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| **QMP:** | **5.4.2**  | Description: | **Correspondence and communication requirements for Subcontractors – Procore Collaboration Software example - 2020-05-01, highlighted 2020-10-21** |
|  |
| **Date:** |  | **Issued by:** |  | **Rev:** | A |

**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 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 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 version includes collaboration software elements, but if your project doesn’t utilize collaboration software, then delete those items.]

**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.**

**Document Control** **Assistance:** Contact, Document Controller or \_\_\_\_:

 **[Typical Supplier Collaboration Software Usage:**

The main advantage of getting suppliers set up on Collaboration Software is to allow both the suppliers and CONTRACTOR to communicate effectively and have one source to upload files, download files and create RFIs.]

 **Getting Started with Collaboration Software:**

Once you have been set up on Collaboration Software, an invitation will be sent to your email account. Please follow the on screen instructions and create a password. Once logged in you will be presented with the home screen listing the current portfolios, please select the Project [name].

Once you are in the project you will notice the navigation bar (grey in color) on the top third of the screen. Here you can view documents/files relative to the project, create Submittals and send RFIs to the relevant project resources.



**Example Screen Shot**

**The “Documents” tab:**

This is the main tab for this project and lists all the

Figure 1

files related to this project (*see figure 1*).

* **The “Drawing List”** is an important document, that tracks all drawings and is saved on Collaboration Software 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 Project Engineer at CONTRACTOR and matches exactly with drawing numbers and drawing revision numbers that are attached to “submittals”. Suppliers must have a discussion with Document Controller about drawings naming and the entries into the drawing list.
* **The “Vendors”** folder is located within the documents tab and is an important folder listing all the suppliers/vendors 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 Settings** To track a file or **track a folder**, one simply highlights the file/folder that is required to be tracked, then by navigating to the top right corner of the middle window, one puts a check in the box marked “Track File” or “Track Folder”, now you are tracking your folder, to ensure that this is working please email Document Control and ask for a test file to be added to your folder, this will eliminate any confusion and instills confidence in the system.

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

Shop drawings from suppliers 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.

To ensure stability of this project it is important to have a manageable and highly searchable filing format. Owner’s Rep has a naming convention that is robust and detailed; please use this as a guide when naming a drawing and use the Owner asset numbering standard for your drawing and specification naming convention. If you are creating a shop drawing or review drawing, name it with your unique company project number (for this project) followed by the asset number that closest refers to the drawing see Owner’s Rep Drawing Key (*figure 2*) e.g. “12345-340-001\_RevA”, (12345 = supplier project number, 340 = waste-water , 001 = Series/Drawing number, Revision A drawing). To ensure appropriate file naming the vendors must contact Document Controller to have their naming convention approved before submitting drawings via Collaboration Software.

**Submittals** are to be implemented (uploaded to Collaboration Software) for suppliers via the submittals tab on Collaboration Software. Please ensure that Project Manager and Document Control 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. Document Controller will then log the list of drawings submitted and send your submittal to the relevant parties/approvers. When a new submittal is created, Collaboration Software automatically generates 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.

**Where the Submittal files will be copied to 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 and Erection Drawings folder.

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

Specifications can also be sent using the submittals tab. These specifications should be named with your own company’s project number (for this project) and must include an asset number that is a closest match to the information (See Figure 2). These should be accompanied with an excel file containing a list of all the attached files.

**RFIs** are to be implemented through Collaboration Software using the RFIs Tab.

**When to use RFIs:** Collaboration Software RFIs shall be utilized by subcontractors or suppliers for requesting information regarding design items from CONTRACTOR. 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 Collaboration Software, however exceptions can be made. Please ensure that RFIs are sent directly to document control by email, and CC the project manager in this correspondence, document control will distribute the RFI to the relevant parties as required.

**When creating an RFI please ensure to fill in the appropriate fields**, 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.

**Searching Collaboration Software**: The search function on Collaboration Software is very detailed and user friendly tool. It can be used by highlighting a file root that you want to search (e.g. Project Phase) this will in turn search all the folders under that root.

**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 search-ability reasons, and shall follow the OWNER asset/drawing number system. Please ensure that Document Control is included in this correspondence.

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

**Drawing numbers** are to follow the Owner Asset/Drawing numbering guideline. See Attachment for Owner asset and drawing numbering details. Drawing numbers are assigned or monitored through the CONTRACTOR Document Control. Ensure new drawings are numbered at creation, with your own project number and appropriate corresponding asset number. Ensure revisions are up to date. (*See figure 2*)

**This procedure should be edited and amended for each company and for each project. Subcontractors and suppliers need to be directed as to the method of communication for each project and for the various types of communication that may be required.**