Use the Find tool to select from the list of optional contacts who will be receiving the Bid Request.

**Bid Amount**

This field is used to manually enter the Bid Amount when it is received from the vendor.

**Sent Via**

Click on the box next to the appropriate method(s) of transmission of the Bid Request to the subcontractor. Note that the Other box also includes a small text box that allows entry of a method other than those listed.

**Work to Perform**

This is a text box that allows entry of the details of the work for which the bid is sought. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS<sup>®</sup> documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**Notes**

This is a text box that allows entry of notes about the Bid. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS<sup>®</sup> documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**Subject**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Plan Document

A general contractor frequently loans out architectural drawings, engineering specifications, and other job documents to subcontractors when required. Frequently, general contractors require deposits from subcontractors that may be refunded when the documents are returned at the end of the jobs. The Plan Log supports creation, modification, tracking, previewing, printing, exporting, of the loaned documents issued for many jobs. Plan documents are created using this option, and plan reports can be printed or viewed online for tracking the possession of the loaned documents.

The Plan log screen gives a one line summary of each plan document that has been entered. The log allows browsing all documents or selectively viewing documents using searching, sorting, or filtering criteria. From the log screen users can also print Plan logs. After plans have been returned and refunds issued, the Plan document is kept in a history list for later reference if desired.

- **Status with Subcontractor/Vendor**

The log tracks date sent, date due and date received when plans are loaned to subcontractors. The log also records deposit payment and refund information.

- **Status with Owner**

The log tracks date sent, date due and date received concerning the contractor's receipts of plan sets from the owner. Like subcontractor status, it also keeps deposit payment and refund information.

- **Plan History**

All completed transactions in which plans are loaned, returned, and deposits refunded are kept in a history list for later reference.

## Modular Menu Access

Job | Documents | Plan

## Standard Menu Access

DM | Plan

The BIS<sup>®</sup> Plan screen gives a one line summary of each Plan that has been entered. This log allows for browsing all documents or selectively viewing documents using searching, sorting, or filtering criteria. From the report query screen the user can also print out summary or detail reports. Single and multiple page forms can be printed, exported, or emailed, to be sent to subcontractors for bidding.

## Form Fields

### Vendor

Use this field to select the Subcontractor/Vendor Id with whom a plan is to be transmitted. Please note that when the selection is made, BIS<sup>®</sup> will automatically enter the Company name, Address, City, State, Zip code, and Telephone and Fax numbers from the Vendor master record. Please note that the down arrow in the Vendor title area enables the user to add or edit the list of vendors.

### Contact

Use this field to select the Contact person of the Vendor that was selected. Please note that when the selection is made, BIS<sup>®</sup> will automatically enter the person's Title from the Vendor master record.

### Plan Set Number

Use this field to enter a number for this record. Please note that this field may be up to 10 characters, based on a setting in the Document Manager tab of the System Wide Parameters. Each document requires a number before it can be saved.



# Plan Screen Entry Form

Plan - Edit
Plan Set #

## Plan

Vendor

Company

Address

City

State  Zip Code

Telephone

Fax

Contact

Title

Job

Description

**Description**

This is a set of different specs for the job, mainly those describing glass domes needed for the project.

**Current Vendor Status**

Plans		Deposit Payment		Deposit Refund	
Date Sent	<input type="text" value="01/05/xxxx"/> <input type="button" value="v"/>	Date Paid	<input type="text" value="01/05/xxxx"/> <input type="button" value="v"/>	Date Refunded	<input type="text" value="//"/> <input type="button" value="v"/>
Date Due at GC	<input type="text" value="01/20/xxxx"/> <input type="button" value="v"/>	Amount Paid	<input type="text" value="120.00"/>	Amount Refunded	<input type="text" value="0.00"/>
Date Returned	<input type="text" value="//"/> <input type="button" value="v"/>	Deposit Chk #	<input type="text"/>	Refund Check #	<input type="text"/>

**Status with Owner**

Date Received	<input type="text" value="//"/> <input type="button" value="v"/>	Date Paid	<input type="text" value="//"/> <input type="button" value="v"/>	Date Refunded	<input type="text" value="//"/> <input type="button" value="v"/>
Date Due	<input type="text" value="//"/> <input type="button" value="v"/>	Amount Paid	<input type="text" value="0.00"/>	Amount Refunded	<input type="text" value="0.00"/>
Date Returned	<input type="text" value="//"/> <input type="button" value="v"/>	Deposit Chk #	<input type="text"/>	Refund Check #	<input type="text"/>

**History**

Vendor	Sent	Due	Returned	Paid	Amount	Check	Refu
<input type="text" value="0201"/> <input type="button" value="Q"/>	<input type="text" value="//"/> <input type="button" value="v"/>	<input type="text" value="//"/> <input type="button" value="v"/>	<input type="text" value="//"/> <input type="button" value="v"/>	<input type="text" value="//"/> <input type="button" value="v"/>	<input type="text" value="0.00"/>		<input type="text" value="//"/>

**Notes:**

**Subject**

Subject	Description	Notes
<input type="text"/> <input type="button" value="Q"/>		

Figure: DM-10 Document Manager Plan screen form with sample data.

**Job**

The down arrow within the field title enables the user to either add or modify an existing job. Use the Find tool to select a jobs from the Job master record list. Please note that when the selection is made, BIS® will automatically enter the Description from the Job master record.

**Description**

This is a text box that allows entry of the details of the plans being tracked. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS® documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**Current Vendor Status Data Section****Plans Column****Date Sent**

This is the date on which this set of plans was sent to the indicated vendor.

**Date Due at GC**

This is the due date for the vendor to return this set of plans.

**Date Returned**

This is the date on which this set of plans was actually returned.

**Deposit Payment Column****Date Paid**

This is the date on which the vendor paid his deposit on this set of plans.

**Amount Paid**

This is the amount of deposit paid by the vendor.

**Deposit Check #**

This is the number on the check which paid the deposit.

**Deposit Refund Column****Date Returned**

This is the date on which the vendor's deposit was refunded.

**Amount Returned**

This is the amount of the deposit refunded.

**Refund Check #**

This is the check number which refunded the deposit.

**Complete Button**

This button will add a completed plan cycle to the History section and clear the current fields in the Current Vendor Status section. Missing or updated information can be entered directly on the saved History line and column. See the History section below.

**Status with Owner Data Section****Plans Column****Date Received**

This is the date on which this set of plans was delivered to the GC.

**Date Due**

This is the due date for returning this set of plans to the architect or engineer.

**Date Returned**

This is the date on which the plans were actually sent back to the architect or engineer.

**Deposit Payment Column****Date Paid**

This is the date on which the GC paid the deposit for this set of plans.

**Amount Paid**

This is the amount of deposit paid by the GC for this set of plans.

**Deposit Check #**

This is the check number which paid the deposit to the architect or engineer for this set of plans.

**Deposit Refund Column****Date Returned**

This is the date on which the GC's deposit was refunded.

**Amount Returned**

This is the amount of the GC's deposit that was refunded.

**Refund Check #**

This is the check number which refunded the GC's deposit.

**History Data Section**

Since plans can often be sent back and forth between the GC, subcontractor, and owner, the History area is needed to record the progress of the plans. Each of the columns in the History Block can be updated from within the line and column of the appropriate data.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a line in the History section.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a line.

**Notes**

This is a text box that allows entry of notes about the Bid. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS<sup>®</sup> documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**Subject**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

## Insurance Document

General contractors frequently require proof of a subcontractor's insurance before work can begin on a job. The insurance expiration dates are also required so that the general contractor can request proof of renewed insurance if the current policy lapses while the work is still being performed. General contractors also require the subcontractor's insurance company name and phone number to be used for verification of policy status and policy limits.

The Insurance Log supports creation, modification, tracking and printing of worker's compensation insurance and general liability insurance for subcontractors. Insurance documents are created using this option, and insurance reports can be printed or viewed online for tracking the status of subcontractor's insurance policies.

- **Worker's Compensation**

Records expiration date and certificate number of worker's compensation insurance policy.

- **General Liability**

Records expiration date and certificate number of general liability insurance policy.

- **Provider Information**

Keeps track of Insurance company name and phone number. Separate company for worker's compensation and general liability.

- **Job Specificity**

Allows indicating whether the insurance policy is written specifically for a certain job or covers all work for that subcontractor.

### Modular Menu Access

Job | Documents | Insurance

### Standard Menu Access

DM | Insurance

The BIS<sup>®</sup> Insurance Log screen gives a one line summary of each insurance document that has been entered. The log allows browsing all documents or selectively viewing documents using search, sort, and/or filter criteria. From the Report Query screen the user can also produce summary or detail reports.

## Form Fields

### Job

This is the number of the relevant job.

### Vendor

This is the number of the relevant vendor company.

### Record #

This is the identification number for this insurance policy record.

## Worker's Compensation Section

### Certificate Number

This is the certificate number of the vendor's Worker's Compensation insurance policy.

### Expiration Date

This is the expiration date of the vendor's Worker's Compensation insurance policy.

## Insurance Screen Entry Form

**Insurance - Edit**

**Insurance**

Number: I-743W

Vendor: 0201  
 Company: BK Contracting  
 Address: 16701 Douglas Way  
 City: Oceano  
 State: CA Zip Code: 93455  
 Telephone: (805) 543-7000  
 Fax: (805) 534-1595

Job: 1000  
 Description: Pacific View Apartments

**Workers' Comp.**

W/C Certificate Number: 7DJC-D73SS  
 W/C Expiration Date: 10/15/XXXX  
 W/C Insurance Company: PHOENIX INS.  
 W/C Telephone: (111) 222-3333

Job Specific  
 General

**General Liability**

G/L Certificate Number: 77DH-93232  
 G/L Expiration Date: 10/20/XXXX  
 G/L Insurance Company: PHONIX INS.  
 G/L Telephone: (111) 222-3333

Job Specific  
 General

**Notes**

**Subject**

Subject	Description	Notes

**Figure: DM-11** Document Manager Insurance screen form with sample data.

### Insurance Company

This is the name of the vendor's W/C insurance provider.

### Insurance Co. Phone

This is the phone number of the vendor's W/C insurance provider.

### Job Specific/General

These two fields are controlled by a single radio button. This means that only one of the items can be selected at a time. Place the dot next to the field that best describes if this record is Job Specific or General.

## General Liability Section

### Certificate Number

This is the certificate number of this vendor's General Liability insurance policy.

### Expiration Date

This is the expiration date of the vendors' General Liability insurance policy.

**Insurance Company**

This is the name of the vendor's General Liability insurance provider.

**Insurance Co. Phone**

This is the phone number of the vendor's General Liability insurance provider.

**Job Specific/General**

These two fields are controlled by a single radio button, and only one of the items can be selected at a time. Place the dot next to the field that best describes if this insurance is Job Specific or General.

**Notes**

This is a text box that allows entry of notes about the Insurance documents. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS® documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**Subject**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Subcontract

On a typical construction job, a general contractor may employ dozens of subcontractors to complete the work. For each subcontractor task, a contract will be created that specifies the work to be performed, payment schedule, and completion date, and more. Each of these subcontracts needs to be monitored by the general contractor to move the entire job towards completion.

In the same way that the Insurance document contains insurance data for each subcontractor, the Subcontract Document keeps all subcontract information online for quick reference. The subcontract information includes pay schedules, contract amounts, and work descriptions. The Subcontract Log supports online creation, modification, tracking and printing of subcontract performance. Subcontract documents are created using the Add option, and insurance reports can be printed or viewed online for tracking the status of subcontractor's contract performance status.

- **Identification**

Records job number, vendor number, cost code, and subcontract number for a subcontract.

- **Description**

A text field is dedicated to a description of the work to be done. Separate fields contain start date, completion date, and contract dollar amount.

- **Payment Schedule**

A scrolling payment schedule with completion date, criteria, and dollar value is provided.

- **Contract Execution Tracking**

Log tracks when the contract was sent, returned and signed by the contractor, and when an executed copy was forwarded to the subcontractor.

## Modular Menu Access

Job | Documents | Subcontract

## Standard Menu Access

DM | Subcontract

The online Subcontract log screen gives a one line summary of each subcontract document that has been entered. This log allows for browsing of all documents, or for selectively viewing documents using searching, sorting, or filtering criteria. From the log screen the user can also printout summary or detail reports.

## Form Fields

### Vendor

This is the number of the relevant vendor company. Please note that when the Vendor is selected the company name, address, city, state, zip code, and telephone and fax numbers appear.

### Job

This field is used to enter the number of the job.

### Cost Code

This field is used to enter the applicable cost code number.

## Subcontract Screen Entry Form

**Subcontract - Edit**

**Subcontract** Number: 66YDD-32932

Vendor: 0201 Company: BK Contracting Address: 16701 Douglas Way City: Oceano State: CA Zip Code: 93455 Telephone: (805) 543-7000 Fax: (805) 534-1595

Job: 1000 Description: Pacific View Apartments

Link to Job Subcontract:  Yes  No

Cost Code: 02000 Description: Site Work

**Description of Work**

**Contract Information**

Start Date	01/01/xxxx
Finish Date	04/20/xxxx
Amount	4,500.00

**Tracking Information**

Date Sent	//
Date Returned	//
Date Executed	//
Date Forwarded	//

**Payment Schedule**

Date	Amount	Work
01/15/xxxx	1,500.00	...
02/28/xxxx	2,000.00	...
04/20/xxxx	1,000.00	...
//	0.00	...

**Notes**

**Subject**

Subject	Description	Notes

Figure: DM-12 Subcontract screen form with sample data.

### Number

This field is used to enter the identification number for this Subcontract.

### Description of Work

This is a text box that is used to describe the subcontracted work. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS® documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.



## Contract Information Section

### Start Date

This is the date on which the specified work is to begin.

### Finish Date

This is the date by which the specified work must be completed.

### Amount

This is the total dollar amount of the subcontract.

## Tracking Information Section

### Date Sent

This is the date on which the subcontract was sent to the vendor for review.

### Date Returned

This is the date on which the subcontract was returned by the subcontractor.

### Date Executed

This is the date on which the subcontract was signed by the GC.

### Date Forwarded

This is the date on which a copy of the executed contract was sent back to the subcontractor.

## Payment Schedule Section

This region contains a line by line record of the payments involved in this subcontract.

### Date

This is the date on which the vendor paid his deposit on this set of plans.

### Amount

This is the amount of deposit paid by the vendor.

### Work

This section is used to describe the work done for the payment listed.

### Insert Line Button



The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Payment Schedule line.

### Delete Line Button



The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a line.

## Notes

This is a text box that allows entry of notes about the subcontract. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS<sup>®</sup> documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**Subject**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Submittal Document

During the preparation stages of a job, an architect, engineer, or other project planner may require samples of project materials be submitted by subcontractors for approval. In some cases these are construction materials that must meet testing guidelines, perhaps for strength or durability. In other cases material may be requested for aesthetic purposes, perhaps to evaluate whether the material meets the project's desired look and feel. Typically, the project planner informs the general contractor when a submission of project materials for some form of inspection is needed. The general contractor may then pass the request to the subcontractor who is supplying those materials. The general contractor may impose a due date for when the submittal materials are required. Once received, the project material may or may not pass the project planner's evaluation; the material is returned; and the process repeats.

Submittals pose what is perhaps the most difficult tracking task in job administration. The Submittal Log supports creation, modification, tracking and printing of all facets of the submittal process described above. Submittal reports can be printed or viewed for tracking the status each submittal and for identifying past due submittals.

- **Description**

One text field is dedicated to a description of the submittal items. Another is provided for general notes.

- **Submittal History**

The Log tracks the history of the submittal, recording all sent, received and due dates. This method provides an easy way to see the dates and results of each unaccepted submission.

- **Submittal Tracking**

Records requested submittals and their arrival date, date forwarded to owner, and date returned as well as due dates along the way. Status is selected from Approved, Accepted with Notes, Rejected, or Pending with a simple radio-button interface.

### Modular Menu Access

Job | Documents | Submittal

### Standard Menu Access

DM | Submittal

The online Submittal Log screen gives a one line summary of each submittal document that has been entered. This log allows for browsing of all documents, or for selectively viewing documents using searching, sorting, or filtering criteria. From the log screen the user can also print out summary or detail reports.

## Form Fields

### Vendor

Use this field to select the Subcontractor/Vendor Id with whom a submittal is prepared. Please note that when the selection is made, BIS<sup>®</sup> will automatically enter the Company name, Address, City, State, Zip code, and Telephone and Fax numbers from the Vendor master record. Please note that the down arrow in the Vendor title area enables the user to add or edit the list of vendors.

### Number

Use this field to enter a number for this record. Please note that this field may be up to 10 characters, based on a setting in the Document Manager tab of the System Wide Parameters. Each document requires a number before it can be saved.

### Job

The down arrow within the field title enables the user to either add or modify an existing job. Use the Find tool to select a jobs from the Job master record list. Please note that when the selection is made, BIS<sup>®</sup> will automatically enter the Description from the Job master record.

### Submittal Screen Entry Form

Submittal - Edit

## Submittal

Number: 8KDKD-032

Vendor: 0201

Company: BK Contracting

Address: 16701 Douglas Way

City: Oceano

State: CA Zip Code: 93455

Telephone: (805) 543-7000

Fax: (805) 534-1595

Job: 1000

Description: Pacific View Apartments

**Description**

The Submittal is subject to conditions by California Code regarding submittals under section 42-142 and amendments thereof. Applicable local codes apply.

**Current Cycle**

Subcontractor		Owner		Status
Requested	10/11/xxxx	Due at Owner	10/14/xxxx	<input checked="" type="radio"/> Approved
Due at GC	10/12/xxxx	Sent to Owner	10/13/xxxx	<input type="radio"/> Accepted with notes
Arrived	10/12/xxxx	Return by	10/15/xxxx	<input type="radio"/> Rejected
Returned	//	Arrived	//	<input type="radio"/> Unknown
Resubmittal	//	Resubmittal	//	<input type="radio"/> Resubmittal for A/E Review & Approval

**History**

Req. Date	Due at GC	Arrived	Returned	Due	Sent	Return by	Arri
10/11/xxxx	10/12/xxxx	10/12/xxxx	10/15/xxxx	10/14/xxxx	10/13/xxxx	10/15/xxxx	//
//	//	//	//	//	//	//	//

**Status Notes**

**Subject**

Subject	Description	Notes

Figure: DM-13 Submittal screen form with sample data.

#### Description

This is a text box that allows entry of the details of the transmittal. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS® documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

## Current Cycle Status Data Section

### Subcontractor Column

#### Requested

This is the date on which this submittal is requested from the vendor.

#### Date Due at GC

This is the due date for the vendor to return this set plans to the General Contractor.

#### Arrived

This is the date on which this submittal was actually returned.

### Owner Column

#### Due at Owner

This is the date on which this submittal was due at the owner.

#### Sent to Owner

This is the date on which the submittal was sent to the owner.

#### Return By

This is the date by which the submittal should be returned.

#### Arrived

This is the date on which the submittal arrived from the owner.

### Resubmittal

This is the date on which the submittal was sent back to the owner.

## Status Section

This radio button selection region is used to keep a current progress check on the Submittal Log.

### Complete Button

This button will add a completed submittal cycle to the History section and clear the current fields in the Current Cycle Status section. Missing or updated information can be entered directly on the saved History line and column. See the History section below.

## History Data Section

Since submittals can often be sent back and forth between the GC, subcontractor, and owner, the History area is needed to record the progress of the submittals. Each of the columns in the History Block can be updated from within the line and column of the appropriate data.

### Insert Line Button



The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a line in the History section.

### Delete Line Button



The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a line.

**Status Notes**

This is a text box that allows entry of notes about the Submittal . Please note that users may copy the text from another document and paste them into this text box. In the standard BIS® documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**Subject**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Change Orders

For most contractors, changes to the job are expected. Typically these changes are the result of either unforeseen requirements that are not met by the current baseline plan, or they are simply design changes desired by the owner. In such situations, the general contractor many times plays the role of the "go between" from the owner to the subcontractors. Changes to the formal plan must be formalized as change orders that must be carefully tracked and monitored for pending approval, approval, or rejection. There are two types of change orders: between the owner and the general contractor (general change order) and between the general contractor and the subcontractors (subcontract change order).

### General Change Order

The General Change Order Log supports online creation, modification, tracking and printing of the numerous change orders typically issued for many jobs. Both General Change Orders and Subcontract Change Orders are created using this option and a formal change order can be printed for submission to subcontractors or presentation to the owners.

- **From/To with Title**

Allows entering the name and title of both the sender and the recipient.

- **Change Order Tracking**

Change Order status is selected with a radio-button as Pending, Approved, or Rejected. A Pending Change Order acts as a Change Order Request. Dates sent, received and approved are recorded.

- **CC Line**

The CC line is provided to indicate where a copy of this notice has been sent.

### Modular Menu Access

Job | Documents | Change Order | General Change Order

### Standard Menu Access

DM | Change Order | General Change Order

Both the online General Change Order Log screen and the Subcontract Change Order Log screen give a one line summary of each change order that has been entered. The log allows browsing all change order documents or for selectively searching, sorting, or filtering. From the Print Query screen the user can print summary or detail reports. Forms can be printed and sent to subcontractors or owners for approval and implementation.

### Form Fields

#### From Employee or From Contact

This is the Id number of the sender, either an employee or a contact. When the magnifying glass icon is selected, the user has a choice between the Employee list and the Contact List. Please note that when the From Employee or From Contact Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record.

#### To

This is the Id number of the contact. Please note that when the From Employee is selected the person's name and title appear. The down arrow within the field name allows the user to add a new record.

#### Number

This is the identification number for this General Change Order.

#### Date

This is the date for this General Change Order document.

### General Change Order Screen Entry Form

The screenshot shows a web-based form titled "General Change Order - Edit". The form is divided into several sections:

- General Information:** Includes fields for "Number" (1) and "Date" (03/15/xxxx). Below this are search-enabled dropdowns for "From Employee" (E001) and "Job" (1000).
- Employee Details:** A table with fields for "Name" (Bill Johnson) and "Title" (Owner).
- Job Details:** A table with fields for "Description" (Pacific View Apartments), "Street Address 1" (1800 Pacific Avenue), "Street Address 2", and "City, State, Zip" (Pismo Beach, CA. 93448).
- To:** Search-enabled dropdowns for "Name", "Title", and "Company".
- Status Section:** Contains "Date Sent" (03/01/xxxx), "Date Returned" (//), "Date Approved" (//), and "Approved by". It also features radio buttons for "Pending" (selected), "Approved", and "Rejected".
- Changes:** A table with columns: Item, Amount, Days +/-, and Description.
 

Item	Amount	Days +/-	Description
1.00	150.00	14.00	
2.00	340.00	10.00	
- Sent via:** Checkboxes for "Mail", "Fax", "Email", and "Other".
- Notes:** A text area containing: "Site work located at map location 0444356-55981821. Comply with California CEQA regulations regarding Native American remains. Evaluation due on endangered plant and animal species."
- CC:** A text area for carbon copy recipients.
- Subject:** A table with columns: Subject, Description, and Notes.
 

Subject	Description	Notes

Figure: DM-14 General Change Order screen form with sample data.

#### Job

This is the number of the relevant job. The down arrow within the field name allows the user to add a new record. When the Job is selected, its address is also displayed.

#### Status Section

##### Date Sent

This is the date on which this General Change Order was sent to the recipient.



**Date Returned**

This is the date on which the General Change Order arrived from the recipient.

**Resubmittal**

This is the date on which the General Change Order was sent back to the owner.

**Status Buttons**

This radio button selection is used to keep a current progress check on the General Change Order Log.

**Date Approved**

This is the date on which the General Change Order was approved.

**Approved by**

This field is used to enter the name of the person who approved the General Change Order.

**Changes Section****Item**

This field can hold any number. A readable sequence could have the item numbers follow a sequence 1.0, 1.1, 2.0, etc.

**Amount**

This is the amount of change.

**Days**

This is the number of days

**Description**

This field can hold a text description of the change being made.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a line in the Changes section.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a line.

**Sent Via**

This region allows selection of one or more options to track how this document was sent. The Other selection allows a manual entry.

**Notes**

This is a text box that allows entry of the notes about the General Change Order. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS® documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**CC**

This text line can be used to list any other people or places where this document was sent. Please note that this is for internal information only, and it does not affect printed reports or To/From fields.

**Subject**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Subcontract Change Order

The Subcontract Change Order Log supports online creation, modification, tracking and printing of the numerous change orders typically issued for many jobs. Both General Change Orders and Subcontract Change Orders are created using this option and a formal change order can be printed for submission to subcontractors or presentation to the owners.

- **From/To with Title**

Allows entering the name and title of both the sender and the recipient.

- **Subcontract Change Order Tracking**

Change Order status is selected with a radio-button as "Approved or Quote Request". A Quote Request acts as a Request for Quote to determine a subcontractors estimate of a change in the subcontract. Dates sent, received and approved are recorded.

- **CC Line**

The CC line is provided to indicate where a copy of this notice has been sent.

### Modular Menu Access

Job | Documents | Change Order | Subcontract Change Order

### Standard Menu Access

DM | Change Order | Subcontract General Change Order

Both the online General Change Order Log screen and the Subcontract Change Order Log screen give a one line summary of each change order that has been entered. The log allows browsing all change order documents or for selectively searching, sorting, or filtering. From the Print Query screen the user can print summary or detail reports. Forms can be printed and sent to subcontractors or owners for approval and implementation.

## Form Fields

### Vendor

This is the Id number of the subcontractor vendor. When the magnifying glass icon is selected, the user can choose from the list of vendors. Please note that when the Vendor Id is selected, the company's name, address, and telephone and fax numbers are displayed. The down arrow within the field name allows the user to add a new record.

### To (Contact)

This field is used to select from among the vendor's contacts. When the Vendor Id is selected, the Contact's Title is also listed. However, when the To (Optional) field is selected, that entry is used on the record.

### Number

This is the identification number for the Subcontract Change Order.

### Date

This is the date for this Subcontract Change Order document.

### Job

This is the number of the relevant job. The down arrow within the field name allows the user to add a new record. When the Job is selected, its address is also displayed.

### From Employee/Contacts

This is the Id number of the sender, either an employee or contact. When the magnifying glass icon is selected, the user can choose from the Employee list. Please note that when the From Employee Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record.

## Subcontract Change Order Screen Entry Form

**Subcontract Change Order - Edit**

### Subcontract Change Order

Vendor	0701	Number	871245
Company	A1 Insulation	Date	03/10/XXXX
Address	1825 Highland Way Suite 305	Job	1000
City	San Luis Obispo	Description	Pacific View Apartments
State	CA	Zip Code	93401
Telephone	(805) 543-7000	<b>Link to Job Subcontract Change Order:</b>	
Fax	(805) 534-1595	<input type="radio"/> Yes <input checked="" type="radio"/> No	
To (Contact)		Cost Code	
Title		Description	
<b>Status</b>		Change Order	
<input checked="" type="radio"/> Quote Request <input type="radio"/> Approved SCO		Description	
Date Sent	03/14/XXXX	From Employee	E002
Date Returned	//	Name	Mike Jarvis
Date Approved	//	Title	Project Manger
Approved by		To (Optional)	JSMITH
		Name	Jim Smith
		Title	Supervisor
		Company	ABC Co.

**Sent Via**

Mail   
  Fax   
  Email   
  Other

**Changes**

Item	Amount	Days +/-	Description
1.00	50.00	0.00	Change in type of insulation

**Notes**

**CC**

**Subject**

Subject	Description	Notes

**Figure: DM-15** Subcontract Change Order screen form with sample data.

### To (Optional)

The user can choose from the Contact List. Please note that when the From Contact Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record.

### Status Section

#### Status Buttons

This radio button selection is used to identify if the Subcontract Change Order is a Quote Request or an Approved Subcontract Change Order.

**Date Sent**

This is the date on which this Subcontract Change Order was sent to the recipient.

**Date Returned**

This is the date on which the Subcontract Change Order arrived from the recipient.

**Date Approved**

This is the date on which the Subcontract Change Order was approved.

**Approved by**

This field is used to enter the name of the person who approved the Subcontract Change Order.

**Sent Via Section**

This region allows selection of one or more options to track how this document was sent. The Other selection allows a manual entry.

**Changes Section****Item**

This field can hold any number. A readable sequence could have the item numbers follow a sequence 1.0, 1.1, 2.0, etc.

**Amount**

This is the amount of change.

**Days**

This is the number of days required to complete the change.

**Description**

This field can hold a text description of the change being made.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Changes line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Changes line.

**Notes**

This is a text box that allows entry of the notes about the Subcontract Change Order. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS<sup>®</sup> documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**CC**

This text line can be used to list any other people or places where this document was sent. Please note that this is for internal information only, and it does not affect printed reports or To/From fields.

**Subject**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Transmittal

During the performance of a job, there are frequent transmittals of paper documents between subcontractors and the general contractor. The documents often include exact instructions for what is to be performed. A transmittal log is a method to keep track of the paper workflow between the parties.

The transmittal is a commonly used document. The Transmittal Log supports creation, modification, tracking, and printing of all facets of the transmittal process. Transmittal documents are created using this option, and the transmittal reports can be produced so that the transmittal package contents may be reviewed later.

- **From/To with Title**

Allows entering the name and title of both the sender and the recipient.

- **Subject of Transmittal**

A ready-made series of subjects is provided and any number can be selected with a simple check-box interface.

- **Notes**

A general-purpose memo field is provided for making any special notes on each transmittal.

- **CC Line**

The CC line is provided to indicate where a copy of this notice has been sent.

## Modular Menu Access

Job | Documents | Transmittal

## Standard Menu Access

DM | Transmittal

The Transmittal Log screen gives a one line summary of each transmittal document entered. The log allows users to browse all documents or selectively view documents using search, sort, and/or filter criteria. From the Print Query screen the user can print summary or detail reports.

## Form Fields

### To Vendor/Customer/Other

This is the Id number of the recipient. When the magnifying glass icon is selected, the user can choose from the list of Vendors, Customers, or Other Companies master records. Please note that when the Id is selected, the company's name, address, and telephone and fax numbers are displayed. The down arrow within the field name allows the user to add a new record to that master record.

### To (Contact)

This field is used to select from among the contacts in the primary To field. When a "To" Id is selected, the Contact's Title is also listed. However, when the To (Optional) field is selected, that entry is used on the record.

### Number

This is the identification number for the Transmittal.

### Date

This is the date for this Transmittal document.

### From Employee/Contacts

This is the Id number of the sender, either an employee or an other contact. When the magnifying glass icon is selected, the user can choose either Employee or the Other Contact list. Please note that when the Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record to the selected master record.

# Transmittal Screen Entry Form

**Transmittal**

Number: 5454-5411  
Date: 02/15/xxxx

To Customer: C001  
Name: Far West Properties  
Address: 1625 Parker Street  
City: Los Angeles  
State: CA Zip Code: 90001  
Telephone: (805) 543-7000  
Fax: (805) 534-1595  
To (Contact):  
Title:

From Employee: E002  
Name: Mike Jarvis  
Title: Project Manger  
Job: 1000  
Description: Pacific View Apartments  
To (Optional):  
Name:  
Title:  
Company:

**Subject**

Certificates       Plans  
 Shop drawings       Samples  
 Change order       Letter  
 Specifications       Other  
 Prints

**Contents**

Under separate cover  
 Attached

**Sent Via**

Mail  
 Fax  
 E-Mail  
 Other

**Items**

Cop	Date	Reference	Description
1	02/15/xxxx	SPEC-89323	
	//		

**Action**

Records       As requested       Corrections  
 Approval       Review and comments       Other

**Notes**

**CC**

**Subject**

Subject	Description	Notes

Figure: DM-16 Transmittal screen form with sample data.

### Job

This is the number of the relevant job. The down arrow within the field name allows the user to add a new record. When the Job is selected, its address is also displayed.

### To (Optional)

The user can choose from the Contact List. Please note that when the From Contact Id is selected, the person’s name and title are displayed, and that this information is used in place of any “To (Contact)” selection. The down arrow within the field name allows the user to add a new record.



**Subject Section**

The user can click on any of the available selections: Certificates, Shop Drawings, Change Orders, Specifications, Prints, Plans, Samples, Letters, and/or Other. When Other is selected, the user can enter the text.

**Contents Section**

The user can click on any of the available selections: Under separate cover, and/or Attached.

**Sent Via Section**

This region allows selection of one or more options to track how this document was sent. The user can click on any of the available selections: Mail, Fax, E-Mail, and/or Other. The Other selection allows a manual entry.

**Items Section****Copies**

This field can hold any 3-digit whole number that records the number of copies sent.

**Date**

This field records the date that the copies were sent. The date may be entered or by using the Calendar tool.

**Reference**

This field records a user defined reference for the copies sent.

**Description**

This field displays a description of the selected subject. If the description is longer than the length provided, the button at right can be used to enter an unlimited amount of information.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected an Items line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Items line.

**Action**

This region allows selection of one or more actions concerning the document including: Records, Approval, As Requested, Review and comments, Corrections, and/or Other. The Other selection allows a manual entry. Click on the box next to an option to enter a checkmark.

**Notes**

This is a text box that allows entry of the notes about the Transmittal. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS<sup>®</sup> documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**CC**

This text line can be used to list any other people or places where this document was sent. Please note that this is for internal information only, and it does not affect printed reports or To/From fields.

**Subject**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Request for Information

Question about contract drawings or specifications must be asked of the architect or engineer, and the answers must be recorded and disseminated quickly and without confusion. The Request for Information log provides a means to enter the questions, the responses, the date of the response and the name of the responder.

The Request for Information (RFI) is a commonly used document. The Request for Information Log supports online creation, modification, tracking and printing of all facets of the RFI process. RFI documents are created using the this option, and RFI reports can be produced to monitor the status of all outstanding RFIs.

- **From/To with Title**

Allows entering the name and title of both the sender and the recipient.

- **CC Line**

The CC line is provided to indicate where a copy of this notice has been sent.

- **References**

Document explicitly states specification and drawing references for the question indicated.

- **Response Tracking**

In addition to recording the subject of the RFI, space is provided to include the response and other tracking information on the same document.

### Modular Menu Access

Job | Documents | Request for Information

### Standard Menu Access

DM | Request for Information

The RFI Log screen gives a one line summary of each transmittal document entered. The log allows users to browse all documents or selectively view documents using search, sort, and/or filter criteria. From the Print Query screen the user can print summary or detail reports.

## Form Fields

### To Vendor/Customer/Other

This is the Id number of the recipient. When the magnifying glass icon is selected, the user can choose from the list of Vendors, Customers, or Other Companies master records. Please note that when the Id is selected, the company's name, address, and telephone and fax numbers are displayed. The down arrow within the field name allows the user to add a new record to that master record.

### To (Contacts)

This field is used to select from among the contacts in the primary To field. When a "To" Id is selected, the Contact's Title is also listed. However, when the To (Optional) field is selected, that entry is used on the record.

### Number

This is the identification number for the Request For Information.

### Date

This is the date for this Request for Information document.

### Request for Information Screen Entry Form

The screenshot shows a software window titled "Request For Information - Edit". The main heading is "Request For Information". The form is divided into several sections:

- Customer Information:** To Customer (C001), Company (Far West Properties), Address (1625 Parker Street), City (Los Angeles), State (CA), Zip Code (90001), Telephone ((805) 543-7000), Fax ((805) 534-1595), To (Contact), and Title.
- Employee Information:** From Employee (E001), Name (Bill Johnson), Title (Owner), Job (1000), and Description (Pacific View Apartments).
- Optional Contact:** To (Optional), Name, Title, and Company.
- Subject:** Includes checkboxes for "Additional Information Required", "Interpretation" (checked), and "Apparent Conflict". It also has fields for "Drawing Ref" and "Spec Ref".
- Sent Via:** Includes checkboxes for "Mail", "Fax" (checked), "Email", and "Other".
- Notes:** A text area containing the message: "Please double-check the specifications on the paint color in the reception area. I don't think this is what you intended. Also, there is a problem with the class of insulation specified as well. See the attached letter."
- Response Info:** Includes fields for "Response Requested", "From", "Date", and "Date Send to Subs", along with "Sent via" options: "Telephone", "Returned RFI", and "Separate Document".
- Response:** A large empty text area for the response.
- CC:** A large empty text area for carbon copy recipients.
- Subject Table:** A table with columns for "Subject", "Description", and "Notes".

Figure: DM-17 Request for Information screen form with sample data.

**From Employee/Contacts**

This is the Id number of the sender, either an employee or an other contact. When the magnifying glass icon is selected, the user can choose either Employee or the Other Contact list. Please note that when the Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record to the selected master record.

**Job**

This is the number of the relevant job. The down arrow within the field name allows the user to add a new record. When the Job is selected, its address is also displayed.

**To (Optional)**

The user can choose from the Contact List. Please note that when the From Contact Id is selected, the person's name and title are displayed, and that this information is used in place of any "To (Contact)" selection. The down arrow within the field name allows the user to add a new record.

**Subject Section**

The user can click on any of the available selections: Additional Information Required, Interpretation, and/or Apparent Conflict. In addition, there are fields to manually enter the Drawing Reference and/or Specification Reference.

**Sent Via Section**

This region allows selection of one or more options to track how this document was sent. The user can click on any of the available selections: Mail, Fax, E-Mail, and/or Other. The Other selection allows a manual entry.

**Notes Section**

This is a text box that allows entry of the notes about the RFI. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS® documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**Response Info Section****Date**

This field records the date that the response was sent. The date may be entered or by using the Calendar tool. The Sent via section allows for selecting Telephone, Returned RFI, and Separate Document.

**From**

This field records a user defined entry to record the sender of the response.

**Date**

This field records the date that the response was sent. The date may be entered or by using the Calendar tool.

**Date Send To Subs**

This field records the date that the copies were sent. The date may be entered or by using the Calendar tool.

**Response Section**

This is a text box and can be used to enter an unlimited amount of information.

**CC Section**

This text line can be used to list any other people or places where this document was sent. Please note that this is for internal information only, and it does not affect printed reports or To/From fields.

**Subject Section**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Deficiency Notice

The Deficiency Notice is a standard general contractor's form used for notifying their subcontractors of any deficiency in the work being performed. Examples of deficiencies could include a notice that the liability insurance has lapsed and new proof of insurance is required or that the general contractor is waiting for a material submittal that is late. The notice serves as a record of the deficiency, and it serves to clearly communicate the problem and the proposed solution. The Deficiency Notice log supports creation, modification, tracking, and printing of the numerous Deficiency Notice letters typically issued for many jobs. Deficiency Notices are created using this option, and a formal Deficiency Notice form can be printed for submission to subcontractors.

- **From/To with Title**

This field allows entering the name and title of both the sender and the recipient.

- **CC Line**

The CC line is provided to indicate where a copy of this notice has been sent.

### Modular Menu Access

Job | Documents | Deficiency Notice

### Standard Menu Access

DM | Deficiency Notice

The Deficiency Notice Log screen gives a one line summary of each Deficiency Notice that has been entered. The log allows browsing of all documents or selectively view documents using search, sort, and/or filter criteria. From the Print Query screen, the user can also produce summary or detail reports.

## Form Fields

### Vendor

Use this field to select the Subcontractor/Vendor Id from whom a notice is sent. Please note that when the selection is made, BIS® will automatically enter the Company name, Address, City, State, Zip code, and Telephone and Fax numbers from the Vendor master record. Please note that the down arrow in the Vendor title area enables the user to add or edit the list of vendors.

### To (Contact)

Use this field to select the Contact person of the Vendor that was selected. Please note that when the selection is made, BIS® will automatically enter the person's Title from the Vendor master record. Alternatively, this field's data may be overwritten on the printed form if another selection is made in the To (Optional) field.

### Title

This field displays the title of the selected To (Contact) person.

### Number

This is the identification number for the Deficiency Notice.

### Date

This is the date for the Deficiency Notice document.

## Deficiency Notice Screen Entry Form

**Deficiency Notice**

Number: 762332  
 Date: 02/25/xxxx  
 Date Due: / /

Vendor: 0801  
 Vendor Name: Higuerra Glass  
 Address: 1396 Higuerra Street  
 City: San Luis Obispo  
 State: CA Zip Code: 93401  
 Telephone: (805) 543-7000  
 Fax: (805) 534-1595

From Employee: E001  
 Name: Bill Johnson  
 Title: Owner

Job: 1000  
 Description: Pacific View Apartments

To (Contact):  
 Title:

To (Optional):  
 Name:  
 Title:  
 Company:

**Deficiency**

Contract     Samples     Purchase Order  
 Insurance Certificates     Materials List     Warranty  
 Shop Drawings     Submittal     As-built Drawings  
 Colors / Textures     Schedule     Cost Analysis  
 Other

**Sent via**

Mail  
 Fax  
 Email  
 Other

**Notes**

We show your worker's compensation insurance as having expired last month. Please send proof of the renewal.

**CC**

**Subject**

Subject	Description	Notes

Figure: DM-18 Deficiency Notice screen form with sample data.

### Date Due

This field records the date that the response is due back. The date may be entered or by using the Calendar tool.

### From Employee/Contacts

This is the Id number of the sender, either an employee or an other contact. When the magnifying glass icon is selected, the user can choose either Employee or the Other Contact list. Please note that when the Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record to the selected master record.

### Job

This is the number of the relevant job. The down arrow within the field name allows the user to add a new record. When the Job is selected, its address is also displayed.



**To (Optional)**

The user can choose from the Contact List. Please note that when the From Contact Id is selected, the person's name and title are displayed, and that this information is used in place of any "To (Contact)" selection. The down arrow within the field name allows the user to add a new record.

**Deficiency Section**

The user can click on any of the available selections:

Contract	Samples	Warranty
Insurance Certificates	Materials List	As-build Drawings
Shop Drawings	Submittal	Cost Analysis
Colors / Textures	Schedule	Other
	Purchase Order	

Please note that if the Other item is selected, the user can enter text of up to 50 characters describing it.

**Sent via Section**

This region allows selection of one or more options to track how this document was sent. The user can click on any of the available selections: Mail, Fax, E-Mail, and/or Other. The Other selection allows a manual entry of up to 30 characters.

**Notes Section**

This is a text box that allows entry of the notes about the Deficiency Notice. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS® documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**CC Section**

This text line can be used to list any other people or places where this document was sent. Please note that this is for internal information only, and it does not affect printed reports or To/From fields.

**Subject Section**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Lien Release

Although laws vary from state to state, almost every general contractor requires a subcontractor to sign a release of lien at regular intervals throughout the job. Most often, lien releases are generated when a partial payment for work performed is provided, or upon job completion.

The Lien Release Log keeps track of all relevant release information, and makes it online for instant access. Note that the actual legal lien release document is generated outside of the BIS® system by the general contractor's attorney; the Document Manager Lien Release document tracks the issuance and basic terms of the legal lien release document.

The Lien Release Log supports online creation, modification, tracking and printing of lien releases typically issued for each subcontractor. Bid Requests are created using this option, and lien release document reports can be printed.

- **Release Types**

Several Lien Release are available: partial or final payment, and as either conditional (upon receipt of payment) or unconditional. All selections are made with a simple radio-button interface.

- **Release Tracking**

This log records the sent date and received date for the Release.

- **Payment Tracking**

This log also records the check number, date, and dollar amount.

## Modular Menu Access

Job | Documents | Lien Release

## Standard Menu Access

DM | Lien Release

The Lien Release log screen gives a one line summary of each Lien Release. The log allows browsing all documents or selectively viewing documents using search, sort, or filter criteria. From the Report Query screen, the user can also produce summary or detail reports.

## Form Fields

### Vendor

Use this field to select the Subcontractor/Vendor Id for whom the Lien Release is provided. Please note that when the selection is made, BIS® will automatically enter the Company name, Address, City, State, Zip code, and Telephone and Fax numbers from the Vendor master record. Please note that the down arrow in the Vendor title area enables the user to add or edit the list of vendors.

### Number

This is the identification number for the Lien Release.

### Date

This is the date for the Lien Release document.

### Job

This is the number of the relevant job. The down arrow within the field name allows the user to add a new record. When the Job is selected, its address is also displayed.

## Lien Release Screen Entry Form

**Lien Release**

Number	8232
Date	03/25/xxxx

Vendor	0901		
Company	Quintus Drywall		
Address	3258 Los Casitas Drive		
City	Santa Maria		
State	CA	Zip Code	93454
Telephone	(805) 543-7000		
Fax	(805) 534-1595		

Job	1000
Description	Pacific View Apartments

**Release Terms**

Partial     
  Final     
 As of: 02/19/xxxx     
 Disputed Amount: 0.00     
  Conditional     
  Unconditional

**Payment**

Check Number	1564	Date LR Sent	03/20/xxxx
Check Date	03/20/xxxx	Check Sent	03/25/xxxx
Check Amount	2,500.00	Date LR Returned	/ /

**Notes**

Signed in office when picked up check.

**Subject**

Subject	Description	Notes

Figure: DM-19 Lien Release screen form with sample data.

### Release Terms Section

Two radio button permit selecting either Partial or Final. Two other radio buttons permit choosing either Conditional or Unconditional.

#### As of

This field records the date that the Lien Release is applicable. The date may be entered or by using the Calendar tool.

#### Disputed Amount

This field is used to enter the number for any disputed amount.

## Payment Section

This section contains a record of the payment involved in the lien release.

### Check Number

This field is used to enter the number of the check for which the lien release is applicable.

### Check Date

This field is used to enter the date of the check for which the lien release is applicable. The Calendar tool may be used to select the date.

### Check Amount

This field is used to enter the amount of the check for the applicable lien release.

### Date LR Sent

This field is used to enter the date of the lien release was sent. The Calendar tool may be used to select the date.

### Check Sent

This field is used to enter the sent date of the check for which the lien release is applicable. The Calendar tool may be used to select the date.

### Date LR Returned

This field is used to enter the vendor's return date of the applicable lien release. The Calendar tool may be used to select the date.

## Notes Section

This is a text box that allows entry of the notes about the Lien Release. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS<sup>®</sup> documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

## Subject Section

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

### Description

The Description field is populated from that associated with the selected Subject.

### Notes

The Notes field is populated with manually entered text.

### Insert Line Button



The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

### Delete Line Button



The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Meeting Minutes

Project meetings are summarized in meeting minutes that list the items discussed and the names of the people present. Afterwards, the party responsible for taking minutes must also send a copy of the summary to a number of people who may or may not have been present. The Meeting Minutes Log simplifies this process.

The Meeting Minutes Log supports the creation, modification, tracking, and printing job-related meeting minutes. Meeting Minutes are created using this option, and can be produced for submission to all interested parties.

- **Business Items**

This log maintains an enumerated list of business items discussed, including open, closed, and due dates.

- **Attendee List**

A list of attendee names and companies is included in the log.

- **Distribution List**

Because copies of the minutes may be sent to those not present at the meeting, a separate list of intended recipient names and companies is available in addition to the date on which minutes were sent.

### Modular Menu Access

Job | Meeting Minutes

### Standard Menu Access

DM | Meeting Minutes

The Meeting Minutes screen gives a one line summary of each Meeting Minutes document that has been entered. The log allows browsing all documents or viewing documents using search, sort, and/or filter criteria. The user can also produce document reports giving summary or detailed reports including all data entered for each document.

## Form Fields

### Location

This field is used to enter the Id of the location at which this meeting was held. It may be a Customer number, a Vendor Number, or a Company Number from the Document Manager Company List. For on-site meetings, create an entry in the Company List such as: JOB xxxxxx Main Office.

### Chairperson

This field is used to enter the name of the person presiding over the meeting.

### Number

This field is used to identify the number for this Meeting Minutes.

### Date

This field is used to enter the date for this Meeting Minutes document. The Calendar tool may be used to select the date.

## Meeting Minutes Screen Entry Form

Meeting Minutes - Edit

### Meeting Minutes

Location Company	ARCH	<input type="button" value="Q"/>
Description	Miller & Associates Architects	
Chairperson	1000	<input type="button" value="Q"/>
Name	Carl Goodman	

Number	WEEKLY-21
Date	03/29/XXXX

From Employee	E001	<input type="button" value="Q"/>
Name	Bill Johnson	
Title	Owner	

Job	1000	<input type="button" value="Q"/>
Description	Pacific View Apartments	

**Sent via:**

Mail
  Fax
  E-Mail
  Other

**Business**

Item	Opened	Closed	Due	Description
1.0	03/01/XXXX	//	//	Further discussion on paneling style
2.0	03/01/XXXX	03/15/XXXX	//	Pacific Coast Construction
2.1	03/01/XXXX	//	04/15/XXXX	Lisa will talk to customer at this time
2.2	03/01/XXXX	//	05/10/XXXX	Lisa will have final report completed

**Attendees**

Name	Title	Company Id	Company Name
		<input type="button" value="Q"/>	

**Distribution**

Name	Title	Company Id	Company Name
<input checked="" type="checkbox"/> Jim Snipes		<input type="button" value="Q"/>	Pacific Coast Construc
<input type="checkbox"/>		<input type="button" value="Q"/>	

**Notes:**

**Subject**

Subject	Description	Notes
<input type="button" value="Q"/>		

**Figure: DM-20** Meeting Minutes screen form with sample data.

### From Employee/Contacts

This is the Id number of the sender, either an employee or an other contact. When the magnifying glass icon is selected, the user can choose either Employee or the Other Contact list. Please note that when the Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record to the selected master record.

**Title**

This field displays the title of the selected From (Employee/Contact) person.

**Job**

This is the number of the relevant job. The down arrow within the field name allows the user to add a new record. When the Job is selected, its address is also displayed.

**Sent Via Section**

This region allows selection of one or more options to track how this document was sent. The Other selection allows a manual entry.

**Business Section****Item**

This field can hold any number. A readable sequence could have the item numbers follow a sequence 1.0, 1.1, 2.0, etc.

**Opened**

This field is used to enter or select the date on which the listed Business Item was opened.

**Closed**

This field is used to enter or select the date on which the listed Business Item was closed.

**Due**

This field is used to enter or select the date on which the listed Business Item was due.

**Description**

This field can hold a text description of the item. The button at the right of the Description area allows unlimited text to be added to the Description.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected an Item line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected an Item line.

**Attendees Section****Name**

This field is used to enter the names of the attendees to the meeting.

**Title**

This field is used to enter the title of the attendee to the meeting.

**Company Id**

This is the Id number of the attendees' companies. When the magnifying glass icon is selected, the user can choose either Customers, Vendors, or the Other Companies list. Please note that when the Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record to the selected master record.

**Company Name**

This field will display the company name of the Company Id entered.

**Distribution Section**

The Distribution Section enables the user to click on a check box to select which individuals are to receive a copy of the Meeting Minutes; even though someone may be listed as an attendee it does not automatically include them on the distribution selection list.

**Name**

This field is used to enter the names of the potential recipients of the Meeting Minutes.

**Title**

This field is used to enter the title of a potential recipients of the Meeting Minutes.

**Company Id**

This is the Id number of the potential recipient companies of the Meeting Minutes. When the magnifying glass icon is selected, the user can choose either Customers, Vendors, or the Other Companies list. Please note that when the Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record to the selected master record.

**Company Name**

This field will display the company name of the Company Id entered

**Notes Section**

This is a text box that allows entry of notes about the General Change Order. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS<sup>®</sup> documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**Subject Section**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.



## Closeout Submittal

At the end of a job, there may be items such as operating manuals or warranty certificates which must be sent from the subcontractor to the general contractor, to be forwarded to the owner. Since the paper flow is similar to that of the regular submittal, with the exception that they are not being approved but merely submitted, the Closeout Submittal Log tracks these final submissions in a manner similar to the Submittal Log.

The Closeout Submittal Log supports online creation, modification, tracking and printing of Closeout Submittal lists. Closeout Submittals are created using the Add option, and reports can be printed out. Closeout Submittals can be modified by using the Edit option.

- **Contents**

A series of potential contents are listed for selection as well as allowing user input.

- **Submittal Tracking**

This log records requested and arrival date, date forwarded to owner, and due dates are provided in a smaller version of the Submittal Log.

- **Subject**

This log also records user-definable subjects, descriptions, and notes.

### Modular Menu Access

Job | Documents | Closeout Submittal

### Standard Menu Access

DM | Closeout Submittal

The Closeout Submittal Log screen gives a one line summary of each Closeout Submittal that has been entered. This log allows browsing all documents or selectively viewing documents using search, sort, and/or filter criteria. From the Report Query screen, the user can also produce document reports giving summary or detailed reports including all data entered for each document reported.

## Form Fields

### Vendor

Use this field to select the Subcontractor/Vendor Id for whom the Closeout Submittal is provided. Please note that when the selection is made, BIS® will automatically enter the Company name, Address, City, State, Zip code, and Telephone and Fax numbers from the Vendor master record. Please note that the down arrow in the Vendor title area enables the user to add or edit the list of vendors.

### Number

This field is used to enter the identification number for the Closeout Submittal.

### Job

This is the number of the relevant job. The down arrow within the field name allows the user to add a new record. When the Job is selected, its address is also displayed.

### Closeout Submittal Screen Entry Form

The screenshot shows a web application window titled "Closeout Submittal - Edit". The main heading is "Closeout Submittal".

**Number:** 1233

**Vendor:** 0201 (with search icon)  
Company: BK Contracting  
Address: 16701 Douglas Way  
City: Oceano  
State: CA | Zip Code: 93455  
Telephone: (805) 543-7000  
Fax: (805) 534-1595

**Job:** 1000 (with search icon)  
Description: Pacific View Apartments

**Contents:**  
 Warranties / Guaranties  
 Instructions / Manuals  
 As-built Drawings  
 Other

**Tracking:**

Date Requested	10/29/xxxx	▼
Date Due at GC	10/29/xxxx	▼
Date Arrived	10/29/xxxx	▼
Date Due at Owner	10/29/xxxx	▼
Date Forwarded	10/29/xxxx	▼

**Notes:**  
[Empty text area]

**Subject**

Subject	Description	Notes
[Search icon]		

Figure: DM-21 Closeout Submittal screen form with sample data.

### Tracking Section

This section contains a record of the dates involved in the closeout submittal.

#### Date Requested

This field is used to enter the date that the closeout submittal was requested. The Calendar tool may be used to select the date.

#### Date Due at GC

This field is used to enter the date that the closeout submittal was due at the general contractor. The Calendar tool may be used to select the date.

**Date Arrived**

This field is used to enter the date that the closeout submittal arrived. The Calendar tool may be used to select the date.

**Date Due at Owner**

This field is used to enter the date that the applicable closeout submittal was due at to owner. The Calendar tool may be used to select the date.

**Date Forwarded**

This field is used to enter the date that the applicable closeout submittal was forwarded. The Calendar tool may be used to select the date.

**Notes Section**

This is a text box that allows entry of the notes about the Closeout Submittal. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS<sup>®</sup> documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**Subject Section**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Punchlist

The final list of odd jobs and touch-up tasks that must be completed by each contractor is often referred to as a punchlist. The punchlist can also be sent to a subcontractor periodically informing them of work still to be completed. The punchlist is similar in form and function to Document Manager Submittal document. The Punchlist Log supports creation, modification, tracking and printing of Punchlists.

- **Items List**

An enumerated list of punchlist items is provided, along with open and close dates and dollar value.

- **History**

A history of revision dates and send dates allows review of when the list was last revised or printed.

- **From/To with Title**

Allows entering the name and title of both the sender and the recipient.

- **CC Line**

The CC line is provided to indicate where a copy of this notice has been sent.

## Modular Menu Access

Job | Documents | Punchlist

## Standard Menu Access

DM | Punchlist

The Punchlist Log screen gives a one line summary of each Punchlist that has been entered. The log allows browsing all documents or selectively viewing documents using search, sort, or filter criteria. From the Report Query, the user can also produce document reports giving summary or detailed reports including all data.

## Form Fields

### Vendor

This is the Id number of the subcontractor vendor. When the magnifying glass icon is selected, the user can choose from the list of vendors. Please note that when the Vendor Id is selected, the company's name, address, and telephone and fax numbers are displayed. The down arrow within the field name allows the user to add a new record.

### To (Contact)

This field is used to select from among the vendor's contacts. When the Vendor Id is selected, the Contact's Title is also listed. However, when the To (Optional) field is selected, that entry is used on the record.

### Number

This is the identification number assigned to the Punchlist.

### From Employee

This field is used to enter or select the Id number of the sender, either an employee or Other Contact. When the magnifying glass icon is selected, the user can choose from the Employee or Other Contact list. Please note that when the Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record.

### Job

This field is used to enter the number of the relevant job. The down arrow within the field name allows the user to add a new record. When the Job is selected, its address is also displayed.

## Punchlist Screen Entry Form

**Punchlist**

Number: 5451

Vendor: 0701  
 Company: A1 Insulation  
 Address: 1825 Highland Way Suite 305  
 City: San Luis Obispo  
 State: CA Zip Code: 93401  
 Telephone: (805) 543-7000  
 Fax: (805) 534-1595  
 Contact: [dropdown]  
 Title: [text]

From Employee: E001  
 Name: Bill Johnson  
 Title: Owner

Job: 1000  
 Description: Pacific View Apartments

To: [dropdown]  
 Name: [text]  
 Title: [text]  
 Company: [text]

**Sent Via**

Mail  Fax  Email  Other [text]

**History**

Date	Action
//	[dropdown]

**List**

Item	Opened	Closed	Amount	Description
1.00	03/20/xxxx	//	50.00	[text]
2.00	03/20/xxxx	//	125.00	[text]
	//	//	0.00	[text]

**Notes**

[text area]

**CC**

[text area]

**Subject**

Subject	Description	Notes
[text]		

Figure: DM-22 Punchlist screen form with sample data.

### To (Optional)

The user can choose from the Contact List. Please note that when the From Contact Id is selected, the person's name and title are displayed. The down arrow within the field name allows the user to add a new record.

### Sent Via Section

This region allows selection of one or more options to track how this document was sent. The Other selection allows a manual entry.

## History Data Section

Since submittals can often be sent back and forth between the GC, subcontractor, and owner, the History area is needed to record the progress of the submittals. Each of the columns in the History Block can be updated from within the line and column of the appropriate data.

### Date

This field is used to enter the date that action was taken on the punchlist item. The Calendar tool may be used to select the date.

### Action

This field is used to record the item number on which the action was taken.

### Insert Line Button



The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a History line.

### Delete Line Button



The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a History line.

## List Section

### Item

This field can hold any number. A readable sequence could have the item numbers follow a sequence 1.0, 1.1, 2.0, etc.

### Opened

This field is used to enter the date that action was requested. The Calendar tool may be used to select the date.

### Closed

This field is used to enter the date that action was taken on the punchlist item. The Calendar tool may be used to select the date.

### Amount

This field is used to record the cost of the punchlist item.

### Description

This field can hold a text description of the punchlist item.

### Insert Line Button



The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a List line.

### Delete Line Button



The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a List line.

## Notes Section

This is a text box that allows entry of the notes about the Punchlist. Please note that users may copy the text from another document and paste them into this text box. In the standard BIS® documents, the box will only permit a fixed number of lines of detail. In the Alternate forms, any additional detail will carry to another page.

**CC Section**

This text line can be used to list any other people or places where this document was sent. Please note that this is for internal information only, and it does not affect printed reports or To/From fields.

**Subject Section**

The subject field includes its own Find function that enables looking up a pre-existing subject. The Subject list is accessible from the Miscellaneous item under the Document Manager menu.

**Description**

The Description field is populated from that associated with the selected Subject.

**Notes**

The Notes field is populated with manually entered text.

**Insert Line Button**

The Insert Line button is used to add a line above the highlighted line. It is only visible when the cursor has selected a Subject line.

**Delete Line Button**

The Delete Line button is used to remove the highlighted line. It is only visible when the cursor has selected a Subject line.

## Miscellaneous

The Miscellaneous section of the Document Manager function offers a means by which users can add other records to those available from other modules in the program. The additional master records include Companies, Contacts, and Subjects.

### Modular Menu Access

Job | Documents | Miscellaneous


### Standard Menu Access

DM | Miscellaneous

## Companies

The Companies Form provides a means of entering information about companies that are not in the BIS® Vendor or Customer lists. The same popup pick-list operation can be used to select Company Numbers as is used for Vendors and Customers when a Company Number is required during data entry.

### New Record

Initial access to new Companies from the menu opens the Companies - New form. The form is used to enter new miscellaneous company information. However, access to a new form when another company's record is on the screen only requires pressing Ctrl+N or using the New  icon on the toolbar. The system will ask if any changes to the record should be saved.


### Modular Menu Access

Job | Documents | Miscellaneous | Companies

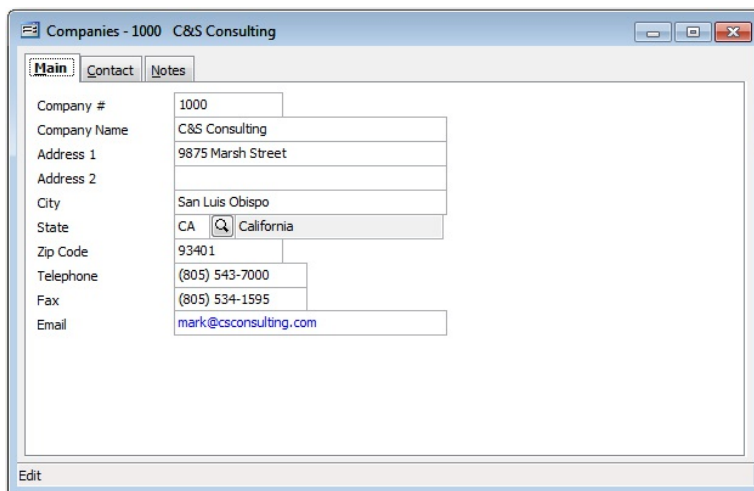
### Standard Menu Access


DM | Miscellaneous | Companies

### Editing an Existing Record

The list of companies may be examined by clicking on the Magnifying Glass  icon (at the top of the screen) or pressing Ctrl+F, and double clicking on the item of interest. Records can be edited by either using the Search button feature or by using the mouse or cursor keys to select the record to be edited.

**Figure: DM-23**  
Sample Companies record for editing Main tab.






Companies - 1000 C&S Consulting	
Main   Contact   Notes	
Company #	1000
Company Name	C&S Consulting
Address 1	9875 Marsh Street
Address 2	
City	San Luis Obispo
State	CA  California
Zip Code	93401
Telephone	(805) 543-7000
Fax	(805) 534-1595
Email	mark@cscsconsulting.com

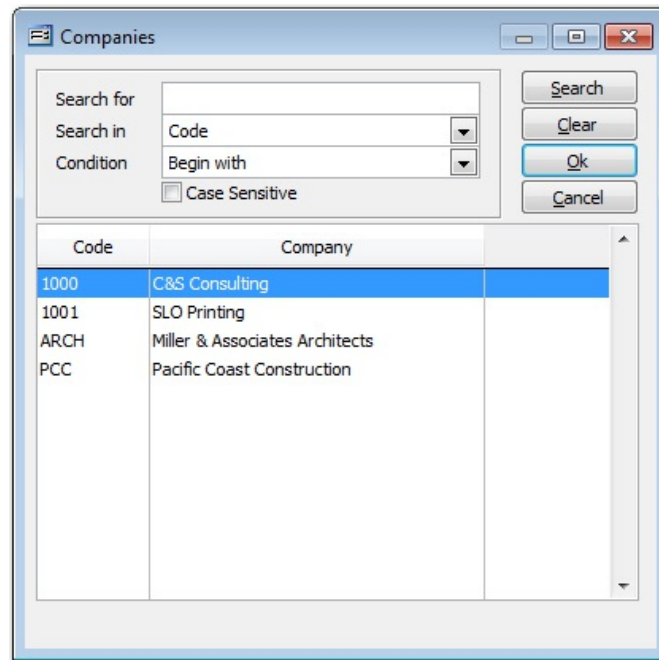
Edit





### Scrolling Through Miscellaneous Company Records


Users can scroll through the miscellaneous company records by using the Navigation buttons on the toolbar  at the top of the screen. Clicking on the First  icon (at the top of the screen) will open the first record of the list according to Company Code. Clicking on the Previous  icon (at the top of the screen) will open the

**Figure: DM-24**  
Miscellaneous Companies  
Find/Search screen.

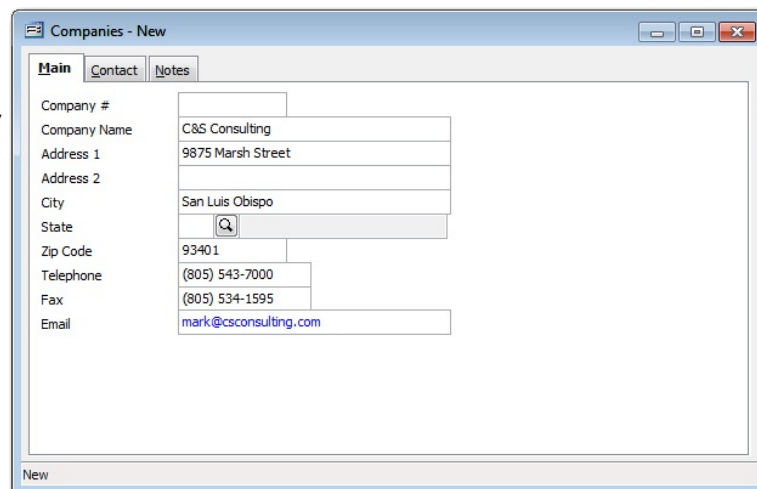


immediately previous record of the list according to Company Code. Clicking on the Next  icon (at the top of the screen) will open the next record of the list, according to Company Code. Clicking on the Last  icon (at the top of the screen) will open the last record of the list according to Company Code.


### Cloning an Existing Record

Once a record is selected, it can be cloned to create a new record, making modifications to the cloned record. Once the source record is brought to the screen, use the Clone Record  icon on the toolbar. The system will ask, “Do you want to clone this record?” Click on the Yes button to clone it, or click on the No button to leave the process. Records can be edited as described above. However one difference is that the cloned record will require a new Company Id to be saved as a new record.


**Figure DM-25**  
Cloned record. Note that all of the initial fields, except for the Company #, match the source record.



**Deleting an Existing Record**

Existing records can be deleted, but only if there are no existing transactions or other master records dependent on the one selected. Once the source record is brought to the screen, use the Delete  icon (at the top of the screen). The system will ask, "Do you want to delete this record? Click on the Yes button to delete it, or click on the No button to leave the process."

**Save the Changed Record**

When the record is complete or satisfactorily edited, either click on the Save  button on the toolbar or press Ctrl-S to save the changes.

**Main Tab**

The Main tab of this form is used to enter new miscellaneous company information.

**Company #**

The company number is used within the Document Manager module in BIS to identify the company throughout a variety of documents. Any 10-digit alpha or numeric character or combination of both may be used in the Company #. BIS® checks for number duplication. A warning will appear if the number has already been assigned.

**Company Name**

This field is used to enter the name of the company, up to 30 characters.

**Street Address 1**

Enter the street number and street name of the company. This is an alphanumeric field up to 30 characters.

**Street Address 2**

Enter any secondary address information such as a suite number for the company. This is an alphanumeric field up to 30 characters.

**City**

This field is used to enter the name of the city, up to 30 characters.

**State**

The two-character state abbreviation may be typed manually or selected from the list of defined state codes. Click on the Find tool, or the drop down button (whichever is available on the form) to see an extended list of states.

**Zip Code**

This field is used to enter the postal zip code. The number limited to nine characters and will be formatted automatically as 99999-9999 as the number is entered.

**Telephone**

This field is used to enter the main telephone number of the company. The number limited to ten digits and will be formatted automatically as (999) 999-9999 as the number is entered.

**Fax**



This field is used to enter the fax telephone number. The number limited to ten digits and will be formatted automatically as (999) 999-9999 as the number is entered.

**E-mail**

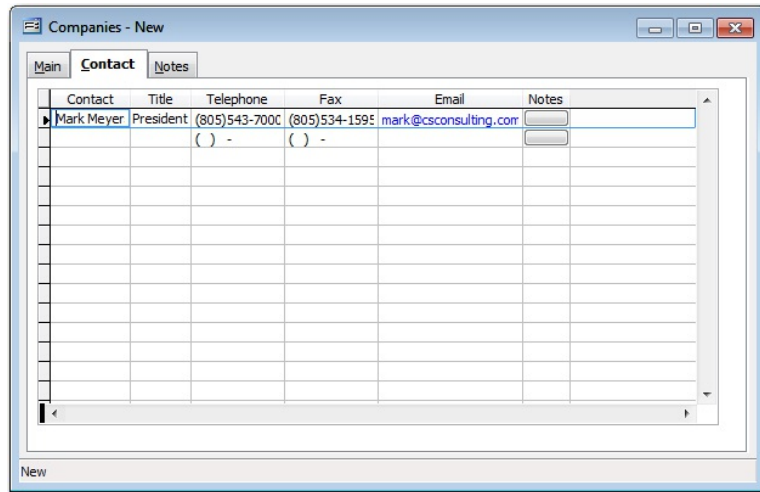
This field is used to enter the e-mail address, an alphanumeric field limited to 35 characters.



## Contact Tab

The Contact tab screen form records an unlimited number of contacts for the miscellaneous company. The contact name, title, telephone and fax number, and e-mail address can be entered in the corresponding fields. To enter notes for a particular contact, click the button in the Notes column to open the screen for notes.

Two buttons on the toolbar are useful when modifying or editing the grid area on a screen form. The Insert Line icon  (or Ctrl+I) adds a blank line to the current grid of the form that is open. The Delete Line  icon (or Ctrl+) removes the currently highlighted line from the grid of the open record.

**Figure: DM-26**  
Sample Company master record screen form Contact tab.



Contact	Title	Telephone	Fax	Email	Notes
▶ Mark Meyer	President	(805)543-7000	(805)534-1595	mark@cscsconsulting.com	
		( ) -	( ) -		

### Contact Name

Enter the name of the person contacted at the company.

### Title

Enter the Contact person's title.

### Telephone

Enter the telephone number of the contact. The number limited to ten digits and will be formatted automatically as (999) 999-9999 as the number is entered.

### Fax

Enter the Fax telephone number. The number limited to ten digits and will be formatted automatically as (999) 999-9999 as the number is entered.


### E-mail

Enter the electronic mail (e-mail) address.

### Notes

The Notes section is a work area for miscellaneous notes and may be used as needed.

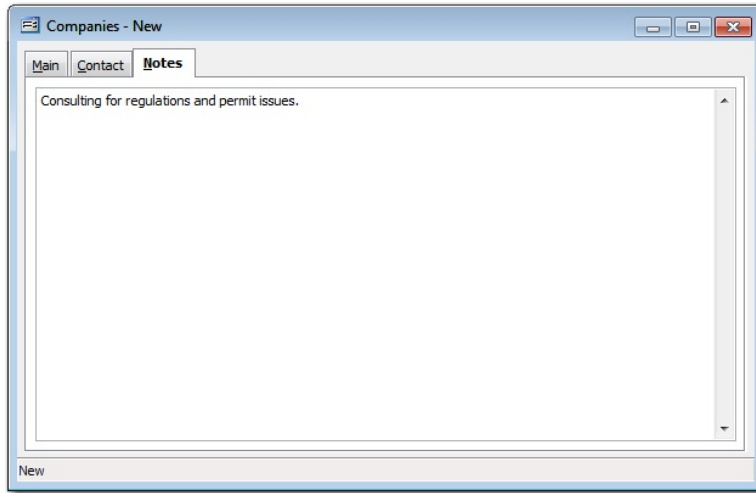
### Save the Changed Record

When the record is complete or satisfactorily edited, either click on the Save  button on the toolbar or press Ctrl-S to save the changes.


**Notes Tab**

The Notes section is a work area for miscellaneous notes and may be used as needed.

**Figure: DM-27**  
Sample miscellaneous  
Companies master record  
screen form Notes tab.




**Save the Changed Record**

When the record is complete or satisfactorily edited, either click on the Save  button on the toolbar or press Ctrl-S to save the changes.

## Contacts

The Contacts Form provides a means of entering information about contacts that are not in the BIS® Vendor, Customer, or Employee lists. The same popup pick-list operation can be used to select Contact Codes as is used for Vendors, Customers, and Employees when a Contact Number is required during data entry.

### New Record

Initial access to new Contacts from the menu opens the Contacts - New form. The form is used to enter new miscellaneous contact information. However, access to a new form when another contact's record is on the screen only requires pressing Ctrl+N or using the New  icon on the toolbar. The system will ask if any changes to the record should be saved.


### Modular Menu Access

Job | Documents | Miscellaneous | Contacts

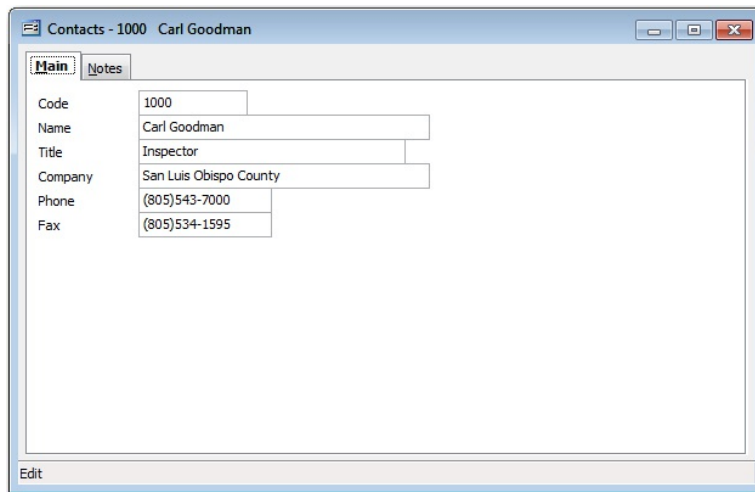
### Standard Menu Access

DM | Miscellaneous | Contacts

### Editing an Existing Record






The list of contacts may be examined by clicking on the Magnifying Glass  icon (at the top of the screen) or pressing Ctrl+F, and double clicking on the item of interest. Records can be edited by either using the Search button feature or by using the mouse or cursor keys to select the record to be edited.

**Figure: DM-28**  
Sample miscellaneous  
Contacts records for  
editing Main tab.



Contacts - 1000 Carl Goodman	
Code	1000
Name	Carl Goodman
Title	Inspector
Company	San Luis Obispo County
Phone	(805)543-7000
Fax	(805)534-1595


### Scrolling Through Contact Records

Users can scroll through the miscellaneous contact records by using the Navigation buttons on the toolbar  at the top of the screen. Clicking on the First  icon (at the top of the screen) will open the first record of the list according to Contact Code. Clicking on the Previous  icon (at the top of the screen) will open the immediately previous record of the list according to Contact Code. Clicking on the Next  icon (at the top of the screen) will open the next record of the list, according to Contact Code. Clicking on the Last  icon (at the top of the screen) will open the last record of the list according to Contact Code.

**Figure: DM-29**  
Miscellaneous Contacts  
Find/Search screen.

Code	Name	Company
1000	Carl Goodman	San Luis Obispo County
1001	Kristy Komi	Central Coast Designs
JSMITH	Jim Smith	ABC Co.


### Cloning an Existing Record

Once a record is selected, it can be cloned to create a new record, making modifications to the cloned record. Once the source record is brought to the screen, use the Clone Record  icon on the toolbar. The system will ask, “Do you want to clone this record?” Click on the Yes button to clone it, or click on the No button to leave the process. Records can be edited as described above. However one difference is that the cloned record will require a new Contact Id to be saved as a new record.


**Figure: DM-30**  
Cloned record. Note that all of the initial fields, except for the Contact Code, match the source record.

Code	
Name	Carl Goodman
Title	Inspector
Company	San Luis Obispo County
Phone	(805)543-7000
Fax	(805)534-1595

### Deleting an Existing Record

Existing records can be deleted, but only if there are no existing transactions or other master records dependent on the one selected. Once the source record is brought to the screen, use the Delete  icon (at the top of the screen). The system will ask, “Do you want to delete this record? Click on the Yes button to delete it, or click on the No button to leave the process.

**Save the Changed Record**

When the record is complete or satisfactorily edited, either click on the Save  button on the toolbar or press Ctrl-S to save the changes.

**Main Tab**

The Main tab screen form is used to record miscellaneous contact information. The contact name, title, telephone and fax number, and e-mail address can be entered in the corresponding fields.

**Code**

The contact code is used within the Document Manager module in BIS to identify the contact throughout a variety of documents. Any 10-digit alpha or numeric character or combination of both may be used in the Contact Code field. BIS® checks for number duplication. A warning will appear if the number has already been assigned.

**Contact Name**

Enter the name of the miscellaneous contact person. This is an alphanumeric field and is limited to 30 characters.

**Title**

Enter the Contact person's title. This is an alphanumeric field and is limited to 20 characters.

**Company**

Enter the company name associated with the Contact person. This is an alphanumeric field and is limited to 20 characters.

**Telephone**

Enter the telephone number of the contact. The number limited to ten digits and will be formatted automatically as (999) 999-9999 as the number is entered.


**Fax**

Enter the Fax number. The number limited to ten digits and will be formatted automatically as (999) 999-9999 as the number is entered.

**Notes**

The Notes section is a work area for miscellaneous notes and may be used as needed.

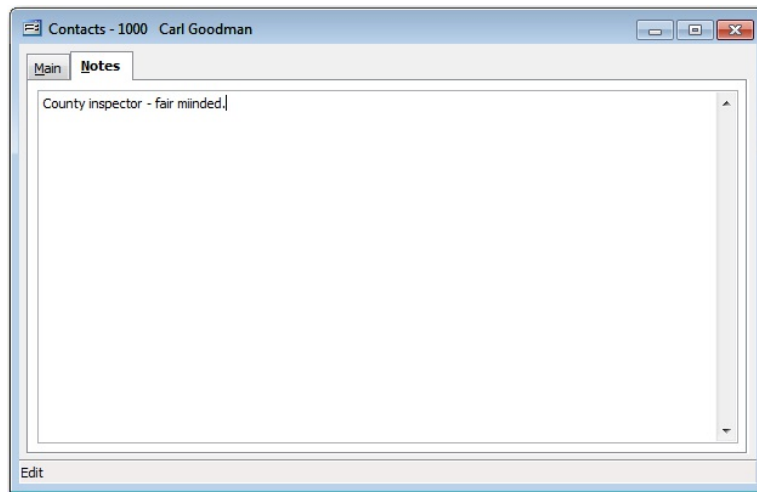
**Save the Changed Record**

When the record is complete or satisfactorily edited, either click on the Save  button on the toolbar or press Ctrl-S to save the changes.


**Notes Tab**

The Notes section is a work area for miscellaneous notes and may be used as needed.

**Figure: DM-31**  
Sample miscellaneous  
Contacts master record  
screen form Notes tab.



### Save the Changed Record

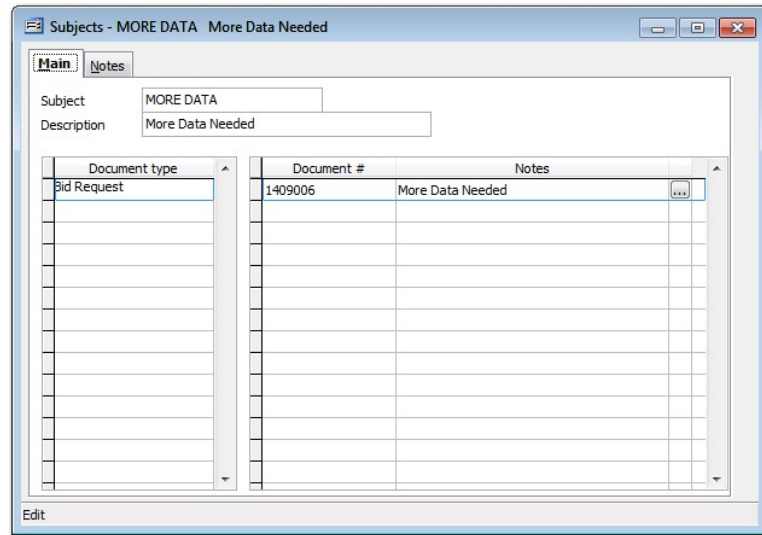
When the record is complete or satisfactorily edited, either click on the Save  button on the toolbar or press Ctrl-S to save the changes.




## Subjects

When an issue arises on the job, that issue can be defined in Document Manager as a subject. After a subject is created in the Subject Master File, documents of any type can be associated with that subject.

**Figure: DM-32**  
Sample miscellaneous Subjects records for editing Main tab.



### New Record

Initial access to new Subjects from the menu opens the Subjects - New form. The form is used to enter new Subjects information. However, access to a new form when another subject record is on the screen only requires pressing Ctrl+N or using the New  icon on the toolbar. The system will ask if any changes to the record should be saved.


### Modular Menu Access

Job | Documents | Miscellaneous | Subjects






### Standard Menu Access

DM | Miscellaneous | Subjects

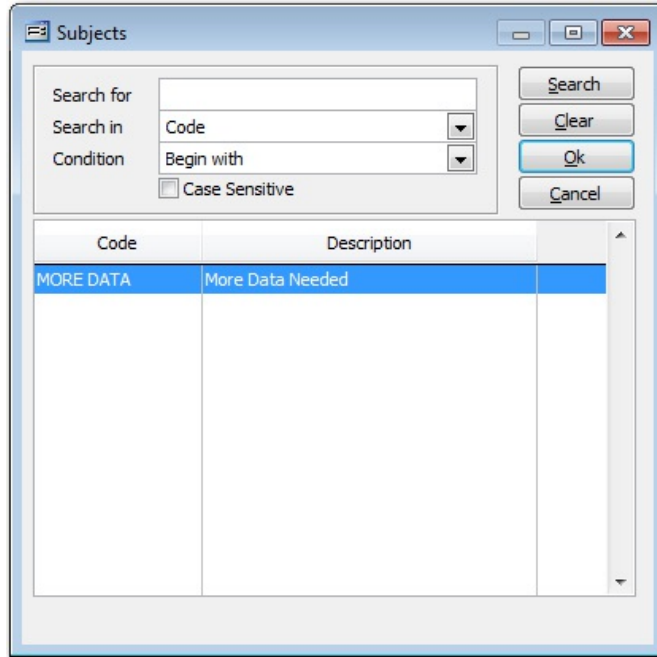
### Editing an Existing Record

The list of subjects may be examined by clicking on the Magnifying Glass  icon (at the top of the screen) or pressing Ctrl+F, and double clicking on the item of interest. Records can be edited by either using the Search button feature or by using the mouse or cursor keys to select the record to be edited.


### Scrolling Through Subject Records

Users can scroll through the miscellaneous Subject records by using the Navigation buttons on the toolbar  at the top of the screen. Clicking on the First  icon (at the top of the screen) will open the first record of the list according to Subject. Clicking on the Previous  icon (at the top of the screen) will open the immediately previous record of the list according to Subject. Clicking on the Next  icon (at the top of the screen) will open the next record of the list, according to Subject Code. Clicking on the Last  icon (at the top of the screen) will open the last record of the list according to Subject Code.

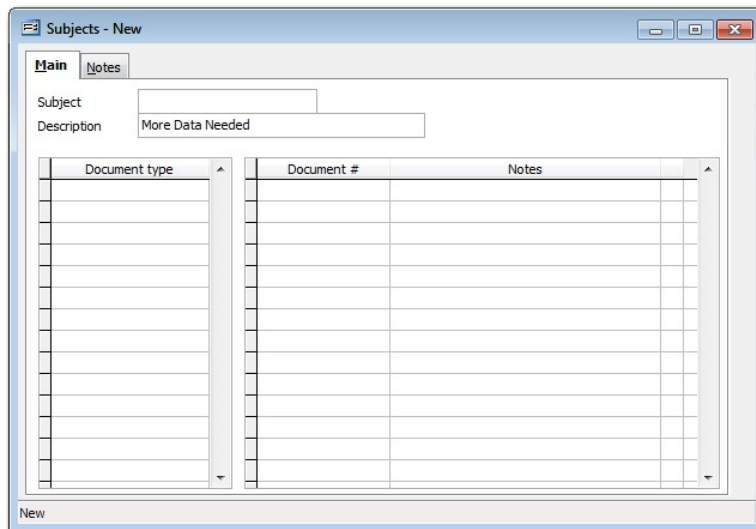
**Figure: DM-33**  
Miscellaneous Subjects  
Find/Search screen.




**Cloning an Existing Record**

Once a record is selected, it can be cloned to create a new record, making modifications to the cloned record. Once the source record is brought to the screen, use the Clone Record  icon on the toolbar. The system will ask, “Do you want to clone this record?” Click on the Yes button to clone it, or click on the No button to leave the process. Records can be edited as described above. However one difference is that the cloned record will require a new Subject Id to be saved as a new record.


**Figure: DM-34**  
Cloned record. Note that  
all of the initial fields,  
except for the Subject,  
match the source record.



**Deleting an Existing Record**

Existing records can be deleted, but only if there are no existing transactions or other master records dependent on the one selected. Once the source record is brought to the screen, use the Delete  icon (at the top of the screen). The system will ask, “Do you want to delete this record? Click on the Yes button to delete it, or click on the No button to leave the process.

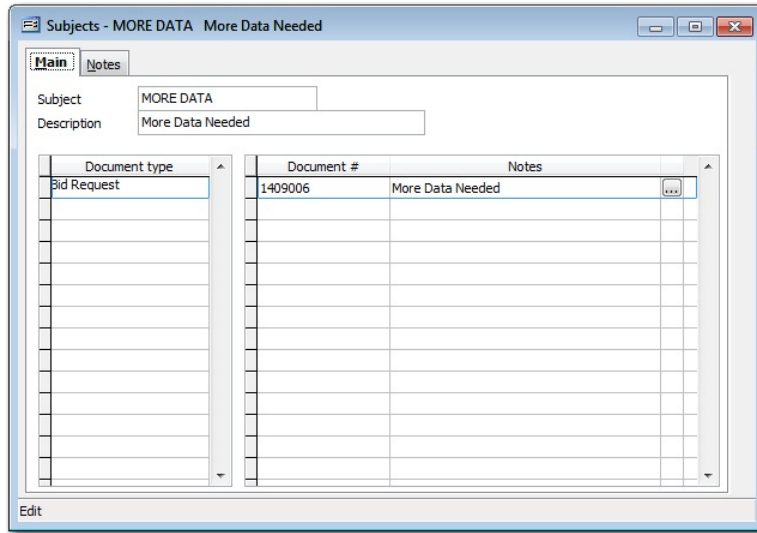
**Save the Changed Record**

When the record is complete or satisfactorily edited, either click on the Save  button on the toolbar or press Ctrl-S to save the changes.

### Main Tab

The Main tab screen form is used to edit, view, or delete after navigating to the Subject.

**Figure: DM-35**  
Sample miscellaneous  
Subjects records for  
editing Main tab.



### Subject

This field is used to record the user defined Id of the subject. The Id, an alphanumeric field and is limited to 15 characters, will be used to reference a subject throughout the Document Manager module.

### Description Column

This field is used to record a description of the specified subject. This is an alphanumeric field and is limited to 30 characters.

### Document Type Column

This field displays the document types associated with the subject.


### Document # column

This field displays the document number associated with the selected document type.


### Notes Column

This field displays the document notes associated with the selected document number. The button to the right will open the specified document related to the subject.

### Open Document

 The Open Document button will open the specified document related to the subject.

### Save the Changed Record

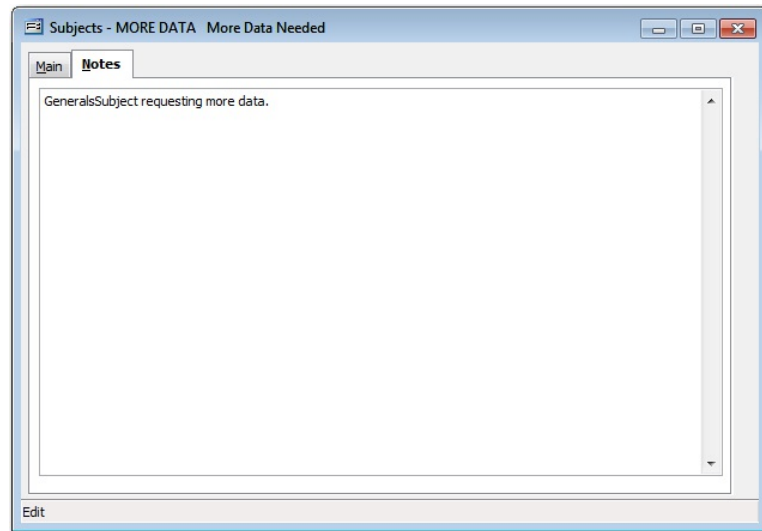
When the record is complete or satisfactorily edited, either click on the Save  button on the toolbar or press Ctrl-S to save the changes.

### Notes Tab


The Notes section is a work area for miscellaneous notes and may be used as needed.

**Figure: DM-36**

Sample miscellaneous  
Subjects master record  
screen form Notes tab.



### Save the Changed Record

When the record is complete or satisfactorily edited, either click on the Save  button on the toolbar or press Ctrl-S to save the changes.

## Section 4 – Document Manager Settings

Document Manager employs alternative technologies that enable users to produce documents two ways: preset documents with or without logos (legacy mode); and user-modifiable documents. The user-definable documents employ the BIS® Word Processor that enables users to modify formatting, add or remove fields, utilize a different numbering system, and more.

The Document Manager settings are in two areas under the Administrator settings: System Wide Parameters and User Preferences. The System Wide Parameters settings allow the system administrator to determine which format will be used by the company, and the User Preferences permit the user to define which printer to which the documents will be produced.

### System Wide Parameters

The System Wide Parameters provides a means by which users can decide whether to show their company fax number, decide on a numbering format for User-defined Document Manager forms, select a logo to include on forms, choose the document formats, open the BIS® Word Processor, and select the default printer.

#### Menu Access

Administrator | System Wide Parameters | System Wide Parameters

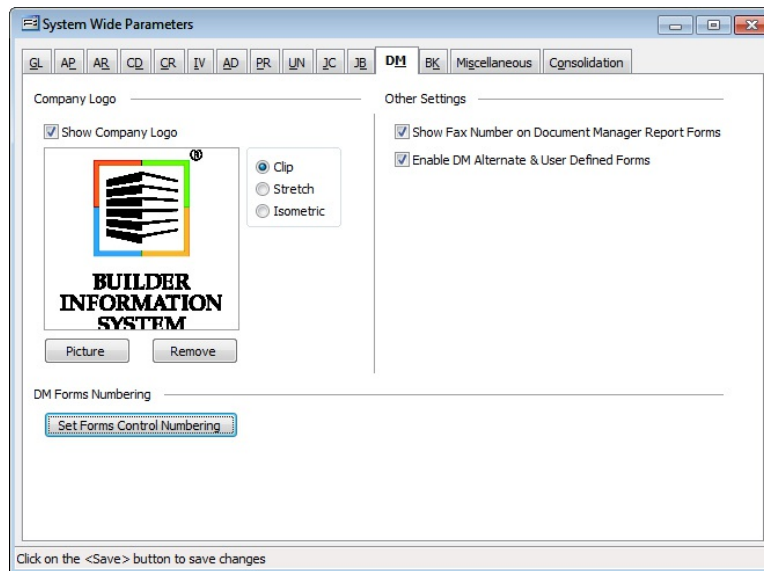
### DM Tab

The Document Manager tab provides a means by which users can decide whether to show their company fax number, decide on a numbering format for User-defined Document Manager forms, and select a logo to include on forms.

#### Menu Access

Administrator | System Wide Parameters | System Wide Parameters | DM Tab

**Figure: DM-37**  
System Wide Parameters Document Manager tab screen form showing selected logo and more.



#### Show Fax Number on Document Manager Report Forms

Click on this box to include the company's fax number on the Document Manager forms header.

#### Enable DM Alternate & User Defined Forms

Although the legacy Document Manager documents use the numbering entered onto the form by the user, the Alternate and User-Definable forms can employ a different numbering system consisting of a Job Number, hyphen, and a consecutive number in that job series. Each element of that numbering system can consist of 10 numeric digits.

## Company Logo

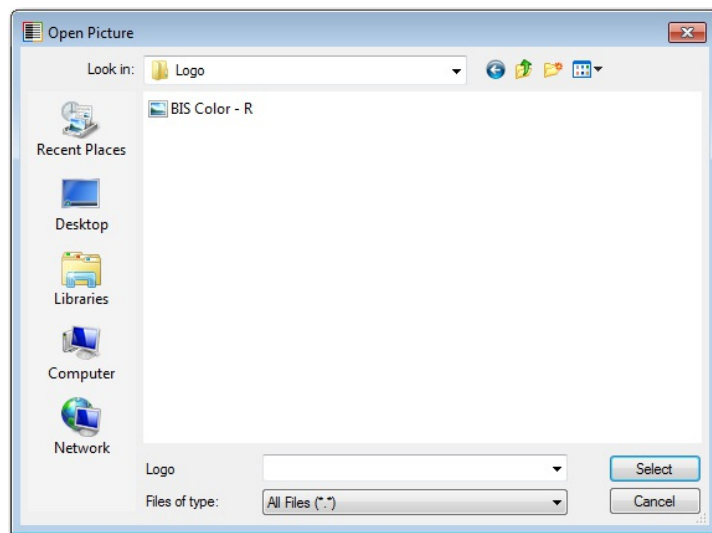
Document Manager also allows a graphic image of the company logo to be included in Standard and Alternate formats.

## Picture

To select a graphic file, click the Picture button to open an Open Picture dialog box to add or change the BMP (bitmap), JPEG (JPG), or GIF photo file selected. Once selected, the image will appear in the large box of the screen form.

The file formats are common to photo and artwork images, and come from many sources. Most graphic software vendors who use other file formats supply some means of converting their own formats to these formats. These files usually contain a BMP, JPG, or GIF file extension. For more information about working with graphics, contact a local software vendor.

**Figure: DM-38**  
Picture screen form used to select logo file for Document Manager forms.



## Remove

To remove the selected graphic file, click the Remove button.


## Clip, Stretch, Isometric

Use one of these three radio buttons to select the manner in which the image is to be rendered in the available area.

## Show Company Logo

Select this option to include the selected company logo in the documents.

## Save the Changed Record

When the record is complete or satisfactorily edited, either click on the Save  button on the toolbar or press Ctrl-S to save the changes.

## Forms & Printers – System Wide Parameters

Document Manager employs alternative technologies that enable users to produce documents two ways: preset documents with or without logos (legacy mode); and user-modifiable documents. The user-definable documents employ the BIS® Word Processor that enables users to modify formatting, add or remove fields, utilize a different numbering system, and more.

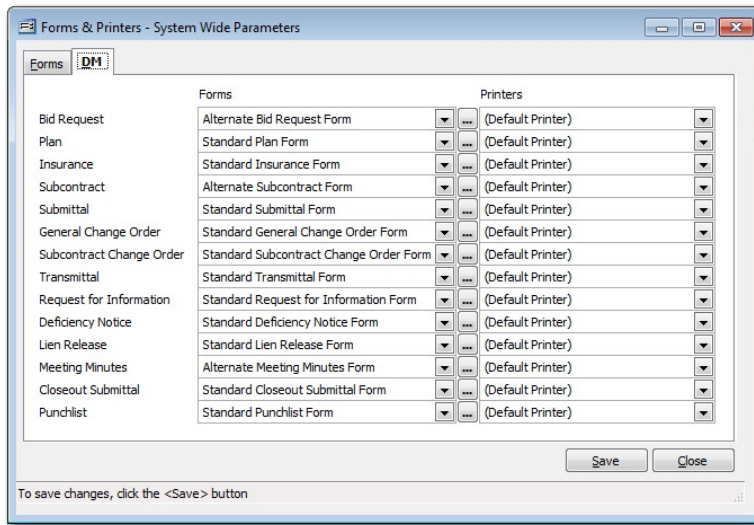
The System Wide Parameters, Forms & Printers option allows the system administrator to determine which format will be used by the company, add or modify alternate formats, and set the default printer to which the documents will be produced.

### Menu Access

Administrator | System Wide Parameters | Forms & Printers | DM Tab

Initial access to the Document Manager Forms & Printers displays the DM tab for Document Manager forms.

**Figure: DM-39**  
System Wide Parameters, Forms & Printers, DM tab screen form.

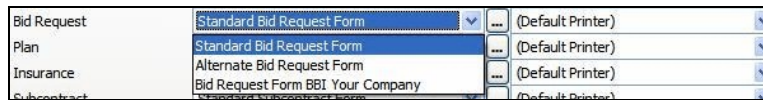


### Tip

The default form set here can be changed on-the-fly by the user when actually printing the form.

### Bid Request

This option is used to select the user’s default Bid Request document print format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Bid Request Form and Alternate Bid Request Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-40** Document Manager – Bid Request Form drop-down showing Standard and Alternate default formats, and a user-defined format.



**Plan**

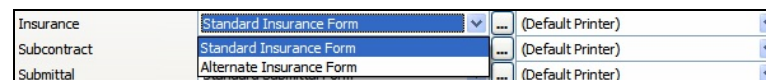
This option is used to select the user’s default Plan document print format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Plan Form and Alternate Plan Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-41** Document Manager – Plan Form drop-down showing Standard and Alternate default formats, and a user-defined format.

**Insurance**

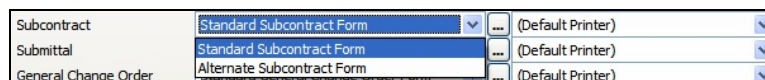
This option is used to select the user’s default Insurance document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Insurance Form and Alternate Insurance Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-42** Document Manager – Insurance Form drop-down showing Standard and Alternate default formats.

**Subcontract**

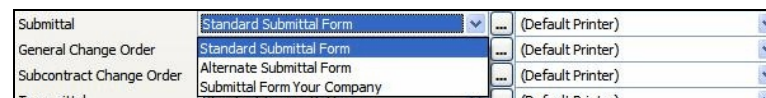
This option is used to select the user’s default Subcontract document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Subcontract Form and Alternate Subcontract Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-43** Document Manager – Subcontract Form drop-down showing Standard and Alternate default formats.

**Submittal**

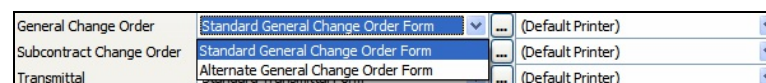
This option is used to select the user’s default Submittal document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Submittal Form and Alternate Submittal Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-44** Document Manager – Submittal drop-down showing Standard and Alternate default formats, and a user-defined format.

**General Change Order**

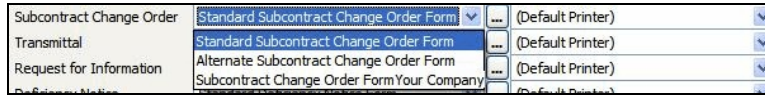
This option is used to select the user’s default General Change Order document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard General Change Order Form and Alternate General Change Order Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-45** Document Manager – General Change Order Form drop-down showing Standard and Alternate default formats.

### Subcontract Change Order

This option is used to select the user’s default Subcontract Change Order document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Subcontract Change Order Form and Alternate Subcontract Change Order Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-46** Document Manager – General Change Order Form drop-down showing Standard and Alternate default formats and a user-defined format.

### Transmittal

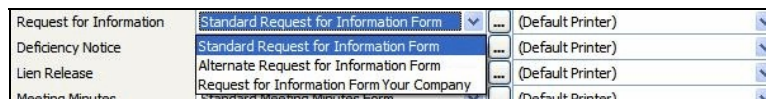
This option is used to select the user’s default Transmittal document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Transmittal Form and Alternate Transmittal Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-47** Document Manager – Transmittal Form drop-down showing Standard and Alternate default forms and a user-defined form.

### Request for Information (RFI)

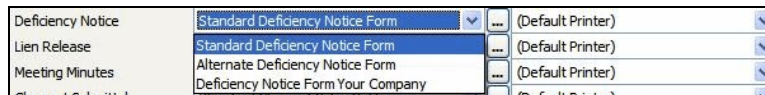
This option is used to select the user’s default Request for Information (RFI) document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard RFI Form and Alternate RFI Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-48** Document Manager – RFI Form drop-down showing Standard and Alternate default forms and a user-defined form.

### Deficiency Information

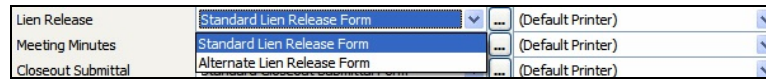
This option is used to select the user’s default Deficiency Notice document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Deficiency Notice Form and Alternate Deficiency Notice Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-49** Document Manager – Deficiency Notice Form drop-down showing Standard and Alternate default forms and a user-defined form.

### Lien Release

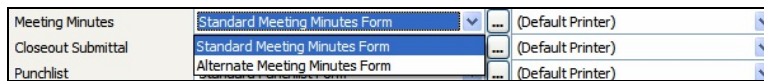
This option is used to select the user’s default Lien Release document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Lien Release Form and Alternate Lien Release Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-50** Document Manager – Lien Release Form drop-down showing Standard and Alternate default formats.

### Meeting Minutes

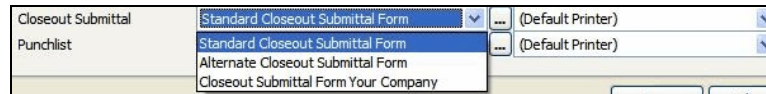
This option is used to select the user’s default Meeting Minutes document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Meeting Minutes Form and Alternate Meeting Minutes Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-51** Document Manager – Meeting Minutes Form drop-down showing Standard and Alternate default formats.

### Closeout Submittal

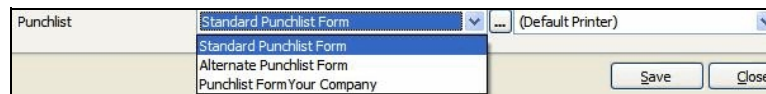
This option is used to select the user’s default Closeout Submittal document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Closeout Submittal Form and Alternate Closeout Submittal Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-52** Document Manager – Closeout Submittal Form drop-down showing Standard and Alternate default formats and one user-defined format.

### Punchlist

This option is used to select the user’s default Punchlist document format. This may be selected using the drop-down tool. Initially, the feature has two options, Standard Punchlist Form and Alternate Punchlist Form. When Alternate forms are modified and saved with new names, they are added to the list.



**Figure: DM-53** Document Manager – Punchlist Form drop-down showing Standard and Alternate default formats and one user-defined format.

### Printers

Use the drop-down tool to select the default printer to which the particular form should be directed. The “(Default Printer)” initially shown is the local computer’s default printer as set in Windows®. The default printer used by BIS® for the selected form can be any printer in the network to which the user’s computer has access. The printer selection can be changed for an individual user in User Preferences or on-the-fly when actually printing the particular form.

## User Preferences – Forms & Printers

Although the system default printers for Document Manager forms are set in System Wide Parameters, individual users may set them to different default printers.

### DM Tab

Initial access to the User Preferences Document Manager Forms & Printers displays the DM tab for Document Manager forms. In this screen form, however, the default form selection may not be changed and are grayed out; only the default printer can be changed.

### Menu Access

Administrator | User Preferences | Forms & Printers | DM Tab

**Figure: DM-54**  
User Preferences, Forms & Printers, DM tab screen form. Note that the Forms selections are grayed out.

	Forms	Printers
Bid Request	Standard Bid Request Form	(Default Printer)
Plan	Standard Plan Form	(Default Printer)
Insurance	Standard Insurance Form	(Default Printer)
Subcontract	Standard Subcontract Form	(Default Printer)
Submittal	Standard Submittal Form	(Default Printer)
General Change Order	Standard General Change Order Form	(Default Printer)
Subcontract Change Order	Standard Subcontract Change Order Form	(Default Printer)
Transmittal	Standard Transmittal Form	(Default Printer)
Request for Information	Standard Request for Information Form	(Default Printer)
Deficiency Notice	Standard Deficiency Notice Form	(Default Printer)
Lien Release	Standard Lien Release Form	(Default Printer)
Meeting Minutes	Standard Meeting Minutes Form	(Default Printer)
Closeout Submittal	Standard Closeout Submittal Form	(Default Printer)
Punchlist	Standard Punchlist Form	(Default Printer)

To save changes, click the <Save> button


### Printers

Use the drop-down tool to select the default printer to which the particular form should be directed for the individual user. The “(Default Printer)” initially shown is the default printer as set in System Wide Parameters. The default printer used by a particular BIS® user for the selected form can be any printer in the network to which the user’s computer has access. The printer selection also can be changed on-the-fly when actually printing the particular form.

### Tip

The default form set here can be changed on-the-fly by the user when actually printing the form.

## BIS® DM Form Editor

 The Edit Forms button is used to access the BIS® DM Form Editor functions. The DM Form Editor may be used to copy existing forms, save them with a different name, and modify them. It can also be used to import and export formats. Such modifications could include adding graphics to the form, changing fonts, adding or removing text, removing or adding lines or columns, and more. Newly created user forms can then be set as the default Type for the specific form.

### Tip

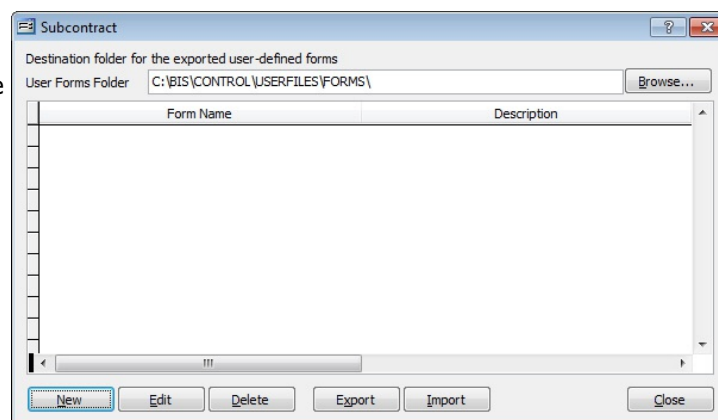
Refer to the Form Editor & Report Writer manual for detailed information about the Forms Editor use.

### Menu Access

Administrator | User Preferences | Forms & Printers | DM Tab | Edit Forms Button

**Figure: DM-55**

BIS® DM Form Editor screen form used to create a new form, modify, delete, export, or import a previously created form.



### User Forms Folder

Enter the Destination Folder for the new, imported, and exported user-defined forms. The Browse button may be used to open an Explorer-like screen to select a folder.

### Tip

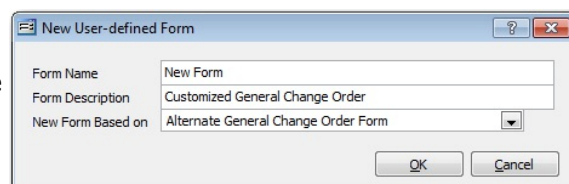
- ◆ If the folder does not exist, the system will ask permission to create it.
- ◆ If the destination folder is different from a previously used folder, a message will appear reminding the user to manually move the previous user-defined forms.

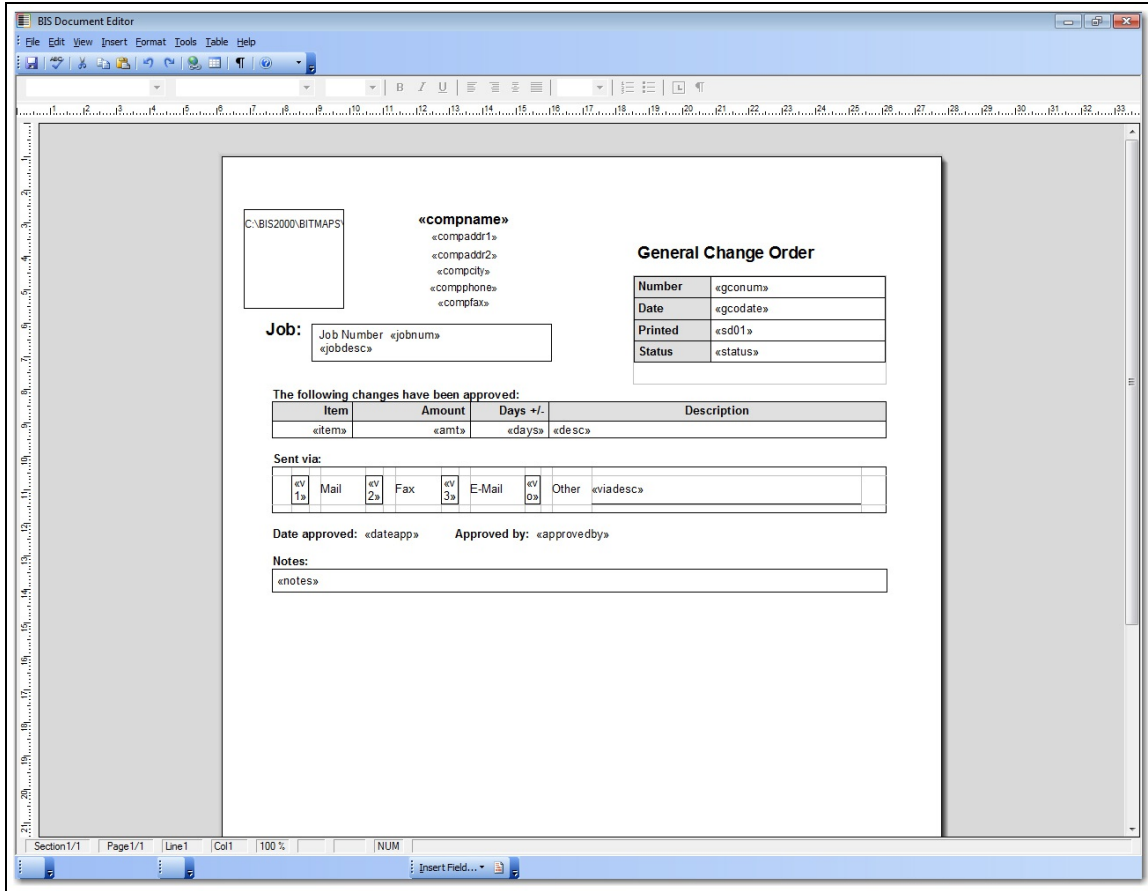
### New Button

The New Button opens the New User-defined Form window that is used to enter the Form Name and a Form Description, as well as to choose which existing form the new form is to be based.

**Figure: DM-55**

BIS® DM Form Editor screen form used to create a new form, modify, delete, export, or import a previously created form.





DM-56 BIS® Document Designer screen for General Change Order.

## Section 5 – Document Manager Reports

This section covers the reports available for document manager. Access to specific reports begins with the Query screen that enable the selection of the particular variation needed. As with other reports in BIS<sup>®</sup>, reports can generally be one of 3 types: Summary and Detail, but Document Manager also permits producing the actual underlying Form document.

### Tip

The specific document format produced is controlled by the default selection made in Administrator | System Wide Parameters | Forms & Printers | DM tab. Changing the default form is covered in Section 4 of this manual.

Most reports offer the ability to select an “Order By” setting, and often have several choices of fields for that choice. Additionally, most reports have a variety of Options allowing certain elements to show or not on the report. Finally, most reports offer a listing of fields that can allow a refined selection of data. The Report Query will be remembered by User Id until changed.

All report options are listed under the Reports menu, and many reports can be selected by right-clicking on a data hyperlink to open pop-up report menus related to that field. Either method opens a report setup form depending upon the type of report selected.

Reports offer the opportunity to view all records and activity for a company. Reports are an easy way to view the effects of specific transactions. They are also a good way to get a summary view of either all transactions of a specific type, all entries for a single account or file.

BIS<sup>®</sup> reports allow the user to enter the exact specifications of what the report will contain. Make it as detailed or simple as needed. Narrow or broaden the search criteria to allow as few as one record, or as many as all records pertaining to the topic.

Once the criteria has been entered into the report form, the report can be viewed on the screen by clicking the Preview button. A window will open displaying the report. This is useful for detecting any errors in setting up the report before actually printing it on paper. Use the scroll bars on the right side and bottom of the screen to move around the page. BIS<sup>®</sup> reports can be printed from within the preview screen.

When previewing a report, the usual toolbar will disappear and the preview toolbar appears. After closing the preview of the report and returning to the Report form, the report can be printed. Select Print, either from the File menu or by clicking the Print button on the main tool bar. The Print dialogue box will open. Specify whether to print the entire document or select certain pages to print. Also, select the number of copies desired and which printer to use.

Reports can be viewed on the screen, printed, and exported. In other editions of BIS<sup>®</sup>, reports can be exported and emailed in up to 6 different formats; documents can be exported and emailed in up to 4 different formats.. The screen presentation of most reports offers hyperlinks that enable drilling down to the source record, or by right-clicking, opening a list of other reports and functions related to the hyperlink field selected.

### Report Toolbar Controls


There are a number of controls that affect reports and how they are rendered. Initial access comes from the Report Toolbar.




**Figure: DM-57**  
Report Toolbar

## Reports Toolbar


### Preview

 The Preview icon works with the Report and printing functions, allowing previewing in WYSIWYG (What You See Is What You Get) mode. As with other screen elements, these report previews can be tiled or layered with the BIS® MSD (Multiple Screen Display).


### Print (Ctrl-P)

 The BIS® Print icon causes the current document or report to be sent to the print spooler so that it can be printed by the default or selected printer accessible to the sending computer.

### Export Report

 The Export Report icon exports the current report in up to six different formats, depending on the edition of BIS® used. Standard edition users can export in DOS TXT, Microsoft® Excel® WKS, and Adobe® PDF formats. Professional edition users add Microsoft® Word® and the graphical TIFF formats. Finally, Enterprise edition users can also export in HTML format. Depending on edition, documents can be exported in DOS TXT, Adobe® PDF formats, Microsoft® Word® and HTML formats.


### Email Report

 The Email Report icon enables Professional and Enterprise edition users to email reports from directly within BIS®. The available formats for these editions are the same as listed for Export above.


## Preview Toolbar Controls

Once a report is opened, and appears on the screen, an additional Preview Toolbar opens.


### Table of Contents

 The BIS® Table of Contents icon adds a table of contents to the left side of the screen report. Using a familiar Explorer-style format, each primary record of the report can be directly accessed, eliminating the need for laborious searching.


### Show/Hide Ruler

 The Show/Hide Rule icon reveals or hides a ruler guide to the top and side of the report. Users of word processing and some graphics programs should be familiar with this feature.


### Copy Page

 The Copy Page icon copies the current page of the report to the Windows Clipboard.


### Find

 The BIS® Find icon enables finding or searching for a particular piece of data in the current report.


### Display Pages

 The Display Pages icon controls how many pages of the report can appear on a single screen and how they are arranged. The choices are: 1x1, 1x2, 1x3, 2x1, 2x2, and 2x3.

### Zoom In


 The Zoom In icon enlarges the screen image by preset percentages.

### Zoom Out


 The Zoom In icon reduces the screen image by preset percentages.




### Zoom Control

 The Zoom Control drop-down allows enlarging or reducing the screen image by preset percentages: 25, 50, 75, 100, 125, 150, 175, 200, 400, and 800, as well as Page Width and Full Page.


### “Navigation” Buttons

 The Navigation button icons provide a way of moving through pages of the report. In sequence, they are: the First Page, the Previous Page, the Next Page, and the Last Page. The numeric information in the center indicates which page is showing or selected out of the total number of pages in the report.


### Backward

 The Backward icon reverses the order of the pages of the report that appear on the screen.

### Forward

 The Forward icon resets the order of the pages of the report that appear on the screen.


### Hyperlink Appearance

 The Hyperlink Appearance icon controls how the hyperlinks will appear on the displayed report (and any report printed from the preview).

**Figure: DM-58**  
Hyperlink format options



### Refresh

 The Refresh icon updates the report with the latest data from the program.

### List Reports

The majority of BIS<sup>®</sup> reports are list reports. This section explains how to set up a list report and define the search criteria on which to base it. If the criteria specified does not yield any records, BIS<sup>®</sup> will not allow the report to be previewed or printed.

#### Tip

Document Manager offers both List reports and documents from its Query screens.

### Report Type

Select the type of report, which generally determines the level of detail contained in the report itself. The amount and type of detail available varies from report to report.

### Order By

Use the drop down menu in the Order By option to select which field should be used to list entries. Some reports can only be ordered by a certain field. If applicable, choose whether the entries will be shown in ascending or descending order. For example, ascending alphabetical listings display entries A-Z, while a descending list orders entries Z-A.

### Options

The choices given in the Options box allow the report to be further defined. To select any of these options, check the corresponding box.

## Filter

The listing at the bottom of the form defines which records will be included in the report. Data can be selected for inclusion by the fields displayed in this area. A variety of criteria can be used to make the report as narrow or broad as necessary.

First select an operator from the drop down list in the Operator field. Depending on which operator is chosen, the Beginning and/or Ending fields may need to be filled with data based on the field type. Sometimes a drop-down menu is made available in these columns so that a selection can be made from records on file.

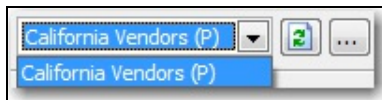
## Operators

All	Shows all records.
=	Displays only records with data matching the data in the Beginning column.
On Date Run	For Date fields only; this dynamic operator uses the system date for the program.
Day # of Month	For Date fields only; this dynamic operator uses the pre-selected specific day of the month.
First Day of the Month	For Date fields only; this dynamic operator uses the first day of the current month.
Last Day of the Month	For Date fields only; this dynamic operator uses the last day of the current month.
In	Includes all records contain the data entered in the Beginning column.
Between	Shows records that fall between the records listed in the Beginning and Ending columns.
Tag	Includes specific records tagged from a drop-down list of records.
>	Includes records that have a value greater than that entered in the Beginning column.
<	Only shows records with a value less than that defined.
>=	Displays records with a value greater than or equal to the defined data.
<=	Includes records whose value is less than or equal to the data entered.

## My Query

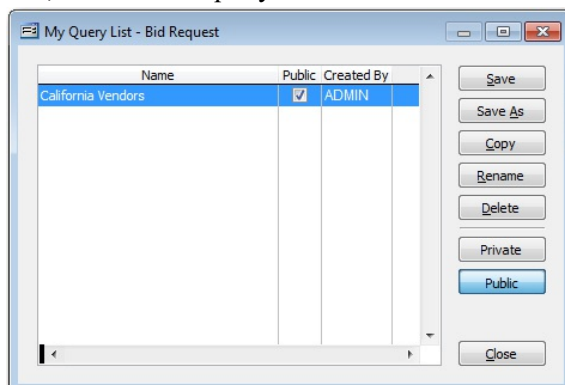
The My Query option enables the user to save multiple sets of query conditions including Order By, Field Operators and their settings, and Options. The initial use of My Query shows no saved Queries. If there are existing named queries available they can be seen using the drop-down tool. The saved Query, however, can be applied to any of the available Report Types.

**Figure: DM-59**  
My Query drop-down list.




As with other system reports, each named query selection can be further refined with the other settings.


**Figure: DM-60**  
My Query List sample screen form.



### Refresh Button

 If a query has been saved, and new changes are made to the query settings, clicking on the Refresh button will remove those unsaved changes.

### Details Button

 A query can be saved by clicking on the Details button. If there are no pre-existing queries, two buttons are available, Save As and Close.

### Save

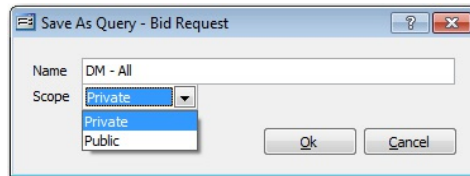
The Save button will save the current settings, but will provide a dialog box asking, “Do you want to overwrite this query?” Click on Yes to save the current settings under the selected name, or No to not save them under the current name.

### Save As

The Save As button opens the Save As Query sub-form.

**Figure: DM-61**

Save As Query List sample screen form showing the two optional Scope selections: Private and Public.



### Name

Use this field to assign a name to the saved query.

### Scope

The Scope option allows the user to specify whether the saved query will be kept for private use or be made available to all users with access rights to the information.

### OK

Click on the OK button to accept the name and scope selections.

### Cancel

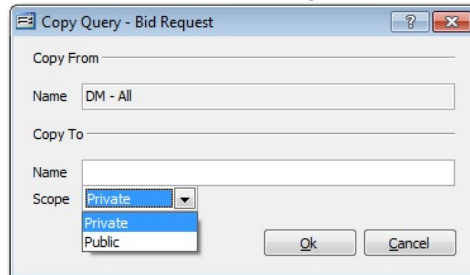
Click on the Cancel button to close the form without saving.

### Copy

The copy button will copy the current saved query to a new name, and allow changing its scope setting. The newly named query can then be edited and saved again.

**Figure: DM-62**

Copy query screen form.

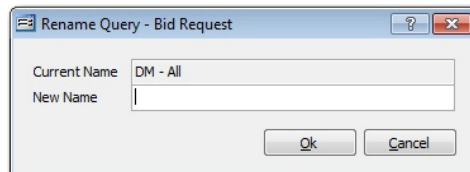


### Rename

The Rename button opens the Rename Query form that allows the query to be saved with a new name.

**Figure: DM-63**

Rename Query screen form.



**Delete**

The Delete button will delete the selected named query. If the query is a public query, the following dialog box question will appear, “This is a public query. Are you sure that you want to delete this query?” If the selected query is not a public query, the system simply asks for a confirmation of the action.

**Private**

If the query is marked as Private, this button will be inactive. The user has the option of changing the scope of the query to Public by using the next button.


**Public**

If the query is marked as Public, this button will be inactive. The user has the option of changing the scope of the query to Private by using the preceding button.

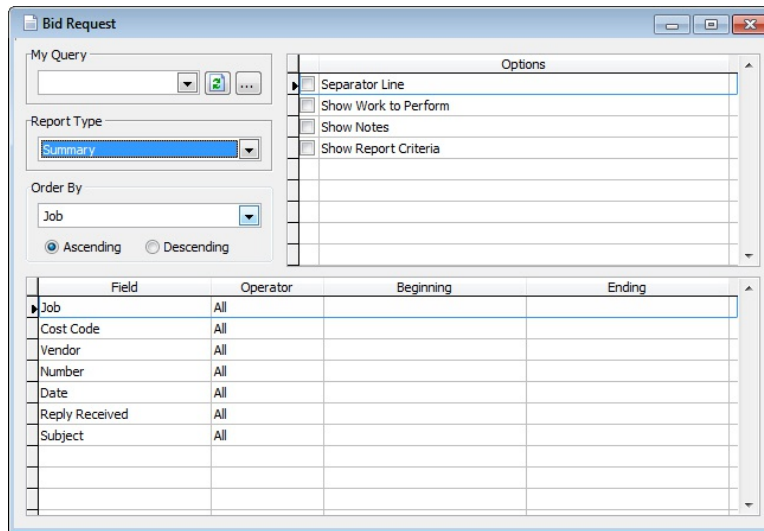
**Close**

This button closes the My Query List.

**Clear Button**

 The clear button is located on the tool bar normally at the top of the screen. This button applies only to the report queries. BIS® reports query settings are remembered by user from one session to the next. Thus, if a saved query was last used, the query screen for the same report would open with it preselected. The clear button resets the query screen to the system default.

**Figure: DM-64**  
Sample report query form after applying the clear button.



## Document Manager Report & Document Form List

The following is a list of Document Manager reports available in BIS<sup>®</sup>. All but the Miscellaneous are available also as documents.

- Bid Request
- Plan
- Insurance
- Subcontract
- Submittal
- Change Order
  - General Change Order
- Subcontract Change Order
- Transmittal
- Request for Information
- Deficiency Notice
- Lien Release
- Meeting Minutes
- Closeout Submittal
- Punchlist
- Miscellaneous
  - Companies
  - Contacts
  - Subjects

### Menu Access

Access to reports can be achieved via 3 different menus: Modules with Reports Group, Modules with Reports Listed, and Standard.

### Reports Access via Modules with Reports Group

DM | Reports

### Reports Access via Modules with Reports Listed

DM

### Standard Menu

Reports | Document Manager

## Bid Request

The Bid Request report lists the bid requests on file for a company. Users can also produce the actual documents.

### Access to Bid Request

#### Module Menu with Reports Group

DM | Reports | Bid Request

#### Module Menu with Reports List

DM | Bid Request

### Standard Menu

Reports | Document Manager | Bid Request

### Report Types

#### Summary

The Summary Report Type displays the document number, date, job, cost code, vendor, contact, from, bid amount, date sent, reply due, and reply received.

#### Detail

The Detail Report Type also includes field description lines and sent via information.

#### Form

The Form Type displays a preview of the actual bid request document(s).

#### Order By

- Job
- Cost Code
- Vendor
- Number
- Date
- Reply Received

#### Options

- Separator Line
- Show Work to Perform
- Show Notes
- Show Report Criteria

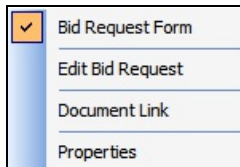
#### Fields

- Job
- Cost Code
- Vendor
- Number
- Date
- Reply Received
- Subject

### Drill-Down+® Destinations

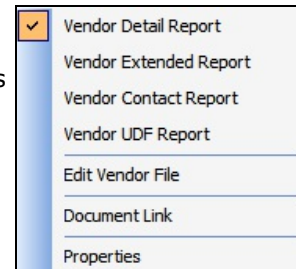
**Figure: DM-65**

Right-click a Bid Request# hyperlink to access reports and other features.



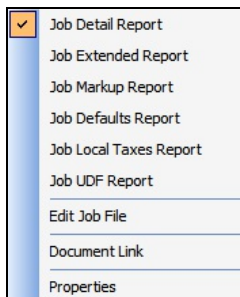
**Figure: DM-67**

Right-click a Vendor hyperlink to access reports and other features.



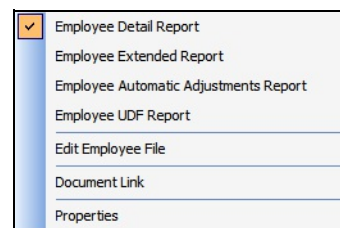
**Figure: DM-66**

Right-click a Job Number hyperlink to access reports and other features.



**Figure: DM-68**

Right-click a From Employee hyperlink to access reports and other features.



**Bid Request – Summary Report**

Best Construction Company										
<b>Bid Request</b>										
Summary Report <span style="float: right;">Page 1</span>										
Bid#	Date	Job	Cost Code	Vendor	Contact	From	Bid Amount	Date Sent	Reply Due	Reply Received
<a href="#">1409006</a>	09/09/xxxx	<a href="#">1000</a>	03000	<a href="#">0301</a>		<a href="#">E003</a>	13,400.00	09/09/xxxx	09/15/xxxx	09/10/xxxx
<b>Work to Perform</b>										
Concrete & Paving Start - 10/11/xxxx										
<a href="#">14004</a>	02/26/xxxx	<a href="#">1000</a>	02000	<a href="#">0201</a>		<a href="#">E002</a>	23,500.00	02/26/xxxx	03/15/xxxx	/ /
<b>Work to Perform</b>										
Concrete & Paving Start - 05/01/xxxx										
<a href="#">1000-1024</a>	01/02/xxxx	<a href="#">1010</a>	07200	<a href="#">0701</a>		<a href="#">E001</a>	36,000.00	01/02/xxxx	01/07/xxxx	01/05/xxxx
<b>Work to Perform</b>										
Install all fiberglass insulation and weather-stripping for the Truesdale Elementary School project as outlined in specifications section 31-45-1. Start work - 02/13/xxxx										

**Figure: DM-69** Bid Request – Summary Report.

Bid Request – Detail Report

Bid Request		Best Construction Company	
Detail Report		Page 1	
<b>Bid Request #</b>	<a href="#">1409006</a>	<b>Date</b>	09/09/xxxx
<b>Job Number</b>	<a href="#">1000</a> Pacific View Apartments	<b>Bid Amount</b>	13,400.00
<b>Cost Code</b>	03000 Concrete	<b>Date Sent</b>	09/09/xxxx <input checked="" type="checkbox"/> Fax
<b>Vendor</b>	<a href="#">0301</a> Dry Gulch Concrete	<b>Reply Due</b>	09/15/xxxx <input checked="" type="checkbox"/> Mail
<b>Contact</b>		<b>Reply Received</b>	09/10/xxxx <input type="checkbox"/> Email
<b>From</b>	<a href="#">E003</a> Alissa Monte		<input type="checkbox"/> Other
<b>Work to Perform</b>			
Concrete & Paving			
Start - 10/11/xxxx			
.....			
<b>Bid Request #</b>	<a href="#">14004</a>	<b>Date</b>	02/26/xxxx
<b>Job Number</b>	<a href="#">1000</a> Pacific View Apartments	<b>Bid Amount</b>	23,500.00
<b>Cost Code</b>	02000 Site Work	<b>Date Sent</b>	02/26/xxxx <input type="checkbox"/> Fax
<b>Vendor</b>	<a href="#">0201</a> BK Contracting	<b>Reply Due</b>	03/15/xxxx <input type="checkbox"/> Mail
<b>Contact</b>		<b>Reply Received</b>	// <input type="checkbox"/> Email
<b>From</b>	<a href="#">E002</a> Mike Jarvis		<input checked="" type="checkbox"/> Other By Hand
<b>Work to Perform</b>			
Concrete & Paving			
Start - 05/01/xxxx			
.....			
<b>Bid Request #</b>	<a href="#">1000-1024</a>	<b>Date</b>	01/02/xxxx
<b>Job Number</b>	<a href="#">1010</a> Truesdale Elementary School	<b>Bid Amount</b>	36,000.00
<b>Cost Code</b>	07200 Insulation	<b>Date Sent</b>	01/02/xxxx <input type="checkbox"/> Fax
<b>Vendor</b>	<a href="#">0701</a> A1 Insulation	<b>Reply Due</b>	01/07/xxxx <input checked="" type="checkbox"/> Mail
<b>Contact</b>		<b>Reply Received</b>	01/05/xxxx <input checked="" type="checkbox"/> Email
<b>From</b>	<a href="#">E001</a> Bill Johnson		<input type="checkbox"/> Other
<b>Work to Perform</b>			
Install all fiberglass insulation and weather-stripping for the Truesdale Elementary School project as outlined in specifications section 31-45-1.			
Start work - 02/13/xxxx			

Figure: DM-70 Bid Request – Detail Report showing field description lines and Sent Via information.




**Bid Request – Standard Document Form Without Logo**

<b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000 Fax: (805)534-1595		<b>Bid Request</b> <table border="1"><tr><td>Number</td><td>1409006</td></tr><tr><td>Date</td><td>09/09/XXXX</td></tr><tr><td>From</td><td>Alissa Monte</td></tr><tr><td>Title</td><td>Office Manager</td></tr><tr><td>To</td><td></td></tr><tr><td>Title</td><td></td></tr><tr><td>Telephone</td><td></td></tr><tr><td>Fax</td><td></td></tr><tr><td>Printed</td><td>10/01/XXXX</td></tr></table>	Number	1409006	Date	09/09/XXXX	From	Alissa Monte	Title	Office Manager	To		Title		Telephone		Fax		Printed	10/01/XXXX
Number	1409006																			
Date	09/09/XXXX																			
From	Alissa Monte																			
Title	Office Manager																			
To																				
Title																				
Telephone																				
Fax																				
Printed	10/01/XXXX																			
<b>To:</b>	Dry Gulch Concrete 193 Snake Canyon Road Santa Maria, CA 93448 Telephone (805)543-7000																			
<b>Job:</b>	Job Number 1000 Pacific View Apartments																			
<p>We request your bid on the following work</p> <table border="1"><tr><td>Concrete &amp; Paving Start - 10/11/xxxx</td></tr></table>			Concrete & Paving Start - 10/11/xxxx																	
Concrete & Paving Start - 10/11/xxxx																				
<b>Notes:</b> <table border="1"><tr><td style="height: 80px;"></td></tr></table>																				
Signed: _____		<small>Form MICS-Dm001 (c) 1995 - 2006 MICS Inc. All Rights Reserved</small>																		

**Figure DM-71** Document Manager – Bid Request Form without company logo.

Bid Request – Standard Document Form With Logo



**BUILDER INFORMATION SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Bid Request**

Number	<a href="#">1409006</a>
Date	09/09/XXXX
From	Alissa Monte
Title	Office Manager
To	
Title	
Telephone	
Fax	
Printed	10/01/XXXX

**To:** Dry Gulch Concrete  
193 Snake Canyon Road  
Santa Maria, CA 93448  
Telephone (805)543-7000

**Job:** Job Number [1000](#)  
Pacific View Apartments

We request your bid on the following work

Concrete & Paving  
Start - 10/11/xxxx

**Notes:**

Signed: \_\_\_\_\_

Form MICS-Dm001 (c) 1995 - 2006 MICS Inc. All Rights Reserved


Figure DM-72 Document Manager – Bid Request Form with company logo.

**Bid Request – Alternate Document Form Without Logo**

<b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000 Fax: (805)534-1595		<b>Bid Request</b> <table border="1"><tr><td>Number</td><td>1409006</td></tr><tr><td>Date</td><td>09/09/xxxx</td></tr><tr><td>From</td><td>Alissa Monte</td></tr><tr><td>Title</td><td>Office Manager</td></tr><tr><td>To</td><td></td></tr><tr><td>Title</td><td></td></tr><tr><td>Telephone</td><td></td></tr><tr><td>Fax</td><td></td></tr><tr><td>Printed</td><td>10/01/XXXX</td></tr></table>	Number	1409006	Date	09/09/xxxx	From	Alissa Monte	Title	Office Manager	To		Title		Telephone		Fax		Printed	10/01/XXXX
Number	1409006																			
Date	09/09/xxxx																			
From	Alissa Monte																			
Title	Office Manager																			
To																				
Title																				
Telephone																				
Fax																				
Printed	10/01/XXXX																			
<b>To:</b>	Dry Gulch Concrete 193 Snake Canyon Road Santa Maria, CA 93448 Telephone (805) 543-7000																			
<b>Job:</b>	Job Number 1000 Pacific View Apartments																			
We request your bid on the following work																				
Concrete & Paving Start - 10/11/xxxx																				
Notes:  																				
Signed: _____																				
<small>Form MICS-Dm001 (c) 1995-2007 MICS Inc. All Rights Reserved</small>																				

**Figure DM-73** Document Manager – Bid Request Alternate Form without company logo.

**Bid Request – Alternate Document Form With Logo**

 <b>BUILDER INFORMATION SYSTEM</b>	<b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000 Fax: (805)534-1595	<b>Bid Request</b> <table border="1"> <tr><td>Number</td><td>1409006</td></tr> <tr><td>Date</td><td>09/09/XXXX</td></tr> <tr><td>From</td><td>Alissa Monte</td></tr> <tr><td>Title</td><td>Office Manager</td></tr> <tr><td>To</td><td></td></tr> <tr><td>Title</td><td></td></tr> <tr><td>Telephone</td><td></td></tr> <tr><td>Fax</td><td></td></tr> <tr><td>Printed</td><td>10/01/XXXX</td></tr> </table>	Number	1409006	Date	09/09/XXXX	From	Alissa Monte	Title	Office Manager	To		Title		Telephone		Fax		Printed	10/01/XXXX
	Number	1409006																		
Date	09/09/XXXX																			
From	Alissa Monte																			
Title	Office Manager																			
To																				
Title																				
Telephone																				
Fax																				
Printed	10/01/XXXX																			
<b>To:</b> <table border="1"> <tr><td>Dry Gulch Concrete 193 Snake Canyon Road Santa Maria, CA 93448 Telephone (805) 543-7000</td></tr> </table>	Dry Gulch Concrete 193 Snake Canyon Road Santa Maria, CA 93448 Telephone (805) 543-7000																			
Dry Gulch Concrete 193 Snake Canyon Road Santa Maria, CA 93448 Telephone (805) 543-7000																				
<b>Job:</b> <table border="1"> <tr><td>Job Number 1000 Pacific View Apartments</td></tr> </table>	Job Number 1000 Pacific View Apartments																			
Job Number 1000 Pacific View Apartments																				
<b>We request your bid on the following work</b> <table border="1"> <tr><td>Concrete &amp; Paving Start - 10/11/XXXX</td></tr> </table>			Concrete & Paving Start - 10/11/XXXX																	
Concrete & Paving Start - 10/11/XXXX																				
<b>Notes:</b> <table border="1"> <tr><td></td></tr> </table>																				
Signed: _____																				
<small>Form MICS-Dm001 (c) 1995-2007 MICS Inc. All Rights Reserved</small>																				

**Figure DM-74** Document Manager – Bid Request – Alternate Form with company logo.

**Plan**

The Plan report lists the Plan Documents on file for a company. Users can also produce the actual documents.

**Access to Plan**

**Module Menu with Reports Group**

DM | Reports | Plan

**Module Menu with Reports List**

DM | Plan

**Standard Menu**

Reports | Document Manager | Plan

**Report Types**

**Summary**

The Summary Report Type displays plan number, job, description, vendor, name, and contact.

**Detail**

The Detail Report Type also includes date received, amount paid, deposit check number, amount refunded, refund check number, date returned, date due, date paid, and date refunded for both the vendor and subcontractor status.

**Form**

The Form Type displays a preview of the actual Plan document(s).

**Order By**

- Number
- Job
- Vendor
- Date Due
- Date Due at GC

**Options**

- Show Report Criteria
- Show Description
- Show Notes
- Separator Line

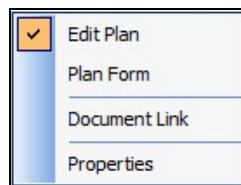
**Fields**

- Number
- Job
- Vendor
- Date Due
- Date Due at GC
- Subject

**Drill-Down+® Destinations**

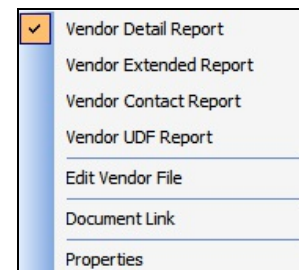
**Figure: DM-75**

Right-click a hyperlink to access reports and other features.



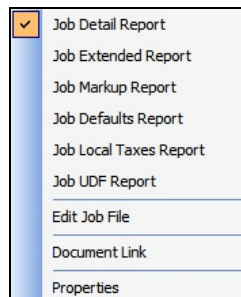
**Figure: DM-77**

Right-click a hyperlink to access reports and other features.



**Figure: DM-76**

Right-click a hyperlink to access reports and other features.



Plan – Summary Report

Best Construction Company

**Plan**  
Summary Report Page 1

Plan#	Job	Description	Vendor	Name	Contact
<a href="#">3</a>	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0201</a>	BK Contracting	
<b>Description of Work</b>					
This is a set of different specs for the job, mainly those describing glass domes needed for the project.					
<a href="#">4</a>	<a href="#">1010</a>	Tuesdale Elementary School	<a href="#">0201</a>	BK Contracting	Jon Kessel
<b>Description of Work</b>				<b>Notes</b>	
20 pieces of an item and 15 pieces are needed to go directly to a job site, the remaining 5 will go to the warehouse for stock. On either the PO or Vendor Invoice, this is done by using a Job Cost GL Account for the 15 items and the inventory account for the remaining 5 pieces going into stock. These are entered as separate line-items on the same transaction. The 15 pieces will post directly to the job and not show as QOH inventory.				Vendor Invoice using an existing inventory item to represent our example. Initiate a Vendor Invoice and enter in the required information on the upper part of the form. Enter the first item using the Job Cost GL account (Material) for the item with a quantity of "15" which will be associated to a Job and Cost Code.	

Figure: DM-78 Plan – Summary Report.

Plan – Detail Report

Plan		Best Construction Company						
Detail Report		Page 1						
Plan #	Job	Description	Vendor	Name	Contact			
<u>3</u>	<u>1000</u>	Pacific View Apartments	<u>0201</u>	EK Contracting				
		Vendor Status		Subcontractor				
Date Received	09/09/xxxx	Date returned	//	Date Sent	01/05/xxxx	Date due	01/20/xxxx	
Amount Paid	120.00	Date due	10/10/xxxx	Amount paid	120.00	Date returned	//	
Deposit Check #		Date paid	09/01/xxxx	Deposit Check #		Date paid	01/05/xxxx	
Amount Refunded	0.00	Date refunded	//	Amount refunded	0.00	Date refunded	//	
Refund Check #				Refund Check #				
Description of Work								
This is a set of different specs for the job, mainly those describing glass domes needed for the project.								
<u>4</u>	<u>1010</u>	Tuesday Elementary School	<u>0201</u>	EK Contracting	Jon Kessel			
		Vendor Status		Subcontractor				
Date Received	09/15/xxxx	Date returned	//	Date Sent	09/09/xxxx	Date due	09/09/xxxx	
Amount Paid	0.00	Date due	09/21/xxxx	Amount paid	0.00	Date returned	//	
Deposit Check #		Date paid	//	Deposit Check #		Date paid	//	
Amount Refunded	0.00	Date refunded	//	Amount refunded	0.00	Date refunded	//	
Refund Check #				Refund Check #				
Description of Work				Notes				
20 pieces of an item and 15 pieces are needed to go directly to a job site, the remaining 5 will go to the warehouse for stock. On either the PO or Vendor Invoice, this is done by using a Job Cost GL Account for the 15 items and the inventory account for the remaining 5 pieces going into stock. These are entered as separate line-items on the same transaction. The 15 pieces will post directly to the job and not show as QOH inventory.				Vendor Invoice using an existing inventory item to represent our example. Initiate a Vendor Invoice and enter in the required information on the upper part of the form. Enter the first item using the Job Cost GL account (Material) for the item with a quantity of "15" which will be associated to a Job and Cost Code.				

Figure: DM-79 Plan – Detail Report.

Plan – Standard Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Plan**  
 Number 3

**To:** EK Contracting  
 16701 Douglas Way  
 Oceano, CA 93455  
 Telephone 805-543-7000

**Job:** Job Number 1000  
 Pacific View Apartments

**Description**  
This is a set of different specs for the job, mainly those describing glass domes needed for the project.

**Current Vendor Status**

Plans		Deposit Payment		Deposit Refund	
Date Sent	09/09/xxxx	Date Paid	09/01/xxxx	Date Refunded	/ /
Date Due at GC	/ /	Amount Paid	120.00	Amount Refunded	0.00
Date Returned	10/10/xxxx	Deposit Check #		Refund Check #	

**Status with Owner**

Date Received	01/05/xxxx	Date Paid	01/05/xxxx	Date Refunded	/ /
Date Due	01/20/xxxx	Amount Paid	120.00	Amount Refunded	0.00
Date Returned	/ /	Deposit Check #		Refund Check #	

**History**

Vendor	Date Sent	Date Due	D. Returned	Date Paid		Check	D. Refunded	
					Amount			Amount
0801	09/09/xxxx	09/10/xxxx	09/10/xxxx	/ /	0.00		/ /	0.00
0801	09/01/xxxx	09/04/xxxx	09/05/xxxx	/ /	0.00		/ /	0.00

**Status Notes**


Signed: \_\_\_\_\_

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Figure DM-80 Document Manager – Plan Standard Form without company logo.



Plan – Standard Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Plan**

Number	3
--------	---

**To:** EK Contracting  
16701 Douglas Way  
Oceano, CA 93455  
Telephone 805-543-7000

**Job:** Job Number 1000  
Pacific View Apartments

**Description**

This is a set of different specs for the job, mainly those describing glass domes needed for the project.

**Current Vendor Status**

Plans	Deposit Payment	Deposit Refund
Date Sent: 09/09/xxxx	Date Paid: 09/01/xxxx	Date Refunded: / /
Date Due at GC: / /	Amount Paid: 120.00	Amount Refunded: 0.00
Date Returned: 10/10/xxxx	Deposit Check #:	Refund Check #:

Status with Owner	Deposit Payment	Deposit Refund
Date Received: 01/05/xxxx	Date Paid: 01/05/xxxx	Date Refunded: / /
Date Due: 01/20/xxxx	Amount Paid: 120.00	Amount Refunded: 0.00
Date Returned: / /	Deposit Check #:	Refund Check #:

**History**

Vendor	Date Sent	Date Due	D. Returned	Date Paid	Check	D. Refunded	Check
				Amount		Amount	
0801	09/09/xxxx	09/10/xxxx	09/10/xxxx	/ / 0.00		/ / 0.00	
0801	09/01/xxxx	09/04/xxxx	09/05/xxxx	/ / 0.00		/ / 0.00	

**Status Notes**

Signed: \_\_\_\_\_

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Figure DM-81 Document Manager – Plan Standard Form with company logo.

Plan – Alternate Document Form Without Logo

1200 Main Street  
Unit 100  
Arroyo Grande, CA 93420  
Telephone: (805)543-7000  
Fax: (805)534-1595

**Plan**  
Number

**To:**

BK Contracting 16701 Douglas Way Oceano, CA 93455 Telephone (805) 543-7000
---

**Job:**

Job Number 1000 Pacific View Apartments
--

**Description**  

This is a set of different specs for the job, mainly those describing glass domes needed for the project.
---

**Current Vendor Status**

Plans	Deposit Payment	Deposit Return																		
<table border="1" style="width: 100%;"><tr><td>Date Sent</td><td>01/05/xxxx</td></tr><tr><td>Date Due at GC</td><td>01/20/xxxx</td></tr><tr><td>Date Returned</td><td></td></tr></table>	Date Sent	01/05/xxxx	Date Due at GC	01/20/xxxx	Date Returned		<table border="1" style="width: 100%;"><tr><td>Date Paid</td><td>01/05/xxxx</td></tr><tr><td>Amount Paid</td><td style="text-align: right;">120.00</td></tr><tr><td>Deposit Check#</td><td></td></tr></table>	Date Paid	01/05/xxxx	Amount Paid	120.00	Deposit Check#		<table border="1" style="width: 100%;"><tr><td>Date Refund ed</td><td></td></tr><tr><td>Amt Refunded</td><td style="text-align: right;">0.00</td></tr><tr><td>Refund Check#</td><td></td></tr></table>	Date Refund ed		Amt Refunded	0.00	Refund Check#	
Date Sent	01/05/xxxx																			
Date Due at GC	01/20/xxxx																			
Date Returned																				
Date Paid	01/05/xxxx																			
Amount Paid	120.00																			
Deposit Check#																				
Date Refund ed																				
Amt Refunded	0.00																			
Refund Check#																				

Status with Owner	Deposit Payment	Deposit Return																		
<table border="1" style="width: 100%;"><tr><td>Date Received</td><td>09/09/xxxx</td></tr><tr><td>Date Due</td><td>10/10/xxxx</td></tr><tr><td>Date Returned</td><td></td></tr></table>	Date Received	09/09/xxxx	Date Due	10/10/xxxx	Date Returned		<table border="1" style="width: 100%;"><tr><td>Date Paid</td><td>09/01/xxxx</td></tr><tr><td>Amount Paid</td><td style="text-align: right;">120.00</td></tr><tr><td>Deposit Check#</td><td></td></tr></table>	Date Paid	09/01/xxxx	Amount Paid	120.00	Deposit Check#		<table border="1" style="width: 100%;"><tr><td>Date Refund ed</td><td></td></tr><tr><td>Amt Refunded</td><td style="text-align: right;">0.00</td></tr><tr><td>Refund Check#</td><td></td></tr></table>	Date Refund ed		Amt Refunded	0.00	Refund Check#	
Date Received	09/09/xxxx																			
Date Due	10/10/xxxx																			
Date Returned																				
Date Paid	09/01/xxxx																			
Amount Paid	120.00																			
Deposit Check#																				
Date Refund ed																				
Amt Refunded	0.00																			
Refund Check#																				

**History**

Vendor	Date Sent	Due Date	Date Returned	Date Paid Amount	Check	Date Refunded Amount	Check
0801	09/09/xxxx	09/10/xxxx	09/10/xxxx			0.00	
0801	09/01/xxxx	09/04/xxxx	09/05/xxxx			0.00	

**Status Notes**  


--

Signed: \_\_\_\_\_

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Figure DM-82 Document Manager – Plan – Alternate form without company logo.

Plan – Alternate Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Plan**

<b>Number</b>	3
---------------	---

**To:** BK Contracting  
16701 Douglas Way  
Oceano, CA 93455  
Telephone (805) 543-7000

**Job:** Job Number 1000  
Pacific View Apartments

**Description**

This is a set of different specs for the job, mainly those describing glass domes needed for the project.

**Current Vendor Status**

Plans	Deposit Payment	Deposit Return
Date Sent 01/05/xxxx	Date Paid 01/05/xxxx	Date Refund ed
Date Due at GC 01/20/xxxx	Amount Paid 120.00	Amt Refunded 0.00
Date Returned	Deposit Check#	Refund Check#

**Status with Owner**

Date Received 09/09/xxxx	Date Paid 09/01/xxxx	Date Refund ed
Date Due 10/10/xxxx	Amount Paid 120.00	Amt Refunded 0.00
Date Returned	Deposit Check#	Refund Check#

**History**

Vendor	Date Sent	Due Date	Date Returned	Date Paid Amount	Check	Date Refunded Amount	Check
0801	09/09/xxxx	09/10/xxxx	09/10/xxxx	0.00		0.00	
0801	09/01/xxxx	09/04/xxxx	09/05/xxxx	0.00		0.00	

**Status Notes**

Signed: \_\_\_\_\_

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Figure DM-83 Document Manager – Plan – Alternate form with company logo.

## Insurance Information

The Insurance Information report lists the Insurance Information documents on file for a company. Users can also produce the actual documents.

### Access to Insurance

#### Module Menu with Reports Group

DM | Reports | Insurance

#### Module Menu with Reports List

DM | Insurance

### Standard Menu

Reports | Document Manager | Insurance

## Report Types

### Summary

The Summary Report Type displays insurance record number, job, description, vendor, name, workers compensation certificate number, workers compensation expiration date, general liability certificate number, and general liability expiration date.

### Detail

The Detail Report Type also includes insurance company name and telephone number for workers compensation insurance and general liability insurance.

### Form

The Form Type displays a preview of the actual plan document(s).

### Order By

- Number
- Job
- Vendor
- WC Expiration Date
- LI Expiration Date

### Options

- Show Report Criteria
- Show Notes
- Separator Line

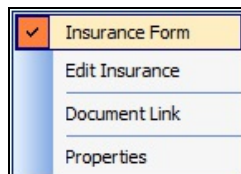
### Fields

- Number
- Job
- Vendor
- WC Expiration Date
- LI Expiration Date
- Subject

## Drill-Down+® Destinations

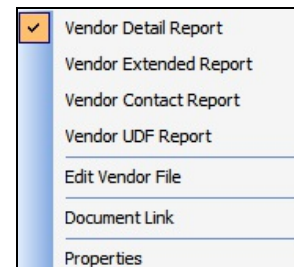
### Figure: DM-84

Right-click a hyperlink to access reports and other features.



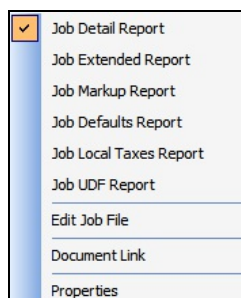
### Figure: DM-86

Right-click a hyperlink to access reports and other features.



### Figure: DM-85

Right-click a hyperlink to access reports and other features.



Insurance – Summary Report

Best Construction Company

**Insurance**  
Summary Report Page 1

Ins. Rec.#	Job	Description	Vendor	Name	WC Cert #	WC Exp. Date	GL Cert #	GL Exp. Date
<a href="#">1409001</a>	<a href="#">1010</a>	Truesdale Elementary School	<a href="#">0202</a>	Nagel Foundations	WC-4587U22	06/01/xxxx	5453232-41	10/31/xxxx
<b>Notes</b> Audits required								
<a href="#">1409002</a>	<a href="#">1020</a>	Giovanni's Pasta House	<a href="#">0301</a>	Dry Gulch Concrete	WC-5456X31	12/31/xxxx	545523V234	09/01/xxxx
<b>Notes</b> Update insurance certifications prior to start of new year.								
<a href="#">1743W</a>	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0201</a>	BK Contracting	7DJC-D7355	10/15/xxxx	77DH-93232	10/20/xxxx

Figure: DM-87 Insurance Summary Report.

Insurance – Detail Report

Best Construction Company									
Insurance									
Detail Report									
									Page 1
Ins. Rec.#	Job	Description	Vendor	Name	WC Cert #	WC Exp. Date	GL Cert #	GL Exp. Date	
<a href="#">1409001</a>	<a href="#">1010</a>	Thuesdale Elementary School	<a href="#">0202</a>	Nagel Foundations	WC4587U22	06/01/xxxx	5453232-41	10/31/xxxx	
<b>Worker's Compensation Insurance</b>					<b>General Liability Insurance</b>				
Insurance Company		Acme Work. Comp. Ins.		Insurance Company		Acme General Liab. Ins.			
Telephone		(800)555-1212		Telephone		(800)555-1212			
		<input checked="" type="checkbox"/> WC Job-specific				<input checked="" type="checkbox"/> GL Job-specific			
<b>Notes</b>									
Audits required									
-----									
<a href="#">1409002</a>	<a href="#">1020</a>	Giovanni's Pasta House	<a href="#">0301</a>	Dry Gulch Concrete	WC5456X31	12/31/xxxx	545523V234	09/01/xxxx	
<b>Worker's Compensation Insurance</b>					<b>General Liability Insurance</b>				
Insurance Company		ABC Work. Comp. Ins.		Insurance Company		ABC General Liab. Ins.			
Telephone		(800)555-3434		Telephone		(800)555-3434			
		<input checked="" type="checkbox"/> WC Job-specific				<input checked="" type="checkbox"/> GL Job-specific			
<b>Notes</b>									
Update insurance certifications prior to start of new year.									
-----									
<a href="#">1743W</a>	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0201</a>	BK Contracting	7DJC-D7355	10/15/xxxx	77DH-93232	10/20/xxxx	
<b>Worker's Compensation Insurance</b>					<b>General Liability Insurance</b>				
Insurance Company		PHOENIX INS.		Insurance Company		PHOENIX INS.			
Telephone		(111)222-3333		Telephone		(111)222-3333			
		<input checked="" type="checkbox"/> WC Job-specific				<input checked="" type="checkbox"/> GL Job-specific			
-----									


Figure: DM-88 Insurance – Detail Report

Insurance – Standard Document Form Without Logo

<b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000		<b>Insurance</b>	
		Number	1409002
<b>To:</b>	Dry Gulch Concrete 193 Snake Canyon Road Santa Maria, CA 93448 Telephone (805)543-7000		
<b>Job:</b>	Job Number <u>1020</u> Giovanni's Pasta House		
<b>Workers' Comp.</b>		<b>General Liability</b>	
Certificate Number	WCS 456X31	Certificate Number	545523V234
Expiration Date	12/31/xxxx	Expiration Date	09/01/xxxx
Insurance Company	ABC Work. Comp. Ins.	Insurance Company	ABC General Liab.
Telephone	(800) 555-3434	Telephone	(800) 555-3434
<input checked="" type="checkbox"/> Job Specific		<input checked="" type="checkbox"/> Job Specific	
<input type="checkbox"/> General		<input type="checkbox"/> General	
<b>Notes:</b>			
Update insurance certifications prior to start of new year.			
Signed: _____			
<small>Form MICS-Dm003 (c) 1995 - 2006 MICS Inc. All Rights Reserved</small>			

Figure: DM-89 Document Manager Standard Insurance Form without logo.

Insurance – Standard Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000

**Insurance**

Number	1409002
--------	---------

**To:** Dry Gulch Concrete  
 193 Snake Canyon Road  
 Santa Maria, CA 93448  
 Telephone (805) 543-7000

**Job:** Job Number 1020  
 Giovanni's Pasta House

**Workers' Comp.**

Certificate Number	WCS 456X31
Expiration Date	12/31/xxxx
Insurance Company	ABC Work. Comp. Ins.
Telephone	(800) 555-3434

Job Specific  
 General

**General Liability**

Certificate Number	545523V234
Expiration Date	09/01/xxxx
Insurance Company	ABC General Liab.
Telephone	(800) 555-3434

Job Specific  
 General

**Notes:**

Update insurance certifications prior to start of new year.

Signed: \_\_\_\_\_

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Figure: DM-90 Document Manager Standard Insurance Form with company logo.



Insurance – Alternate Document Form Without Logo

**Best Construction Company**  
1200 Main Street  
Unit 100  
Arroyo Grande, CA 93420  
Telephone: (805)543-7000  
Fax: (805)534-1595

**To:** Dry Gulch Concrete  
193 Snake Canyon Road  
Santa Maria, CA 93448  
Telephone (805) 543-7000

**Job:** Job Number 1020  
Giovanni's Pasta House

**Workers' Comp.**

Certificate Number	WC5456X31
Expiration Date	12/31/xxxx
Insurance Company	ABC Work Comp. Ins.
Telephone	(800) 555-3434

Job Specific  
 General

**General Liability**

Certificate Number	545523V234
Expiration Date	09/01/xxxx
Insurance Company	ABC General Liab. Ins.
Telephone	(800) 555-3434

Job Specific  
 General


**Notes:**  
Update insurance certifications prior to start of new year.

Signed: \_\_\_\_\_

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Figure: DM-91 Document Manager – Alternate Insurance form without logo.

Insurance – Alternate Document Form With Logo



**BUI IFR  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Insurance**

Number	1409002
--------	---------

**To:**

Dry Gulch Concrete 193 Snake Canyon Road Santa Maria, CA 93448 Telephone (805) 543-7000
--

**Job:**

Job Number 1020 Giovanni's Pasta House
---

**Workers' Comp.**

Certificate Number	WC5456X31
Expiration Date	12/31 /xxxx
Insurance Company	ABC Work Comp. Ins.
Telephone	(800) 555-3434

Job Specific  
 General

**General Liability**

Certificate Number	545523V234
Expiration Date	09/01 /xxxx
Insurance Company	ABC General Liab. Ins.
Telephone	(800) 555-3434

Job Specific  
 General

**Notes:**

Update insurance certifications prior to start of new year.
---

Signed: \_\_\_\_\_

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Figure: DM-92 Document Manager – Alternate Insurance form with company logo.

## Subcontract

The Subcontract Document report lists the subcontract documents on file for a company. Users can also produce the actual documents.

### Access to Subcontract

#### Module Menu with Reports Group

DM | Reports | Subcontract

#### Module Menu with Reports List

DM | Subcontract

### Standard Menu

Reports | Document Manager | Subcontract

## Report Types

### Summary

The Summary Report Type displays reference number, job, cost code, vendor, amount, start date, finish date, date sent, date returned, date executed, and date forwarded.

### Detail

The Detail Report Type also includes job name, cost code name, vendor name, and Payment Schedule.

### Form

The Form Type displays a preview of the actual bid request(s).

### Order By

- Reference Number
- Job
- Cost Code
- Vendor
- Amount

### Options

- Show Separator Line
- Show Description of Work
- Show Notes
- Show Extended Description
- Show Report Criteria

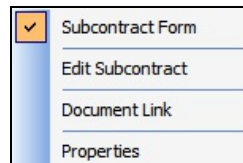
### Fields

- Reference Number
- Job
- Cost Code
- Vendor
- Amount
- Subject

## Drill-Down+® Destinations

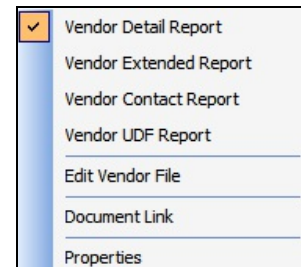
**Figure: DM-93**

Right-click a hyperlink to access reports and other features.



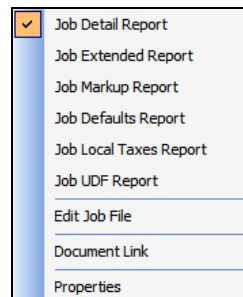
**Figure: DM-95**

Right-click a hyperlink to access reports and other features.



**Figure: DM-94**

Right-click a hyperlink to access reports and other features.



Subcontract – Summary

Best Construction Company

**Subcontract**  
Summary Report Page 1

Ref #	Job	Cost Code	Vendor	Amount	Start Date	Finish Date	Date Sent	Date Rtn.	Date Exec.	Date Frwd
<a href="#">66YDD-32932</a> <a href="#">1000</a>		02000	<a href="#">0201</a>	4,500.00	01/01/XXXX	04/20/XXXX	//	//	//	//
<b>Description of Work</b>				<b>Notes</b>						
Initial subsurface excavation. Site leveling to contract elevations and specs. Earth removal and subsurface primary gravel layer remitted. Drainage trenching.				Complete fire abatement measures at the northwest property line.						
<a href="#">67</a>	<a href="#">1010</a>	02000	<a href="#">0203</a>	7,500.00	09/01/XXXX	10/15/XXXX	//	//	//	//
<b>Description of Work</b>										
Front property landscape and irrigation installation.										

Figure: DM-96 Document Manager – Subcontract Document Summary Report.

Subcontract – Detail Report

Best Construction Company										
Subcontract										Page 1
Detail Report										
Ref #	Job	Cost Code	Vendor	Amount	Start Date	Finish Date	Date Sent	Date Rtn'd.	Date Exec.	Date Frwd
<a href="#">66YDD-32932</a>	<a href="#">1000</a>	02000	<a href="#">0201</a>	4,500.00	01/01/XXXX	04/20/XXXX	//	//	//	//
<b>Job Name</b>	Pacific View Apartments		<b>Cost Code</b>	Site Work	<b>Vendor Name</b>		BK Contracting			
<b>Payment Schedule</b>										
	<b>Date</b>	<b>Amount</b>	<b>Description</b>							
	01/15/XXXX	1,500.00								
	02/28/XXXX	2,000.00								
	04/20/XXXX	1,000.00								
<b>Description of Work</b>					<b>Notes</b>					
Initial subsurface excavation. Site leveling to contract elevations and specs. Earth removal and subsurface primary gravel layer removed. Drainage trenching.					Complete fire abatement measures at the northwest property line.					
<a href="#">67</a>	<a href="#">1010</a>	02000	<a href="#">0203</a>	7,500.00	09/01/XXXX	10/15/XXXX	//	//	//	//
<b>Job Name</b>	Tuesdale Elementary School		<b>Cost Code</b>	Site Work	<b>Vendor Name</b>		Yardsee-Jones Landscaping			
<b>Payment Schedule</b>										
	<b>Date</b>	<b>Amount</b>	<b>Description</b>							
	09/15/XXXX	2,500.00	Completion of phase 1							
<b>Description of Work</b>										
Front property landscape and irrigation installation.										

Figure: DM-97 Document Manager – Subcontract Document Detail Report.

Subcontract – Standard Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**To:** EK Contracting  
 16701 Douglas Way  
 Oceano, CA 93455  
 Telephone 805-543-7000

**Job:** Job Number 1000  
 Pacific View Apartments  
 Cost Code 02000  
 Site Work

**Subcontract**

Number	<u>66YDD-32932</u>
Start	01/01/XXXX
Finish	04/20/XXXX
Amount	4,500.00
Sent	/ /
Returned	/ /
Executed	/ /
Forwarded	/ /
Printed	05/15/XXXX

**Description of Work:**

Initial subsurface excavation. Site leveling to contract elevations and specs.  
 Earth removal and subsurface primary gravel layer remitted.  
 Drainage trenching.

**Payment Schedule:**

Date	Amount	Description
01/15/XXXX	1,500.00	
02/28/XXXX	2,000.00	
04/20/XXXX	1,000.00	

**Notes:**

Complete fire abatement measures at the northwest property line.

Signed: \_\_\_\_\_

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Figure: DM-98 Document Manager – Subcontract Document Standard form without Company Logo.

Subcontract – Standard Document Form With Logo


 <b>BUILDER INFORMATION SYSTEM</b>	<b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000 Fax: (805)534-1595	<b>Subcontract</b>																		
<b>To:</b>	EK Contracting 16701 Douglas Way Oceano, CA 93455 Telephone 805-543-7000	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 30%;"><b>Number</b></td><td><a href="#">66YDD-32932</a></td></tr> <tr><td><b>Start</b></td><td>01/01/XXXX</td></tr> <tr><td><b>Finish</b></td><td>04/20/XXXX</td></tr> <tr><td><b>Amount</b></td><td style="text-align: right;">4,500.00</td></tr> <tr><td><b>Sent</b></td><td style="text-align: center;">/ /</td></tr> <tr><td><b>Returned</b></td><td style="text-align: center;">/ /</td></tr> <tr><td><b>Executed</b></td><td style="text-align: center;">/ /</td></tr> <tr><td><b>Forwarded</b></td><td style="text-align: center;">/ /</td></tr> <tr><td><b>Printed</b></td><td>05/15/XXXX</td></tr> </table>	<b>Number</b>	<a href="#">66YDD-32932</a>	<b>Start</b>	01/01/XXXX	<b>Finish</b>	04/20/XXXX	<b>Amount</b>	4,500.00	<b>Sent</b>	/ /	<b>Returned</b>	/ /	<b>Executed</b>	/ /	<b>Forwarded</b>	/ /	<b>Printed</b>	05/15/XXXX
<b>Number</b>	<a href="#">66YDD-32932</a>																			
<b>Start</b>	01/01/XXXX																			
<b>Finish</b>	04/20/XXXX																			
<b>Amount</b>	4,500.00																			
<b>Sent</b>	/ /																			
<b>Returned</b>	/ /																			
<b>Executed</b>	/ /																			
<b>Forwarded</b>	/ /																			
<b>Printed</b>	05/15/XXXX																			
<b>Job:</b>	Job Number <a href="#">1000</a> Pacific View Apartments Cost Code 02000 Site Work																			
<b>Description of Work:</b>																				
Initial subsurface excavation. Site leveling to contract elevations and specs. Earth removal and subsurface primary gravel layer remitted. Drainage trenching.																				
<b>Payment Schedule:</b>																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Date</th> <th style="width: 15%;">Amount</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>01/15/XXXX</td> <td style="text-align: right;">1,500.00</td> <td></td> </tr> <tr> <td>02/28/XXXX</td> <td style="text-align: right;">2,000.00</td> <td></td> </tr> <tr> <td>04/20/XXXX</td> <td style="text-align: right;">1,000.00</td> <td></td> </tr> </tbody> </table>			Date	Amount	Description	01/15/XXXX	1,500.00		02/28/XXXX	2,000.00		04/20/XXXX	1,000.00							
Date	Amount	Description																		
01/15/XXXX	1,500.00																			
02/28/XXXX	2,000.00																			
04/20/XXXX	1,000.00																			
<b>Notes:</b>																				
Complete fire abatement measures at the northwest property line.																				
Signed: _____		Form MICS-Dm004 (c) 1995 - 2006 MICS Inc. All Rights Reserved																		

Figure: DM-99 Document Manager – Subcontract Document with Company Logo.

Subcontract – Alternate Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**To:** Yards ee-Jones Landscaping  
 5231 28th Street  
 Oceano, CA 93446  
 Telephone (805) 543-7000

**Job:** Job Number 1010  
 Truesdale Elementary School  
 Cost Code 02000  
 Site Work

**Subcontract**

<b>Number</b>	67
<b>Start</b>	09/01/XXXX
<b>Finish</b>	10/15/XXXX
<b>Amount</b>	7,500.00
<b>Sent</b>	
<b>Returned</b>	
<b>Executed</b>	
<b>Forwarded</b>	
<b>Printed</b>	12/15/XXXX

**Description of Work:**

**Payment Schedule:**

Date	Amount	Description
09/15/XXXX	2,500.00	Completion of phase 1

**Notes:**


Signed: \_\_\_\_\_

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Figure: DM-100 Document Manager – Subcontract Document Alternate form without Company Logo.



Subcontract – Alternate Document Form With Logo

 <p><b>BUILDER INFORMATION SYSTEM</b></p>	<p><b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000 Fax: (805)534-1595</p>	<p><b>Subcontract</b></p> <table border="1"> <tr><td>Number</td><td>67</td></tr> <tr><td>Start</td><td>09/01/XXXX</td></tr> <tr><td>Finish</td><td>10/15/XXXX</td></tr> <tr><td>Amount</td><td>7,500.00</td></tr> <tr><td>Sent</td><td></td></tr> <tr><td>Returned</td><td></td></tr> <tr><td>Executed</td><td></td></tr> <tr><td>Forwarded</td><td></td></tr> <tr><td>Printed</td><td>12/15/XXXX</td></tr> </table>	Number	67	Start	09/01/XXXX	Finish	10/15/XXXX	Amount	7,500.00	Sent		Returned		Executed		Forwarded		Printed	12/15/XXXX
	Number	67																		
Start	09/01/XXXX																			
Finish	10/15/XXXX																			
Amount	7,500.00																			
Sent																				
Returned																				
Executed																				
Forwarded																				
Printed	12/15/XXXX																			
<p><b>To:</b></p> <table border="1"> <tr><td>Yards ee-Jones Landscaping 5231 28th Street Oceanso, CA 93445 Telephone (805) 543-7000</td></tr> </table>	Yards ee-Jones Landscaping 5231 28th Street Oceanso, CA 93445 Telephone (805) 543-7000																			
Yards ee-Jones Landscaping 5231 28th Street Oceanso, CA 93445 Telephone (805) 543-7000																				
<p><b>Job:</b></p> <table border="1"> <tr><td>Job Number 1010 Truesdale Elementary School Cost Code 02000 Site Work</td></tr> </table>	Job Number 1010 Truesdale Elementary School Cost Code 02000 Site Work																			
Job Number 1010 Truesdale Elementary School Cost Code 02000 Site Work																				
<p><b>Description of Work:</b></p> <table border="1"> <tr><td>Front property lands cape and irrigation installation.</td></tr> </table>			Front property lands cape and irrigation installation.																	
Front property lands cape and irrigation installation.																				
<p><b>Payment Schedule:</b></p> <table border="1"> <thead> <tr> <th>Date</th> <th>Amount</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>09/15/XXXX</td> <td>2,500.00</td> <td>Completion of phase 1</td> </tr> </tbody> </table>			Date	Amount	Description	09/15/XXXX	2,500.00	Completion of phase 1												
Date	Amount	Description																		
09/15/XXXX	2,500.00	Completion of phase 1																		
<p><b>Notes:</b></p> <table border="1"> <tr><td></td></tr> </table>																				
<p>Signed: _____</p>																				
<p style="text-align: right;"><small>Form MICS-Dm004 (c) 1995-2007 MICS Inc. All Rights Reserved</small></p>																				

**Figure: DM-101** Document Manager – Alternate Subcontract Document form with Company Logo.

### Submittal

The Submittal Document report lists the submittal documents on file for a company. Users can also produce the actual documents.

### Access to Submittal

#### Module Menu with Reports Group

DM | Reports | Submittal

#### Module Menu with Reports List

DM | Submittal

### Standard Menu

Reports | Document Manager | Subcontract

### Report Types

#### Summary

The Summary Report Type displays document number, job number, description, vendor ID, vendor name, and status.

#### Detail

The Detail Report Type also includes subcontractor dates for requested, due at general contractor, arrived and returned as well as owner dates for due, sent, return by, arrived and status.

#### Form

The Form Type displays a preview of the actual bid request(s).

#### Order By

- Number
- Job
- Vendor

#### Options

- Show Report Criteria
- Show Description
- Show Notes
- Separator Line

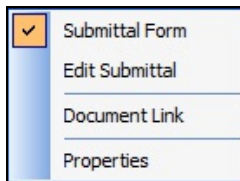
#### Fields

- Number
- Job
- Vendor
- Subject

### Drill-Down+® Destinations

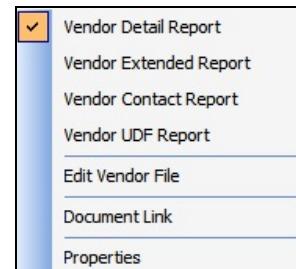
**Figure: DM-102**

Right-click a hyperlink to access Submittal and other features.



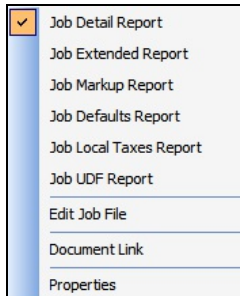
**Figure: DM-104**

Right-click a hyperlink to access reports and other features.



**Figure: DM-103**

Right-click a hyperlink to access reports and other features.



Submittal – Summary Report

Best Construction Company

**Submittal**  
Summary Report Page 1

Doc#	Job	Description	Vendor	Name	Status
<a href="#">8KDKD-032</a>	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0201</a>	BK Contracting	Approved

**Description**  
The Submittal is subject to conditions by California Code regarding submittals under section 42-142 and amendments thereof.  
Applicable local codes apply.

---

Figure: DM-105 Document Manager – Submittal Form Summary Report.

Submittal – Detail Report

Best Construction Company

**Submittal**  
Detail Report Page 1

Doc#	Job	Description			Vendor		Name			Status	
		Requested	Due at GC	Arrived	Returned	Due	Sent	Return by	Arrived		
<a href="#">8KDKD-032</a>	<a href="#">1000</a>	Pacific View Apartments			<a href="#">0201</a>	BK Contracting					
<b>Subcontractor</b>		10/11/XXXX	10/12/XXXX	10/12/XXXX	//	<b>Owner</b>	10/14/XXXX	10/13/XXXX	10/15/XXXX	//	Approved
		10/11/XXXX	10/12/XXXX	10/12/XXXX	10/15/XXXX		10/14/XXXX	10/13/XXXX	10/15/XXXX	//	

**Description**  
The Submittal is subject to conditions by California Code regarding submittals under section 42-142 and amendments thereof.  
Applicable local codes apply.

---

Figure: DM-106 Document Manager – Submittal Document Detail Report

Submittal – Standard Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Submittal**

Number	SKDKD-032
--------	-----------

**To:**

EK Contracting 16701 Douglas Way Oceano, CA 93455 Telephone 805-543-7000
---

**Job:**

Job Number <u>1000</u> Pacific View Apartments
---

**Description**

The Submittal is subject to conditions by California Code regarding submittals under section 42-142 and amendments thereof. Applicable local codes apply.
---

**Current Cycle**

Subcontractor	Owner	Status
Requested	10/12/XXXX	<input checked="" type="checkbox"/> Approved
Due at GC	10/11/XXXX	<input type="checkbox"/> Accepted with notes
Arrived	10/12/XXXX	<input type="checkbox"/> Rejected
Returned	/ /	<input type="checkbox"/> Unknown
	Due at Owner	10/14/XXXX
	Sent to Owner	10/13/XXXX
	Return by	10/15/XXXX
	Arrived	/ /

**History**

Reg. Date	Due at GC	Arrived	Returned	Due	Sent	Return by	Arrived
10/11/XXXX	10/12/XXXX	10/12/XXXX	10/15/XXXX	10/14/XXXX	10/13/XXXX	10/15/XXXX	

**Status Notes**


--

Signed: \_\_\_\_\_

Form MICS-Dm005 (c) 1995 - 2006 MICS Inc. All Rights Reserved

Figure: DM-107 Document Manager – Submittal Standard form without Company Logo.

Submittal – Standard Document Form With Logo



**BUILDER INFORMATION SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Submittal**

Number	SKDKD-032
--------	-----------

**To:**

EK Contracting 16701 Douglas Way Oceano, CA 93455 Telephone 805-543-7000
---

**Job:**

Job Number <a href="#">1000</a> Pacific View Apartments
--

**Description**

The Submittal is subject to conditions by California Code regarding submittals under section 42-142 and amendments thereof. Applicable local codes apply.
---

**Current Cycle**

Subcontractor		Owner		Status
Requested	10/12/XXXX	Due at Owner	10/14/XXXX	<input checked="" type="checkbox"/> Approved
Due at GC	10/11/XXXX	Sent to Owner	10/13/XXXX	<input type="checkbox"/> Accepted with notes
Arrived	10/12/XXXX	Return by	10/15/XXXX	<input type="checkbox"/> Rejected
Returned	/ /	Arrived	/ /	<input type="checkbox"/> Unknown

**History**

Reg. Date	Due at GC	Arrived	Returned	Due	Sent	Return by	Arrived
10/11/XXXX	10/12/XXXX	10/12/XXXX	10/15/XXXX	10/14/XXXX	10/13/XXXX	10/15/XXXX	

**Status Notes**

--

Signed: \_\_\_\_\_

Form MICS-Dm005 (c) 1995 - 2006 MICS Inc. All Rights Reserved

**Figure: DM-108** Document Manager – Subcontract Standard Document with Company Logo.

Submittal – Alternate Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Submittal**

<b>Number</b>	8KDKD-032
---------------	-----------

**To:**

BK Contracting 16701 Douglas Way Oceano, CA 93455 Telephone (805) 543-7000
---

**Job:**

Job Number 1000 Pacific View Apartments
--

**Description**

The Submittal is subject to conditions by California Code regarding submittals under section 42-142 and amendments thereof. Applicable local codes apply.
--

**Current Cycle**

Subcontractor		Owner		Status	
Requested	10/11/XXXX	Due at Owner	10/14/XXXX	<input checked="" type="checkbox"/>	Approved
Due at GC	10/12/XXXX	Sent to Owner	10/13/XXXX	<input type="checkbox"/>	Accepted with notes
Arrived	10/12/XXXX	Returned by	10/15/XXXX	<input type="checkbox"/>	Rejected
Returned		Arrived		<input type="checkbox"/>	Unknown

**History**

Reg. Date	Due at GC	Arrived	Returned	Due	Sent	Returned	Arrived
10/11/XXXX	10/12/XXXX	10/12/XXXX	10/15/XXXX	10/14/XXXX	10/13/XXXX	10/15/XXXX	

**Status Notes**


--

Signed: \_\_\_\_\_

Form MICS-Dm005 (c) 1995-2007 MICS Inc. All Rights Reserved

Figure: DM-109 Document Manager – Submittal Alternate form without Company Logo.

Submittal – Alternate Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Submittal**

<b>Number</b>	8KDKD-032
---------------	-----------

**To:** BK Contracting  
16701 Douglas Way  
Ocesano, CA 93455  
Telephone (805) 543-7000

**Job:** Job Number 1000  
Pacific View Apartments

**Description**

The Submittal is subject to conditions by California Code regarding submittals under section 42-142 and amendments thereof.  
Applicable local codes apply.

**Current Cycle**

Subcontractor		Owner		Status
Requested	10/11/XXXX	Due at Owner	10/14/XXXX	<input checked="" type="checkbox"/> Approved
Due at GC	10/12/XXXX	Sent to Owner	10/13/XXXX	<input type="checkbox"/> Accepted with notes
Arrived	10/12/XXXX	Returned by	10/15/XXXX	<input type="checkbox"/> Rejected
Returned		Arrived		<input type="checkbox"/> Unknown

**History**

Reg. Date	Due at GC	Arrived	Returned	Due	Sent	Returned	Arrived
10/11/XXXX	10/12/XXXX	10/12/XXXX	10/15/XXXX	10/14/XXXX	10/13/XXXX	10/15/XXXX	

**Status Notes**

Signed: \_\_\_\_\_

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Figure: DM-110 Document Manager – Submittal Alternate Document with company logo.



## General Change Order

The General Change Order Document report lists the General Change Order documents on file for a company. Users can also produce the actual documents.

### Access to General Change Order

#### Module Menu with Reports Group

DM | Reports | Change Order | General Change Orders

#### Module Menu with Reports List

DM | Change Order | General Change Orders

### Standard Menu

Reports | Document Manager | Change Order | General Change Orders

### Report Types

#### Summary

The Summary Report Type displays number, date, job, to, from, status, date sent, date returned, date approved, and approval by.

#### Detail

The Detail Report Type also includes copies, item, amount, days +/-, description and sent via.

#### Form

The Form Type displays a preview of the actual general change order(s).

#### Order By

- Number
- Job
- Date

#### Options

- Pending
- Approved
- Rejected
- Separator Line
- Show Notes
- Show Extended Description
- Show Report Criteria

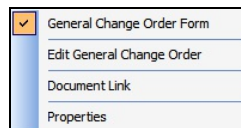
#### Fields

- Number
- Job
- Date
- Subject

### Drill-Down+® Destinations

**Figure: DM-111**

Right-click a hyperlink to access General Change Order and other features.



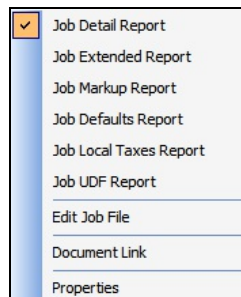
**Figure: DM-113**

Right-click a hyperlink to access reports and other features.



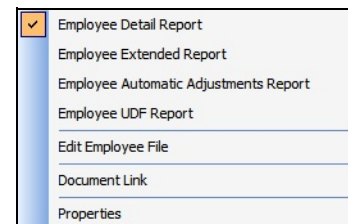
**Figure: DM-112**

Right-click a hyperlink to access reports and other features.



**Figure: DM-114**

Right-click a hyperlink to access reports and other features.



General Change Order – Summary

Best Construction Company

**Change Order**  
Summary Report Page 1

Number	Date	Job	To	From	Status	Date Sent	Date Returned	Date Approved	Approved by
<a href="#">1</a>	03/01/xxxx	<a href="#">1000</a>	<a href="#">C001</a>	<a href="#">E001</a>	Approved	03/01/xxxx	03/03/xxxx	03/02/xxxx	Jim Corrant
<b>Note</b> Site work located at map location 0444356-55961821. Comply with California CEQA regulations regarding Native American remains. Evaluation due on endangered plant and animal species.									
<a href="#">2</a>	09/10/xxxx	<a href="#">1000</a>	<a href="#">C001</a>	<a href="#">E006</a>	Approved	09/10/xxxx	09/12/xxxx	09/11/xxxx	Jim Corrant
<b>Note</b> Installation of 8 new solar panels.									

Figure: DM-115 Document Manager – General Change Order Form Summary Report.

General Change Order – Detail Report

Best Construction Company

**Change Order**  
Detail Report Page 1

---

<b>Number</b> <u>1</u>		<b>Status</b> Approved		<b>Sent</b>	<b>Via</b>
<b>Date</b> 3/1/xxxx		<b>Date Sent</b> 03/01/xxxx		<input type="checkbox"/>	Fax
<b>Job</b> <u>1000</u> Pacific View Apartments		<b>Date Returned</b> 03/03/xxxx		<input checked="" type="checkbox"/>	Mail
<b>To</b> <u>C001</u>		<b>Date Approved</b> 03/02/xxxx		<input checked="" type="checkbox"/>	Email
<b>From</b> <u>E001</u> Bill Johnson		<b>Approved by</b> Jim Corran		<input type="checkbox"/>	Other

**Copies**

Item	Amount	Days +/-	Description
1	150.00	14	
2	340.00	10	

**Notes**  
Site work located at map location 0444356-55961821. Comply with California CEQA regulations regarding Native American remains. Evaluation due on endangered plant and animal species.

---

<b>Number</b> <u>2</u>		<b>Status</b> Approved		<b>Sent</b>	<b>Via</b>
<b>Date</b> 9/10/xxxx		<b>Date Sent</b> 09/10/xxxx		<input type="checkbox"/>	Fax
<b>Job</b> <u>1000</u> Pacific View Apartments		<b>Date Returned</b> 09/12/xxxx		<input checked="" type="checkbox"/>	Mail
<b>To</b> <u>C001</u>		<b>Date Approved</b> 09/11/xxxx		<input checked="" type="checkbox"/>	Email
<b>From</b> <u>E006</u> Steve Schwartz		<b>Approved by</b> Jim Corran		<input type="checkbox"/>	Other

**Copies**

Item	Amount	Days +/-	Description
8	267.50	1	Kyocera K D 250GX-LFB Solar Panels

**Notes**  
Installation of 8 new solar panels.

Figure: DM-116 Document Manager – General Change Order Document Detail Report

General Change Order – Standard Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Change Order**

Number	<u>1</u>
Date	03 / 01 / 2000
Printed	03 / 15 / 2000
Status	Approved

**Job:** Job Number 1000  
 Pacific View Apartments

The following changes have been approved:

Printed	Amount	Days +/-	Description
1.00	150.00	14.00	
2.00	340.00	10.00	

Sent via:

Mail     Email     Fax     Other \_\_\_\_\_

Date Approved: 03 / 02 / 2000      Approved by: Jim Corrant

Notes:


Site work located at map location 0444356-55981821. Comply with California CEQA regulations regarding Native American remains. Evaluation due on endangered plant and animal species.

Signed: \_\_\_\_\_

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Figure: DM-117 Document Manager – General Change Order Standard Form without Company Logo.

General Change Order – Standard Document Form With Logo

 <p><b>BUILDER INFORMATION SYSTEM</b></p>	<p align="center"><b>Best Construction Company</b></p> <p align="center">1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000 Fax: (805)534-1595</p>	<p><b>Change Order</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Number</td> <td><u>1</u></td> </tr> <tr> <td>Date</td> <td>03 / 01 /xxxx</td> </tr> <tr> <td>Printed</td> <td>03 / 15 /xxxx</td> </tr> <tr> <td>Status</td> <td>Approved</td> </tr> </table>	Number	<u>1</u>	Date	03 / 01 /xxxx	Printed	03 / 15 /xxxx	Status	Approved				
Number	<u>1</u>													
Date	03 / 01 /xxxx													
Printed	03 / 15 /xxxx													
Status	Approved													
<p><b>Job:</b> Job Number <u>1000</u> Pacific View Apartments</p>														
<p>The following changes have been approved:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Printed</th> <th style="width: 15%;">Amount</th> <th style="width: 10%;">Days +/-</th> <th style="width: 65%;">Description</th> </tr> </thead> <tbody> <tr> <td>1.00</td> <td>150.00</td> <td>14.00</td> <td></td> </tr> <tr> <td>2.00</td> <td>340.00</td> <td>10.00</td> <td></td> </tr> </tbody> </table>			Printed	Amount	Days +/-	Description	1.00	150.00	14.00		2.00	340.00	10.00	
Printed	Amount	Days +/-	Description											
1.00	150.00	14.00												
2.00	340.00	10.00												
<p>Sent via:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;"><input checked="" type="checkbox"/> Mail</td> <td style="width: 25%;"><input checked="" type="checkbox"/> Email</td> <td style="width: 25%;"><input type="checkbox"/> Fax</td> <td style="width: 25%;"><input type="checkbox"/> Other _____</td> </tr> </table>			<input checked="" type="checkbox"/> Mail	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Fax	<input type="checkbox"/> Other _____								
<input checked="" type="checkbox"/> Mail	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Fax	<input type="checkbox"/> Other _____											
<p>Date Approved: 03 / 02 /xxxx      Approved by: Jim Corrant</p>														
<p>Notes:</p> <div style="border: 1px solid black; padding: 5px; min-height: 150px;"> <p>Site work located at map location 0444356-55981821. Comply with California CEQA regulations regarding Native American remains. Evaluation due on endangered plant and animal species.</p> </div>														
<p>Signed: _____</p> <p align="right" style="font-size: small;">Form MICS-Dm006 (c) 1995 - 2006 MICS Inc. All Rights Reserved</p>														

**Figure: DM-118** Document Manager – General Change Order Standard Document with Company Logo.

General Change Order – Alternate Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**General Change Order**

<b>Job:</b> Job Number 1000 Pacific View Apartments	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 30%;">Number</td><td>2</td></tr> <tr><td>Date</td><td>09/10/xxxx</td></tr> <tr><td>Printed</td><td>09/15/xxxx</td></tr> <tr><td>Status</td><td>Approved</td></tr> </table>	Number	2	Date	09/10/xxxx	Printed	09/15/xxxx	Status	Approved
Number	2								
Date	09/10/xxxx								
Printed	09/15/xxxx								
Status	Approved								

The following changes have been approved:

Item	Amount	Days +/-	Description
8.00	287.50	1.00	Kyocera KD 250GX-LFB Solar Panels

Sent via:

Mail     Fax     E-Mail     Other \_\_\_\_\_

Date approved: 09/11/xxxx      Approved by: Jim Corrant

Notes


Installation of 8 new solar panels.

Signed: \_\_\_\_\_

Form MICS-Dm006 (c) 1995-2007 MICS Inc. All Rights Reserved

Figure: DM-119 Document Manager – General Change Order Alternate Form without Company Logo.

General Change Order – Alternate Document Form With Logo



**BUILDER INFORMATION SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**General Change Order**

Number	2
Date	09/10/xxxx
Printed	09/15/xxxx
Status	Approved

**Job:** Job Number 1000  
Pacific View Apartments

The following changes have been approved:

Item	Amount	Days +/-	Description
8.00	287.50	1.00	Kyocera KD 250GX-LFB Solar Panels

Sent via:

<input checked="" type="checkbox"/> Mail	<input type="checkbox"/> Fax	<input checked="" type="checkbox"/> E-Mail	<input type="checkbox"/> Other _____
--	------------------------------	--	--------------------------------------

Date approved: 09/11/xxxx      Approved by: Jim Corrant

Notes

Installation of 8 new solar panels.

Signed: \_\_\_\_\_

Form MISC-Dm006 (c) 1996-2007 MICS Inc. All Rights Reserved

**Figure: DM-120** Document Manager – General Change Order Alternate Document with company logo.

### Subcontract Change Order

The Subcontract Change Order Document report lists the Subcontract Change Order documents on file for a company. Users can also produce the actual documents.

### Access to Subcontract Change Order

#### Module Menu with Reports Group

DM | Reports | Change Order | Subcontract Change Orders

#### Module Menu with Reports List

DM | Change Order | Subcontract Change Orders

### Standard Menu

Reports | Document Manager | Change Order | Subcontract Change Orders

### Report Types

#### Summary

The Summary Report Type displays number, date, job, vendor, from, status, date sent, date returned, date approved, and approval by.

#### Detail

The Detail Report Type also includes copies, item, amount, days +/-, description and sent via.

#### Form

The Form Type displays a preview of the actual subcontract change order(s).

#### Order By

- Number
- Date
- Job
- Vendor

#### Options

- Separator Line
- Quote Request
- Approved SCO
- Show Notes
- Show Extended Description
- Show Report Criteria

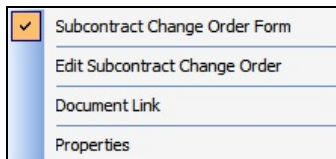
#### Fields

- Number
- Date
- Job
- Vendor
- Subject

### Drill-Down+® Destinations

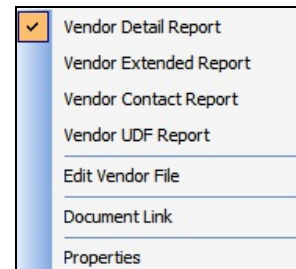
**Figure: DM-121**

Right-click a hyperlink to access Subcontract Change Order and other features.



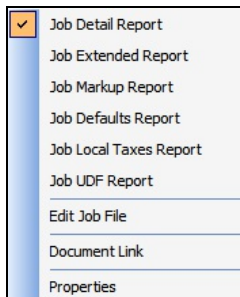
**Figure: DM-123**

Right-click a hyperlink to access reports and other features.



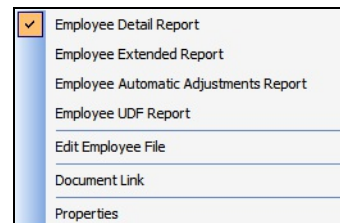
**Figure: DM-122**

Right-click a hyperlink to access reports and other features.



**Figure: DM-124**

Right-click a hyperlink to access reports and other features.





Subcontract Change Order – Summary

Best Construction Company

**Subcontract Change Order**  
Summary Report Page 1

---

Number	Date	Job	Vendor	From	Status	Date Sent	Date Returned	Date Approved	Approved by
<a href="#">871245</a>	03/10/xxxx	<a href="#">1000</a>	<a href="#">0701</a>	<a href="#">E002</a>	Quote Request	03/14/xxxx	03/15/xxxx	/ /	

**Note**  
Materials cannot be stored on grounds due to a lack of security fencing or storage buildings.

---

Figure: DM-125 Document Manager – General Change Order Form Summary Report.

Subcontract Change Order – Detail Report

<b>Subcontract Change Order</b>				Best Construction Company	
Detail Report				Page 1	
Number	<a href="#">871245</a>	Status	Quote		
Date	03/10/xxxx	Date Sent	03/14/xxxx	Sent Via	
Job	<a href="#">1000</a> Pacific View Apartments	Date Returned	03/15/xxxx	<input type="checkbox"/>	Fax
Vendor	<a href="#">0701</a> A1 Insulation	Date Approved	//	<input type="checkbox"/>	Mail
From	<a href="#">8002</a> Mike Jarvis	Approved by		<input checked="" type="checkbox"/>	Email
Copies				<input type="checkbox"/>	Other
Item	Amount	Days +/-	Description		
Item	amount	days	linedesc		
<b>Notes</b>					
Materials cannot be stored on grounds due to a lack of security fencing or storage buildings.					


Figure: DM-126 Document Manager – Subcontract Change Order Document Detail Report

Subcontract Change Order – Standard Document Form Without Logo

<p><b>Best Construction Company</b>                  1200 Main Street                  Unit 100                  Arroyo Grande, CA 93420                  Telephone: (805)543-7000                  Fax: (805)534-1595</p>	<p style="text-align: center;"><b>Subcontract Change Order</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Number</td><td>871245</td></tr> <tr><td>Date</td><td>03/10/xxxx</td></tr> <tr><td>From</td><td>Mike Jarvis</td></tr> <tr><td>Title</td><td>Project Manger</td></tr> <tr><td>To</td><td>Jim Smith</td></tr> <tr><td>Title</td><td>Supervisor</td></tr> <tr><td>Telephone</td><td></td></tr> <tr><td>Printed</td><td>03/16/xxxx</td></tr> <tr><td>Status</td><td>Quote Request</td></tr> </table>	Number	871245	Date	03/10/xxxx	From	Mike Jarvis	Title	Project Manger	To	Jim Smith	Title	Supervisor	Telephone		Printed	03/16/xxxx	Status	Quote Request
Number	871245																		
Date	03/10/xxxx																		
From	Mike Jarvis																		
Title	Project Manger																		
To	Jim Smith																		
Title	Supervisor																		
Telephone																			
Printed	03/16/xxxx																		
Status	Quote Request																		
<p><b>To:</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>A1 Insulation 1825 Highland Way Suite 305 San Luis Obispo, CA 93401 Telephone 805-543-7000</td></tr> </table>	A1 Insulation 1825 Highland Way Suite 305 San Luis Obispo, CA 93401 Telephone 805-543-7000																		
A1 Insulation 1825 Highland Way Suite 305 San Luis Obispo, CA 93401 Telephone 805-543-7000																			
<p><b>Job:</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Job Number 1000 Pacific View Apartments</td></tr> </table>	Job Number 1000 Pacific View Apartments																		
Job Number 1000 Pacific View Apartments																			
<p>The following changes has been approved:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Item</th> <th style="width: 15%;">Amount</th> <th style="width: 10%;">Days +/-</th> <th style="width: 65%;">Description</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1.00</td> <td style="text-align: center;">50.00</td> <td style="text-align: center;">1.00</td> <td>Change in type of insulation</td> </tr> </tbody> </table>		Item	Amount	Days +/-	Description	1.00	50.00	1.00	Change in type of insulation										
Item	Amount	Days +/-	Description																
1.00	50.00	1.00	Change in type of insulation																
<p>Sent via:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;"><input type="checkbox"/> Mail</td> <td style="text-align: center;"><input checked="" type="checkbox"/> Email</td> <td style="text-align: center;"><input type="checkbox"/> Fax</td> <td style="text-align: center;"><input type="checkbox"/> Other _____</td> </tr> </table>		<input type="checkbox"/> Mail	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Fax	<input type="checkbox"/> Other _____														
<input type="checkbox"/> Mail	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Fax	<input type="checkbox"/> Other _____																
<p>Date Approved:    /    /                      Approved by:</p>																			
<p>Notes:</p> <table border="1" style="width: 100%; border-collapse: collapse; height: 150px;"> <tr> <td style="vertical-align: top; padding: 5px;">                 Materials cannot be stored on grounds due to a lack of security fencing or storage buildings.             </td> </tr> </table>		Materials cannot be stored on grounds due to a lack of security fencing or storage buildings.																	
Materials cannot be stored on grounds due to a lack of security fencing or storage buildings.																			
<p>Signed: _____</p> <p style="text-align: right; font-size: small;">Form MICS-Dm007 (c) 1995 - 2006 MICS Inc. All Rights Reserved</p>																			

Figure: DM-127 Document Manager – Subcontract Change Order Standard Form without Logo.

Subcontract Change Order – Standard Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Subcontract Change Order**

Number	871245
Date	03/10/xxxx
From	Mike Jarvis
Title	Project Manger
To	Jim Smith
Title	Supervisor
Telephone	
Printed	03/16/xxxx
Status	Quote Request

**To:** A1 Insulation  
1825 Highland Way Suite 305  
San Luis Obispo, CA 93401  
Telephone 805-543-7000

**Job:** Job Number 1000  
Pacific View Apartments

The following changes has been approved:

Item	Amount	Days +/-	Description
1.00	50.00	1.00	Change in type of insulation

Sent via:

Mail    
  Email    
  Fax    
  Other \_\_\_\_\_

Date Approved:    /    /                      Approved by:

Notes:

Materials cannot be stored on grounds due to a lack of security fencing or storage buildings.

Signed: \_\_\_\_\_

Form MICS-Dm007 (c) 1995 - 2006 MICS Inc. All Rights Reserved

Figure: DM-128 Document Manager – Subcontract Change Order Standard Form with Company Logo.

Subcontract Change Order – Alternate Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Subcontract Change Order**

Number	871245
Date	03/10/xxxx
From	Mike Jarvis
Title	Project Manger
To	Jim Smith
Title	Supervisor
Telephone	
Fax	
Printed	03/16/xxxx
Status	Quote Request

**To:** A1 Insulation  
1825 Highland Way Suite 305  
San Luis Obispo, CA 93401  
Telephone (805) 543-7000

**Job:** Job Number 1000  
Pacific View Apartments

The following changes have been approved:

Item	Amount	Days +/-	Description
1.00	50.00	1.00	Change in type of insulation

Sent via:

Mail    Fax    E-Mail    Other \_\_\_\_\_

Date approved: \_\_\_\_\_      Approved by: \_\_\_\_\_

Notes:


Materials cannot be stored on grounds due to a lack of security fencing or storage buildings.

Signed: \_\_\_\_\_

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Figure: DM-129 Document Manager Subcontract Change Order Standard form without company logo.

Subcontract Change Order – Alternate Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Subcontract Change Order**

<b>Number</b>	871245
<b>Date</b>	03/10/xxxx
<b>From</b>	Mike Jarvis
<b>Title</b>	Project Manger
<b>To</b>	Jim Smith
<b>Title</b>	Supervisor
<b>Telephone</b>	
<b>Fax</b>	
<b>Printed</b>	03/16/xxxx
<b>Status</b>	Quote Request

**To:** A1 Insulation  
1825 Highland Way Suite 305  
San Luis Obispo, CA 93401  
Telephone (805) 543-7000

**Job:** Job Number 1000  
Pacific View Apartments

The following changes have been approved:

Item	Amount	Days +/-	Description
1.00	50.00	1.00	Change in type of insulation

Sent via:

Mail
  Fax
  E-Mail
  Other \_\_\_\_\_

Date approved: \_\_\_\_\_ Approved by: \_\_\_\_\_

Notes:

Materials cannot be stored on grounds due to a lack of security fencing or storage buildings.

Signed: \_\_\_\_\_

Form M/CB-Dm007 (c) 1995-2007 MICS Inc. All Rights Reserved

Figure: DM-130 Document Manager – Subcontract Change Order Alternate Form with company logo.

## Transmittal

The Transmittal Document report lists the transmittal documents on file for a company. Users can also produce the actual documents.

### Access to Transmittal

#### Module Menu with Reports Group

DM | Reports | Transmittal

#### Module Menu with Reports List

DM | Transmittal

### Standard Menu

Reports | Document Manager | Transmittal

### Report Types

#### Summary

The Summary Report Type displays the transmittal number, date, job, description, to, and from.

#### Detail

The Detail Report Type also includes items sent, copies, action, description of the items and sent via.

#### Form

The Form Type displays a preview of the actual transmittal(s).

#### Order By

- Number
- Date
- Job Number
- To

#### Options

- Separator Line
- Show Notes
- Show Extended Description
- Show Report Criteria

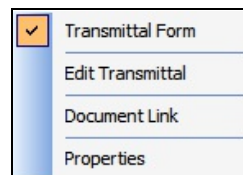
#### Fields

- Number
- Date
- Job Number
- To
- Subject

### Drill-Down+® Destinations

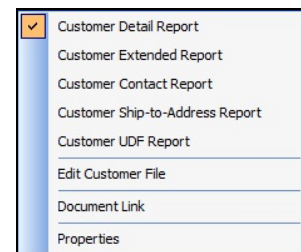
**Figure: DM-131**

Right-click a hyperlink to access Transmittal and other features.



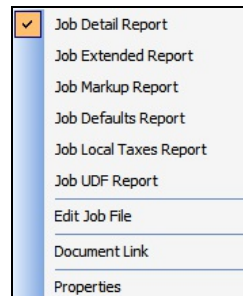
**Figure: DM-133**

Right-click a hyperlink to access reports and other features.



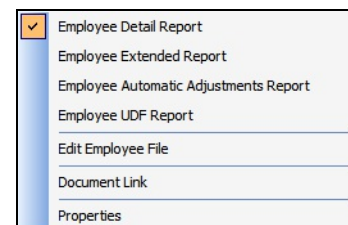
**Figure: DM-132**

Right-click a hyperlink to access reports and other features.



**Figure: DM-134**

Right-click a hyperlink to access reports and other features.



Transmittal – Summary

Best Construction Company

**Transmittal**  
Summary Report Page 1

Transmittal#	Date	Job	Description	To	Name	From	Name
<a href="#">5454-54.11</a>	02/15/xxxx	<a href="#">1000</a>	Pacific View Apartments	<a href="#">C001</a>	Far West Properties	<a href="#">E0.02</a>	Mike Jarvis
<a href="#">5455</a>	09/16/xxxx	<a href="#">1020</a>	Giovanni's Pasta House	<a href="#">C002</a>	Harmon Brothers	<a href="#">E0.02</a>	Mike Jarvis

**Notes**  
Provide d the requisite original drawings, specs, and owner plans as noted for review.

Additional documents pertaining to the initial subsurface excavation. Site leveling to contract elevations and specs.  
Earth removal and subsurface primary gravel layer remitted.

\*Complete fire abatement measures at the northwest property line.

Figure: DM-135 Document Manager – Transmittal Form Summary Report.



Transmittal – Detail Report

Best Construction Company

**Transmittal**  
Detail Report Page 1

Transmittal#	Date	Job	Description	To	Name	From	Name
<a href="#">5454-54.11</a>	02/15/xxxx	<a href="#">1000</a>	Pacific View Apartments	<a href="#">C001</a>	Far West Properties	<a href="#">ED02</a>	Mike Jarvis
<b>Items Sent</b>				<b>Sent Via</b>		<b>Items are</b>	
<input type="checkbox"/> Certificates		<input type="checkbox"/> Plans		<input type="checkbox"/> Fax		<input checked="" type="checkbox"/> Attached	
<input type="checkbox"/> Shop drawings		<input type="checkbox"/> Samples		<input checked="" type="checkbox"/> Mail		<input type="checkbox"/> Separate cover	
<input type="checkbox"/> Change Orders		<input type="checkbox"/> Letter		<input type="checkbox"/> Email			
<input checked="" type="checkbox"/> Specification		<input type="checkbox"/> Other		<input type="checkbox"/> Other			
<input type="checkbox"/> Prints							
<b>Copies</b>							
1	02/15/xxxx	SPEC-89323					
<b>Action</b>							
<input checked="" type="checkbox"/> For your records		<input checked="" type="checkbox"/> As requested		<input type="checkbox"/> For corrections			
<input type="checkbox"/> For approval		<input type="checkbox"/> For review & comments		<input type="checkbox"/> Other			
<hr/>							
<a href="#">5455</a>	09/16/xxxx	<a href="#">1020</a>	Giovanni's Pasta House	<a href="#">C002</a>	Hammon Brothers	<a href="#">ED02</a>	Mike Jarvis
<b>Items Sent</b>				<b>Sent Via</b>		<b>Items are</b>	
<input type="checkbox"/> Certificates		<input checked="" type="checkbox"/> Plans		<input type="checkbox"/> Fax		<input checked="" type="checkbox"/> Attached	
<input checked="" type="checkbox"/> Shop drawings		<input type="checkbox"/> Samples		<input checked="" type="checkbox"/> Mail		<input type="checkbox"/> Separate cover	
<input type="checkbox"/> Change Orders		<input type="checkbox"/> Letter		<input type="checkbox"/> Email			
<input checked="" type="checkbox"/> Specification		<input type="checkbox"/> Other		<input type="checkbox"/> Other			
<input type="checkbox"/> Prints							
<b>Copies</b>							
3	09/16/xxxx		Job Specs and shop drawings				
<b>Action</b>							
<input type="checkbox"/> For your records		<input checked="" type="checkbox"/> As requested		<input type="checkbox"/> For corrections			
<input type="checkbox"/> For approval		<input type="checkbox"/> For review & comments		<input type="checkbox"/> Other			
<b>Notes</b>							
Provide the requisite original drawings, specs, and owner plans as noted for review.							
Additional documents pertaining to the initial subsurface excavation, site leveling to contract elevations and specs.							
Earth removal and subsurface primary gravel layer remitted.							
*Complete fire abatement measures at the northwest property line.							

Figure: DM-136 Document Manager – Transmittal document – Detail Report.

Transmittal – Standard Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**To:** Far West Properties  
 1625 Parker Street  
 Los Angeles, CA 90001  
 Telephone: (805)543-7000

**Job:** Job Number 1000  
 Pacific View Apartments

**Transmittal**

Number	<u>5454-5411</u>
Date	02/15/xxxx
From	Mike Jarvis
Title	Project Manger
To	Carl Goodman
Title	Inspector
Telephone	(805)543-7000
Fax	(805)534-1595
Printed	02/16/xxxx

**We are sending you the following items:**

Certificates       Plans  
 Shop drawings       Samples  
 Change Orders       Letter  
 Specifications       Other  
 Prints

**Sent via:**  Fax       Mail       Email       Other

**Items are:**  Attached       Separate cover

Copies	Date	Ref. Number	Description
1	02/15/xxxx	SPEC-89923	

**Action**

For your records       As requested       For corrections  
 For approval       For review & comments       Other \_\_\_\_\_


**Notes:**

Signed: \_\_\_\_\_

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Figure: DM-137 Document Manager – Transmittal Standard form without logo.

Transmittal – Standard Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Transmittal**

Number	<u>5454-5411</u>
Date	02/15/xxxx
From	Mike Jarvis
Title	Project Manger
To	Carl Goodman
Title	Inspector
Telephone	(805)543-7000
Fax	(805)534-1595
Printed	02/16/xxxx

**To:**

Far West Properties  
 1625 Parker Street  
 Los Angeles, CA 90001  
 Telephone: (805)543-7000

**Job:**

Job Number 1000  
 Pacific View Apartments

We are sending you the following items:

<input type="checkbox"/> Certificates	<input type="checkbox"/> Plans
<input type="checkbox"/> Shop drawings	<input type="checkbox"/> Samples
<input type="checkbox"/> Change Orders	<input type="checkbox"/> Letter
<input checked="" type="checkbox"/> Specifications	<input type="checkbox"/> Other
<input type="checkbox"/> Prints	

Sent via:

<input type="checkbox"/> Fax	<input checked="" type="checkbox"/> Attached
<input checked="" type="checkbox"/> Mail	<input type="checkbox"/> Separate cover
<input type="checkbox"/> Email	
<input type="checkbox"/> Other	

Copies	Date	Ref. Number	Description
1	02/15/xxxx	SPEC-89923	

**Action**

<input checked="" type="checkbox"/> For your records	<input checked="" type="checkbox"/> As requested	<input type="checkbox"/> For corrections
<input type="checkbox"/> For approval	<input type="checkbox"/> For review & comments	<input type="checkbox"/> Other _____

**Notes:**

Signed: \_\_\_\_\_

Form MICS-Dm008 (c) 1995 - 2006 MICS Inc. All Rights Reserved

Figure: DM-138 Document Manager – Transmittal Standard form with company logo.

Transmittal – Alternate Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**To:** Harmon Brothers  
5400 Peach Street  
Atlanta, GA 30301  
Telephone (805) 543-7000

**Job:** Job Number 1020  
Giovanni's Pasta House

**Transmittal**

<b>Number</b>	5455
<b>Date</b>	09/16/xxxx
<b>From</b>	Mike Jarvis
<b>Title</b>	Project Manger
<b>To</b>	Susan Ursklah
<b>Title</b>	Manager
<b>Telephone</b>	(805) 543-7000
<b>Fax</b>	
<b>Printed</b>	09/16/xxxx

**We are sending the following items:**

Certificates     Plans  
 Shop drawings     Samples  
 Change Orders     Letter  
 Specifications     Other  
 Prints

**Sent Via:**

Mail  
 Fax  
 E-Mail  
 Other

**Items are:**

Attached  
 Separate cover

Copies	Date	Ref. Number	Description
3	09/16/xxxx		Job Specs and shop drawings

**Action**

For your records     As requested     For corrections  
 For approval     For review & comments     Other

**Notes:**

Provided the requisite original drawings, specs, and owner plans as noted for review.

Additional documents pertaining to the initial subsurface excavation. Site leveling to contract elevations and specs. Earth removal and subsurface primary gravel layer remitted.


\*Complete fire abatement measures at the northwest property line.

Signed: \_\_\_\_\_

Form M/C9-Dm008 (c) 1995-2007 M/C9 Inc. All Rights Reserved

Figure: DM-139 Document Manager – Transmittal Alternate form without logo.

Transmittal – Alternate Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Transmittal**

<b>Number</b>	5455
<b>Date</b>	09/16/xxxx
<b>From</b>	Mike Jarvis
<b>Title</b>	Project Manger
<b>To</b>	Susan Ursklah
<b>Title</b>	Manager
<b>Telephone</b>	(805) 543-7000
<b>Fax</b>	
<b>Printed</b>	09/16/xxxx

**To:** Harmon Brothers  
5400 Peach Street  
Atlanta, GA 30301  
Telephone (805) 543-7000

**Job:** Job Number 1020  
Giovanni's Pasta House

**We are sending the following items:**

<input type="checkbox"/> Certificates	<input checked="" type="checkbox"/> Plans
<input checked="" type="checkbox"/> Shop drawings	<input type="checkbox"/> Samples
<input type="checkbox"/> Change Orders	<input type="checkbox"/> Letter
<input checked="" type="checkbox"/> Specifications	<input type="checkbox"/> Other
<input type="checkbox"/> Prints	

**Sent Via:**

<input checked="" type="checkbox"/> Mail	<input type="checkbox"/> Fax	<input type="checkbox"/> E-Mail	<input type="checkbox"/> Other
--	------------------------------	---------------------------------	--------------------------------

**Items are:**

<input checked="" type="checkbox"/> Attached	<input type="checkbox"/> Separate cover
--	---

Copies	Date	Ref. Number	Description
3	09/16/xxxx		Job Specs and shop drawings

**Action**

<input type="checkbox"/> For your records	<input checked="" type="checkbox"/> As requested	<input type="checkbox"/> For corrections
<input type="checkbox"/> For approval	<input type="checkbox"/> For review & comments	<input type="checkbox"/> Other

**Notes:**

Provided the requisite original drawings, specs, and owner plans as noted for review.

Additional documents pertaining to the initial subsurface excavation. Site leveling to contract elevations and specs. Earth removal and subsurface primary gravel layer remitted.

\*Complete fire abatement measures at the northwest property line.

Signed: \_\_\_\_\_

Form MICS-Dm008 (c) 1996-2007 MICS Inc. All Rights Reserved

**Figure: DM-140** Document Manager – Transmittal Alternate form with company logo.

### Request for Information (RFI)

The Request for Information Document report lists the RFI documents on file for a company. Users can also produce the actual documents.

#### Access to Request for Information

##### Module Menu with Reports Group

DM | Reports | Request for Information

##### Module Menu with Reports List

DM | Request for Information

#### Standard Menu

Reports | Document Manager | Request for Information

#### Report Types

##### Summary

The Summary Report Type displays the Request for Information number, date, job, description, to, and from.

##### Detail

The Detail Report Type also includes the contact, subject, copies, sent via, drawing reference, specification reference, response from, response date, and response via.

##### Form

The Form Type displays a preview of the actual RFI(s).

#### Order By

- Number
- Job
- Date
- Response Date

#### Options

- Show Response
- Separator Line
- Show Notes
- Show Report Criteria

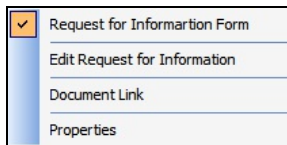
#### Fields

- Number
- Job
- Date
- Response Date
- Subject

#### Drill-Down+® Destinations

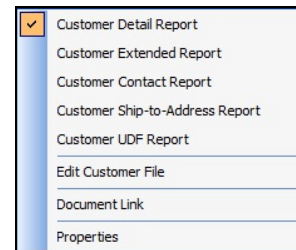
**Figure: DM-141**

Right-click a hyperlink to access RFI and other features.



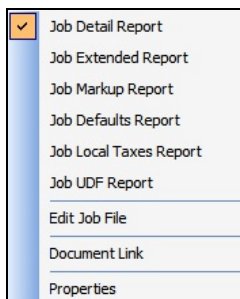
**Figure: DM-143**

Right-click a hyperlink to access reports and other features.



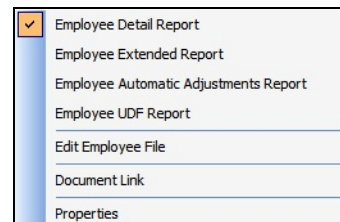
**Figure: DM-142**

Right-click a hyperlink to access reports and other features.



**Figure: DM-144**

Right-click a hyperlink to access reports and other features.



Request for Information – Summary Report

Request for Information								Best Construction Company	
Summary Report								Page 1	
RFI #	Date	Job	Description	To	Name	From	Name		
<a href="#">123</a>	01/25/xxxx	<a href="#">1000</a>	Pacific View Apartments	<a href="#">C001</a>	Far West Properties	<a href="#">E001</a>	Bill Johnson		
<b>Notes</b>									
Please double-check the specifications on the paint color in the reception area. I don't think this is what you intended. Also, there is a problem with the class of insulation specified as well. See the attached letter.									
<a href="#">124</a>	01/16/xxxx	<a href="#">1000</a>	Pacific View Apartments	<a href="#">C001</a>	Far West Properties	<a href="#">E002</a>	Mike Jarvis		
<b>Response</b>									
Please send the paint color booklet so we can match the manufacturer, shade, and finish you had specified.									

Figure: DM-145 Document Manager – Request for Information – Summary Report.

Request for Information – Detail Report

Best Construction Company

**Request for Information**  
Detail Report Page 1

RFI#	Date	Job	Description	To	Name	From	Name
<a href="#">123</a>	01/25/xxxx	<a href="#">1000</a>	Pacific View Apartments	<a href="#">C001</a>	Far West Properties	<a href="#">E001</a>	Bill Johnson
<b>Contact</b>		Jim Corrant		<b>Sent Via</b>		<b>Resp. From</b>	
<b>Subject</b>	<input type="checkbox"/>	Additional Information	<input checked="" type="checkbox"/>	Fax	Drawing Ref.	<b>Resp. Date</b>	//
	<input checked="" type="checkbox"/>	Interpretation	<input type="checkbox"/>	Mail	Spec. Ref.	<b>Resp. Via</b>	<input type="checkbox"/> Phone
	<input type="checkbox"/>	Apparent Conflict	<input type="checkbox"/>	Email			<input type="checkbox"/> Fax
<b>Copies</b>			<input type="checkbox"/>	Other			<input checked="" type="checkbox"/> Mail
<b>Notes</b>							
Please double-check the specifications on the paint color in the reception area. I don't think this is what you intended. Also, there is a problem with the class of insulation specified as well. See the attached letter.							
<a href="#">124</a>	01/16/xxxx	<a href="#">1000</a>	Pacific View Apartments	<a href="#">C001</a>	Far West Properties	<a href="#">E002</a>	Mike Jarvis
<b>Contact</b>				<b>Sent Via</b>		<b>Resp. From</b>	
<b>Subject</b>	<input checked="" type="checkbox"/>	Additional Information	<input type="checkbox"/>	Fax	Drawing Ref.	<b>Resp. Date</b>	//
	<input type="checkbox"/>	Interpretation	<input type="checkbox"/>	Mail	Spec. Ref.	<b>Resp. Via</b>	<input type="checkbox"/> Phone
	<input type="checkbox"/>	Apparent Conflict	<input type="checkbox"/>	Email			<input type="checkbox"/> Fax
<b>Copies</b>			<input checked="" type="checkbox"/>	Other	Our courier		<input type="checkbox"/> Mail
<b>Response</b>							
Please send the paint color booklet so we can match the manufacturer, shade, and finish you had specified.							

Figure: DM-146 Document Manager – Request for Information – Detail Report.



Request for Information – Standard Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Request for Information**

Number	<u>123</u>
Date	01 / 25 / xxxx
From	Bill Johnson
Title	Owner
To	Jim Corrant
Title	Vice President
Telephone	
Fax	
Printed	01 / 25 / xxxx
Dwg Ref	
Spec Ref	

**To:** Far West Properties  
 1625 Parker Street  
 Los Angeles, CA 90001  
 Telephone: (805)543-7000

**Job:** Job Number 1000  
 Pacific View Apartments

We are requesting the following:

Please double-check the specifications on the paint color in the reception area. I don't think this is what you intended. Also, there is a problem with the class of insulation specified as well. See the attached letter.

For the following reason:

Additional information required

Interpretation of documents

Apparent conflict in documents

Sent via

Fax

Mail

Email

Other

Please respond on this form or send a separate answer \_\_\_\_\_


Response

Signed: \_\_\_\_\_

Form MICS-Dm009 (c) 1995 - 2006 MICS Inc. All Rights Reserved

Figure: DM-147 Document Manager – Request for Information Standard form without logo.

Request for Information – Standard Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Request for Information**

Number	<a href="#">123</a>
Date	01 / 25 / 2000
From	Bill Johnson
Title	Owner
To	Jim Corrant
Title	Vice President
Telephone	
Fax	
Printed	01 / 25 / 2000
Dwg Ref	
Spec Ref	

**To:** Far West Properties  
 1625 Parker Street  
 Los Angeles, CA 90001  
 Telephone: (805)543-7000

**Job:** Job Number [1000](#)  
 Pacific View Apartments

We are requesting the following:

Please double-check the specifications on the paint color in the reception area. I don't think this is what you intended. Also, there is a problem with the class of insulation specified as well. See the attached letter.

For the following reason:

<input type="checkbox"/> Additional information required <input checked="" type="checkbox"/> Interpretation of documents <input type="checkbox"/> Apparent conflict in documents	<p>Sent via</p> <input checked="" type="checkbox"/> Fax <input type="checkbox"/> Mail <input type="checkbox"/> Email <input type="checkbox"/> Other
--	--

Please respond on this form or send a separate answer \_\_\_\_\_

Response

Signed: \_\_\_\_\_

Form MICS-Dm009 (c) 1995 - 2006 MICS Inc. All Rights Reserved

Figure: DM-148 Document Manager – Request for Information – Standard form with company logo.

Request for Information – Alternate Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**To:** Far West Properties  
 1625 Parker Street  
 Los Angeles, CA 90001  
 Telephone (805) 543-7000

**Job:** Job Number 1010  
 Pacific View Apartments

**Request for Information**

Number	124
Date	01/16/xxxx
From	Mike Jarvis
Title	Project Manger
To	
Title	
Telephone	
Fax	
Printed	01 / 16 / xxxx
Dvg Ref	
Spec Ref	

We are requesting the following:

For the following reason:

<input checked="" type="checkbox"/> Additional information required <input type="checkbox"/> Interpretation of documents <input type="checkbox"/> Apparent conflict in documents	<p>Sent Via</p> <input type="checkbox"/> Mail <input type="checkbox"/> Fax <input type="checkbox"/> Email <input checked="" type="checkbox"/> Other
--	--

Please respond on this form or send a separate answer Our courier \_\_\_\_\_


Response

Signed: \_\_\_\_\_

Form MICS-Dm009 (d) 1995-2007 MICS, Inc. All Rights Reserved

Figure: DM-149 Document Manager – Request for Information Alternate form without logo.

Request for Information – Alternate Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Request for Information**

Number	124
Date	01/16/xxxx
From	Mike Jarvis
Title	Project Manger
To	
Title	
Telephone	
Fax	
Printed	01/16/xxxx
Dwg Ref	
Spec Ref	

**To:** Far West Properties  
1625 Parker Street  
Los Angeles, CA 90001  
Telephone (805) 543-7000

**Job:** Job Number 1000  
Pacific View Apartments

**We are requesting the following:**

**For the following reason:**

Additional information required

Interpretation of documents

Apparent conflict in documents

**Sent Via**

Mail

Fax

Email

Other

Our courier \_\_\_\_\_

Please respond on this form or send a separate answer

**Response**

Please send the paint color booklet so we can match the manufacturer, shade, and finish you had specified.

Signed: \_\_\_\_\_

Form MICS-Dm008 (c) 1995-2007 MICS Inc. All Rights Reserved

Figure: DM-150 Document Manager – Request for Information Alternate form with company logo.

## Deficiency Notice

The Deficiency Notice Document report lists the Deficiency Notice documents on file for a company. Users can also produce the actual documents.

### Access to Deficiency Notice

#### Module Menu with Reports Group

DM | Reports | Deficiency Notice

#### Module Menu with Reports List

DM | Deficiency Notice

### Standard Menu

Reports | Document Manager | Deficiency Notice

## Report Types

### Summary

The Summary Report Type displays deficiency notice number, date, due date, job, description, vendor ID, vendor name, and contact.

### Detail

The Detail Report Type also includes deficiency, copies, sent via, and from.

### Form

The Form Type displays a preview of the actual subcontract change order(s).

### Order By

- Number
- Date
- Job
- Vendor
- Date Due

### Options

- Separator Line
- Show Notes
- Show Report Criteria

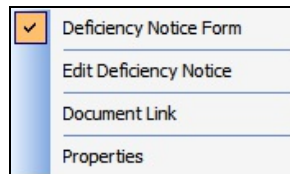
### Fields

- Number
- Date
- Job
- Vendor
- Date Due
- Subject

## Drill-Down+® Destinations

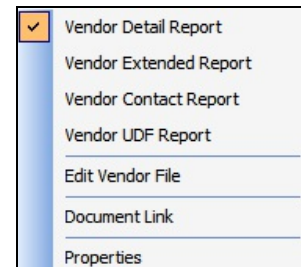
**Figure: DM-151**

Right-click a hyperlink to access Deficiency Notice Form and other features.



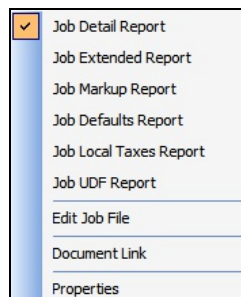
**Figure: DM-153**

Right-click a hyperlink to access reports and other features.



**Figure: DM-152**

Right-click a hyperlink to access reports and other features.



Deficiency Notice – Summary Report

Best Construction Company

**Deficiency Notice**  
Summary Report Page 1

Def. Notice#	Date	Due Date	Job	Description	Vendor	Name	Contact
<a href="#">762332</a>	02/25/xxxx	02/28/xxxx	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0801</a>	Higuera Glass	Henry Ingram
<b>Notes</b> We show your worker's compensation insurance as having expired last month. Could you please send proof of renewal?							
<a href="#">762333</a>	12/17/xxxx	12/20/xxxx	<a href="#">1020</a>	Giovanni's Pasta House	<a href="#">0201</a>	BK Contracting	Jon Kessel
<b>Notes</b> 1. Our records indicate that your worker's compensation insurance is due to expire. Please remit proof of renewal.  2. Schedule for completing the 2nd phase of the contract projects is due 12/21/xxxx.							

Figure: DM-154 Document Manager – Deficiency Notice Form Summary Report.



Deficiency Notice – Standard Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Deficiency Notice**

Number	<u>762332</u>
Date	02/25/xxxx
From	Bill Johnson
Title	Owner
To	
Title	
Telephone	
Fax	
Printed	02/25/xxxx

**To:** Higuerra Glass  
1396 Higuerra Street  
San Luis Obispo, CA 93401  
Telephone 805-543-7000

**Job:** Job Number 1000  
Pacific View Apartments

We are sending you the following items:

<input type="checkbox"/> Contract	<input type="checkbox"/> Samples	<input type="checkbox"/> Purchase Order	<input type="checkbox"/> Fax
<input checked="" type="checkbox"/> Insurance Certificates	<input type="checkbox"/> Materials List	<input type="checkbox"/> Warranty	<input type="checkbox"/> Mail
<input type="checkbox"/> Shop Drawings	<input type="checkbox"/> Submittal	<input type="checkbox"/> As-Built Drawings	<input checked="" type="checkbox"/> Email
<input type="checkbox"/> Colors / Textures	<input type="checkbox"/> Schedule	<input type="checkbox"/> Cost Analysis	<input type="checkbox"/> Other

Other \_\_\_\_\_

Please submit these items by: 02/28/xxxx

**Notes:**

We show your worker's compensation insurance as having expired last month.  
 Could you please send proof of renewal?


Signed: \_\_\_\_\_

Form MICS-Dmd10 (c) 1995 - 2006 MICS Inc. All Rights Reserved

Figure: DM-156 Document Manager – Deficiency Notice Standard form without company logo.



Deficiency Notice – Standard Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Deficiency Notice**

Number	762 332
Date	02 / 25 /xxxx
From	Bill Johnson
Title	Owner
To	
Title	
Telephone	
Fax	
Printed	02 / 25 /xxxx

**To:** Higuerra Glass  
1396 Higuerra Street  
San Luis Obispo, CA 93401  
Telephone 805-543-7000

**Job:** Job Number 1000  
Pacific View Apartments

We are sending you the following items:

<input type="checkbox"/> Contract	<input type="checkbox"/> Samples	<input type="checkbox"/> Purchase Order	<input type="checkbox"/> Fax
<input checked="" type="checkbox"/> Insurance Certificates	<input type="checkbox"/> Materials List	<input type="checkbox"/> Warranty	<input type="checkbox"/> Mail
<input type="checkbox"/> Shop Drawings	<input type="checkbox"/> Submittal	<input type="checkbox"/> As-Built Drawings	<input checked="" type="checkbox"/> Email
<input type="checkbox"/> Colors / Textures	<input type="checkbox"/> Schedule	<input type="checkbox"/> Cost Analysis	<input type="checkbox"/> Other

Other \_\_\_\_\_

Please submit these items by: 02 / 28 /xxxx

**Notes:**

We show your worker's compensation insurance as having expired last month.  
 Could you please send proof of renewal?

Signed: \_\_\_\_\_

Form MICS-Dm010 (c) 1995 - 2006 MICS Inc. All Rights Reserved

Figure: DM-157 Document Manager – Deficiency Notice Standard form with company logo.

Deficiency Notice – Alternate Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**To:** BK Contracting  
 16701 Douglas Way  
 Oceano, CA 93455  
 Telephone: (805) 543-7000

**Job:** Job Number 1020  
 Giovanni's Pasta House

Deficiency Notice	
<b>Number</b>	762333
<b>Date</b>	12/17/xxxx
<b>From</b>	Bill Johnson
<b>Title</b>	Owner
<b>To</b>	
<b>Title</b>	
<b>Telephone</b>	
<b>Fax</b>	
<b>Printed</b>	12/17/xxxx

**We are sending you the following items:**

<input type="checkbox"/> Contact	<input type="checkbox"/> Samples	<input type="checkbox"/> Purchase Order	<input type="checkbox"/> Mail
<input checked="" type="checkbox"/> Insurance Certificates	<input type="checkbox"/> Materials List	<input type="checkbox"/> Warranty	<input type="checkbox"/> Fax
<input type="checkbox"/> Shop Drawings	<input type="checkbox"/> Submittal	<input type="checkbox"/> As-Built Drawings	<input checked="" type="checkbox"/> E-Mail
<input type="checkbox"/> Colors / Textures	<input type="checkbox"/> Schedule	<input type="checkbox"/> Cost Analysis	<input type="checkbox"/> Other
<input type="checkbox"/> Other _____			

**Sent Via**

**Please submit these items by:** 12/20/xxxx

**Notes:**

1. Our records indicate that your worker's compensation insurance is due to expire. Please remit proof of renewal.


2. Schedule for completing the 2nd phase of the contract projects is due 12/21/xxxx.

Signed: \_\_\_\_\_

Form MICS-Dm010 (c) 1995-2007 MICS Inc. All Rights Reserved

Figure: DM-158 Document Manager – Deficiency Notice Alternate form without company logo.

Deficiency Notice – Alternate Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Deficiency Notice**

Number	762333
Date	12/17/xxxx
From	Bill Johnson
Title	Owner
To	
Title	
Telephone	
Fax	
Printed	12/17/xxxx

**To:** BK Contracting  
16701 Douglas Way  
Oceano, CA 93455  
Telephone (805) 543-7000

**Job:** Job Number 1020  
Giovanni's Pasta House

**We are sending you the following items:**

<input type="checkbox"/> Contact	<input type="checkbox"/> Samples	<input type="checkbox"/> Purchase Order	<input type="checkbox"/> Mail
<input checked="" type="checkbox"/> Insurance Certificates	<input type="checkbox"/> Materials List	<input type="checkbox"/> Warranty	<input type="checkbox"/> Fax
<input type="checkbox"/> Shop Drawings	<input type="checkbox"/> Submittal	<input type="checkbox"/> As-Built Drawings	<input checked="" type="checkbox"/> E-Mail
<input type="checkbox"/> Colors / Textures	<input type="checkbox"/> Schedule	<input type="checkbox"/> Cost Analysis	<input type="checkbox"/> Other
<input type="checkbox"/> Other _____			

**Sent Via**

**Please submit these items by:** 12/20/xxxx

**Notes:**

1. Our records indicate that your worker's compensation insurance is due to expire. Please remit proof of renewal.
2. Schedule for completing the 2nd phase of the contract projects is due 12/21/xxxx.

Signed: \_\_\_\_\_

Form MICS-Dm010 (c) 1996-2007 MICS Inc. All Rights Reserved

Figure: DM-159 Document Manager – Deficiency Notice Alternate form with company logo.

### Lien Release

The Lien Release Document report lists the Lien Release documents on file for a company. Users can also produce the actual documents.

#### Access to Lien Release

##### Module Menu with Reports Group

DM | Reports | Lien Release

##### Module Menu with Reports List

DM | Lien Release

#### Standard Menu

Reports | Document Manager | Lien Release

#### Report Types

##### Summary

The Summary Report Type displays lien release number, date, job, description, vendor ID, vendor name, sent, and returned.

##### Detail

The Detail Report Type also includes release terms, check number, check date, disputed amount, and check amount.

##### Form

The Form Type displays a preview of the actual subcontract change order(s).

#### Order By

- Number
- Date
- Date LR Returned
- Job
- Vendor

#### Options

- Show Report Criteria
- Separator Line
- Show Notes

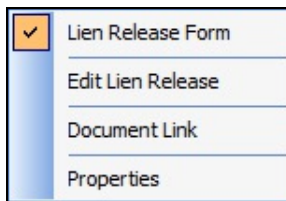
#### Fields

- Number
- Date
- Date LR Returned
- Job
- Vendor
- Subject

#### Drill-Down+® Destinations

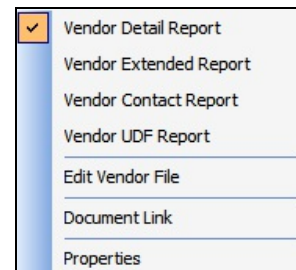
**Figure: DM-160**

Right-click a hyperlink to access Lien Release and other features.



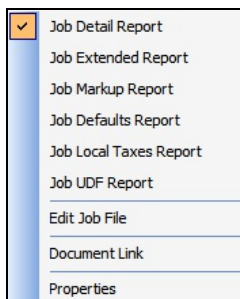
**Figure: DM-162**

Right-click a hyperlink to access reports and other features.



**Figure: DM-161**

Right-click a hyperlink to access reports and other features.



Lien Release – Summary Report

Best Construction Company							
Lien Release							Page 1
Summary Report							
Lien Ref #	Date	Job	Description	Vendor	Name	Sent	Returned
<a href="#">8232</a>	03/25/	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0901</a>	Quintus Drywall	03/20/	//
<b>Notes</b>							
Signed in office when picked up check.							

Figure: DM-163 Document Manager – Lien Release Summary Report.

Lien Release – Detail Report

Best Construction Company

**Lien Release**  
Detail Report Page 1

Lien Ref #	Date	Job	Description	Vendor	Name	Sent	Returned
<a href="#">6232</a>	03/25/xxxx	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0901</a>	Quintus Drywall	03/20/xxxx	/ /
<b>Release terms</b>	Partial Conditional			<b>Disputed Amount</b>	0.00 As of 02/19/xxxx		
<b>Check #</b>	1564	<b>Check Date</b>	03/20/xxxx	<b>Check Amount</b>			
<b>Notes</b> Signed in office when picked up check.							

---

Figure: DM-164 Document Manager – Lien Release – Detail Report.

Lien Release – Standard Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000

**Lien Release**

Number	8232
Date	03/25/xxxx

**To:** Quintus Drywall  
 3258 Los Casitas Drive  
 Santa Maria, CA 93454  
 Telephone (805)543-7000

**Job:** Job Number 1000  
 Pacific View Apartments

**Release Terms**

Partial       Conditional  
 Final       Unconditional

As of	02/19/xxxx
Disputed Amount	0.00

**Payment**

Check Number	1564
Check Date	03/20/xxxx
Check Amount	2,500.00

Date LR Sent	03/25/xxxx
Check Sent	03/20/xxxx
Date LR Returned	/ /

**Notes:**

Signed in office when picked up check.

Signed: \_\_\_\_\_

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Figure: DM-165 Document Manager – Lien Release Standard form without company logo.

Lien Release – Standard Document Form With Logo


 <b>BUILDER INFORMATION SYSTEM</b>	<b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000	<b>Lien Release</b>											
	<b>To:</b>	<table border="1"> <tr> <td>Number</td> <td>8232</td> </tr> <tr> <td>Date</td> <td>03/25/xxxx</td> </tr> </table>	Number	8232	Date	03/25/xxxx							
Number	8232												
Date	03/25/xxxx												
<b>Job:</b>	Quintus Drywall 3258 Los Casitas Drive Santa Maria, CA 93454 Telephone (805) 543-7000	<table border="1"> <tr> <td>Job Number</td> <td>1000</td> </tr> <tr> <td colspan="2">Pacific View Apartments</td> </tr> </table>	Job Number	1000	Pacific View Apartments								
Job Number	1000												
Pacific View Apartments													
<b>Release Terms</b>													
<input checked="" type="checkbox"/> Partial	<table border="1"> <tr> <td>As of</td> <td>02/19/xxxx</td> </tr> <tr> <td>Disputed Amount</td> <td>0.00</td> </tr> </table>	As of	02/19/xxxx	Disputed Amount	0.00	<input checked="" type="checkbox"/> Conditional							
As of	02/19/xxxx												
Disputed Amount	0.00												
<input type="checkbox"/> Final		<input type="checkbox"/> Unconditional											
<b>Payment</b>													
<table border="1"> <tr> <td>Check Number</td> <td>1564</td> </tr> <tr> <td>Check Date</td> <td>03/20/xxxx</td> </tr> <tr> <td>Check Amount</td> <td>2,500.00</td> </tr> </table>	Check Number	1564	Check Date	03/20/xxxx	Check Amount	2,500.00	<table border="1"> <tr> <td>Date LR Sent</td> <td>03/25/xxxx</td> </tr> <tr> <td>Check Sent</td> <td>03/20/xxxx</td> </tr> <tr> <td>Date LR Returned</td> <td>/ /</td> </tr> </table>	Date LR Sent	03/25/xxxx	Check Sent	03/20/xxxx	Date LR Returned	/ /
Check Number	1564												
Check Date	03/20/xxxx												
Check Amount	2,500.00												
Date LR Sent	03/25/xxxx												
Check Sent	03/20/xxxx												
Date LR Returned	/ /												
<b>Notes:</b>													
Signed in office when picked up check.													
Signed: _____													

Figure: DM-166 Document Manager – Lien Release Standard form with company logo.



Lien Release – Alternate Document Form Without Logo

<b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000 Fax: (805)534-1595		<b>Lien Release</b>											
		<table border="1"><tr><td>Number</td><td>8232</td></tr><tr><td>Date</td><td>03/25/xxxx</td></tr></table>	Number	8232	Date	03/25/xxxx							
Number	8232												
Date	03/25/xxxx												
<b>To:</b>	<table border="1"><tr><td>Quintus Drywall 3258 Los Casitas Drive Santa Maria, CA 93454 Telephone R(805) 543-7000</td></tr></table>		Quintus Drywall 3258 Los Casitas Drive Santa Maria, CA 93454 Telephone R(805) 543-7000										
Quintus Drywall 3258 Los Casitas Drive Santa Maria, CA 93454 Telephone R(805) 543-7000													
<b>Job:</b>	<table border="1"><tr><td>Job Number 1000 Pacific View Apartments</td></tr></table>		Job Number 1000 Pacific View Apartments										
Job Number 1000 Pacific View Apartments													
<b>Release Terms</b>													
<input checked="" type="checkbox"/> Partial	<table border="1"><tr><td>As of</td><td>02/19/xxxx</td></tr></table>	As of	02/19/xxxx	<input checked="" type="checkbox"/> Conditional									
As of	02/19/xxxx												
<input type="checkbox"/> Final	<table border="1"><tr><td>Disputed Amount</td><td>0.00</td></tr></table>	Disputed Amount	0.00	<input type="checkbox"/> Unconditional									
Disputed Amount	0.00												
<b>Payment</b>													
<table border="1"><tr><td>Check Number</td><td>1564</td></tr><tr><td>Check Date</td><td>03/20/xxxx</td></tr><tr><td>Check Amount</td><td>2,500.00</td></tr></table>	Check Number	1564	Check Date	03/20/xxxx	Check Amount	2,500.00	<table border="1"><tr><td>Date LR Sent</td><td>03/20/xxxx</td></tr><tr><td>Check Sent</td><td>03/25/xxxx</td></tr><tr><td>Date LR Return</td><td></td></tr></table>	Date LR Sent	03/20/xxxx	Check Sent	03/25/xxxx	Date LR Return	
Check Number	1564												
Check Date	03/20/xxxx												
Check Amount	2,500.00												
Date LR Sent	03/20/xxxx												
Check Sent	03/25/xxxx												
Date LR Return													
<b>Notes:</b>													
<table border="1"><tr><td>Signed in office when picked up check.</td></tr></table>			Signed in office when picked up check.										
Signed in office when picked up check.													
Signed: _____		<small>Form MICS-Dm011 (c) 1996-2007 MICS Inc. All Rights Reserved</small>											

Figure: DM-167 Document Manager – Lien Release Alternate form without company logo.

Lien Release – Alternate Document Form With Logo


 <b>BUILDER INFORMATION SYSTEM</b>	<b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000 Fax: (805)534-1595	<b>Lien Release</b> <table border="1"> <tr> <td>Number</td> <td>8232</td> </tr> <tr> <td>Date</td> <td>03/25/xxxx</td> </tr> </table>	Number	8232	Date	03/25/xxxx								
	Number	8232												
Date	03/25/xxxx													
<b>To:</b> Quintus Drywall 3258 Los Casitas Drive Santa Maria, CA 93454 Telephone R(805) 543-7000														
<b>Job:</b> Job Number 1000 Pacific View Apartments														
<b>Release Terms</b> <input checked="" type="checkbox"/> Partial <b>As of</b> 02/19/xxxx <input checked="" type="checkbox"/> Conditional <input type="checkbox"/> Final <b>Disputed Amount</b> 0.00 <input type="checkbox"/> Unconditional														
<b>Payment</b> <table border="1"> <tr> <td>Check Number</td> <td>1584</td> <td>Date LR Sent</td> <td>03/20/xxxx</td> </tr> <tr> <td>Check Date</td> <td>03/20/xxxx</td> <td>Check Sent</td> <td>03/25/xxxx</td> </tr> <tr> <td>Check Amount</td> <td>2,500.00</td> <td>Date LR Return</td> <td></td> </tr> </table>			Check Number	1584	Date LR Sent	03/20/xxxx	Check Date	03/20/xxxx	Check Sent	03/25/xxxx	Check Amount	2,500.00	Date LR Return	
Check Number	1584	Date LR Sent	03/20/xxxx											
Check Date	03/20/xxxx	Check Sent	03/25/xxxx											
Check Amount	2,500.00	Date LR Return												
<b>Notes:</b> Signed in office when picked up check.														
Signed: _____														

Figure: DM-168 Document Manager – Lien Release Alternate form with company logo.

## Meeting Minutes

The Meeting Minutes Document report lists the meeting minutes documents on file for a company. Users can also produce the actual documents.

### Access to Meeting Minutes

#### Module Menu with Reports Group

DM | Reports | Meeting Minutes

#### Module Menu with Reports List

DM | Meeting Minutes

### Standard Menu

Reports | Document Manager | Meeting Minutes

### Report Types

#### Summary

The Summary Report Type displays the meeting number, date, job, description, from, name, location, and chairperson.

#### Detail

The Detail Report Type also includes sent via, attendee name, title company id, and company name.

#### Form

The Form Type displays a preview of the actual Meeting Minutes document(s).

#### Order By

- Number
- Meeting Date
- Job
- Location
- Subject

#### Options

- Separator Line
- Show Notes
- Show Extended Description
- Show Report Criteria

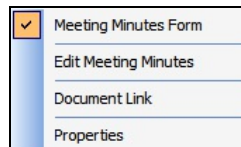
#### Fields

- Number
- Meeting Date
- Job
- Location
- Subject

### Drill-Down+® Destinations

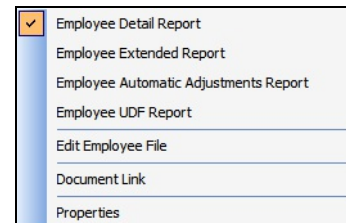
**Figure: DM-169**

Right-click a hyperlink to access Meeting Minutes and other features.



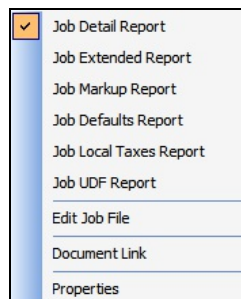
**Figure: DM-171**

Right-click a hyperlink to access reports and other features.



**Figure: DM-170**

Right-click a hyperlink to access reports and other features.



Meeting Minutes – Summary Report

							Best Construction Company	
<b>Meeting Minutes</b>								
Summary Report							Page 1	
Meeting#	Date	Job	Description	From	Name	Location	President	
<a href="#">WEEKLY-21</a>	03/29/	<a href="#">1000</a>	Pacific View Apartments	<a href="#">E001</a>	Bill Johnson	ARCH	1000	

Figure: DM-172 Document Manager – Meeting Minutes – Summary Report.

Meeting Minutes – Detail Report

Best Construction Company									
Meeting Minutes									Page 1
Detail Report									
Meeting#	Date	Job	Description	From	Name	Location	President		
<a href="#">WEEKLY-21</a>	03/29/2000	<a href="#">1000</a>	Pacific View Apartments	<a href="#">ED-01</a>	Bill Johnson	ARCH	1000		
Sent Via	<input checked="" type="checkbox"/> Fax	<input type="checkbox"/> Mail	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Other					
Name			Title		Company Id	Company Name			

Figure: DM-173 Document Manager – Meeting Minutes – Detail Report.

Meeting Minutes – Standard Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**To:**

**Job:** Job Number 1000  
 Pacific View Apartments

Sent via:  Fax  
 Mail  
 Email  
 Other \_\_\_\_\_

**Meeting Minutes**

Number	<u>WEEKLY-21</u>
Date	03/29/xxxx
From	Bill Johnson
Title	Owner
To	Jim Snipes
Title	
Telephone	
Fax	
Printed	03/29/xxxx
Location	ARCH
Date	03/29/xxxx
President	Carl Goodman

**Business:**


Item	Opened	Closed	Due	Notes
1	03/01/xxxx	/ /	/ /	Further discussion on paneling style
2	03/01/xxxx	03/15/xxxx	/ /	Pacific Coast Construction
2.1	03/01/xxxx	/ /	04/15/xxxx	Lisa will talk to customer at this time
2.2	03/01/xxxx	/ /	05/10/xxxx	Lisa will have final report completed

Signed: \_\_\_\_\_

Form MICS-Dm005 (c) 1995 - 2003 MICS Inc. All Rights Reserved

Figure: DM-174 Document Manager – Meeting Minutes Standard form without logo.

Meeting Minutes – Standard Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Meeting Minutes**

Number	<a href="#">WEEKLY-21</a>
Date	03/29/xxxx
From	Bill Johnson
Title	Owner
To	Jim Snipes
Title	
Telephone	
Fax	
Printed	03/29/xxxx
Location	ARCH
Date	03/29/xxxx
President	Carl Goodman

**To:**

**Job:** 1000  
Pacific View Apartments"/>

Sent via:  Fax  
 Mail  
 Email  
 Other \_\_\_\_\_

**Business:**

Item	Opened	Closed	Due	Notes
1	03/01/xxxx	/ /	/ /	Further discussion on paneling style
2	03/01/xxxx	03/15/xxxx	/ /	Pacific Coast Construction
2.1	03/01/xxxx	/ /	04/15/xxxx /	Lisa will talk to customer at this time
2.2	03/01/xxxx	/ /	05/10/xxxx /	Lisa will have final report completed

Signed: \_\_\_\_\_

Form MICS-Dm005 (c) 1995 - 2003 MICS Inc. All Rights Reserved

**Figure: DM-175** Document Manager – Meeting Minutes Standard form with the company logo.

Meeting Minutes – Alternate Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**To:**

**Job:**   
 Job Number 1000  
 Pacific View Apartments

**Sent Via:**  Mail  
 Fax  
 E-Mail  
 Other \_\_\_\_\_

**Meeting Minutes**

<b>Number</b>	WEEKLY-21
<b>Date</b>	03/29/xxxx
<b>From</b>	Bill Johns on
<b>Title</b>	Owner
<b>To</b>	
<b>Title</b>	
<b>Telephone</b>	
<b>Fax</b>	
<b>Printed</b>	03/29/xxxx
<b>Location</b>	ARCH
<b>Date</b>	03/29/xxxx
<b>President</b>	Carl Goodman

**Business:**

Item	Opened	Closed	Due	Description
1.0	03/01/xxxx			Further discus sion on paneling style
2.0	03/01/xxxx	03/15/xxxx		Pacific Coast Cons truction
2.1	03/01/xxxx		04/15/xxxx	Lisa will talk to customer at this time
2.2	03/01/xxxx		05/10/xxxx	Lisa will have final report completed

**Attendees:**

Item	Description

**Notes:**


Signed: \_\_\_\_\_

Form MICS-Dm005 (c) 1996-2007 MICS Inc. All Rights Reserved

Figure: DM-176 Document Manager – Meeting Minutes Alternate form without logo.



Meeting Minutes – Alternate Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone : (805)543-7000  
 Fax: (805)534-1595

**Meeting Minutes**

Number	WEEKLY-21
Date	03/29/xxxx
From	Bill Johnson
Title	Owner
To	
Title	
Telephone	
Fax	
Printed	03/29/xxxx
Location	ARCH
Date	03/29/xxxx
President	Carl Goodman

**To:**

**Job:**

Sent Via:  Mail  
 Fax  
 E-Mail  
 Other \_\_\_\_\_

**Business:**

Item	Opened	Closed	Due	Description
1.0	03/01/xxxx			Further discussion on paneling style
2.0	03/01/xxxx	03/15/xxxx		Pacific Coast Construction
2.1	03/01/xxxx		04/15/xxxx	Lisa will talk to customer at this time
2.2	03/01/xxxx		05/10/xxxx	Lisa will have final report completed

**Attendees:**

Item	Description

**Notes:**

Signed: \_\_\_\_\_

Form M/CB-Dm005 (c) 1995-2007 MICS Inc. All Rights Reserved

Figure: DM-177 Document Manager – Meeting Minutes Alternate form with company logo.

### Closeout Submittal

The Closeout Submittal Document report lists the closeout submittal documents on file for a company. Users can also produce the actual documents.

#### Access to Closeout Submittal

##### Module Menu with Reports Group

DM | Reports | Closeout Submittal

##### Module Menu with Reports List

DM | Closeout Submittal

#### Standard Menu

Reports | Document Manager | Closeout Submittal

#### Report Types

##### Summary

The Summary Report Type displays submittal number, job, description, vendor Id, vendor name, date requested, date due at general contractor, date arrived, date due at owner, and date forwarded.

##### Detail

The Detail Report Type also shows the includes line.

##### Form

The Form Type displays a preview of the actual closeout submittal(s).

#### Order By

- Number
- Job
- Vendor
- Date Requested
- Date Arrived
- Date Forwarded

#### Options

- Show Report Criteria
- Show Notes
- Separator Line

#### Fields

- Number
- Job
- Vendor
- Date Requested
- Date Arrived
- Date Forwarded
- Subject

#### Drill-Down+® Destinations

Figure: DM-178

Right-click a hyperlink to access Closeout Submittal and other features.

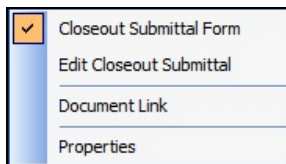


Figure: DM-180

Right-click a hyperlink to access reports and other features.

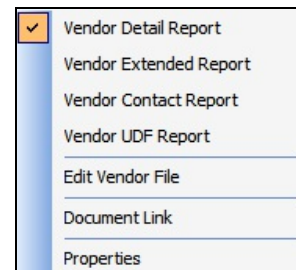
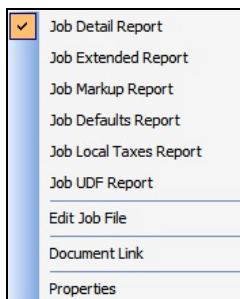


Figure: DM-179

Right-click a hyperlink to access reports and other features.



Closeout Submittal – Summary Report

Best Construction Company

**Closeout Submittal**  
Summary Report Page 1

Submittal#	Job	Description	Vendor	Name	Date Requested	Date Due at G.C.	Date Arrived	Date Due at Owner	Date Forwarded
<a href="#">1233</a>	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0201</a>	BK Contracting	10/29/xxxx	10/29/xxxx	10/29/xxxx	10/29/xxxx	10/29/xxxx

**Notes**  
Please send, via email, a confirmation that all items have been received.

---

Figure: DM-181 Document Manager – Closeout Submittal – Summary Report.

Closeout Submittal – Detail Report

Best Construction Company

**Closeout Submittal**  
Detail Report Page 1

---

Submittal#	Job	Description	Vendor	Name	Date Requested	Date Due at G.C.	Date Arrived	Date Due at Owner	Date Forwarded
<a href="#">1233</a>	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0201</a>	BK Contracting	10/29/xxxx	10/29/xxxx	10/29/xxxx	10/29/xxxx	10/29/xxxx
Includes	<input checked="" type="checkbox"/>	Warranty	<input checked="" type="checkbox"/>	Manual	<input checked="" type="checkbox"/>	Drawings	<input checked="" type="checkbox"/>	Other	Master keys

Notes  
Please send, via email, a confirmation that all items have been received.

---

Figure: DM-182 Document Manager – Closeout Submittal – Detail Report.

Closeout Submittal – Standard Document Form Without Logo

**Best Construction Company**  
1200 Main Street  
Unit 100  
Arroyo Grande, CA 93420  
Telephone: (805)543-7000

**Closeout Submittal**

Number	<a href="#">1233</a>
--------	----------------------

**To:** EK Contracting  
16701 Douglas Way  
Oceano, CA 93455  
Telephone (805)543-7000

**Job:** Job Number [1000](#)  
Pacific View Apartments

**Contents :**

- Warrantees / Guarantees
- Instructions / Manuals
- As-built Drawings
- Other

Master keys \_\_\_\_\_

**Tracking :**

Requested	10 / 29 /xxxx
Due at GC	10 / 29 /xxxx
Arrived	10 / 29 /xxxx
Due at Owner	10 / 29 /xxxx
Forwarded	10 / 29 /xxxx

**Notes:**


Please send, via email, a confirmation that all items have been received.

Signed: \_\_\_\_\_

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Figure: DM-183 Document Manager – Closeout Submittal Standard form without company logo.

Closeout Submittal – Standard Document Form With Logo



**BUILDER INFORMATION SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000

**Closeout Submittal**

Number	<a href="#">1233</a>
--------	----------------------

**To:**

EK Contracting 16701 Douglas Way Oceano, CA 93455 Telephone (805) 543-7000
---

**Job:**

Job Number <a href="#">1000</a> Pacific View Apartments
--

**Contents :**

- Warranties / Guarantees
- Instructions / Manuals
- As-built Drawings
- Other

Master keys \_\_\_\_\_

**Tracking :**

Requested	10 / 29 /xxxx
Due at GC	10 / 29 /xxxx
Arrived	10 / 29 /xxxx
Due at Owner	10 / 29 /xxxx
Forwarded	10 / 29 /xxxx

**Notes:**

Please send, via email, a confirmation that all items have been received.

Signed: \_\_\_\_\_

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Figure: DM-184 Document Manager – Closeout Submittal Standard form with company logo.

Closeout Submittal – Alternate Document Form Without Logo

<b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000 Fax: (805)534-1595		<b>Closeout Submittal</b>
		Number <input type="text" value="1233"/>
<b>To:</b>	<input type="text" value="BK Contracting&lt;br/&gt;16701 Douglas Way&lt;br/&gt;Oceano, CA 93455&lt;br/&gt;Telephone (805) 543-7000"/>	
<b>Job:</b>	<input type="text" value="Job Number 1000&lt;br/&gt;Pacific View Apartments"/>	
<b>Contents:</b>		<b>Tracking:</b>
<input checked="" type="checkbox"/> Warranties / Guarantees		Request <input type="text" value="10/29/xxxx"/>
<input checked="" type="checkbox"/> Instructions / Manuals		Due at GC <input type="text" value="10/29/xxxx"/>
<input checked="" type="checkbox"/> As-built / Drawings		Arrived <input type="text" value="10/29/xxxx"/>
<input checked="" type="checkbox"/> Other		Due at Owner <input type="text" value="10/29/xxxx"/>
Master keys _____		Forwarded <input type="text" value="10/29/xxxx"/>
<b>Notes:</b>	<input type="text" value="Please send, via email, a confirmation that all items have been received."/>	
Signed: _____	<small>Form MICS-Dm013 (c) 1996-2007 MICS Inc. All Rights Reserved</small>	

Figure: DM-185 Document Manager – Closeout Submittal Alternate form without company logo.

Closeout Submittal – Alternate Document Form With Logo


 <b>BUILDER INFORMATION SYSTEM</b>	<b>Best Construction Company</b> 1200 Main Street Unit 100 Arroyo Grande, CA 93420 Telephone: (805)543-7000 Fax: (805)534-1595	<b>Closeout Submittal</b> <table border="1"> <tr> <td>Number</td> <td>1233</td> </tr> </table>	Number	1233								
	Number	1233										
<b>To:</b> <table border="1"> <tr> <td>           BK Contracting            16701 Douglas Way            Oceano, CA 93455            Telephone (805) 543-7000         </td> </tr> </table>	BK Contracting 16701 Douglas Way Oceano, CA 93455 Telephone (805) 543-7000											
BK Contracting 16701 Douglas Way Oceano, CA 93455 Telephone (805) 543-7000												
<b>Job:</b> <table border="1"> <tr> <td>           Job Number 1000            Pacific View Apartments         </td> </tr> </table>	Job Number 1000 Pacific View Apartments											
Job Number 1000 Pacific View Apartments												
<b>Contents:</b> <input checked="" type="checkbox"/> Warranties / Guarantees <input checked="" type="checkbox"/> Instructions / Manuals <input checked="" type="checkbox"/> As-built / Drawings <input checked="" type="checkbox"/> Other Master keys	<b>Tracking:</b> <table border="1"> <tr> <td>Request</td> <td>10/29/xxxx</td> </tr> <tr> <td>Due at GC</td> <td>10/29/xxxx</td> </tr> <tr> <td>Arrived</td> <td>10/29/xxxx</td> </tr> <tr> <td>Due at Owner</td> <td>10/29/xxxx</td> </tr> <tr> <td>Forwarded</td> <td>10/29/xxxx</td> </tr> </table>		Request	10/29/xxxx	Due at GC	10/29/xxxx	Arrived	10/29/xxxx	Due at Owner	10/29/xxxx	Forwarded	10/29/xxxx
Request	10/29/xxxx											
Due at GC	10/29/xxxx											
Arrived	10/29/xxxx											
Due at Owner	10/29/xxxx											
Forwarded	10/29/xxxx											
<b>Notes:</b> <table border="1"> <tr> <td>Please send, via email, a confirmation that all items have been received.</td> </tr> </table>			Please send, via email, a confirmation that all items have been received.									
Please send, via email, a confirmation that all items have been received.												
Signed: _____												
<small>Form MICS-0m013 (c) 1996-2007 MICS Inc. All Rights Reserved</small>												

Figure: DM-186 Document Manager – Closeout Submittal Alternate form with company logo.



## Punchlist

The Punchlist Document report lists the punchlist documents on file for a company. Users can also produce the actual documents.

### Access to Punchlist

#### Module Menu with Reports Group

DM | Reports | Punchlist

#### Module Menu with Reports List

DM | Punchlist

### Standard Menu

Reports | Document Manager | Punchlist

### Report Types

#### Summary

The Summary Report Type displays punchlist number, job, description, vendor Id, vendor name, from Id, and name.

#### Detail

The Detail Report Type also shows the To, Copies, Sent Via, and Items.

#### Form

The Form Type displays a preview of the actual punchlist.

#### Order By

- Number
- Job
- Vendor

#### Options

- Separator Line
- Show Notes
- Show Extended Description
- Show Report Criteria

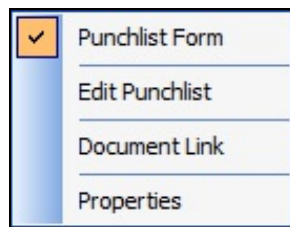
#### Fields

- Number
- Job
- Vendor
- Subject

### Drill-Down+® Destinations

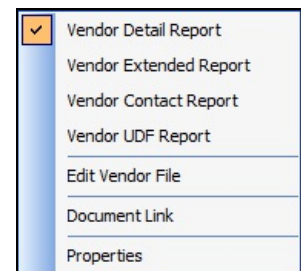
**Figure: DM-187**

Right-click a hyperlink to access reports and other features.



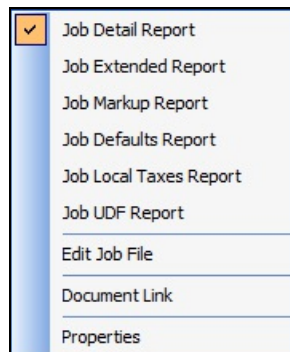
**Figure: DM-189**

Right-click a hyperlink to access reports and other features.



**Figure: DM-188**

Right-click a hyperlink to access reports and other features.



**Figure: DM-190**

Right-click a hyperlink to access reports and other features.



### Punchlist – Summary Report

Best Construction Company

**Punchlist**  
Summary Report Page 1

Punchlist#	Job	Description	Vendor	Name	From	Name
<a href="#">5451</a>	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0701</a>	A1 Insulation	<a href="#">E001</a>	Bill Johnson

**Notes**  
Final cleanup has been completed but the dumpster still needs to be removed from the site.  
.....

**Figure: DM-191** Document Manager – Punchlist – Summary Report.

Best Construction Company

**Punchlist**  
Detail Report Page 1

---

Punchlist#	Job	Description	Vendor	Name	From	Name
<a href="#">5451</a>	<a href="#">1000</a>	Pacific View Apartments	<a href="#">0701</a>	A1 Insulation	<a href="#">E001</a>	Bill Johnson

To \_\_\_\_\_ Sent Via  Fax  Email  
Copies \_\_\_\_\_  Mail  Other

Item	Opened	Closed	Amount	Description
1	03/20/xxxx	03/25/xxxx	50.00	Warranties and specifications
2	03/20/xxxx	03/25/xxxx	125.00	Master keys
3	03/20/xxxx	/ /	150.00	Final job site cleanup

**Notes**  
Final cleanup has been completed but the dumpster still needs to be removed from the site.

---

Figure: DM-192 Document Manager – Punchlist– Detail Report.

**Punchlist – Detail Report**

Punchlist – Standard Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**To:** Al Insulation  
 1825 Highland Way Suite 305  
 San Luis Obispo, CA 93401  
 Telephone 805-543-7000

**Job:** Job Number 1000  
 Pacific View Apartments

**Punchlist**

Number	<u>5451</u>
Date	03 / 25 / xxxx
From	Bill Johnson
Title	Owner
To	
Title	
Telephone	
Fax	
Printed	03 / 25 / xxxx

The following items have yet to be completed on this

Item	Opened	Closed	Amount	Description
1	03/20/xxxx	03/25/xxxx	50.00	Warranties and specifications
2	03/20/xxxx	03/25/xxxx	125.00	Master keys
3	03/20/xxxx		150.00	Final job site cleanup

**Notes:**


Final cleanup has been completed but the dumpster still needs to be removed from the site.

Signed: \_\_\_\_\_

Form MICS-Dm001 (c) 1995 - 2006 MICS Inc. All Rights Reserved

Figure: DM-193 Document Manager – Punchlist Standard form without company logo.

Punchlist – Standard Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Punchlist**

Number	<u>5451</u>
Date	03 / 25 / xxxx
From	Bill Johnson
Title	Owner
To	
Title	
Telephone	
Fax	
Printed	03 / 25 / xxxx

**To:** 
 AI Insulation  
 1825 Highland Way Suite 305  
 San Luis Obispo, CA 93401  
 Telephone 805-543-7000

**Job:** 
 Job Number 1000  
 Pacific View Apartments

The following items have yet to be completed on this

Item	Opened	Closed	Amount	Description
1	03/20/xxxx	03/25/xxxx	50.00	Warranties and specifications
2	03/20/xxxx	03/25/xxxx	125.00	Master keys
3	03/20/xxxx		150.00	Final job site cleanup

**Notes:**

Final cleanup has been completed but the dumpster still needs to be removed from the site.

Signed: \_\_\_\_\_

Form MICS-Dm001 (c) 1995 - 2006 MICS Inc. All Rights Reserved

**Figure: DM-194** Document Manager – Punchlist Standard form with company logo.

Punchlist – Alternate Document Form Without Logo

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**To:** A1 Insulation  
 1825 Highland Way Suite 305  
 San Luis Obispo, CA 93401  
 Telephone (805) 543-7000

**Job:** Job Number 1000  
 Pacific View Apartments

**Punchlist**

<b>Number</b>	5451
<b>Date</b>	03 / 25 / xxxx
<b>From</b>	Bill Johnson
<b>Title</b>	Owner
<b>To</b>	
<b>Title</b>	
<b>Telephone</b>	
<b>Fax</b>	
<b>Printed</b>	03 / 25 / xxxx

The following items have yet to be completed on this

Item	Opened	Closed	Amount	Description
1.00	03/20/xxxx	03/25/xxxx	50.00	Warranties and specifications
2.00	03/20/xxxx	03/25/xxxx	125.00	Master keys
3.00	03/20/xxxx		150.00	Final job site cleanup

**Notes:**


Final cleanup has been completed but the dumpster still needs to be removed from the site.

Signed: \_\_\_\_\_

Form MICS-Dm014 (c) 1995-2007 MICS Inc. All Rights Reserved

Figure: DM-195 Document Manager – Punchlist Alternate form without company logo.

Punchlist – Alternate Document Form With Logo



**BUILDER  
INFORMATION  
SYSTEM**

**Best Construction Company**  
 1200 Main Street  
 Unit 100  
 Arroyo Grande, CA 93420  
 Telephone: (805)543-7000  
 Fax: (805)534-1595

**Punchlist**

<b>Number</b>	5451
<b>Date</b>	03 / 25 / xxxx
<b>From</b>	Bill Johnson
<b>Title</b>	Owner
<b>To</b>	
<b>Title</b>	
<b>Telephone</b>	
<b>Fax</b>	
<b>Printed</b>	03 / 25 / xxxx

**To:** A1 Insulation  
1825 Highland Way Suite 305  
San Luis Obispo, CA 93401  
Telephone (805) 543-7000

**Job:** Job Number 1000  
Pacific View Apartments

The following items have yet to be completed on this

Item	Opened	Closed	Amount	Description
1.00	03/20/xxxx	03/25/xxxx	50.00	Warranties and specifications
2.00	03/20/xxxx	03/25/xxxx	125.00	Master keys
3.00	03/20/xxxx		150.00	Final job site cleanup

**Notes:**

Final cleanup has been completed but the dumpster still needs to be removed from the site.

Signed: \_\_\_\_\_

Form MICS-Dm014 (c) 1995-2007 MICS Inc. All Rights Reserved

**Figure: DM-196** Document Manager – Punchlist Alternate form with company logo.

## Companies

The Companies report lists the other companies (not vendors or customers) on file for a user's company.

### Access to Companies

#### Module Menu with Reports Group

DM | Reports | Miscellaneous | Companies

#### Module Menu with Reports List

DM | Miscellaneous | Companies

### Standard Menu

Reports | Document Manager | Miscellaneous | Companies

### Report Types

#### Summary

The Summary Report Type displays code, company name, telephone, and fax.

#### Detail

The Detail Report Type also includes email, address, city, state and zip code.

#### Order By

- Company Code
- Company Name

#### Options

- Show Report Criteria
- Show Notes
- Case Sensitive

#### Fields

- Company Code
- Company Name

### Drill-Down+® Destinations

#### Figure: DM-197

Right-click a hyperlink to access Miscellaneous Companies and other features.





Companies – Summary Report

Best Construction Company			
<b>Companies</b>			
Summary Report <span style="float: right;">Page 1</span>			
Code	Company Name	Telephone	Fax
<a href="#">1000</a>	C&S Consulting	(805) 543-7000	(805) 534-1595
<a href="#">1001</a>	SLO Printing	(805) 543-7000	(805) 534-1595
<a href="#">ARCH</a>	Miller & Associates Architects		
<a href="#">PCC</a>	Pacific Coast Construction		

Figure: DM-198 Document Manager – Miscellaneous Companies – Summary Report.

Companies – Detail Report

Best Construction Company			
<b>Companies</b>			
Detail Report <span style="float: right;">Page 1</span>			
Code	Company Name Address City	State	Telephone Email Zip Code
<a href="#">1000</a>	C&S Consulting 9875 Marsh Street		(805) 543-7000 (805) 534-1595 <a href="mailto:mark@csconsulting.com">mark@csconsulting.com</a>
	San Luis Obispo	CA	93401
<a href="#">1001</a>	SLO Printing 1608 Forest Street		(805) 543-7000 (805) 534-1595
	San Luis Obispo	CA	93401
<a href="#">ARCH</a>	Miller & Associates Architects		
<a href="#">PCC</a>	Pacific Coast Construction		

Figure: DM-199 Document Manager – Miscellaneous Companies – Detail Report.

Figure: DM-188 Document Manager – Miscellaneous Companies – Summary Report.

### Contacts

The Contacts report lists the other contacts (not vendors’ or customers’ contacts) on file for a user’s company.

### Access to Contacts

#### Module Menu with Reports Group

DM | Reports | Miscellaneous | Contacts

#### Module Menu with Reports List

DM | Miscellaneous | Contacts

### Standard Menu

Reports | Document Manager | Miscellaneous | Contacts

### Report Types

#### Summary

The Summary Report Type displays code, contact name, telephone, and fax.

#### Detail

The Detail Report Type also includes title, and company name.

#### Order By

- Code
- Name

#### Options

- Show Report Criteria
- Show Notes
- Case Sensitive

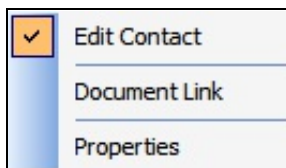
#### Fields

- Code
- Name

### Drill-Down+® Destinations

#### Figure: DM-200

Right-click a hyperlink to access Miscellaneous Contacts and other features.



### Contacts – Summary Report

Best Construction Company			
Contacts			Page 1
Summary Report			
Code	Contact Name	Telephone	Fax
<a href="#">1000</a>	Carl Goodman	(805) 543-7000	(805) 534-1595
<a href="#">1001</a>	Kristy Komi	(805) 543-7000	(805) 534-1595
<a href="#">JSMITH</a>	Jim Smith		

Figure: DM-201 Document Manager – Miscellaneous Contacts – Summary Report.

Contacts – Detail Report

Best Construction Company					
<b>Contacts</b>					
Detail Report					
Page 1					
Code	Contact Name	Title	Company	Telephone	Fax
<a href="#">1000</a>	Carl Goodman	Inspector	San Luis Obispo County	(805) 543-7000	(805) 534-1595
<a href="#">1001</a>	Kristy Komi	Architect	Central Coast Designs	(805) 543-7000	(805) 534-1595
<a href="#">JSMITH</a>	Jim Smith	Supervisor	ABC Co.		

Figure: DM-202 Document Manager – Miscellaneous Contacts – Detail Report.

## Subjects

The Subjects report lists the subjects on file for a user’s company.

### Access to Subjects

#### Module Menu with Reports Group

DM | Reports | Miscellaneous | Subjects

#### Module Menu with Reports List

DM | Miscellaneous | Subjects

### Standard Menu

Reports | Document Manager | Miscellaneous | Subjects

### Report Types

#### Summary

The Summary Report Type displays code and description.

#### Detail

The Detail Report Type also includes document type and document number.

#### Order By

- Subject Code
- Description

#### Options

- Show Report Criteria
- Show Notes
- Case Sensitive

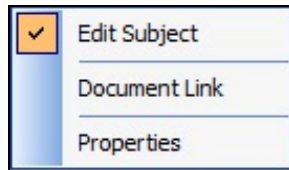
#### Fields

- Subject Code
- Description

### Drill-Down+® Destinations

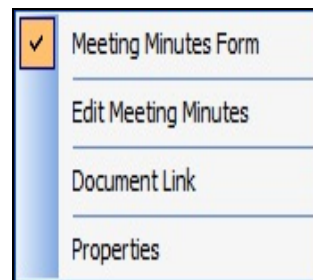
**Figure: DM-203**

Right-click a hyperlink to access reports and other features.



**Figure: DM-204**

Right-click a hyperlink to access reports and other features.



**Subjects – Summary Report**

Best Construction Company	
<b>Subjects</b>	
Summary Report	Page 1
<b>Code</b>	<b>Description</b>
<a href="#">INSPECTION</a>	On-site walk-through
<b>Notes</b>	Walk-through may include owner, business partners, architect, and others.
<a href="#">KEYS</a>	Master keys
<b>Notes</b>	All copies made from the masters must have "Do Not Duplicate" stamped in.

**Figure: DM-205** Document Manager – Miscellaneous Subjects – Summary Report.

**Subjects – Detail Report**

Best Construction Company			
<b>Subjects</b>			
Detail Report	Page 1		
<b>Code</b>	<b>Description</b>	<b>Document #</b>	<b>Description</b>
	<b>Document Type</b>		
<a href="#">INSPECTION</a>	On-site walk-through		
	Meeting Minutes	<a href="#">WEEKLY-21</a>	On-site walk-through
<b>Notes</b>	Walk-through may include owner, business partners, architect, and others.		
<a href="#">KEYS</a>	Master keys		
	Meeting Minutes	<a href="#">WEEKLY-21</a>	Master keys
<b>Notes</b>	All copies made from the masters must have "Do Not Duplicate" stamped in.		

**Figure: DM-206** Document Manager – Miscellaneous Subjects – Detail Report.

## Appendix

### BIS® Document Editor

BIS® Document Editor offers all the formatting control over character and paragraph presentation and that users would expect from a fully fledged word processing package.

Documents created with BIS® Document Editor provide rich character formatting options, including font size, font family, character style, foreground and background colors etc.

All formatting options can be combined with one another, making the possible formatting options almost infinite.

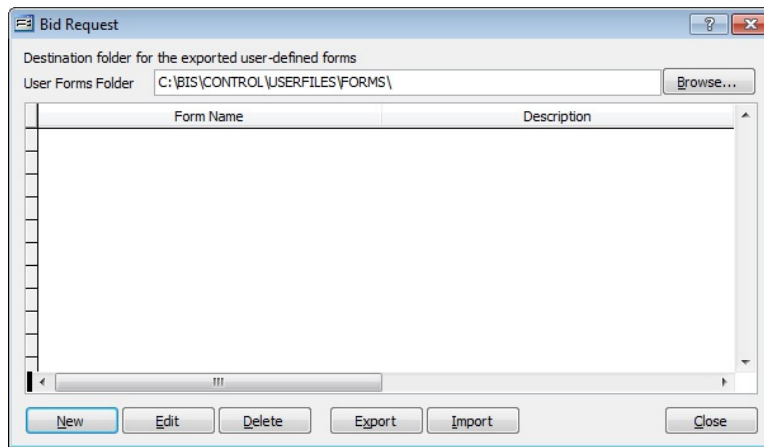
Flexible paragraph formatting such as indentation, many types of tabs, variable line and paragraph spacing, and paragraph frames offer a variety of formatting opportunities.

### Menu Access

Administrator | System Wide Parameters | Forms & Printers | DM Tab | Ellipsis Button

Initial access to the BIS® Document Editor from the User Defined Form button opens the Form definition screen. This form is used to enter the User Forms Folder, as well as to import, modify, delete, export, or import a document form.

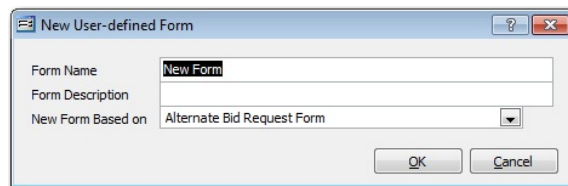
**Figure: DM-207**  
Document Manager – User Defined Form master record screen form.



### New Record

Access to creating a new document form is from the New button.

**Figure: DM-208**  
Document Manager – New User Defined Form master record screen form.



### Form Name

The form name will be the new name applied to the newly created document form of up to 50 alpha-numeric characters.

### Form Description

The form description enables the user to apply a description of up to 50 alpha-numeric characters.

### New Form Based on

Any new form may be based on the BIS® Alternate form from that category. However, if other modified forms already exist, one of those alternate forms may be selected as the basis.

### Modifying an Existing Document Form

An existing document form may be modified by highlighting the document of interest and clicking on the Modify button. Details about using the BIS® Document Designer program may be found in its manual.

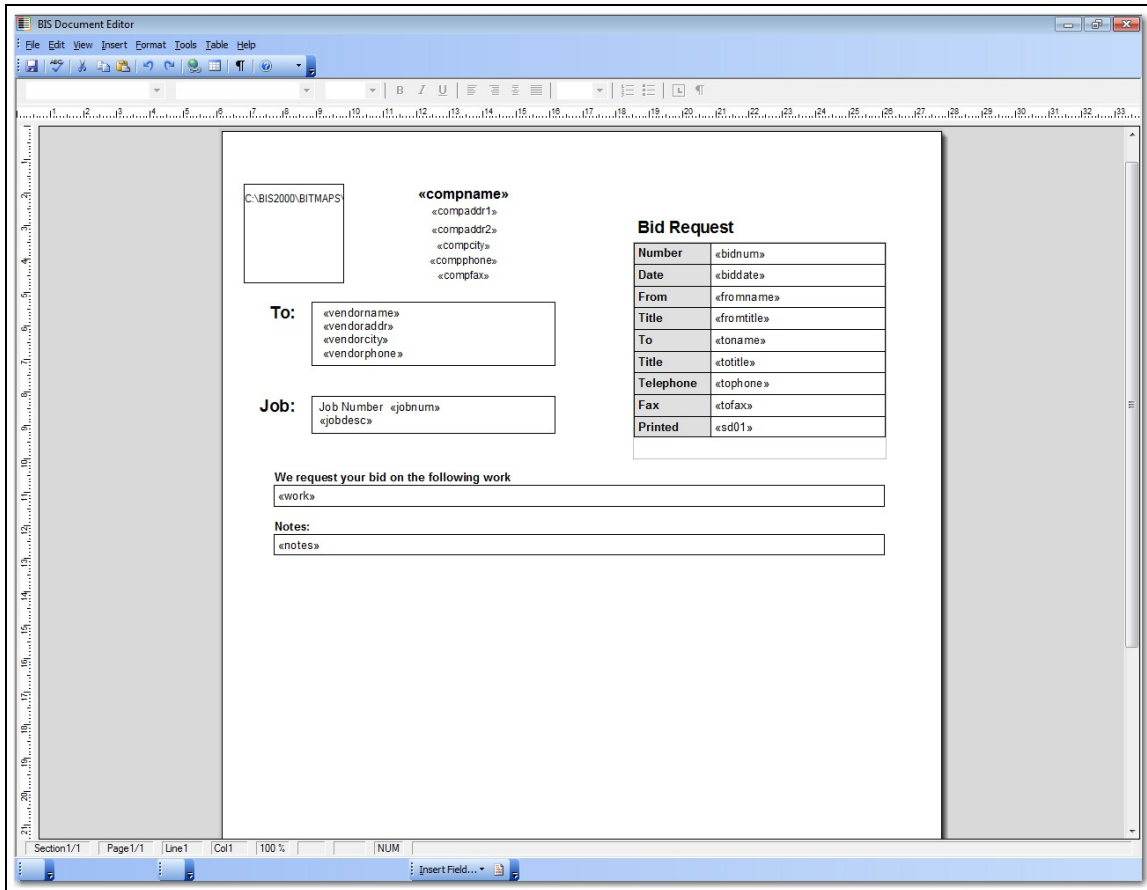


Figure: DM-209 BIS® Document Designer.

### Deleting an Existing Document Form

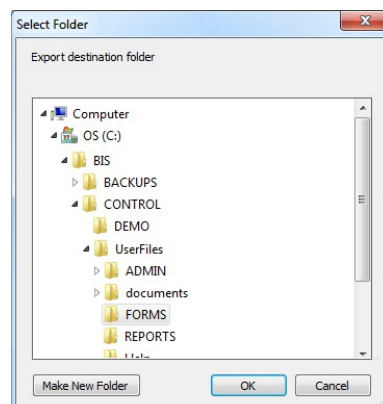
Existing document forms may be deleted by selecting the form name to be deleted and clicking on the Delete button.

### Exporting an Existing Document Form

Existing document forms may be exported by selecting the form name and clicking on the Export button.

#### Figure: DM-210

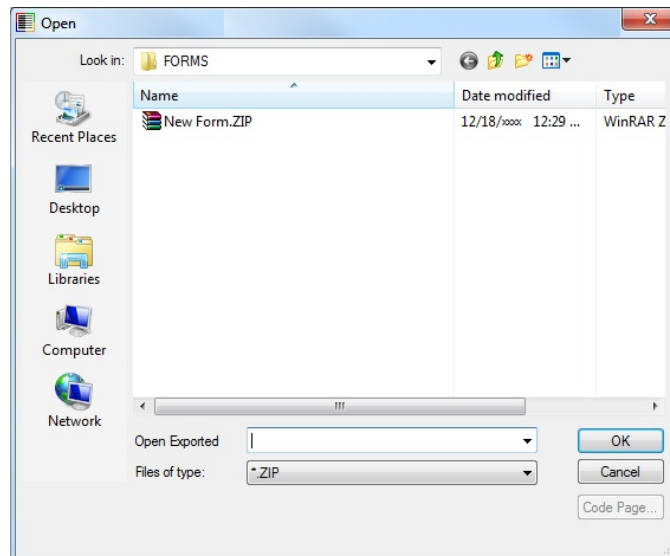
Windows® Explorer® applet to select the location of the exported Document Manager – User Defined Form.



### Importing an Existing Document Form

Externally developed document forms may be imported by clicking on the Import button. A Windows® applet opens allowing the user to select the location of the external zip file to be imported.

**Figure: DM-211**  
Windows® Explorer® applet to select the location of the externally created Document Manager – User Defined Form to be imported.



BIS® will request confirmation to import the new document. After clicking on the Yes button, an “End-User Agreement and License For BIS® Custom Reports, Documents, and/or Forms” will appear. The user should read the agreement, and if accepted, click on the “I agree” button. If the agreement is not acceptable, click on the “I do not agree” button, and the process will be terminated.

An information screen will show that the import process for the form has been completed, and requires the user to click on the OK button to close that window. The new document form will appear in the list for that document type.

### Close

Once the changes are complete, click on the Close button to close the form button.





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