

(CIP Mesa) Electronic Submittal Process – 08/09/18

Follow the Screen Shots in this order/sequence. Best practice is look ahead at the next screen to view anticipated result / outcome.

First InitialLast Name
JDoe
JSmith
RJones

'Initial' Password is provided by your City of Mesa Eng'g representative. Users shall change 'Initial' password to 'Unique' password - immediately

User Login

User Name

Password

Remember me [Forgot your password?](#)

Login

CIPMesa

Workspace
Implementation
Financials
Documents
Reports
Users

My Dashboard

Home
Reports and Links
Workflow Tasks
Email - Notification
Home(1)

Implementation Projects
0 record(s)

| Project ID | Project Name |
|-------------------|--------------|
| No records found. | |

Contracts
1 record(s)

| Contract No. | Contract Name | Contract Status | Project Name | NTP Date Construction/Sign Date Design |
|----------------------|---|-----------------|--------------|--|
| ct-f165-908490389402 | C9988CAP AND C1245CAP University and Val Vista... | Approved | | 6/27/2016 |

Construction Daily Reports
7 record(s)

| Report Number | Contract | Project | Date Covered by This Report | Report Status |
|---------------|---|--|-----------------------------|---------------|
| 008791 | ct-f165-908490389402 - C9988CAP AND C1245CAP Uni... | C9988CAP - City Well 14 Equipping - PRE to PROD CIP... | 12/11/2017 | Draft |
| 008685 | ct-f165-908490389402 - C9988CAP AND C1245CAP Uni... | C9988CAP - City Well 14 Equipping - PRE to PROD CIP... | 11/27/2017 | Draft |
| 008342 | ct-f165-908490389402 - C9988CAP AND C1245CAP Uni... | C9988CAP - City Well 14 Equipping - PRE to PROD CIP... | 10/16/2017 | Rejected |
| 006369 | ct-f165-908490389402 - C9988CAP AND C1245CAP Uni... | C1245CAP - Ray Road Mill and Overlay | 4/13/2017 | Approved |
| 003588 | ct-f165-908490389402 - C9988CAP AND C1245CAP Uni... | C1245CAP - Ray Road Mill and Overlay | 8/11/2016 | Approved |
| 002765 | ct-f165-908490389402 - C9988CAP AND C1245CAP Uni... | C1245CAP - Ray Road Mill and Overlay | 6/8/2016 | Approved |
| 002672 | ct-f165-908490389402 - C9988CAP AND C1245CAP Uni... | C9988CAP - City Well 14 Equipping - PRE to PROD CIP... | 6/1/2016 | Approved |

Your "Dashboard" might be slightly different in appearance - look for your "Contract" - Click on the Yellow Section to access the Contract

This will be the next screen

Note the following:

Add Designer Submittal (Min include Matrix, Conflit Letrs,

Notice: The contract ct-f165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay is associated with the issue being added. You can view this information after the

Category: * Category: Designer Submittal

Issue Description: Contract: ct-f165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay

* Project: [Search Icon]

* ID: [Search Icon]

Mesa Submittal No: [Text Field]

* Status: 1. Submitted for Review

* Title: [Text Field]

* Type: [Type Dropdown]

* Priority: Routine [Priority Dropdown]

Review Start Date: [Text Field]

Engineering Department: [Text Field]

Deadline: [Text Field]

Create Date: [Text Field]

Description: [Text Field]

Resolution: [Text Field]

(1) - Click Drop Down - Change to CONSTRUCTION SUBMITTAL

(2) Click the SpyGlass - Select your Project

(3) Use A - Mesa Project No; followed by B - YOUR Company's Submittal Tracking #

(4) Fill these out. Row # 02 - "TYPE" = CONSTRUCTION

(5) Lastly - Click Save and Continue

Save & Continue Save & Add Cancel

Add Construction Submittal (Min include Matrix, Conflit Letrs, Potho

Notice: The contract ct-f165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay is associated with the issue being added. You can view this information after the

Category: * Category: Construction Submittal

Issue Description: Contract: ct-f165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay

* ID: C9988 Submittal No 001

* Mesa Submittal No: C9988 Submittal No 001 (Format: Submittal Num followed by Project No):

* Project: [Search Icon]

* Title: [Text Field]

* Type: [Type Dropdown]

* Priority: Routine [Priority Dropdown]

* Status: 1. Submitted for Review

Warranty Info in this submittal

Physical Sample

Workflow Submission Date: [Text Field]

Review Start Date: [Text Field]

Create Date: [Text Field]

Deadline: [Text Field]

(1)

(2)

(3) Click on the SpyGlass

als Documents Reports Users

Add Construction Submittal (Min include Matrix, Conflit Letrs, Potholes, AZ811)

C9988CAP AND C1245CAP University and

(3) - After clicking on the Spyglass - this pulled up 2 choices - in this case this Submittal is related to Project C9988 - Click Your Respective Project Number

tion Submittal

8490389402 - C9988CAP AND C1245CAP and Val Vista Traffic Signal and Ray Road Mill

Project ID: Project Name:
Program: ALL Subprogram: ALL
FIN Department: Project Type:
Implementation Status: Project Manager:

Search Reset

Records per page 10 << < Current Page 1 / 1 > >> Record 1 - 2 of 2

| Project ID | Project Name | Project Delivery Method | FIN Department |
|--------------------------------|---|-------------------------------------|-----------------------------------|
| <input type="radio"/> C1245CAP | Ray Road Mill and Overlay | | F920 - Project Management Program |
| <input type="radio"/> C9988CAP | City Well 14 Equipping - PRE to PROD CIPMesa Validation Project | Construction Manager at Risk (CMAR) | F920 - Project Management Program |

Records per page 10 << < Current Page 1 / 1 > >> Record 1 - 2 of 2

OK Cancel

Save & Continue Save & Add Cancel

Add Construction Submittal (Min include Matrix, Conflit Letrs, Potholes, AZ811)

Traffic Signal and Ray Road Mill and Overlay is associated with the issue being added. You can view this information after the issue is saved successfully.

Search

Project ID: Project Name:
Program: ALL Subprogram: ALL
FIN Department: Project Type:
Implementation Status: Project Manager:

Search Reset

Records per page 10 << < Current Page 1 / 1 > >> Record 1 - 2 of 2

| Project ID | Project Name | Project Delivery Method | FIN Department |
|---|---|-------------------------------------|-----------------------------------|
| <input type="radio"/> C1245CAP | Ray Road Mill and Overlay | | F920 - Project Management Program |
| <input checked="" type="radio"/> C9988CAP | City Well 14 Equipping - PRE to PROD CIPMesa Validation Project | Construction Manager at Risk (CMAR) | F920 - Project Management Program |

Records per page 10 << < Current Page 1 / 1 > >> Record 1 - 2 of 2

OK Cancel

Add Construction Submittal (Min include Matrix, Confl Letrs, PotHoles, AZ811)

Traffic Signal and Ray Road Mill and Overlay is associated with the issue being added. You can view this information after the issue is saved successfully.

Search

Project ID: Project Name:
Program: ALL Subprogram: ALL
FIN Department: Project Type:
Implementation Status: Project Manager:

Records per page 10 << < Current Page 1 / 1 > >> Record 1 - 2 of 2

| Project ID | Project Name | Project Delivery Method | FIN Department |
|---|---|-------------------------------------|-----------------------------------|
| <input type="radio"/> C1245CAP | Ray Road Mill and Overlay | | F920 - Project Management Program |
| <input checked="" type="radio"/> C9988CAP | City Well 14 Equipping - PRE to PROD CIPMesa Validation Project | Construction Manager at Risk (CMAR) | F920 - Project Management Program |

Then Click - OK

Records per page 10 << < Current Page 1 / 1 > >> Record 1 - 2 of 2

CIPMesa

Implementation Financials Documents Reports Users

Add Construction Submittal (Min include Matrix, Confl Letrs,

ct-f165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay is associated with the issue being added. You can view this information a

* Category: Construction Submittal

Contract: ct-f165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay

* Project: PRE to PROD CIPMesa Validation Project

* Title:

* Type:

* Priority: Routine

Warranty Info in this submittal
 Physical Sample

Deadline:

Assignment Date:

Start Date:

Create Date:

Description:

Resolution:

(3) Project is now Populated. Complete the TITLE Complete the TYPE = CONSTRUCTION Complete the ROUTINE Complete the PRIORITY Infill any remaining information needed

Last Step - Click the SAVE and CONTINUE Button

Add Construction Submittal (Min include Matrix, Conflit Letrs,

165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay is associated with the issue being added. You can view this information at

Category: **Construction Submittal**

Contract: ct-f165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay

* ID: **C9988 Submittal No 001**
(Format: Submittal Num followed by Project No):

* Project: **ing - PRE to PROD CIPMesa Validation Project**

* Title: **Example: Piping Submittal 36" CIPP piping, 2" Wall - 20 ft Section - AMFab Material Product**

* Type: **Construction**

* Priority: **Routine**

* Status: 1. Submitted for Review
 Warranty Info in this submittal
 Physical Sample

Deadline:

Description:

Returned:

Resolution:

All the Yellow is Filled in - then Click SAVE and CONTINUE

Save & Continue **Save & Add** **Cancel**

Add Construction Submittal (Min include Matrix, Conflit Letrs, Potholes, A

a Traffic S **You have successfully set up the Submittal Cover Page.** after the issue is s

You are NOT done - Still need to Attach Documents

You are NOT done - Still need to Start Workflow

* ID:

* Mesa Submittal No: **C9988 Submittal No 001**
(Format: Submittal Num followed by Project No):


0 ft Section - AMFab Material Pro

* Status: 1. S

Deadline:

Click - OK to return to Submittal Cover Page

Alert

 **Submittal has been saved successfully.**

OK

You have created the Submittal Cover Page

You still need to Attach the Documents

You still need to Start Workflow to commence with these steps - scroll down to mid-page

Submittal: 003582 - Example: Piping Submittal 36" CIPP piping, 2" Wall

Contract: ct-f165-9084908940z - C9988CAP AND C1245CAP * ID: 003582
University and Val Vista Traffic Signal and Ray Road Mill and Overlay * Mesa Submittal No C9988 Submittal No 001
(Format: Submittal Num followed by Project No):

* Project: C9988CAP - City Well 14 Equipping - PRE to F
* Title: Example: Piping Submittal 36" CIPP piping, 2" Wall - 20 ft Section - AMFab Material Product
* Type: Construction
* Priority: Routine
* Status: 1. Submitted for Review
 Warranty Info in this submittal
 Physical Sample

Submission Date:
Start Date:
Create Date: 4/25/2018
Deadline:
Description:
Resolution:

Date: To Commented By:

(Look for the Double Down Arrows on the Left and the word DOCUMENTS next to them)

Records per page 10 Current Page 0/0 Record 0 - 0 of 0

| Document Name | Commented By | Comment | Page Number |
|---------------|--------------|---------|-------------|
|---------------|--------------|---------|-------------|

Select all found records
 Include Document Comments

Records per page 10 Current Page 0/0 Record 0 -

Click on the Double Down Arrows

Workflow Log

* Select a workflow: Construction Submittal processing

Note: The selected workflow process is to review the current object only.

Modify participants

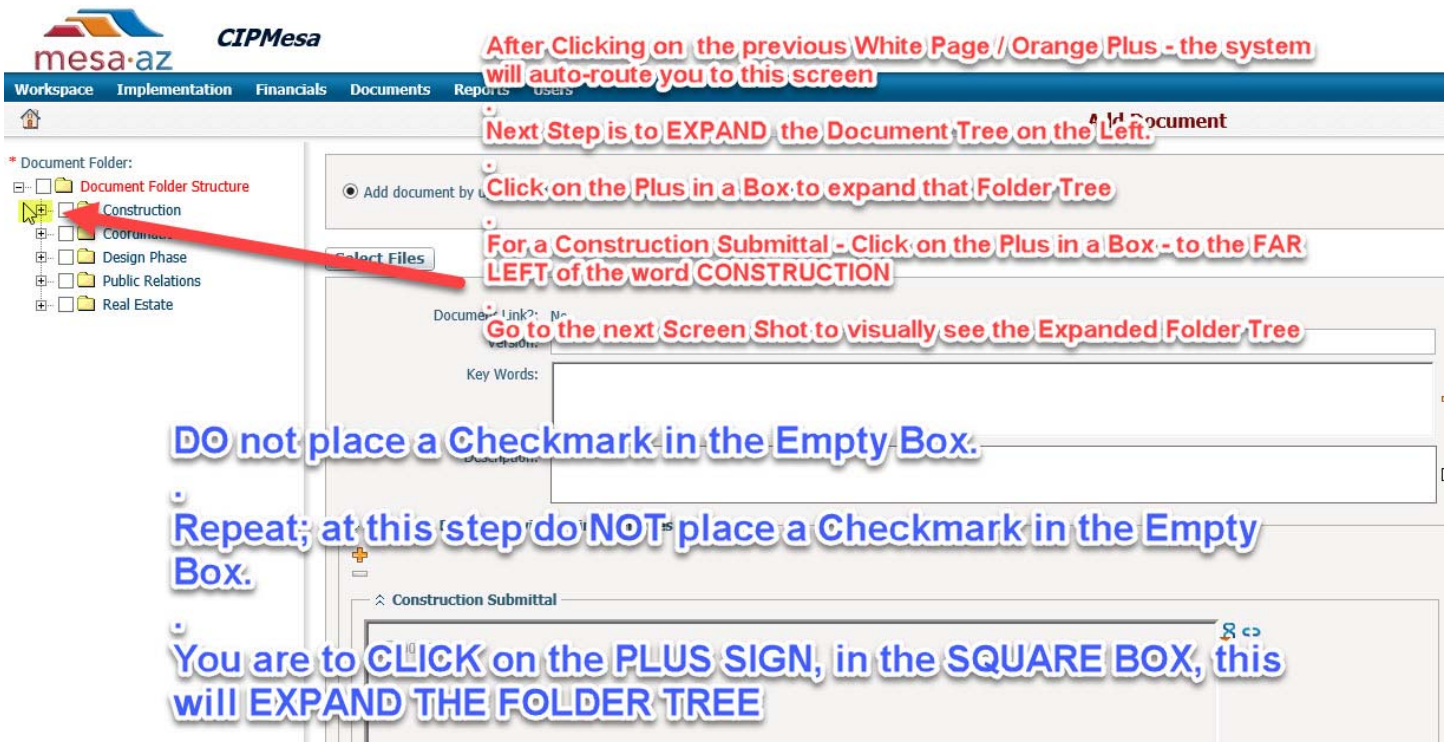
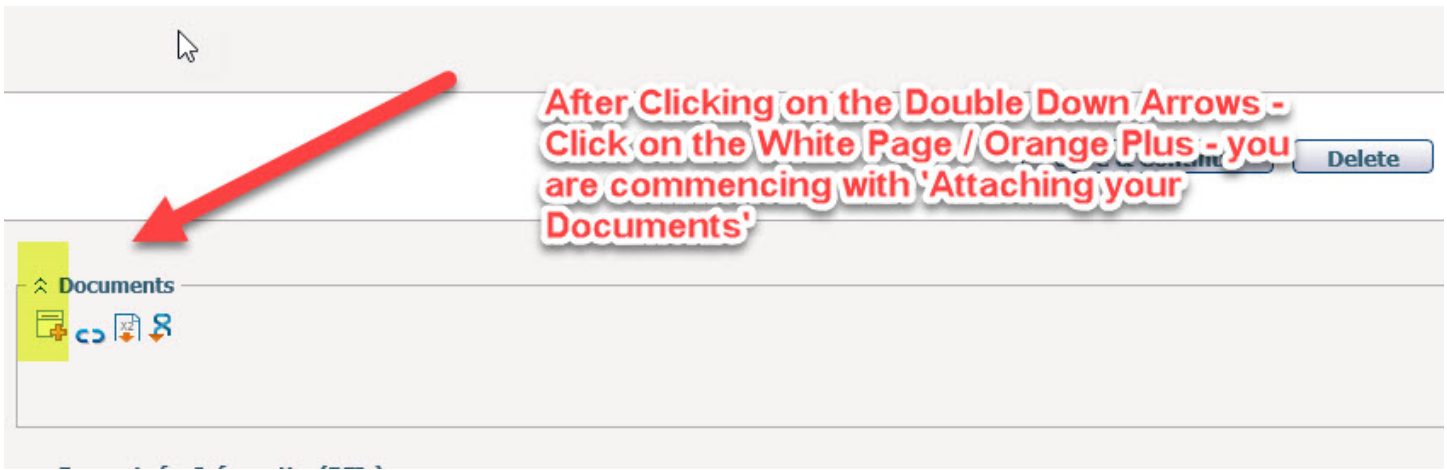
Start W

Save & Continue Delete Cancel

Documents

Requests for Information(RFIs)

Owner Supplementary Instructions(OSIs)



Go to the next screen shot to view the expanded folder tree

* Document Folder:

- Document Folder Structure
 - Construction
 - Bidding
 - Budget
 - Change Order Requests
 - Construction Daily Reports D
 - Contract Documents
 - Final Construction Document
 - Grant Compliance
 - Inspections and Testing
 - Meeting Agendas/Minutes
 - Photos
 - Progress Payments
 - Punch list
 - RFI's/OSI's
 - Schedule
 - Submittals
 - Warranty
 - Coordination
 - Design Phase
 - Public Relations
 - Real Estate

(1) To the left is what the Expanded Folder Tree should look like.

Add document by uploading file Add document by copying existing document

Select Files **(2) Click on the Button "Select Files"**

Document Link?: No

Version:

Key Words:

Description:

Associate Document with Business Entities

Construction Submittal

003582

Open

This PC > Documents

Search Documents

2017 Fire Dept Projects, Add-in Express, Autodesk, CIP Mesa Matters, CIP Planner Amendments, CIPM Compass Reports, CIPMesa Compass 102617 Issues, Custom Office Templates, My Received Files, NAU Masters, New folder, New folder (2), OneNote Notebooks, p26589503_17000_0_Generic

File name:

Open Cancel

Home - CIP Mesa My Dashboard Contract

Document

Associate Document with Business Entities

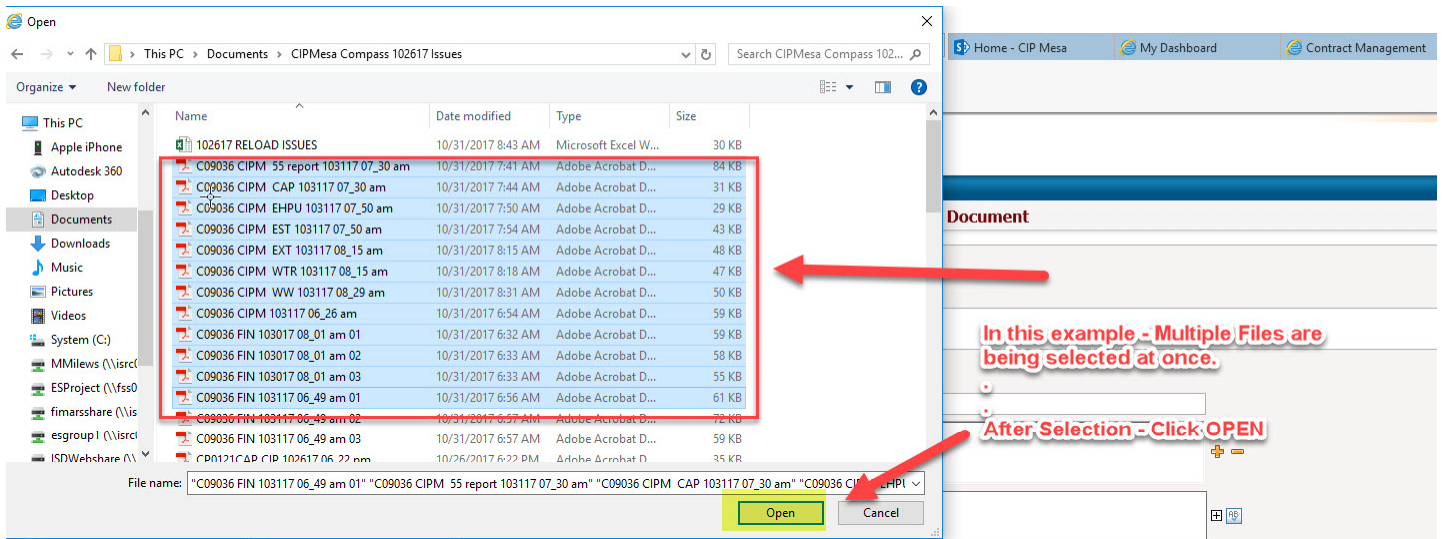
Construction Submittal

003582

After Clicking the Button "Select Files" - your computer should opt into reflecting your local file structures. Select the File or File(s) to attach to this specific Submittal

Implementation Project

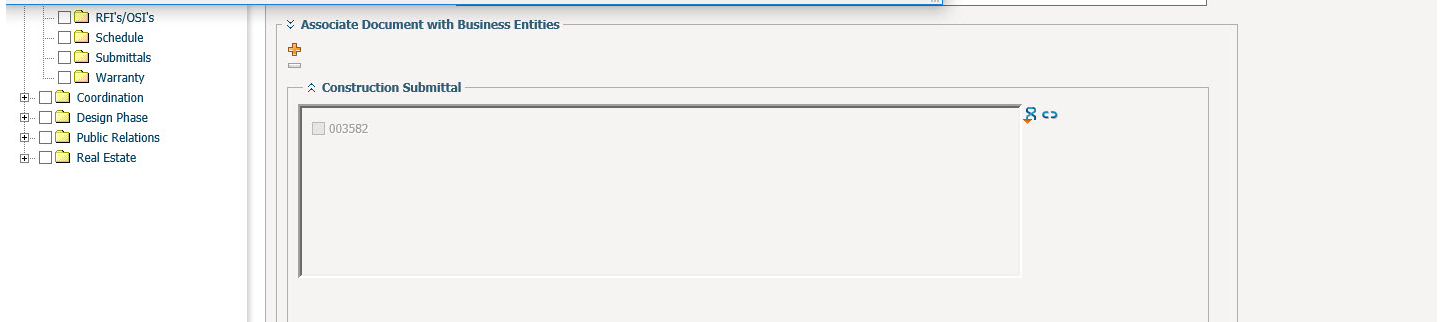
C9988CAP - Ctv Well 14 Eauinoia - PRE to PROD CIPMesa Validation



Document

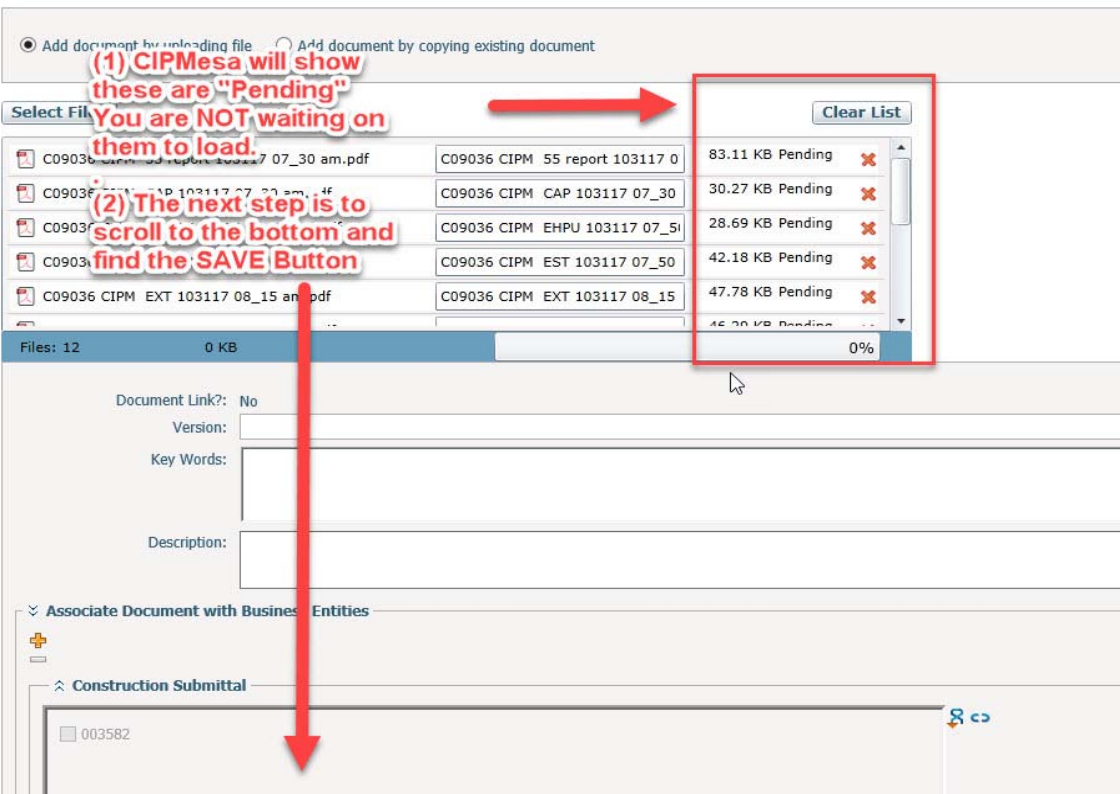
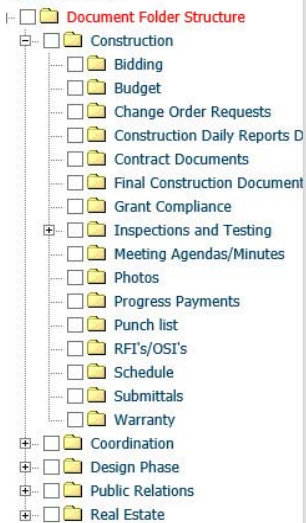
In this example - Multiple Files are being selected at once.

After Selection - Click OPEN



Add Document

Document Folder:



(1) CIPMesa will show these are "Pending" You are NOT waiting on them to load.

(2) The next step is to scroll to the bottom and find the SAVE Button

- Document Folder:
- [-] Document Folder Structure
 - [-] Construction
 - Bidding
 - Budget
 - Change Order Requests
 - Construction Daily Reports D
 - Contract Documents
 - Final Construction Document
 - Grant Compliance
 - [-] Inspections and Testing
 - Meeting Agendas/Minutes
 - Photos
 - Progress Payments
 - Punch list
 - RFI's/OSI's
 - Schedule
 - Submittals
 - Warranty
 - [-] Coordination
 - [-] Design Phase
 - [-] Public Relations
 - [-] Real Estate

Implementation Project

- C9988CAP - City Well 14 Equipping - PRE to PROD CIPMesa Validation Project
- C1245CAP - Ray Road Mill and Overlay

Contract

- ct-f165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay

Buttons: Save, Save and Add Another Document

(1) If you attached Multiple Files - hit SAVE

(2) (OR) If you attached ONE File and need to attach more - Hit SAVE and Add Document

Note: After hitting SAVE, the system will stop you as you need to "Select" the Correct Folder to save these document(s) in. These documents will be saved in CONSTRUCTION > Submittals

Click ok and reference the next screenshot


Implementation Project

- C9988CAP - City Well 14 Equipping - PRE to PROD CIPMesa Validation Project
- C1245CAP - Ray Road Mill and Overlay

Contract

- ct-f165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay

Alert



Please select the correct folder in the document folder structure per the published help document. Select the C icon on the top right to get to the help menu.

OK

* Document Folder:

- Document Folder Structure
 - Construction
 - Bidding
 - Budget
 - Change Order Requests
 - Construction Daily Reports D
 - Contract Documents
 - Final Construction Document
 - Grant Compliance
 - Inspections and Testing
 - Meeting Agendas/Minutes
 - Photos
 - Progress Payments
 - Punch list
 - RFI's/OSI's
 - Schedule
 - Submittals**
 - Warranty
 - Coordination
 - Design Phase
 - Public Relations
 - Real Estate

Click the Checkbox for CONSTRUCTION > Submittals

Implementation Project

- C9988CAP - City Well 14 Equipping - PRE to PROD CIPMesa Validation Project
- C1245CAP - Ray Road Mill and Overlay

Contract

* Document Folder:

- Document Folder Structure
 - Construction
 - Bidding
 - Budget
 - Change Order Requests
 - Construction Daily Reports D
 - Contract Documents
 - Final Construction Document
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 - Progress Payments
 - Punch list
 - RFI's/OSI's
 - Schedule
 - Submittals
 - Warranty
 - Coordination
 - Design Phase
 - Public Relations
 - Real Estate

(1) Box is checked (You have now told the system where to save the attached documents)

(2) Now Scroll to the bottom and Click SAVE

Implementation Project

- C9988CAP - City Well 14 Equipping - PRE to PROD CIPMesa Validation Project
- C1245CAP - Ray Road Mill and Overlay

Contract

- ct-f165-908490389402 - C9988CAP AND C1245CAP University and Val Vista Traffic Signal and Ray Road Mill and Overlay

Save

Save and Add Another Document

Confirmation Screen - indicates that Documents were SAVED

Click the OK button to progress back to the same screen/page.



CIPMesa

Workspace Implementation Financials Documents Reports Users

Edit Construction Submittal

The system will auto-route you back to the Edit Submittal Page. Piping Submittal 36" CIPP piping, 2" Wall

You are still not done yet.

Next - Verify that the documents were actually attached, scroll down the page and locate the Document "Viewbox"

Issue Description

Contract: C9988CAP AND C1245CAP *IP: 002582
Submittal No: C9988 Submittal No 001
(Format: Submittal Num followed by Project No):

* Project: C9988CAP - City Well 14 Equipping - PRE to F
* Title: Example: Piping Submittal 36" CIPP piping, 2" Wall - 20 ft Section - AMFab Material Product
* Type: Construction
* Status: 1. Submitted for Review
* Priority: Routine
 Warranty Info in this submittal
 Physical Sample

Workflow Submission Date:
Review Start Date:
Create Date: 4/25/2018
Deadline:
Description:

Resolution

Date Returned:
Resolution:

Comments

Last Update: To: Commented By:

Search Reset

(1) You should see your multiple attachments listed here

(2) You will see the Folder, location where you saved them listed on the right hand side

(3) After verifying that the documents are there, scroll back UP the page, slightly - find the "Viewbox" and buttons titled WORKFLOW

See next Screenshot for illustration

| Document ID | Document Name | Created On | Is Checked Out | Folder Location |
|-------------|---------------------------------|------------------------|----------------|--------------------------|
| 32,690 | | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,691 | C09036 CIPM CAP 103117 07 30 am | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,692 | C09036 CIPM CAP 103117 07 30 am | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,693 | C09036 CIPM EST 103117 07 50 am | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,694 | C09036 CIPM EXT 103117 08 15 am | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,695 | C09036 CIPM WTR 103117 08 15 am | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,696 | C09036 CIPM WW 103117 08 29 am | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,697 | C09036 CIPM 103117 06 26 am | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,698 | C09036 FIN 103017 08 01 am 01 | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,699 | C09036 FIN 103017 08 01 am 02 | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,700 | C09036 FIN 103017 08 01 am 03 | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |
| 32,701 | C09036 FIN 103117 06 49 am 01 | 04/25/2018 01:09:08 PM | No | /Construction/Submittals |

These will be the last steps:

(1) Verify that the Workflow is CONSTRUCTION SUBMITTAL

(2) Click the START WORKFLOW Button

After Clicking the Start WF button, the system will auto-send an email to the CITY PROJECT MANAGER advising that the Submittal has been initiated.

Workflow Log

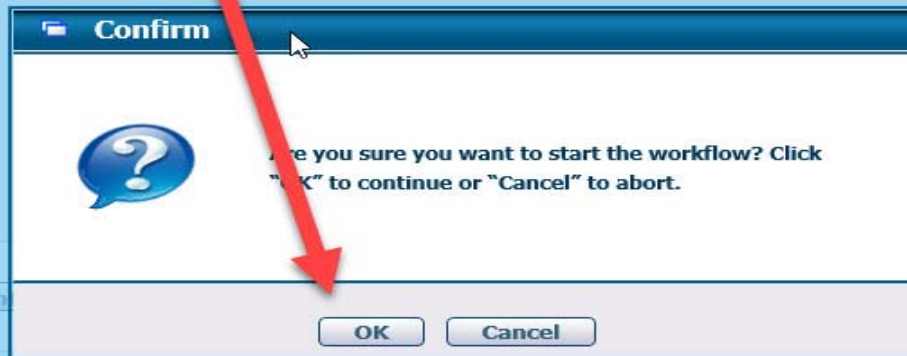
* Select a workflow: Construction Submittal processing 

Note: the selected workflow process is to review the current object only.

[Modify participants](#)



YES - YOU DO !



After clicking OK - Wait for the system to cycle through.

Watch the Spinning Wheels on your topmost menu bar.

CIPMesa is not always \"immediate\" - click and wait please

mesa-az CIPMesa

Workspace Implementation Financials Documents Reports Users

Edit Construction Submittal

Resolution:

Comments

Last Update: To Commented By:

After the Spinning Wheel stops, the system will return to the Submittal Cover Page.

You should be able to verify that the TASK STATUS reflects the Submittal is routed to your CITY PROJECT MANAGER Task List.

| Document Name | Commented By | Comment | Page Number | View |
|---------------|--------------|---------|-------------|------|
| - | | | | |

Select all found records Records per page 10 << < Current Page 0 / 0 > >> Record 0 - 0 of 0

Include Document Comments

.....You are DONE!

Workflow Log

Process Type: Construction Submittal processing

Work Item Name: PM Process Submittal

Task Status: New for MilewskiPM - Mike MilewskiPM, or RandolphPM - Cheryl RandolphPM

Importance: High

Latest Review Result:

Reassign Suspend Terminate

Save & Continue Cancel Notify View Aud

END OF NOTES