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| **QMP** | **5.4.1** |  | **Document control and communication requirements for Subs – Dropbox example** |
| 2019-08-01 Highlights 2022-02-24 |
| **Date:** | (See footer) | **Issued by:** |  | **Rev:** |  |

**Note to users: This QMP will need to be adjusted to the needs of your project.**

**[Objective:** The objective of this QMP is to provide a base level of subcontractor document control and communication requirements (procedure) that all subs are issued upon RFP (or RFQ) and signed contract. It should identify as a minimum, the requirements for communication between Developer (or Owner) and Contractor, or Contractor and Subcontractor. Every instance of procurement of contractor (or subcontractor) will benefit from clear instructions or requirements for communication including written correspondence and any other method(s) of correspondence considered available.]

**This document is to be used as an aid for subcontractors and suppliers when receiving and issuing CONTRACTOR correspondence, submittals, RFIs and all communications and correspondence to ensure standardization and common practice throughout the project.**

**Dropbox:** This version utilizes Dropbox as a software tool that can be utilized. If your organization does not utilize Dropbox, then correct the reference to indicate any software that may be utilized.

**Document Control** **Assistance:** Contact, Document Controller: The [position] of ORGANIZATION is responsible for document control as per this QMP.

 **Typical Subs Dropbox Usage:**

The main advantage of getting subs set up on Dropbox is to allow both the subs and ORGANIZATION to communicate effectively and have one source of files, (uploaded or downloaded by either party) files. Files would include drawings, specs, submittals, RFIs, etc. Shop drawings from subs Issued for Review must be labeled Rev A, B, C etc. and drawings Issued for Construction must be labeled Rev 0 1, 2, 3 etc. Subs must confirm with Organization’s document controller (PM) if the version of drawings or specifications are the most current before using.

 **Getting Started with Dropbox:**

Once the sub contractors and suppliers are settled, the PM will share the log in user name and password of the dropbox with the project related vendors (subs). Each project folder are secured by setting a password and only the project relevant parties can attain the password from Organization’s PM in order to access to the specific project information. Once you are in the Dropbox, you can view documents/files relative to the project, create Submittals and send RFIs to the relevant project resources.

**The “Documents” folder:**

This is the main folder for this project and lists all the files related to this project .

* **The “Drawing List”** is an important document, that tracks all drawings and is saved on Dropbox under Project Phase, Drawings, Drawing List. The Drawing List is to be used as a tool when viewing reference drawings related to the project, by checking this you can ensure that the drawings you are viewing are the most current. The drawing list is kept up to date by the Organization’s PM and matches exactly with drawing numbers and drawing revision numbers that are attached to “submittals”. All project relative subs must have a discussion with Organization’s PM about drawings naming and the entries into the drawing list.
* **The “Vendors”** folder is located within the documents folder and is an important folder listing all the suppliers/vendors and sub contractors that are associated with this project. These folders are to be used as a file sharing method, by allowing the relevant users to track the folders and receive email notifications of new updates when changes are made to that folder. **It is essential to track the vendor folder that has been set up for your company - this notifies you when new files have been uploaded to your folder.**
* **Notification**: Create automatic notification setting. Any updates made on each folders, the notification will automatically update to the project relevant parties.

**Drawing naming conventions for suppliers/subcontractors:**

To ensure stability of this project it is important to have a manageable and highly searchable filing format. ORGANIZATION has its own naming convention standard for drawings. If you are creating a shop drawing or review drawing, name it with your unique company project number (for this project).To ensure appropriate file naming the vendors must contact Document Controller (PM) to have their naming convention approved before submitting drawings via Dropbox.

**Submittals** are to be implemented (uploaded to Dropbox) for suppliers via the submittals folder on dropbox. Please ensure that PM and Email Archive are **all included** in this correspondence. Please ensure to attach an excel file containing a list of each drawing name and the current revision that you are submitting, so that it can be added to the log. The PM will then log the list of drawings submitted and send your submittal to the relevant parties/approvers. When a new submittal is created, the PM creates a submittal number, and the revision defaults to 0 for the first issue. Please note that when submittals are being issued for review that the revision must be alphabetical and when issued for construction that the revision must be numeric. This in turn allows a single submittal number to cover the life of a single set of drawings.

**Submittal file location, for ease of searching:**

A copy of the documents submitted will be filed as noted:

If the Drawings are Issued for Construction, the files will be placed in Project Phase, Drawings, Issued for Construction (IFC), Shop Drawings folder.

If the Drawings are Issued for Review, the files will be placed in Project Phase, Drawings, Project Drawings, Shop Drawings for Review.

Specifications can also be sent by email and upload to Project Phase, Specifications folder. These specifications should be named with your own company’s project number (for this project).

**RFIs** are to be implemented through emails and upload to the RFIs folder in the Dropbox.

**When to use RFIs:** The RFIs folder shall be utilized by subcontractors or suppliers for requesting information regarding design items from ORGANIZATION. Internal RFIs are discouraged (for this project). We prefer to utilize design review meetings to discuss concepts and minimize internal RFIs allowing a record to be kept on Dropbox, however exceptions can be made. Please ensure that RFIs are sent directly to document controller (PM) by email in this correspondence, the PM will distribute the RFI to the relevant parties as required.

**When creating an RFI please ensure to fill in the appropriate fields via emails**, including Subject, Assignee, Received from, Distribution (do no remove default distribution) & Due date. The default due date for RFIs is 7 days. This time period can be increased or decreased depending on urgency. See QMP 5.8 for RFI procedure and a RFI Form attached in QMP 5.8.1.

**Formal correspondence** (electronic letters – sometimes email format or email attachments) to or with Subs or Suppliers shall be formally issued, shall be titled to describe the major aspects of the item in question for future Organization’s PM is included in this correspondence.

**All are reminded to utilize the “comments” box when uploading a drawing or document to Dropbox. State briefly the nature of the revision.**

**Drawing numbers** are to follow the Organization’s drawing numbering convention. Drawing numbers are assigned or monitored through the Organization’s PM. Ensure new drawings are numbered at creation, with your own project number and appropriate correspondence number. Ensure revisions are up to date.