User reference manual

User Manual version 4.9.0 (August 2010 Release)

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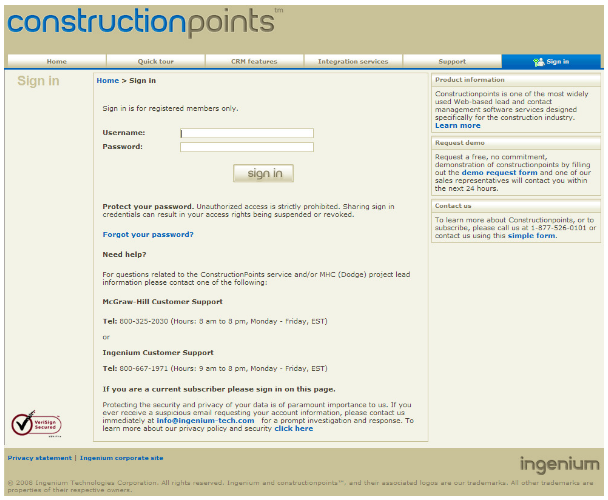
Accessing ConstructionPoints

1. Open a browser window. Please note – if you use AOL please select the option for Internet Explorer from the Programs section of your Start menu. Please note that ConstructionPoints is only supported on Internet Explorer 6 and Internet Explorer 7.
2. Enter your URL address for the system. Do NOT use "www" in the address. Your URL looks like this: **http://yourcompanytag.constructionpoints.com**

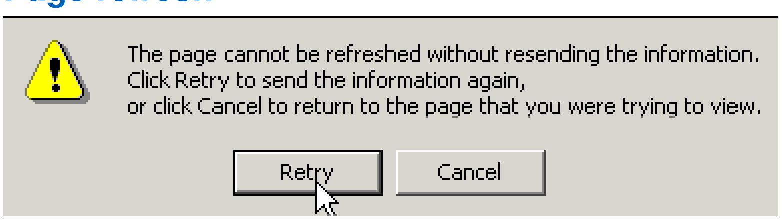


3. The Sign In page will appear and ask you for your user name (usually your email address) and password. These will have been given to you by your manager, or sent to you by email. Passwords are sometimes forgotten. Please keep yours in a secure area for easy reference.
4. Click the large **Sign In** graphic on the screen.

Common problems preventing sign in

- "www" was entered in the URL address resulting in "Site not found".
- URL address was entered in the "search" field, not the "address" field.
- Misspelling of password (hidden text). Delete entry and try again.
- Internet Explorer remembers your password – if you have changed your password check that IE is not automatically loading the old one by entering your current password on the login page.

Page refresh



Occasionally a window will pop-up while you're working in the system which reads: "The page cannot be refreshed without resending the information." When you see this, click **Retry**. As the system works in real-time, this ensures that you are always working with the most current information.

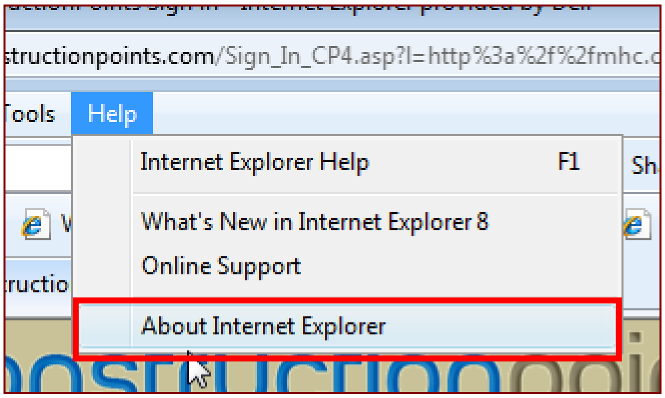
Caution: Browser back button

The system works in "real-time". It is being updated on a constant basis. Each time you save information or run a search your computer communicates with the server and updates your site. For this reason, please *do NOT use* the "back" button on your browser, as you may undo your work.

Which Version of Internet Explorer am I using?

1. Click on the **Help** link in the Internet Explorer toolbar

2. Click on “About Internet Explorer”



3. A pop-up window will appear with the version of Internet Explorer you are currently using.

This is the version number of Internet Explorer you are currently using.

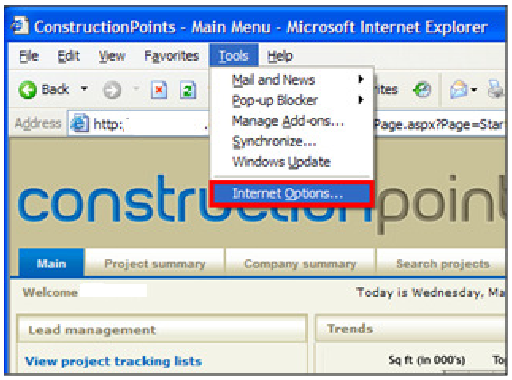
Internet Explorer Settings for IE version 6.0

Setting these Internet Explorer settings when you first start on ConstructionPoints and/or you get a new or updated computer will ensure that all of the features found within the program work as expected and provide you with the optimal experience.

Allowing Pop-ups

Pop-ups are used throughout ConstructionPoints for features such as the Print/Save feature. Enabling pop-ups will help ensure that these features work seamlessly for you.

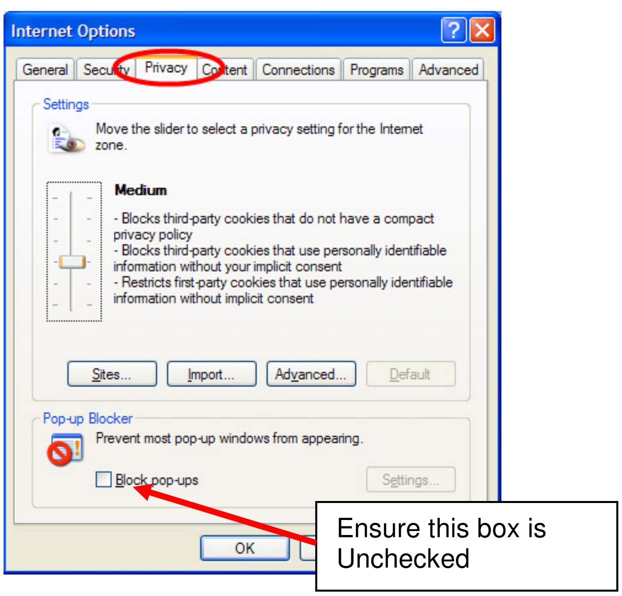
1. Select Tools from your Internet Explorer toolbar.



2. Select Internet Options.

3. Click on the “Privacy” tab

4. Ensure the “Block pop-ups” is unchecked



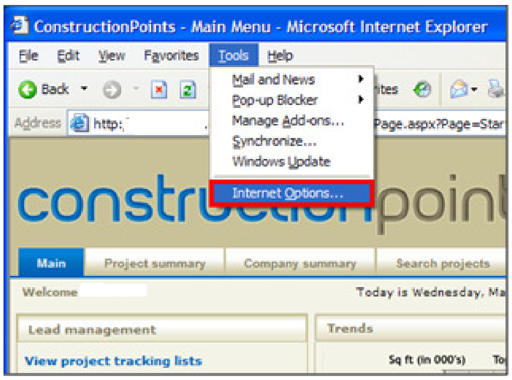
5. Click OK

Adjusting Security Settings

In order to allow you to export reports to Excel, you must first designate Construction Projects Source a trusted site within your network.

1. From the Main Page, Click on Tools in the Internet Explorer toolbar.

2. Click on Internet Options

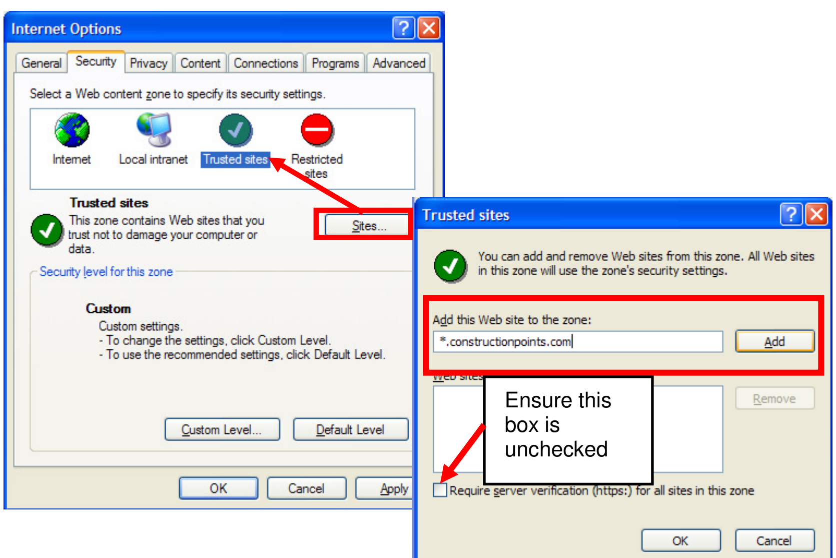


3. Click on the Security tab

4. Click on the Trusted Sites icon

5. Click on the Sites button

6. Add the following website into your trusted sites by typing the address in the “Add this website to the zone:” field: ***.constructionpoints.com**



7. Ensure the Require server verification (https://) for all sites in this zone is unchecked.

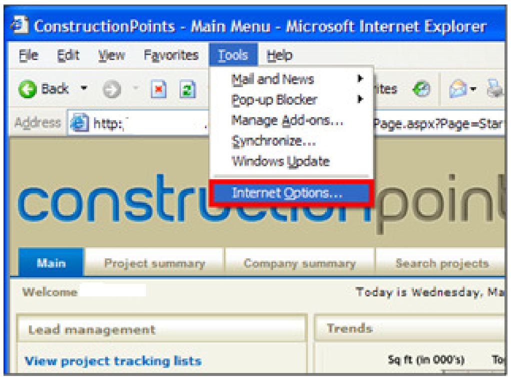
8. Click Ok to close that window

9. Click Ok again to return to the Main Page

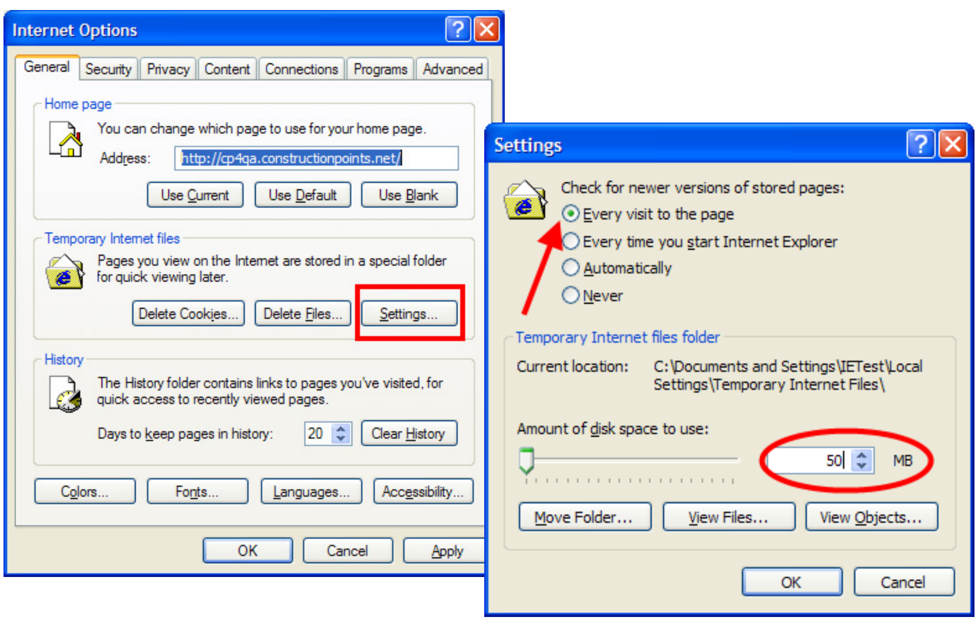
Adjusting History Settings

1. From the Main Page, Click on Tools in the Internet Explorer toolbar.

2. Click on Internet Options



3. Under the “Browsing History” section, click the “Settings” button



4. Under the “Temporary Internet Files” heading:

Under “Check for newer versions of stored pages:” click the “Every time I visit the webpage” radio button.

Ensure that the “Disk space to use” area is set at “50”

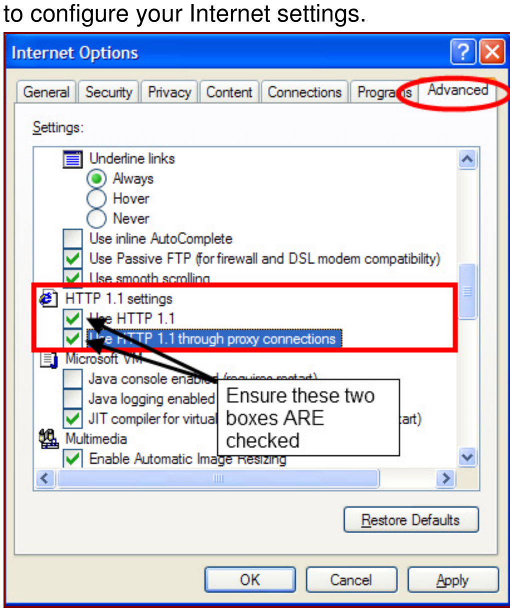
5. Click OK

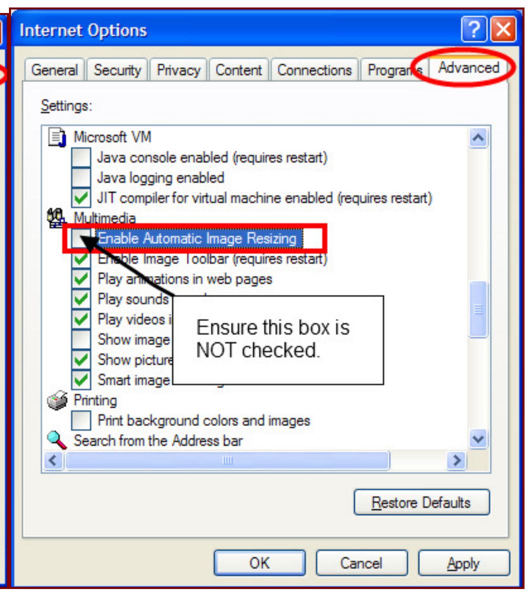
6. Click OK again to exit the window.

Advanced Settings

1. Select Tools from your Internet Explorer toolbar.
2. Select Internet Options.
3. Select the Advanced tab.
4. Scroll down to the Multimedia section.
5. Uncheck the "Enable Automatic Image Resizing" options.
6. Continue scrolling down to the HTTP 1.1 section.
7. Check the “Use HTTP 1.1” and the “Use HTTP 1.1 through proxy connections”
8. Click Apply
9. Click OK.

Note: If you do not see the Advanced tab in your Internet Options, please contact your system administrator to configure your Internet settings.





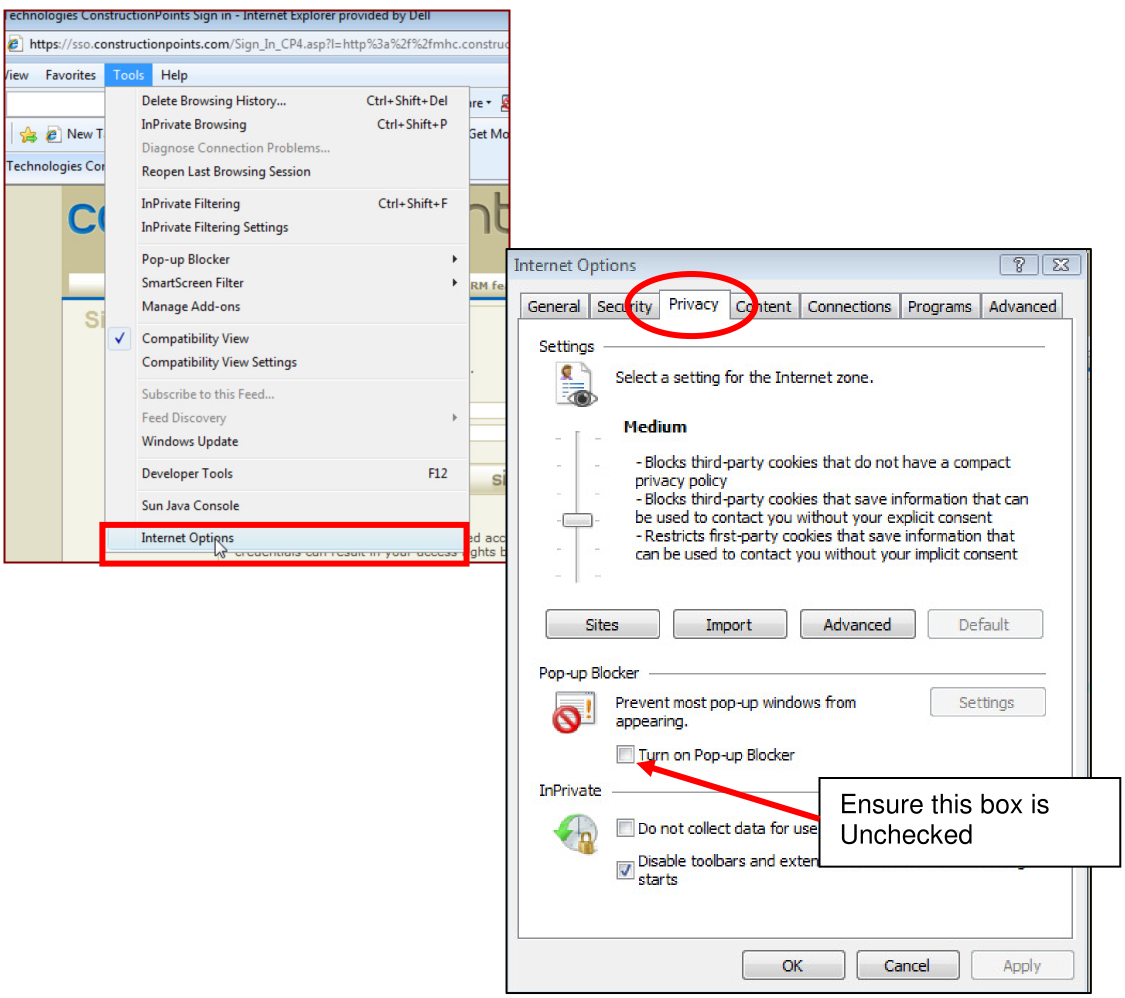
Internet Explorer Settings for IE version 7.0

Setting these Internet Explorer settings when you first start on ConstructionPoints and/or you get a new or updated computer will ensure that all of the features found within the program work as expected and provide you with the optimal experience.

Allowing Pop-ups

Pop-ups are used throughout ConstructionPoints for features such as the Print/Save feature. Enabling pop-ups will help ensure that these features work seamlessly for you.

1. Select Tools from your Internet Explorer toolbar.
2. Select Internet Options.
3. Click on the “Privacy” tab
4. Ensure the “Block pop-ups” is unchecked
5. Click OK

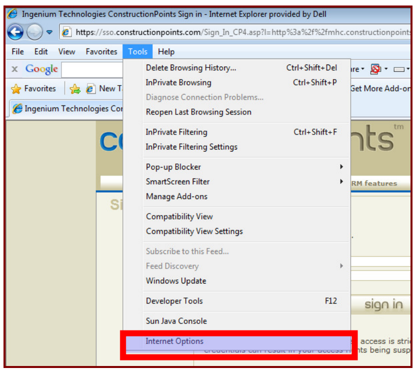


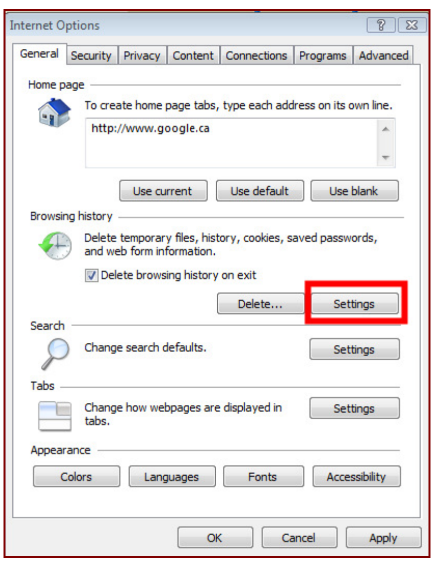
Adjusting History Settings

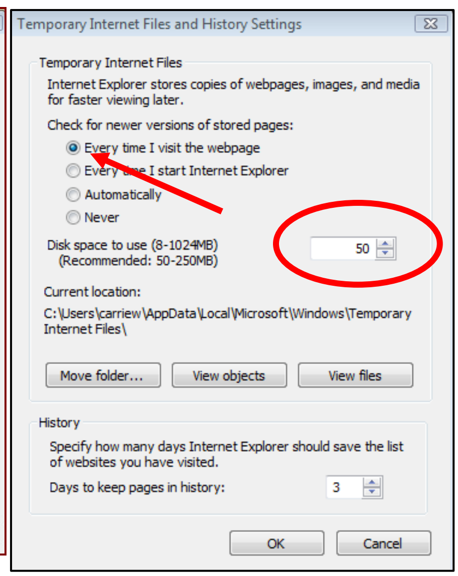
Adjusting these history settings will ensure that Internet Explorer is not accessing a saved ConstructionPoints page from your computer. Since the site works in real time and is constantly being updated, these settings will ensure you are seeing the most up-to-date information and any changes you've made throughout your session are being displayed.

1. From the Main Page, Click on Tools in the Internet Explorer toolbar.

2. Click on Internet Options







3. Under the "Browsing History" section, click the "Settings" button

4. Under the "Temporary Internet Files" heading:

a) Under "Check for newer versions of stored pages:" Click the "Every time I visit the webpage" radio button.

b) Ensure that the "Disk space to use" area is set at "50"

5. Click OK

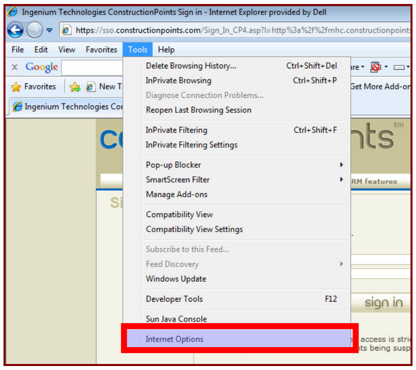
6. Click OK again to exit the window.

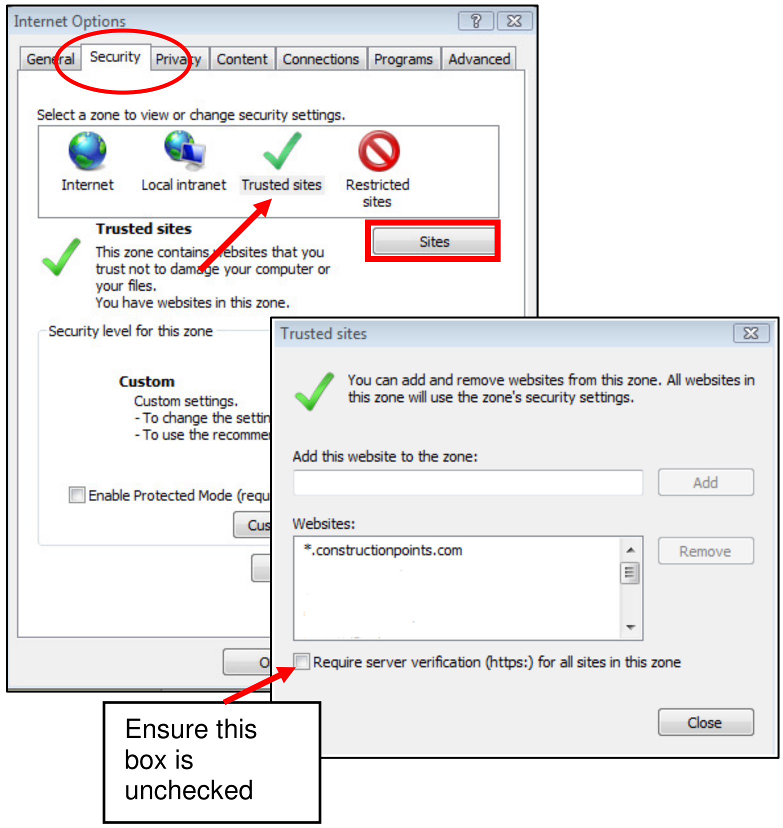
Adjusting Security Settings

In order to allow you to export reports to Excel, you must first designate ConstructionPoints a trusted site within your network.

1. From the Main Page, Click on Tools in the Internet Explorer toolbar.

2. Click on Internet Options





3. Click on the Security tab

4. Click on the Trusted Sites icon

5. Click on the Sites button

6. Add the following website into your trusted sites by typing the address in the “Add this website to the zone:” field:

*.constructionpoints.com

7. Ensure the Require server verification (https://) for all sites in this zone is unchecked.

8. Click Close to close that window

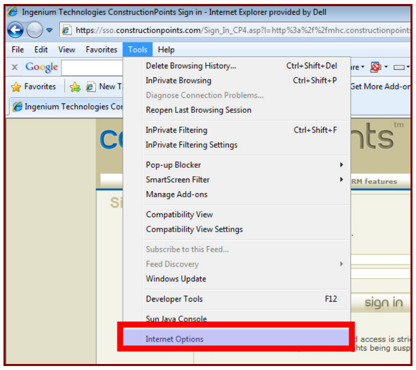
9. Click Ok again to return to the Main Page

Adjusting Advanced Settings

The advanced settings will ensure that ConstructionPoints is working to its optimal performance level therefore allowing you to access the information you need quickly and efficently.

1. Select Tools from your Internet Explorer toolbar.

2. Select Internet Options.



3. Select the Advanced tab.

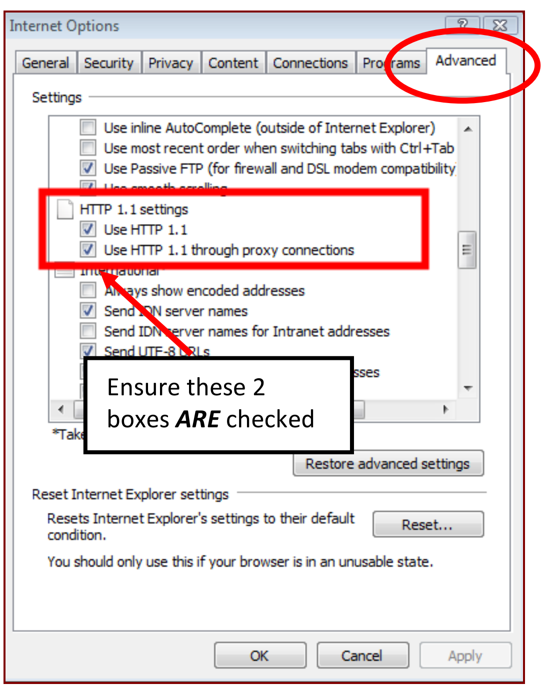
4. Continue scrolling down to the HTTP 1.1 section.

5. Check the “Use HTTP 1.1” and the “Use HTTP 1.1 through proxy connections”

6. Click Apply

7. Click OK.

Note: If you do not see the Advanced tab in your Internet Options, please contact your system administrator to configure your Internet settings.

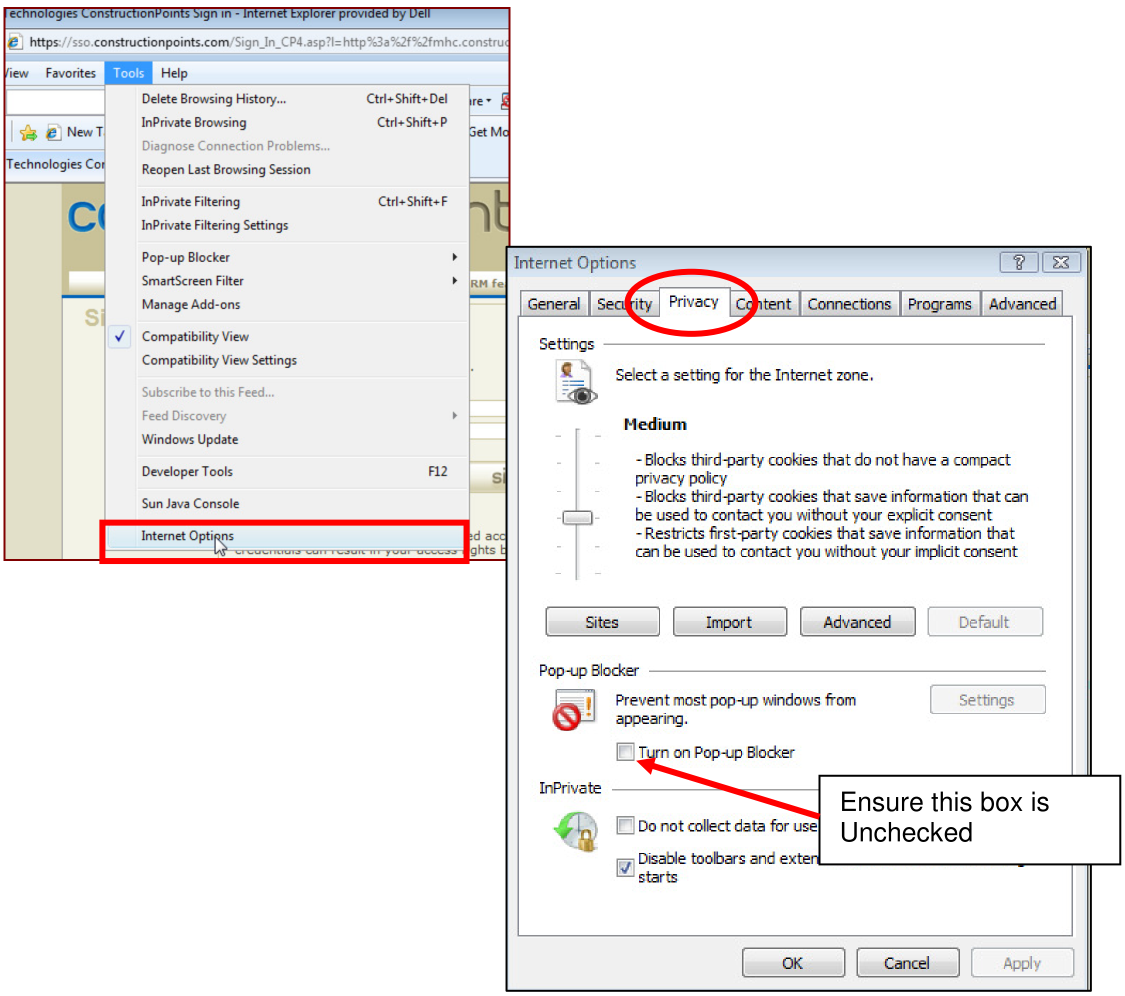


Internet Explorer Settings for IE version 8.0

Setting these Internet Explorer settings when you first start on ConstructionPoints and/or you get a new or updated computer will ensure that all of the features found within the program work as expected and provide you with the optimal experience.

Pop-ups are used throughout ConstructionPoints for features such as the Print/Save feature. Enabling pop-ups will help ensure that these features work seamlessly for you.

1. Select Tools from your Internet Explorer toolbar.
2. Select Internet Options.
3. Click on the “Privacy” tab
4. Ensure the “Block pop-ups” is unchecked
5. Click OK

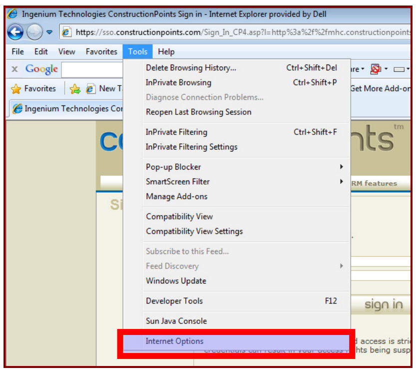


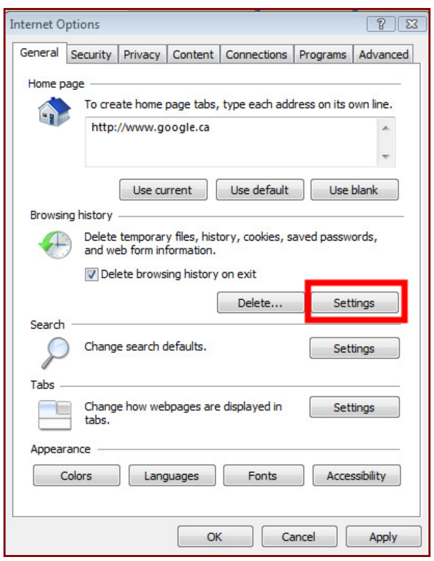
Adjusting History Settings

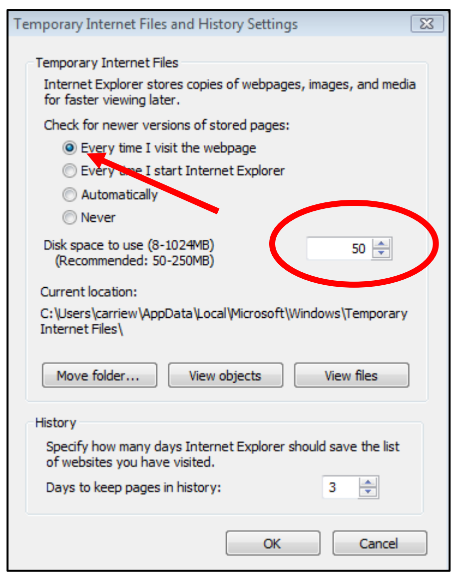
Adjusting these history settings will ensure that Internet Explorer is not accessing a saved ConstructionPoints page from your computer. Since the site works in real time and is constantly being updated, these settings will ensure you are seeing the most up-to-date information and any changes you've made throughout your session are being displayed.

1. From the Main Page, Click on Tools in the Internet Explorer toolbar.

2. Click on Internet Options







3. Under the "Browsing History" section, click the "Settings" button

4. Under the "Temporary Internet Files" heading:

a) Under "Check for newer versions of stored pages:" Click the "Every time I visit the webpage" radio button.

b) Ensure that the "Disk space to use" area is set at "50"

5. Click OK

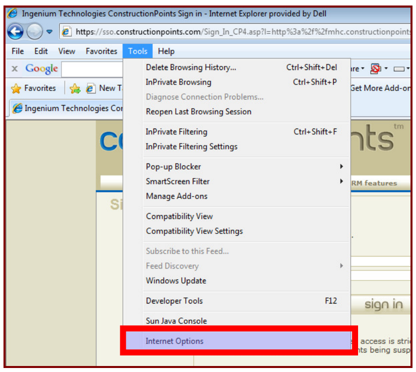
6. Click OK again to exit the window.

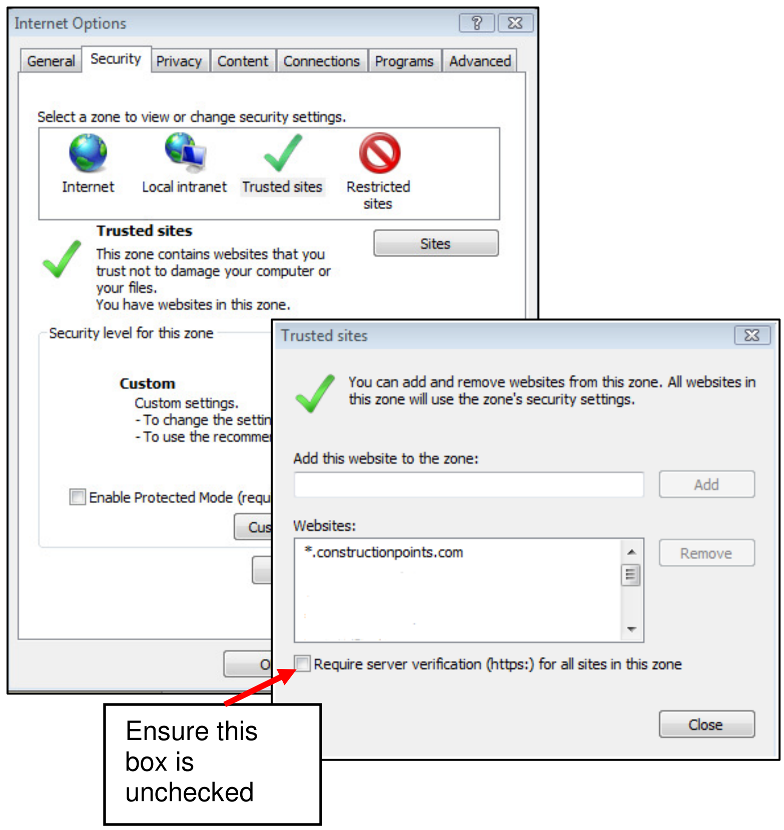
Adjusting Security Settings

In order to ensure exports and other site features are working as expected, you must first designate ConstructionPoints a trusted site within your network. This setting can also help bypass some corporate firewalls.

1. From the Main Page, Click on Tools in the Internet Explorer toolbar.

2. Click on Internet Options





3. Click on the Security tab

4. Click on the Trusted Sites icon

5. Click on the Sites button

6. Add the following website into your trusted sites by typing the address in the “Add this website to the zone:” field: ***.constructionpoints.com**

7. Ensure the Require server verification (https://) for all sites in this zone is unchecked.

8. Click Close to close that window

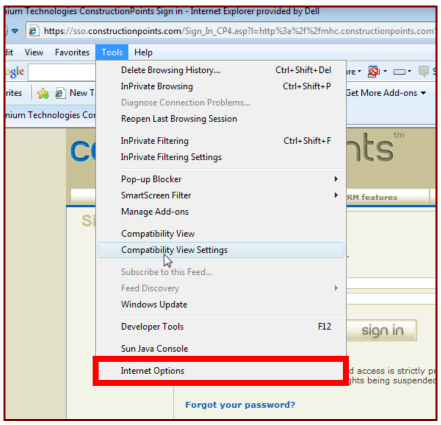
9. Click Ok again to return to the Main Page

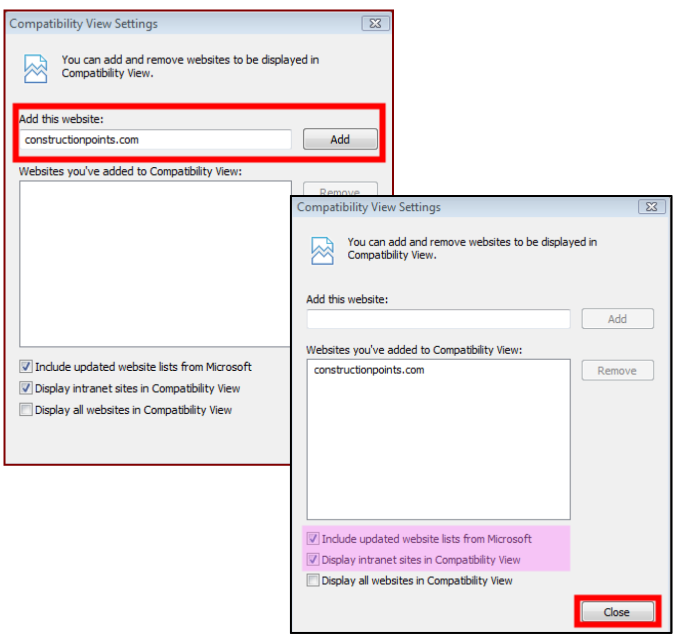
Adjusting Compatibility Settings

Internet Explorer 8 contains a number of upgrades that interfere with a small number of ConstructionPoints features. In order to ensure that you don't experience any of this interference, please view ConstrutionPoints in Compatibility mode.

1. From the Main Page, Click on Tools in the Internet Explorer toolbar.

2. Click on "Compatibility View Settings"





3. Add the following website into your Compatible Sites by typing the Address in the "Add this website" field: **constructionpoints.com**

4. Click Add

5. Ensure that the "Include updated website lists from Microsoft" and the "Display intranet sites in Compatibility View" are checked.

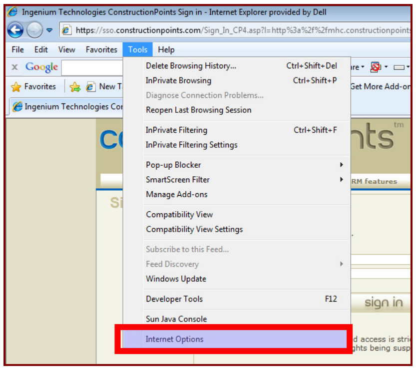
6. Click Close

Adjusting Advanced Settings

The advanced settings will ensure that ConstructionPoints is working to its optimal performance level therefore allowing you to access the information you need quickly and efficently.

1. Select Tools from your Internet Explorer toolbar.

2. Select Internet Options.



3. Select the Advanced tab.

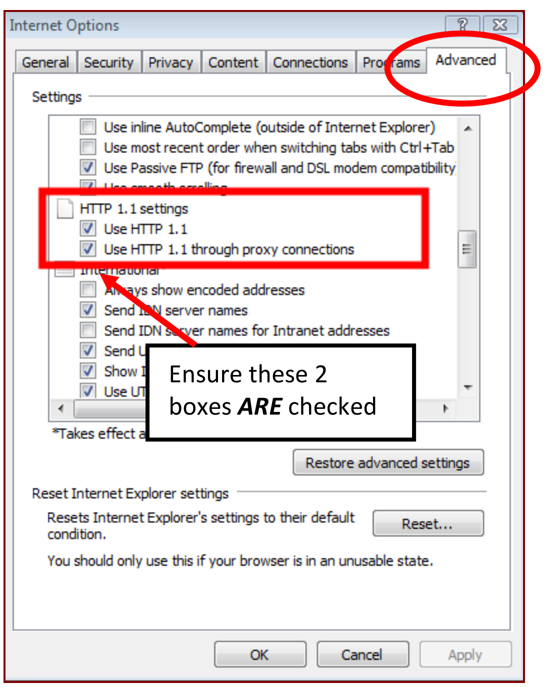
4. Continue scrolling down to the HTTP 1.1 section.

5. Check the “Use HTTP 1.1” and the “Use HTTP 1.1 through proxy connections”

6. Click Apply

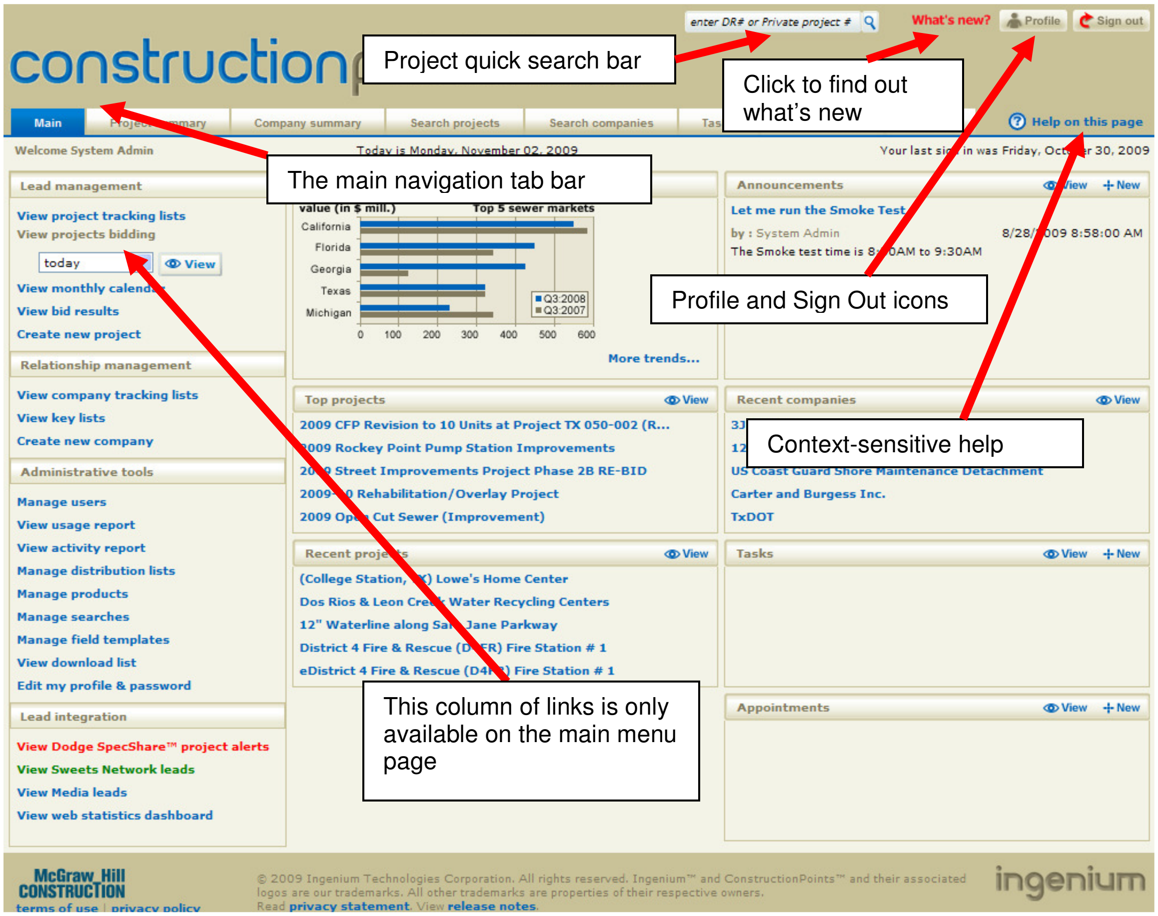
7. Click OK.

Note: If you do not see the Advanced tab in your Internet Options, please contact your system administrator to configure your Internet settings.



ConstructionPoints - Main menu – Start page

The first page to open is the main menu Start Page. The main menu is designed to provide quick access to the information you use the most.



Trends

McGraw-Hill Construction's Market Analytics Group can provide you with forecasts, historical, and customized market analysis for your products. The "Trends" graph provides a real life graph from this group. Clicking on the **More Trends** link will provide you with information on how to contact this specialized group within McGraw-Hill Construction.

Announcements

You can post a public message which will appear on the Start Page for all users in your company. Clicking **More announcements** will show a list of all posted messages.

Top projects

The top projects are determined by the total number of requests for a Dodge project report by all users, in every site. The displayed projects are the ones that are requested most often and which fall within your project territory. Clicking on project title redirects you to the Project Report. Clicking on the **More top projects …** link or the **Top Projects** title bar will take to the Project Search Results page with the top 100 projects within your territory displayed.

Recent companies

Lists the last 5 companies you have viewed. Clicking on company name redirects you to the Company Report. Clicking on *the* **More recent companies …** link or the **Recent Companies** title bar redirects you to the Company Search Results page where the last 25 companies you have viewed will be displayed.

Recent projects

Lists the last 5 projects you have viewed. Clicking on project title redirects you to the Project Report. Clicking on the **More recent projects …** link or the **Recent Projects** title bar redirects you to the Project Search Results page where the last 25 projects you have viewed will be displayed.

Tasks

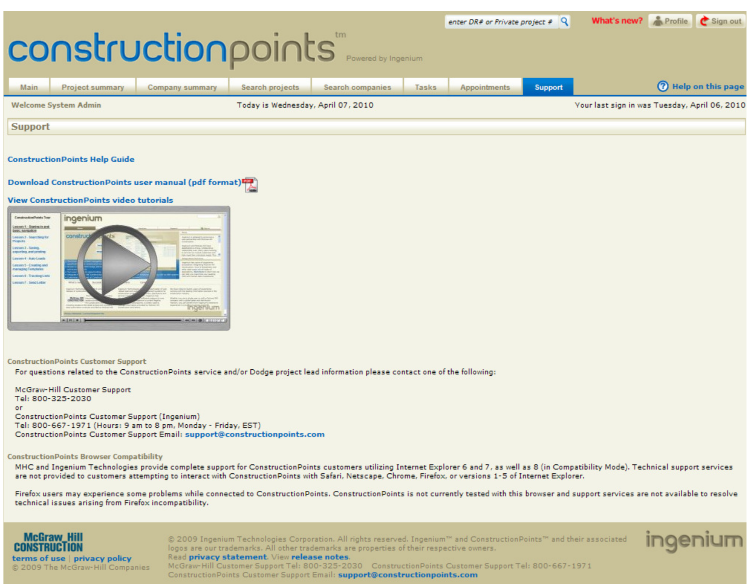
Clicking on the **More tasks …** link or the **Tasks** title bar will take you to the Tasks page where all your outstanding tasks will be displayed in a list. Clicking on the Subject line will open the displayed Task in a new window. Clicking on the **New Task** link will open a blank entry form enabling you to create a new task.

Appointments

Clicking on the **More appointments …** link or the **Appointments** title bar will take you to the Appointments page where all of your appointments will be displayed in a list. Clicking on the Subject line will open the displayed Appointment in a new window. Clicking on the **New Appointment** link will open a blank entry form enabling you to create a new appointment.

Support

Clicking on the **Support** tab will display the support page:



Here you can view support information, access the online ConstructionPoints Help system, view video tutorials on ConstructionPoints, or download the manual in printable (PDF) format.

Main navigation bar

- **Main Menu**: Returns you to the Main Menu page.
- **Project Summary**: Takes you to the Project Summary page, for an overview of all projects.
- **Company Summary:** Takes you to the Company Summary page, for an overview of all companies.
- **Search Projects**: Takes you to the Search Projects page.
- **Search Companies**: Link to the Search Companies or Contacts page.
- **Tasks**: Provides lists of all tasks, both outstanding and completed, and those you have assigned to other people.
- **Appointments**: Provides a list of all appointments.
- **Support**: Contains links to online and printable manuals and other support documents.

Profile and Sign Out icons

There are two special navigation icons on the top right-hand corner of your screen:

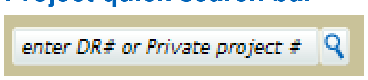
Profile: Clicking on this icon allows you to edit your user profile, in order to adjust your personal site settings and preferences.

Sign Out: Clicking on this icon signs you out of the system. You will be sent to a page that confirms you have signed out of the system and contains a link to the sign in page.

What's new link

Clicking on the **What's New** link opens a pop-up window that lists all the new features of ConstructionPoints that have been added in the current version. You can scroll down the list to find new features that were added in previous versions.

Project quick search bar



This feature enables you to search for a single Dodge project, or a list of Dodge projects, directly from the main menu page. Enter the report number as follows: 99-24456. You can click Enter to search or click the magnification glass icon. You do not need to enter the version number (*eg*: 99-2445-3).

Multiple searches with the Quick Search bar

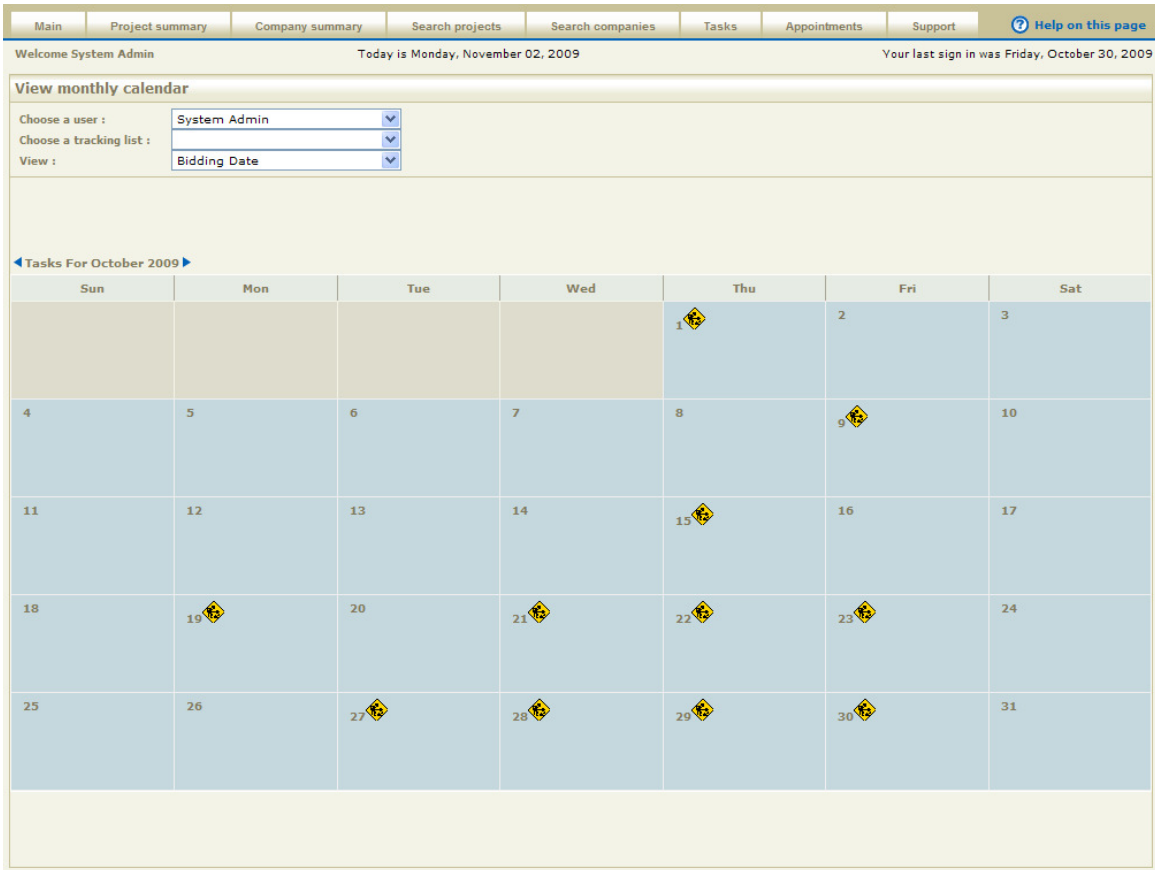
You can enter multiple Dodge Report numbers separated by commas and ConstructionPoints will return all the projects in a single list.

Example: 99-224456, 99-112233, 99-001122

Navigational tools

- **View project tracking lists**: lists may be viewed, edited, or applied against a saved query (search).
- **Projects bidding: today / Next 7 days / next 30 days:** A list of projects in your territory that have bid dates within the selected time period.
- **Monthly calendar***:* View New and Updated project information for all projects or by tracking list (see below for further information).
- **View bid results**: Identify the successful bidders in your area for the last week, including bid amounts.
- **Add a new project**: Project reports may be created manually and will remain in your organization's private database. You can keep them private to yourself, or share them with other people in your company.
- **View company tracking**: lists may be viewed, edited, or applied against a saved query (search).
- **View key lists**: Search for the most active professionals in your territory.
- **Add a new company**: Company reports may be created manually and will remain in your organization's private database. You can keep them private to yourself, or share them with other people in your company.
- **Manage products***:* you can add manufacturers, product categories and products to the system as well as view existing product category information and the sales opportunities associated with each manufacturer or product.
- **Manage saved searches**: view the criteria of your saved searches, edit them or set-up a timeframe for the autoemail notification to run.
- **Edit my profile & password***:* Customize your personal preferences.

View monthly calendar (MonthView)

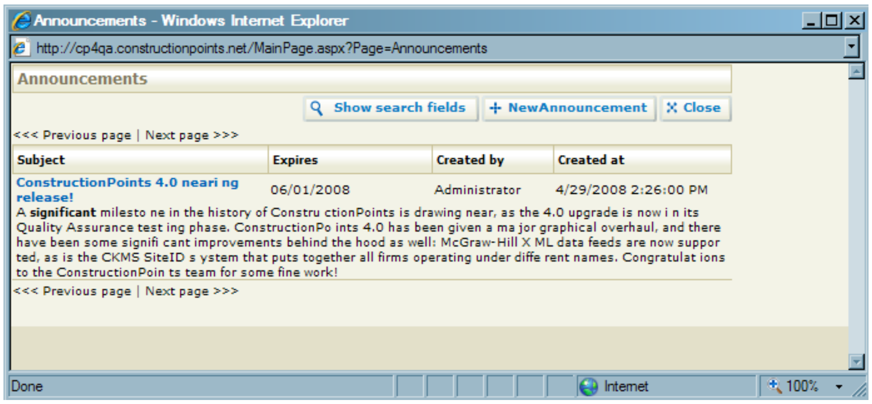


- Selecting the link **View monthly calendar** will give you a calendar showing your project information.
- Icons: Any date with a  icon has project data associated with it. Clicking once on the icon will link to the search results/**Project tracking list** page where the projects will be listed.
- Viewing Projects: Above the calendar are three drop-down menus. You may select **View projects by new and updated date**, or **View projects by bidding date** for all projects, or just tracked projects. The icons will change to reflect the data.
- The orange arrows, on either side of the displayed month, will move the calendar view forward or back.
- Clicking on a numerical date will display that date's **Project summary** information.

Announcements

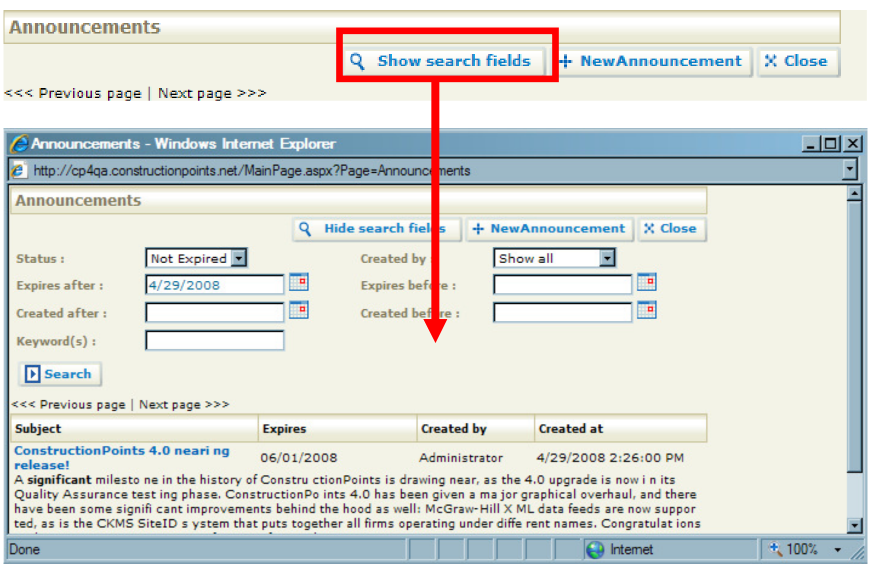
The Start Page will display the most recent announcement added to the site. To view all announcements click 

on the Announcements title bar. You will see a pop-up window with a list of all announcements.

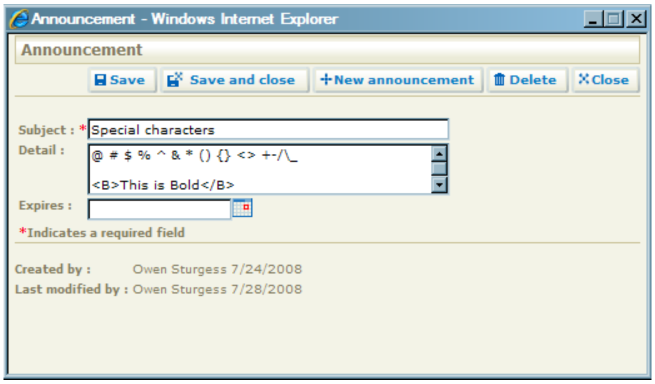


If there are more announcements than can be displayed in the window, the links **Previous page** and **Next page** allow you to scroll through the listings. To open an announcement, click on the **Subject** line.

You can also search the announcements list by clicking **Show search fields**.



Add a new announcement



From the Start Page, on the Announcement title bar, click 

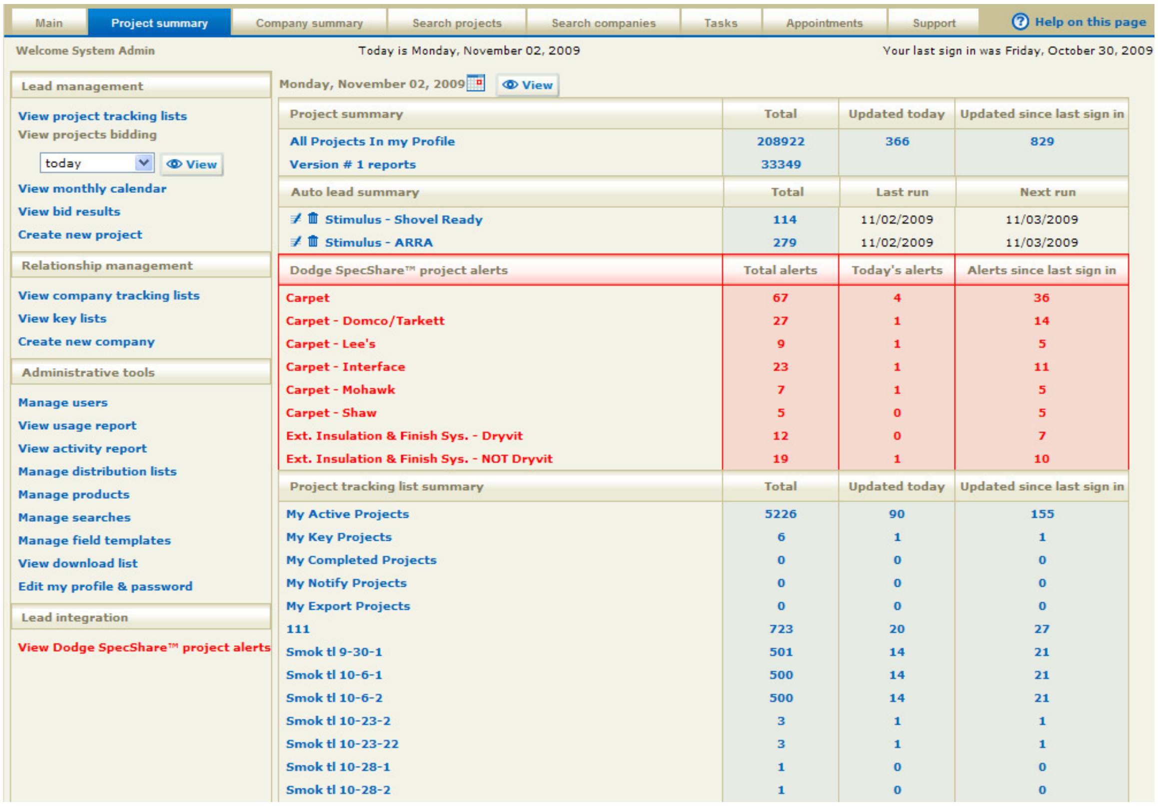
or from the Announcement list page click **New announcement**. You will get a pop-up entry form. Add all information, and an expiry date, and then click **Save and close**.

Your announcement will now be displayed on the Start Page. It will remain on the Start Page until another person adds an announcement or the expiry date you entered is reached. If you do not enter an expiry date the announcement will remain on the **More announcements** pop-up list until you delete it.

Delete an announcement

Open the announcement you wish to delete by clicking on the **Subject** line. When the pop-up opens, click the **Delete** button at the top of the window. The system will ask if you are sure you want to do this – click **OK**. The pop-up will refresh and the message will be erased. Click **Close** to exit the window.

ConstructionPoints – Main menu project summary



The **Project Summary Page** displays the total number of Version #1 projects (projects that are new to the system), New and Updated Projects Since Last Login, counts and Last Run and Next Run times for any **Auto Lead** searches you or your manager has created, optionally displays **Dodge SpecShare *TM*** project alerts (*requires the purchase of the* **Dodge SpecShare *TM*** *service on your account*), and shows updates to your tracked projects.

Column Headings:

Total: this is the sum total of all projects which match each of the entries, for example the Total number of projects on *My Active Projects* tracking list is 81.

Updated today: these are the projects that have been updated (added or edited) on today's date.

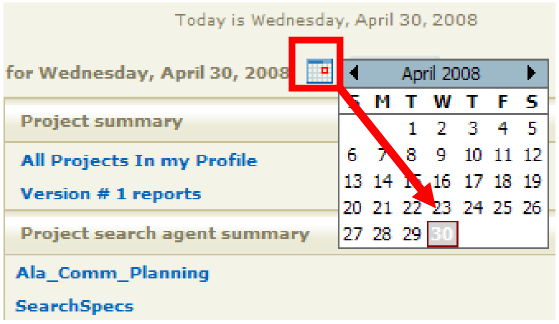
Updated since last sign in*:* these are all the projects that have been updated since the last time you signed into ConstructionPoints.

Auto lead summary column headings:

Total: this is the total of all projects that matched the listed Auto Lead search *when it was last run*. By clicking the number here, you will get the results from the last run of the Auto Lead search.
Last run: this is the date that the Auto Lead was last run.
Next run: this is the date that the Auto Lead is next scheduled to run.

Clicking on a number will take you to the project search results page with those projects displayed, for example *22 My Active Projects Updated Since Last Login.* Clicking on a name will display the full list, for example, clicking **My Active Projects** will display the full contents of that tracking list.

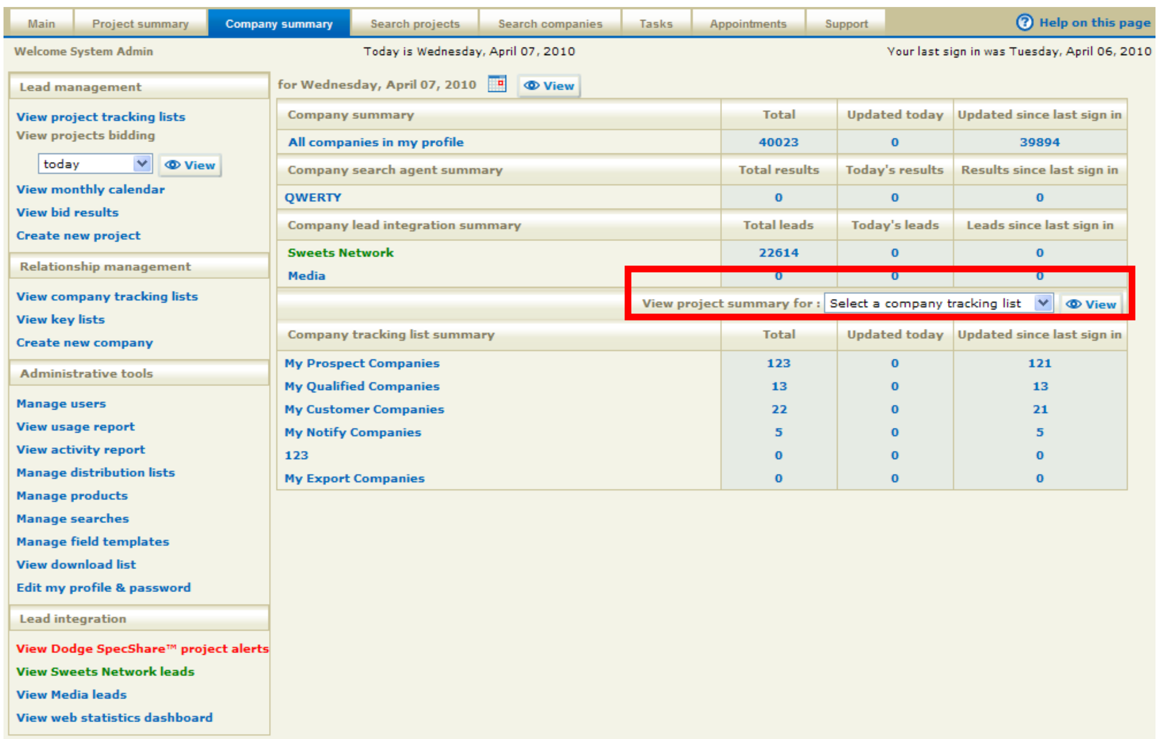
You can choose to view project information for another date by clicking the calendar above the Project Summary header. You will see a pop-up calendar:



Once you select a date the Project Summary page will change to reflect the data for the date selected.

Please note: the calendar may not display on web browsers other than Internet Explorer.

ConstructionPoints – Main menu company summary



The Company Summary Page displays the total number of New and Updated Projects (within your profile/territory) Updated Today or Updated Since Last Login, shows updates to Company Searches you have saved, and updates to projects associated with the companies you have tracked.

Total: this is the sum total of all companies which match each of the displayed lists, for example the total number of companies on the tracking list My Prospect Companies is 23.

Updated Today: these are companies that have projects that have been updated (added or edited) on today's date.

Updated Since Last Login: these are all the companies whose project information has been updated since the last time you signed into ConstructionPoints.

Clicking on a number will take you to the company search results page with those companies displayed, for example the 7 companies on the tracking My Prospect Companies which have been Updated Since Last Login. To view the updated project information open the company report and change the menu **Reported Within** to reflect the time period since you last signed in (the last sign in date is displayed above the Company Summary counts).

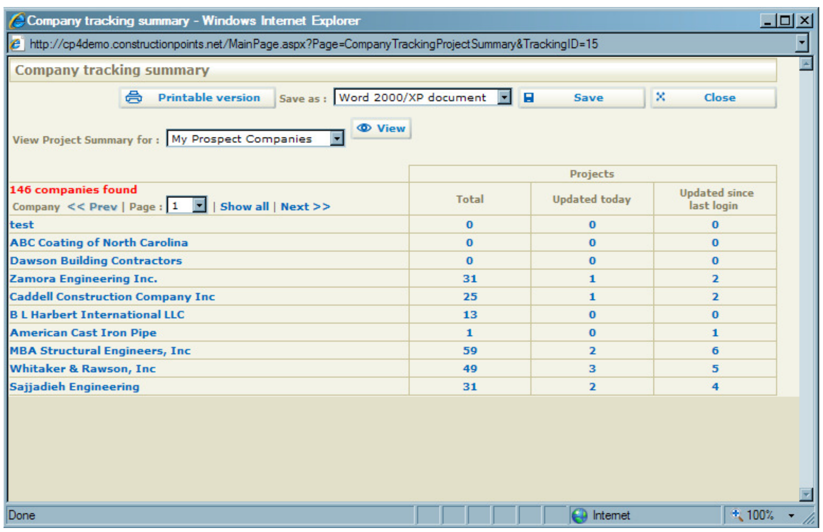
Clicking on a name will display the full list, for example, clicking My Prospect Companies will display the full contents of that tracking list.

Viewing summary for company tracking list

From the Company summary page, select the tracking list or saved search you want and click

.

A pop-up window will appear with each company's name and the counts for how many of each company's related projects have been updated either today or since last login. Clicking a project count will display the updated projects on the project search results page. Clicking on a company name will take you to that company report.   You have the option of printing the list, or saving it as an Excel or Word file.



Edit my profile & password

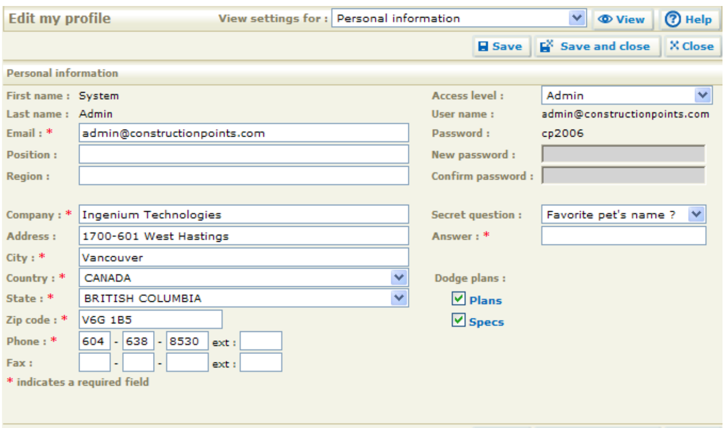
The link **Edit my profile & password** allows you to change your password and create a personal view for working within the system. For example, you may choose to view or hide your tracking lists, change the number of projects or companies which display in a search result, or pre -set what information automatically displays when you access or print a project or company report.

1. Select **Edit my profile & password** from the main menu, or click the 

icon on the top `right.
2. A new window will open showing your current view.

NOTE: Not all features will be available for all users. Some features may be disabled on a company-wide basis. Disabled features cannot be selected with a checkmark. Contact your Dodge rep for details.

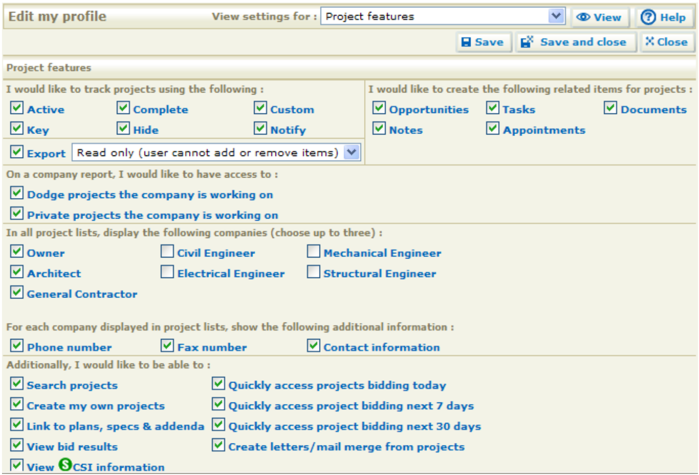
Personal information: password and address



The first view, **Personal Information**, includes your password, access level (may only be changed by your manager or administrator), your manager's name, and your contact information.

1. To change your Password, enter your new password in BOTH fields **New Password** and **Confirm Password**. Click **Save** at the top right of the page to save your changes.
2. To change your Contact Information, add or change your address, email, and telephone or fax numbers, etc and then click **Save** at the top right of the page. The address displayed here is used for the **Send Letter** module when **My Address** is selected as the return address for the letters.
3. Click **Save** at the top or bottom of the page to save your changes. If you are done customizing your view click **Close** to update the site.

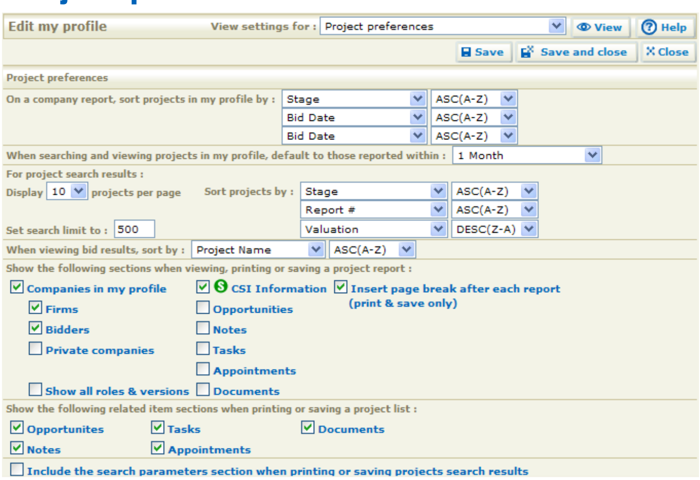
Project features



The second view, **Project Features**, allows you to customize your project view by selecting which tracking lists to use, what private data to add to the reports, which company roles to display in the project search results, and which main menu links you would like to see.

1. Add or remove check marks to customize your view. Some preferences may be fixed at a company-wide level and cannot be changed.
2. Click **Save** at the top or bottom of the page to save your changes. If you are finished customizing your view, click **Close** to update the site.

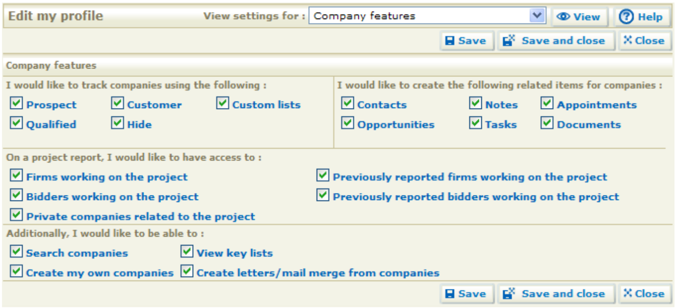
Project preferences



Project Preferences allows you to customize your default search date (Example: Show me projects updated in the last 2 days or 1 month), how projects are displayed on the search results page (Example: Sort by stage or by value), the number of projects to display per page, and what sections of the report to automatically include when printing or saving them as Word or Excel.

1. Add or remove check marks to customize your view. Some preferences may be fixed at a company-wide level and cannot be changed.
2. Click **Save** at the top or bottom of the page to save your changes. If you are done customizing your view, click **Close** to update the site.

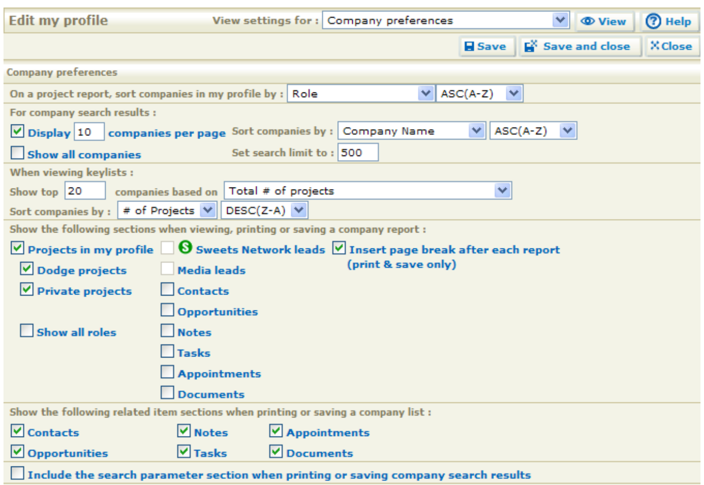
Company features



The fourth view, **Company Features**, allows you to customize your company view by selecting which tracking lists to use, what private data to add to the reports, which firm types to view in the project reports and what links to access like creating your own company reports or viewing the **Key List** page.

1. Add or remove check marks to customize your view. Some preferences may be fixed at a company-wide level and cannot be changed.
2. Click **Save** at the top or bottom of the page to save your changes. If you are done customizing your view click **Close** to update the site.

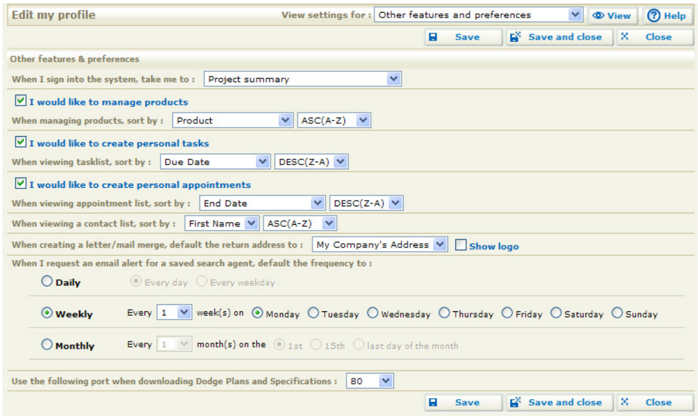
Company preferences



Company Preferences allows you to customize how companies are displayed on the search results page (Example: Sort by name), the number of companies to display per page, the number of companies to find when running Key Lists, and what sections of the report to automatically include when printing or saving them as Word or as Excel.

1. Add or remove check marks to customize your view. Some preferences may be fixed at a company-wide level and cannot be changed.
2. Click **Save** at the top or bottom of the page to save your changes. If you are done customizing your view click **Close** to update the site.

Other features and preferences

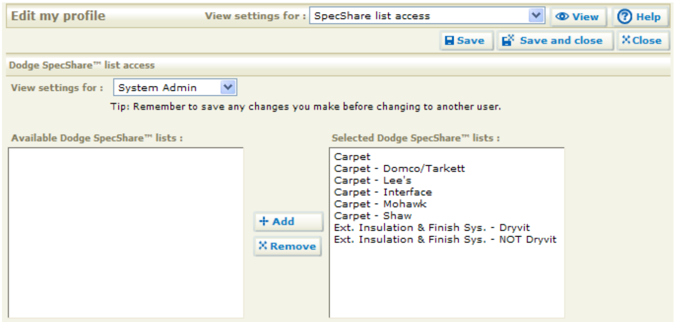


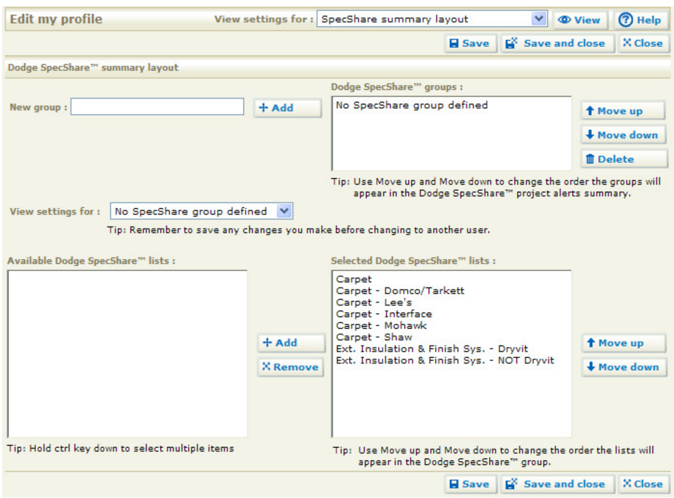
This view allows you to specify whether you wish to add or edit the Products referenced in opportunities, create personal tasks and appointments, choose a **Sort By** option for the Contact search results page, pick the default setting for the return address used in the **Send Letter** module, and define a default setting for the email alerts when creating saved searches.

In addition, you can specify the default frequency for saved search email alerts (also known as **Auto Leads**) to be sent to your email Inbox. Available options are: Daily, Weekly (specify a day of the week) and Monthly.

1. Add or remove check marks to customize your view. Some preferences may be fixed at a company-wide level and cannot be changed.
2. Click **Save** at the top or bottom of the page to save your changes. If you are done customizing your view click **Close** to update the site.

SpecShare list access and Summary layout (optional)

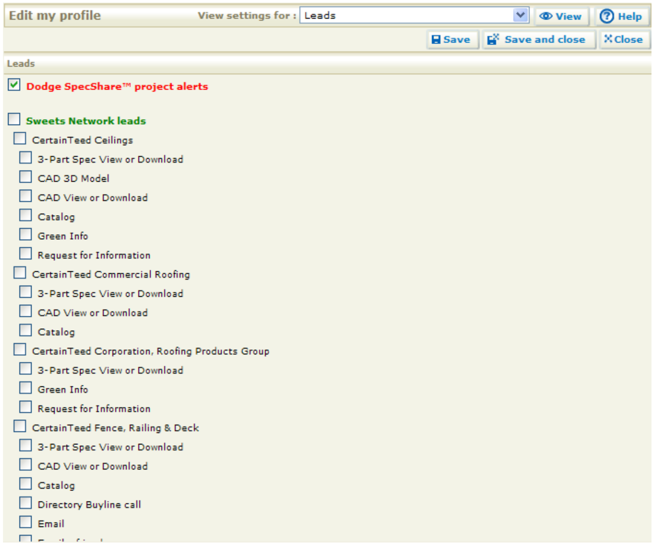




These two views only appear if you have subscribed to the **Dodge SpecShare *TM*** service. Click **Add** or **Remove** to select desired **Dodge SpecShare *TM*** lists. To create a new group for **Dodge SpecShare *TM*** selection, type in the name and click **Add**. You can also change the order the groups will appear in the project alerts summary by clicking **Move up** and **Move down**.

To save your changes, click **Save.** When finished, click **Close** to update the site, or click **Save and close** to do both at once.

Leads



This view allows you to select any leads such as **Dodge SpecShare™** project alerts, **Sweets Network** leads, or **Media** leads, for viewing on the main page. To save your changes, click **Save.** When finished, click **Close** to update the site. Alternatively, you may click the **Save and close** button to save all changes and close the profile window.

Lead subcategories

Sweets Network leads are identified by the words "Sweets Network" in green when you click on the lead in question. These leads have several sub-categories that can be selected for inclusion:

- 3-part spec view or download
- CAD 3D model
- CAD view or download
- Catalog
- Green Info
- Request for Information
- Directory Buyline call
- Sweets request for info

Media leads are identified by the word "Media" in blue when you click on the lead in question. These leads have several sub-categories that can be selected for inclusion:

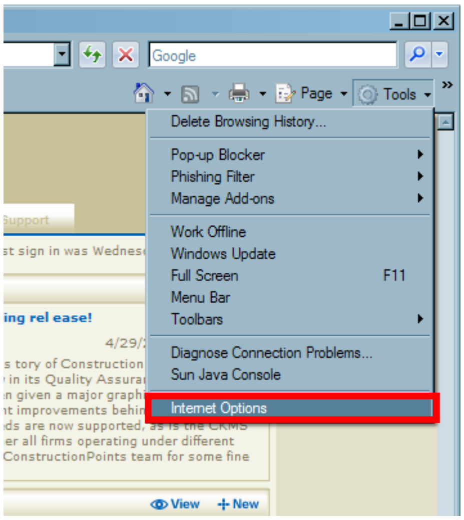
- Architectural record
- Continuing Education
- GreenSource
- Product News

If you do not have access to all these categories, please contact your Dodge™ representative to have them added to your account.

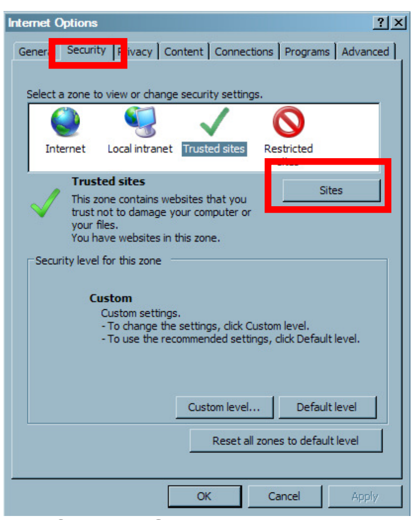
Save to Outlook

Within the system you can use to **Save to Outlook** for: Project Reports, Company Reports, Contacts, Tasks and Appointments.

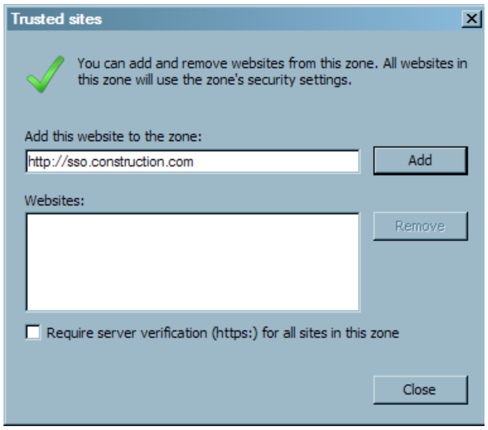
Please note, you must have Outlook, and not Outlook Express installed in order for **Save to Outlook** to work. To allow the Construction Network to communicate with Microsoft Outlook you must make it a “secure site”.



1. Click **Tools** from your browser’s navigation bar. For Internet Explorer 6 this is under the Tools menu. For Internet Explorer 7 and 8 this is a large button on the right hand side of the screen.
2. Click the last option on the menu – **Internet Options**. A new window will open.



3. Click the **Security** tab.
4. Highlight the **Trusted Sites** icon by clicking on it once with your mouse.
5. Click the **Sites** button. A new window will open.
6. Type in the web address of the site you want to setup as a trusted site. Use the following format: http://xxxx.construction.com (Note: This may be entered automatically on some versions of IE. In this case just click the **Add** button).
7. Beneath the URL you have just entered is a box and the phrase **Require Server Verification for all sites in this zone**. If there is a checkmark in the box, remove it.



8. Click **OK**. That window will close and you will be back at the **Security** tab window.
9. With the **Trusted Site**s logo still highlighted, click on **Custom Level** button near the bottom of the window. A new window will open.
10. Check all the **ActiveX** control entries to **Enable**. This will only enable these controls for your site.
11. Click **OK**.
12. You will be prompted with an alert box. Select **Yes** for changing the security settings for this zone.
13. Click **OK.**

Note: Windows XP in non-Administrator mode

Please note, if you use Windows XP and do not have administrator access to it, you will have to ask your administrator to set your user preferences to allow you to make the Construction Network a secure site.

Finding Shovel-Ready and ARRA Projects *(NEW!)*

Introduction

With $131 billion allocated for construction-related spending, the 2009 Stimulus Package is the most important piece of legislation in the history of the A/E/C industry. McGraw-Hill Constructions' editorial staff is working hard gathering and tagging construction projects directly affected by this monumental event.

Two very important things to consider:

- **Shovel Ready** projects are projects that have been identified as "**potential candidates**" for funding for the 2009 Stimulus Act.
- **ARRA Stimulus projects** are projects that have been **funded** by the American Recovery and Reinvestment Act of 2009.

Below you will find information on how to search for and identify projects that are impacted by the 2009 Stimulus Act.

"Shovel Ready" projects

The Transportation and Infrastructure committee of the United States defines "**Shovel Ready**" as the following:

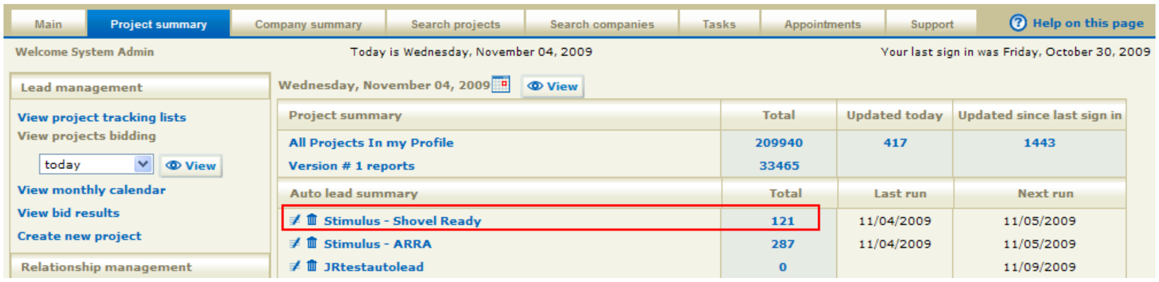
- The project meets the normal eligibility requirements under the existing Federal highway, transit, or other grant program.
- The project has completed all the necessary design work and right-of-way acquisition.
- The project has completed all the environment reviews. If the project would result in significant environmental effects, the Federal agency must have issued an Environmental Impact Statement (EIS) Record of Decision determining that the project complies with environmental laws. As part of this environmental review process, project sponsors must have had public hearings to consider the transportation, environmental, community, and other effects of proposed projects. As part of the EIS Record of Decision, project sponsors must also have environmental mitigation ready to incorporate into the project design.
- The project is on the State plan ("State Transportation Improvement Program") and, if applicable, Metropolitan plan ("Transportation Improvement Program").
- The project is ready to be put out to bid, and contracts can be awarded and work underway within 90 days of enactment.

Any project in ConstructionPoints identified as a "shovel ready" project will have that term listed in the body of the report.

Searching for Shovel Ready Projects

Searching for projects identified as “Shovel Ready” is simple:

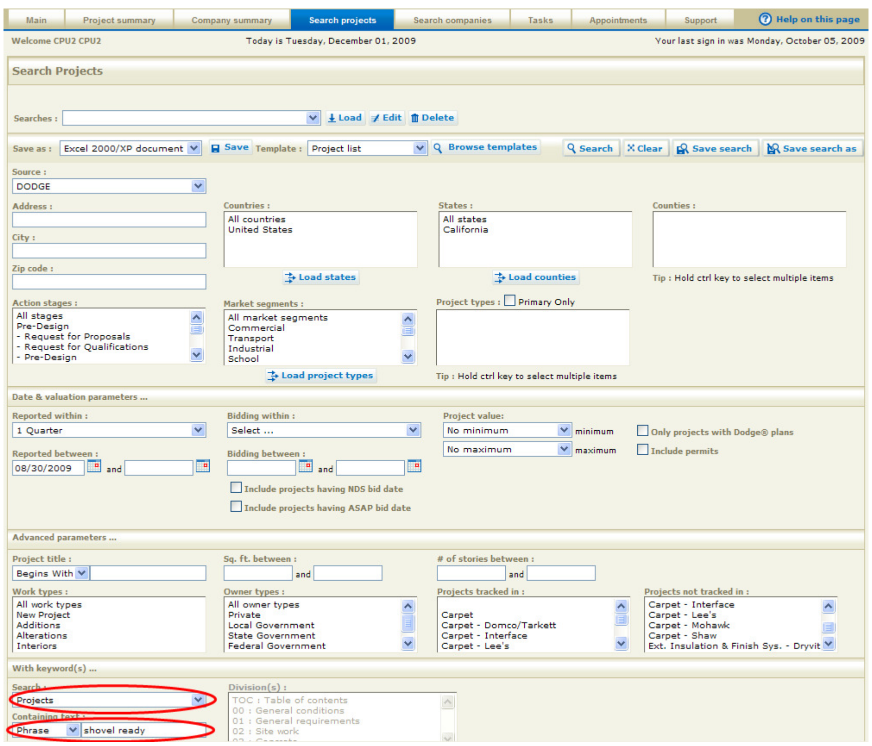
1. Assuming you are logged in, click the **Project Summary** tab.



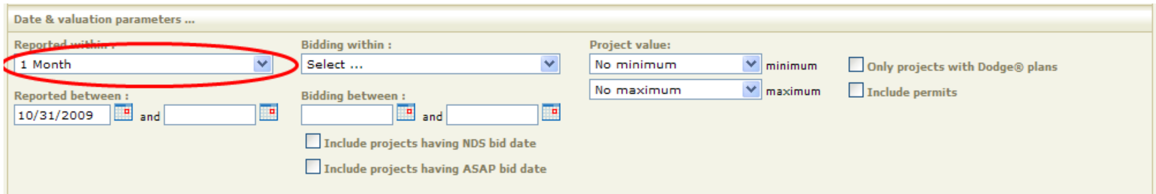
2. Click on the **Stimulus – Shovel Ready** Auto Lead. This is a built-in auto lead that runs every day and brings back all projects that contain the text “Shovel Ready” in the Project information. *NOTE: The results from clicking on this link are based on yesterday’s data.*

Alternatively, if you want to run this search manually using today’s data, do the following:

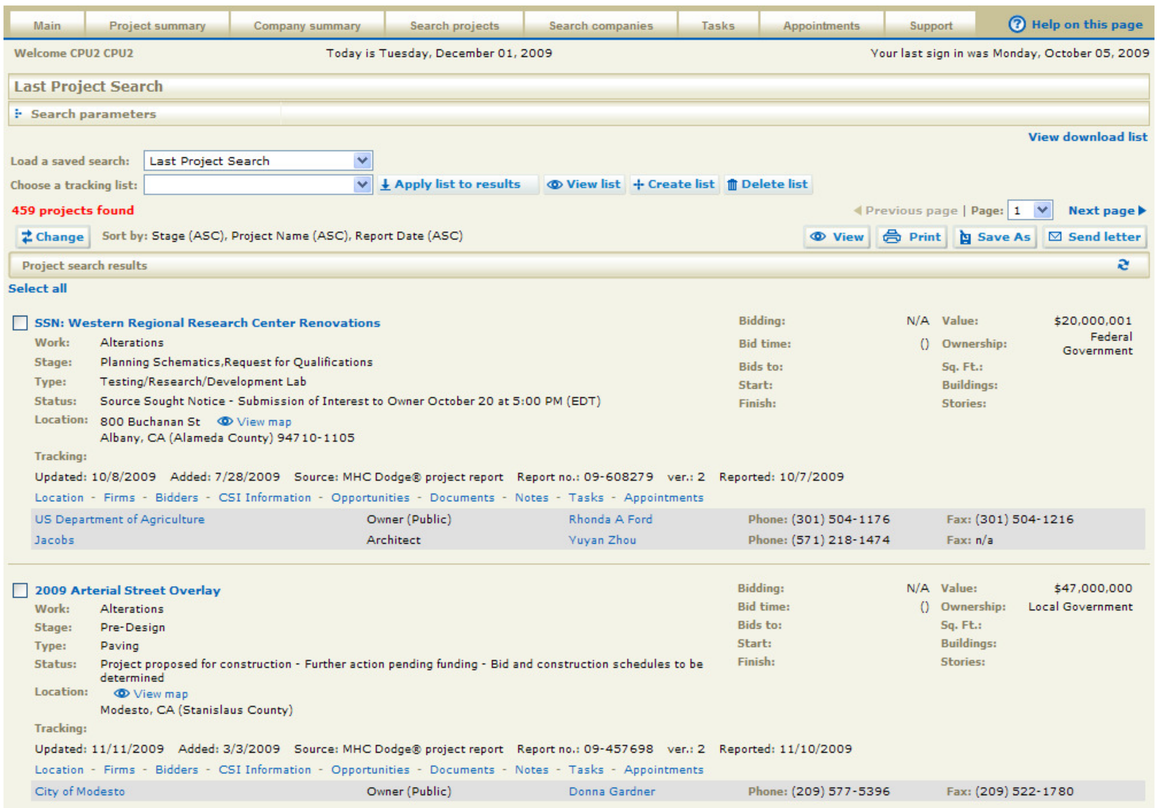
1. Click on the Search Projects tab.
2. Scroll down the **With keyword(s)** section



3. Select **Projects** from the Search drop-down list.
4. Type *shovel ready* in the **Keyword(s)** text field.
5. Select Phrase from the **Containing text**: drop-down list.



6. If needed, scroll down to the Date Settings section and set the date back to the desired timeframe. Remember, shovel ready projects have only been available since January 1, 2009.
7. Click the **Search** button. The list of projects displays.



8. Click the name of any of the reports listed. The project report displays.

The phrase **Shovel Ready** is located under the **Project Details: Special Code**: heading:

Type:	Testing/Research/Development Lab	Bid Time :	
Ownership:	Federal Government	Bids To :	
Sq.ft.:		Start :	
Buildings:	0	Finish :	
Stories:	0 (0 above, 0 below)		

Owner (Public)
US Department of Agriculture
Rhonda A Ford
Phone: 301-504-1176 FAX: 301-504-1216

Architect
Jacobs
Yuyan Zhou
Phone: 571-218-1474

Status

Source Sought Notice - Submission of Interest to Owner October 20 at 5:00 PM (EDT)

Location

800 Buchanan St
Albany, CA (Alameda County)
United States94710-1105
View map

Project details

Status : Source Sought Notice - Submission of Interest to Owner October 20 at 5:00 PM (EDT)

C2NE01 - RECOVERY ? SOURCES SOUGHT FOR MAJOR RENOVATIONS TO THE WESTERN REGIONAL RESEARCH CENTER TO ADDRESS DEFERRED MAINTENANCE OF CRITICAL MECHANICAL, ELECTRICAL AND PLUMBING SYSTEMS AND INCIDENTAL REPAIRS. This Sources Sought Notice is issued under the American Recovery and Reinvestment Act of 2009 (ARRA) and is for information and planning purposes only and shall not be construed as a solicitation or as an obligation on the part of the U.S. Department of Agriculture (USDA), Agricultural Research Service (ARS). The purpose of this notice is to identify potentially qualified sources. After completing an analysis of the responses, the Government will determine whether to set aside this acquisition for certified 8(a), Historically Underutilized Business Zones (HUBZone), or Service-Disabled Veteran-Owned Small Business (SDVOSB) firms or to invite full and open competition. Respondents will not be notified of the results of this notice nor will they be reimbursed for the preparation of the response/information submitted. Interested firms having the skills, qualifications and capabilities to perform this work should submit a Capabilities Statement of no more than 10 pages that includes the following information: (1) Company name; (2) Address; (3) Point of contact; (4) Phone number, fax number, and e-mail address; (5) DUNS number; (6) Type and size of business (e.g., small business, SDVOSB, HUBZone, 8(a), SDB, etc); (7) Bonding capacity by individual project and in the aggregate, as well as the name of the bonding company/Surety; (8) Description of construction experience as a prime contractor for projects of a similar size and complexity; and (9) Demonstration of capability to perform at least 15% of the work with their own forces. This is NOT a Request for Proposals. NO site visits to the facility or contact with the staff are permitted. Interested firms are instructed to submit their written responses by e-mail not later than 20 October 2009, at 5:00 pm, eastern ti me, to ronda.ford@ars.usda.gov or regular mail to the attention of Ronda Ford at USDA/ ARS,/FD, Facilities Contracts Branch; 5601 Sunnyside Ave., Mail Stop 5124; Beltsville, MD 20705-5124. Questions should be directed to Ms. Ford at 301-504-4447.

Valuation :	$15,000,001 - $25,000,000		
Project types :	n/a	Action stages :	
Submit bids to :	n/a	Plans available from :	n/a
Target bid date :	n/a	Architectural plans by :	n/a
Target start date :	n/a	Electrical plans by :	n/a
Target completion date :	n/a	Mechanical plans by :	n/a
Bond remarks :	n/a	Structural plans by :	n/a
Bid bond :	n/a	Plans remarks :	n/a
Payment bond :	n/a		
Performance bond :	n/a		
Permit title :	n/a	Deposit amount :	n/a
Permit issued :	n/a	Percent refund :	n/a
		Plans location :	n/a
Contracting method :	Contract Method Undetermined		
Sub contracts :	n/a	Number of buildings :	n/a
Contract # :	98912607	Sq. ft. :	n/a
Owner type :	Federal Government	Stories above :	n/a
Source of funds :	n/a	Stories below :	n/a
Special code :	Shovel Ready	Dimensions :	n/a
Type of work :	Alterations		
Structural :	n/a		
Features info :	The U.S. Department of Agriculture, Agricultural Research Service (ARS), has a requirement for modernization of the south wing laboratories at the Western Regional Research Center (WRRC) in Albany, CA. Work includes, but is not limited to, deferred maintenance of critical mechanical, electrical, and plumbing systems and incidental		

American Recovery & Reinvestment Act (ARRA)

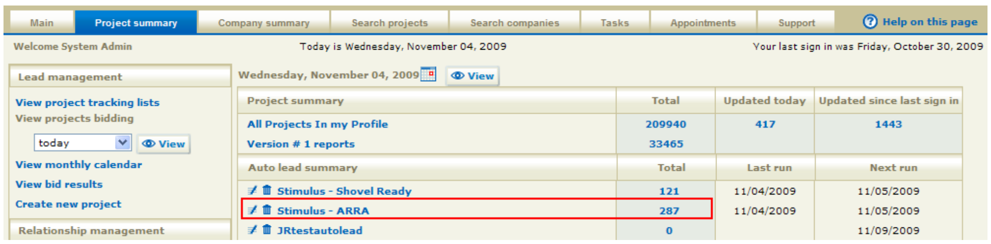
ARRA Stimulus projects are projects that have been funded by the American Recovery and Reinvestment Act of 2009. Any project in the Network identified as an “ARRA Stimulus” project will have that term listed in the body of the report.

Any project in the Network identified as an “ARRA” project will have that term listed in the body of the report.

Searching for ARRA Projects

Searching for projects identified as “Shovel Ready” is simple:

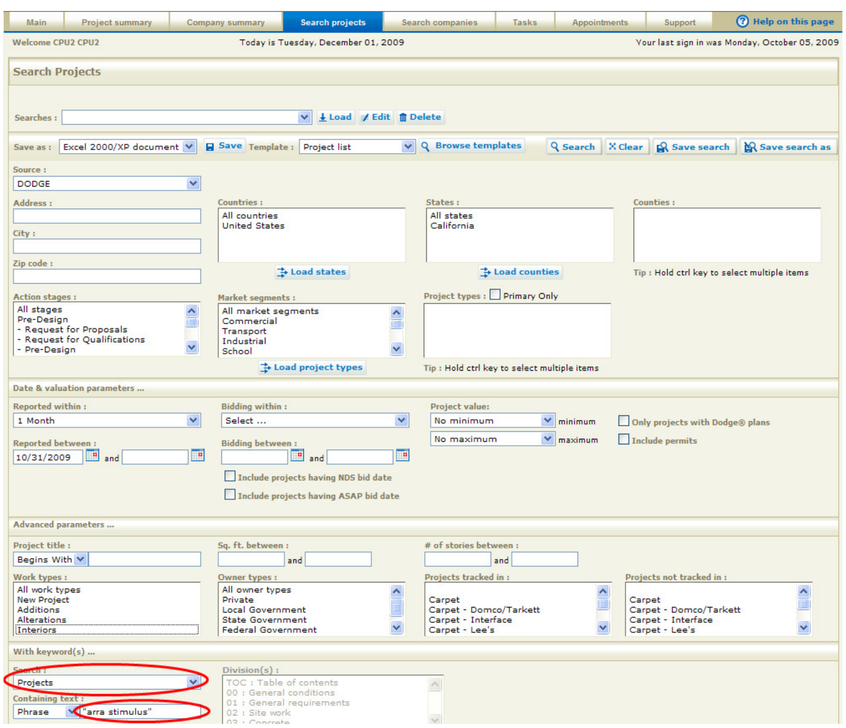
1. Assuming you are logged in, click the **Project Summary** tab.



2. Click on the **Stimulus – ARRA** Auto Lead. This is a built-in auto lead that runs every day and brings back all projects that contain the text “Shovel Ready” in the Project information. *NOTE: The results from clicking on this link are based on yesterday’s data.*

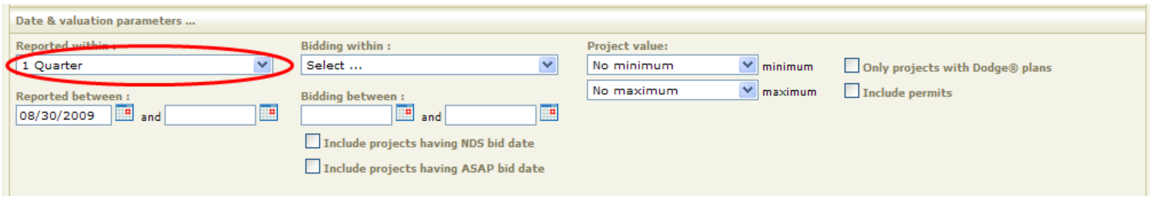
Alternatively, if you want to run this search manually using today’s data, do the following:

1. Assuming that you are logged in, click the Search Projects tab. The Project Search window displays:

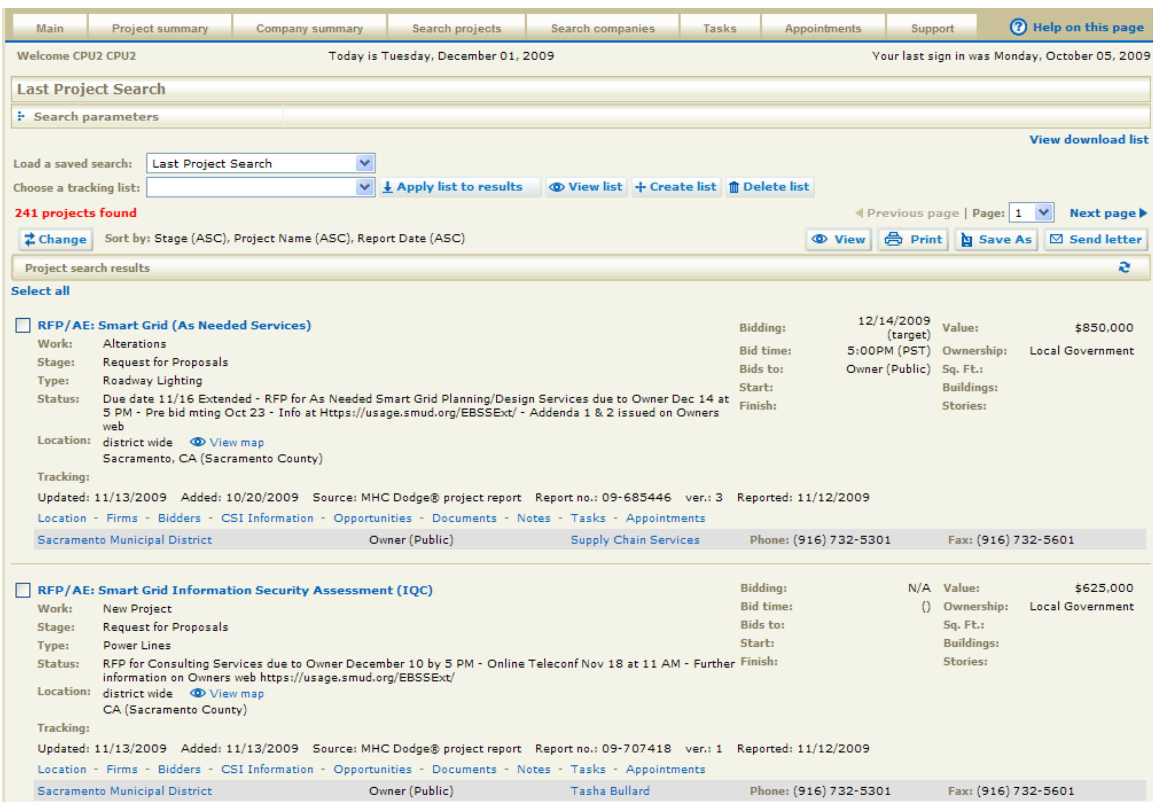


2. Type **ARRA Stimulus** in the **With Keyword(s)** text field. Under **Search** select **Projects**.
3. Select **Phrase** from the **Containing text**: drop-down list.

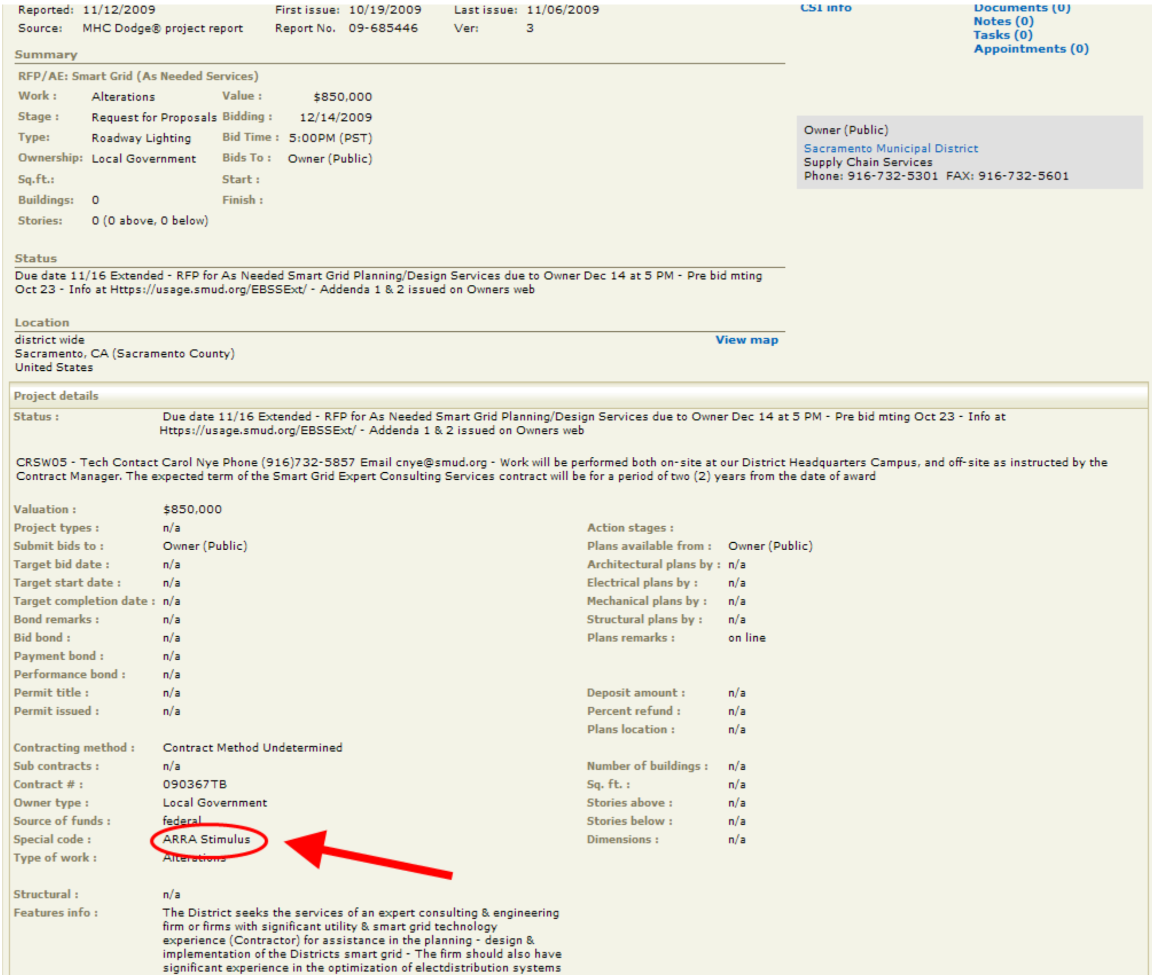
By default, when **Projects** is selected from **Search** the query is set for scanning the entire report. Therefore, there is nothing you need to do for this option.



4. If needed, scroll down to the Date Settings section and set the date back to the desired timeframe. Remember, The American Recovery & Reinvestment Act was not signed into law until February 17, 2009 so limit your timeframe to only calendar year 2009.
5. Click the **Search** button. The list of projects displays.



6. Click the name of any of the reports listed. The project report displays:



Reported: 11/12/2009 First issue: 10/19/2009 Last issue: 11/06/2009
Source: MHC Dodge® project report Report No. 09-685446 Ver: 3

CSI info

Documents (0)
Notes (0)
Tasks (0)
Appointments (0)

Summary

RFP/AE: Smart Grid (As Needed Services)

Work :	Alterations	Value :	$850,000
Stage :	Request for Proposals	Bidding :	12/14/2009
Type:	Roadway Lighting	Bid Time :	5:00PM (PST)
Ownership:	Local Government	Bids To :	Owner (Public)
Sq.ft.:		Start :	
Buildings:	0	Finish :	
Stories:	0 (0 above, 0 below)		

Owner (Public)
Sacramento Municipal District
Supply Chain Services
Phone: 916-732-5301 FAX: 916-732-5601

Status

Due date 11/16 Extended - RFP for As Needed Smart Grid Planning/Design Services due to Owner Dec 14 at 5 PM - Pre bid mting Oct 23 - Info at Https://usage.smud.org/EBSSExt/ - Addenda 1 & 2 issued on Owners web

Location

district wide
Sacramento, CA (Sacramento County)
United States

View map

Project details

Status : Due date 11/16 Extended - RFP for As Needed Smart Grid Planning/Design Services due to Owner Dec 14 at 5 PM - Pre bid mting Oct 23 - Info at Https://usage.smud.org/EBSSExt/ - Addenda 1 & 2 issued on Owners web

CRSW05 - Tech Contact Carol Nye Phone (916)732-5857 Email cnye@smud.org - Work will be performed both on-site at our District Headquarters Campus, and off-site as instructed by the Contract Manager. The expected term of the Smart Grid Expert Consulting Services contract will be for a period of two (2) years from the date of award

Valuation :	$850,000		
Project types :	n/a	Action stages :	
Submit bids to :	Owner (Public)	Plans available from :	Owner (Public)
Target bid date :	n/a	Architectural plans by :	n/a
Target start date :	n/a	Electrical plans by :	n/a
Target completion date :	n/a	Mechanical plans by :	n/a
Bond remarks :	n/a	Structural plans by :	n/a
Bid bond :	n/a	Plans remarks :	on line
Payment bond :	n/a		
Performance bond :	n/a		
Permit title :	n/a	Deposit amount :	n/a
Permit issued :	n/a	Percent refund :	n/a
		Plans location :	n/a
Contracting method :	Contract Method Undetermined		
Sub contracts :	n/a	Number of buildings :	n/a
Contract # :	090367TB	Sq. ft. :	n/a
Owner type :	Local Government	Stories above :	n/a
Source of funds :	federal	Stories below :	n/a
Special code :	ARRA Stimulus	Dimensions :	n/a
Type of work :	Alterations		
Structural :	n/a		
Features info :	The District seeks the services of an expert consulting & engineering firm or firms with significant utility & smart grid technology experience (Contractor) for assistance in the planning - design & implementation of the Districts smart grid - The firm should also have significant experience in the optimization of electdistribution systems		

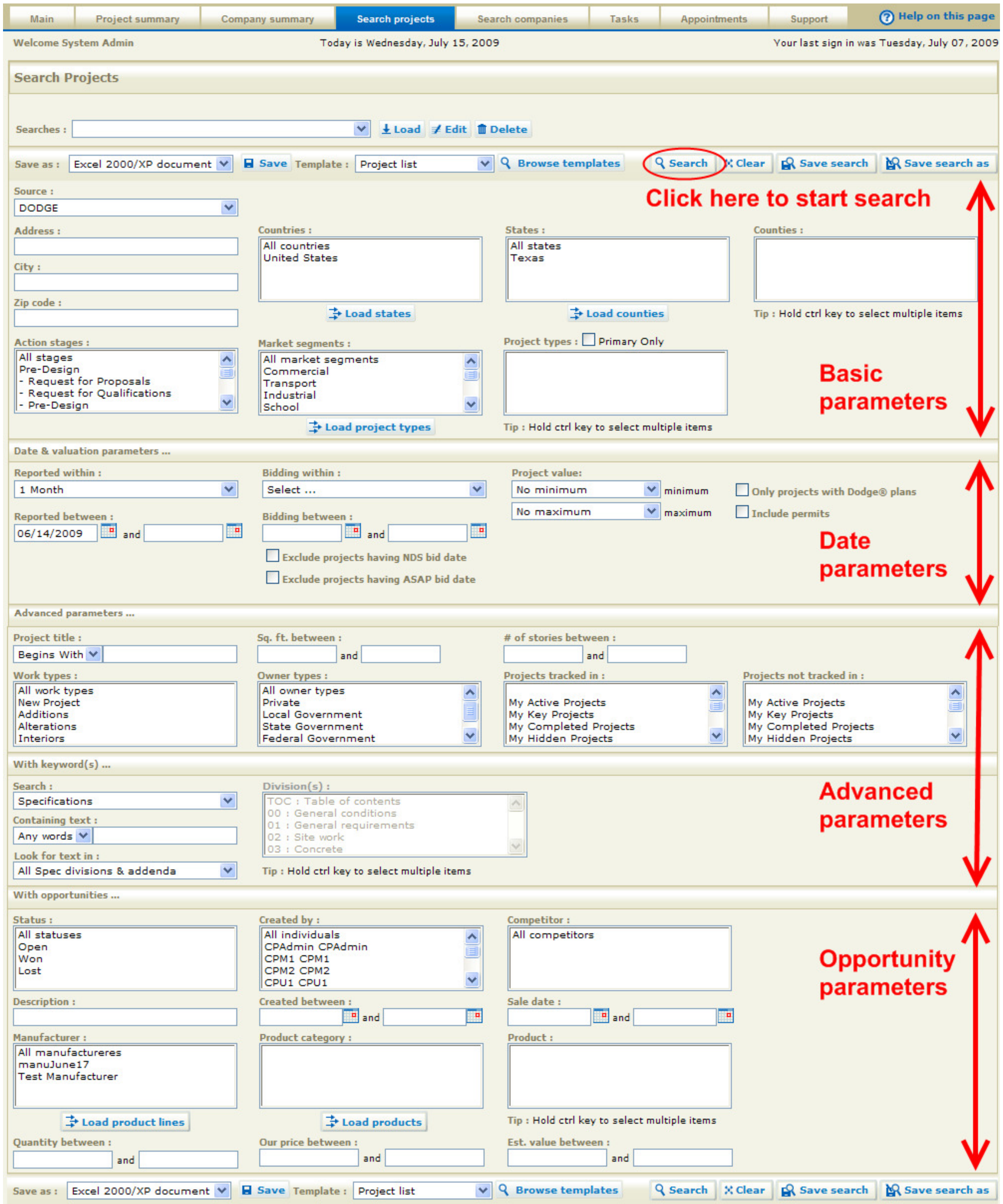
The phrase **ARRA Stimulus** is located under the **Special code:** heading.

The criteria used in *Search Projects* may be as narrow or broad as you require, and can be aimed at finding one specific project or many projects of a certain type, stage, geographic location etc. The **Search Results** page lists the titles of the "found" projects and provides links to the detailed reports.

Each of the sections of the search form is explained in detail in the following pages.

Also included on this page is an Opportunity Search. This will conduct a search based on information entered into the opportunity form within each project report. The opportunity form and search parameters can be tailored to reflect your company's needs. Please call your account representative for more information.

Search Projects

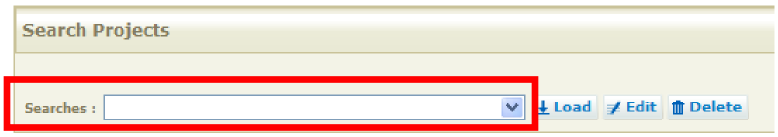


On the Search Projects screen you can specify as many search terms as you like in order to narrow your results. You select search terms by clicking on them. You may select multiple items by holding down the **Ctrl** key on your keyboard and clicking on each item in turn.

To get the results of the search, click **Search**. You may also click Clear to clear all your search parameters and start over, or click **Save search** in order to save your search parameters for quick access later.

Save search

If you regularly search for same project criteria you may wish to set-up saved queries. Once saved, they will appear in the drop down list **Searches:** at the top of the search projects page.

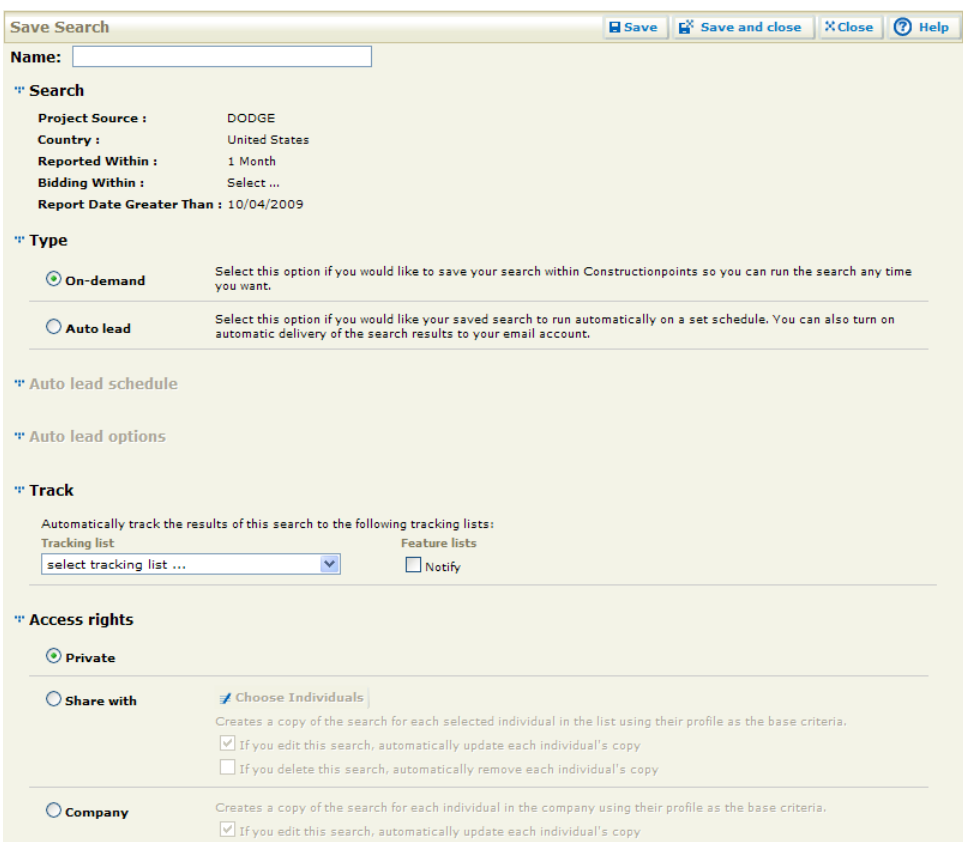


Create a saved search/query

1. On the **Search** Projects page, select all search criteria.
2. Select the **Save Search** button. (The **Save Search As** button is used for renaming an existing search after you have loaded it with the **Load** button).
3. A new pop-up window will appear asking you to enter a name for your search. You have the option of choosing either **On-demand**, which is a search that you can run any time you want, or select Auto lead, which can be set to run on a schedule. You can also select to keep the search Private (accessible only to you), Share with (accessible with people you select), or Company (shared with everyone in your company).

   You can optionally choose to export this file to an existing **Tracking List** of your choosing. *Note*: The tracking list will only get updated when the search is run, so it is best to use this option with Auto Leads, which get run automatically. See the Auto Leads section for more details.

4. When done, click **Save**. Your search will now be displayed in the drop-down list **Searches**. Selecting it and clicking **Open** will load the search criteria.



Edit a saved search

If you run searches that vary only slightly you may want to set up a general saved query and then edit the information slightly for each specific search.
Example: territory and reported within date stay the same but project type varies. Set up a saved search for the territory and reported within date. Each time you load the saved search select a new project type

1. Select the search from the drop-down list **Searches:**
2. Click **Load** to open the saved search criteria on the page.
3. After the page loads the search criteria you have the option of changing anything on the page.
4. Click **Search**.

Delete a saved search/query

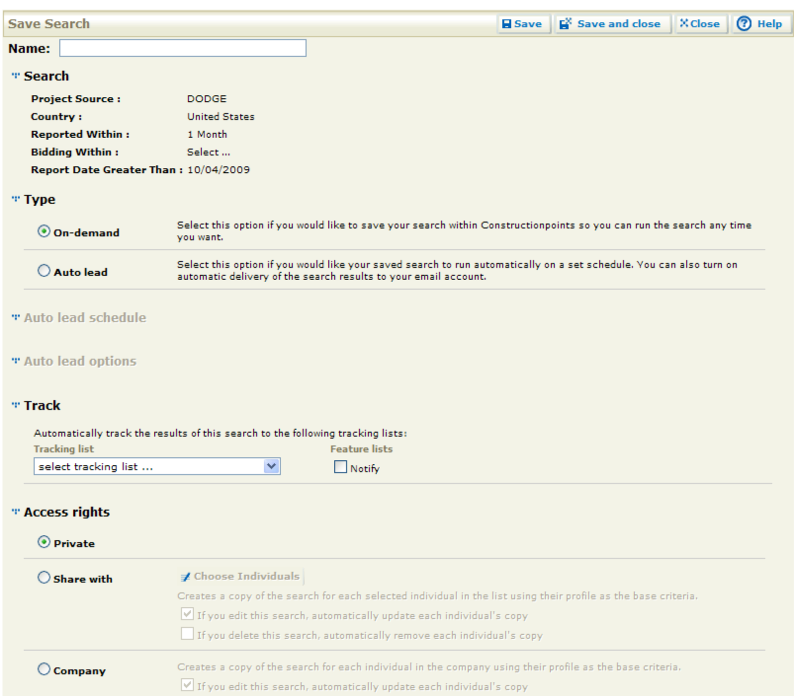
1. From the search projects page select the saved search from the drop-down list **Searches:**
2. Click **Load** to open the saved search.
3. After the search loads click **Delete** to the right of the search name.
4. You will be asked to confirm that you want to delete this search. Click **OK** to confirm.

NOTE: If you have loaded a search that is actually an Auto Lead, the results of the search will be based on when the Auto Lead was last run. If the Auto Lead has not yet been run (for example, if you have just created it and it is scheduled to run tomorrow) there will be no results from this search. See the Auto Lead section for more details.

Auto leads

Auto leads are a new feature of ConstructionPoints 4. Auto leads are a special type of saved search that can be scheduled to automatically run at a set period of time: Daily, Weekly, or Monthly. You can also bundle the results of said search in an email and an Excel spreadsheet that is sent automatically to the user's email address.

Auto leads are created just like any other saved search. From the **Search Projects** page, click **Save Search**. A pop-up window will appear:



Name

Enter a name for the Auto lead in the Name text box. The details of the search, which you already entered on the **Search Projects** page, appear below under the **Search** sub-heading.

Type

The Type of the search can be either **On-Demand** or **Auto lead**. An On-Demand search is one that you can run any time by visiting the **Manage Saved Searches** page. An Auto lead, on the other hand, is a special type of saved search that can be scheduled to run automatically at any frequency you wish. Click the Auto lead radio button to make this saved search an Auto lead.

Auto lead schedule

The Schedule of an Auto lead determines how often the search will be run. You can schedule Auto lead searches to run every day, every week on a certain day, or every month on either the 1st, 15th, or last day of the month.

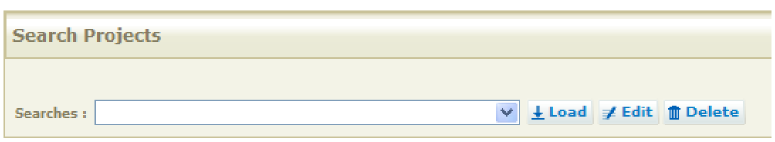
Auto lead searches are run on the Ingenium server, automatically, between 1 and 2 am EST on the day they are scheduled. Please note that there may occasionally be a delay when generating auto leads, depending on server load.

Track

You can also save the results of an Auto Lead to an existing tracking list. Each time the Auto Lead is run, the projects that meet the qualifications of the Auto Lead search will be flagged with the tracking list you specify. You can also add these results to the **Notify** system tracking list.

Editing an Auto lead

Once you have saved an Auto lead, it appears in the list of saved searches at the top of the Search projects page:

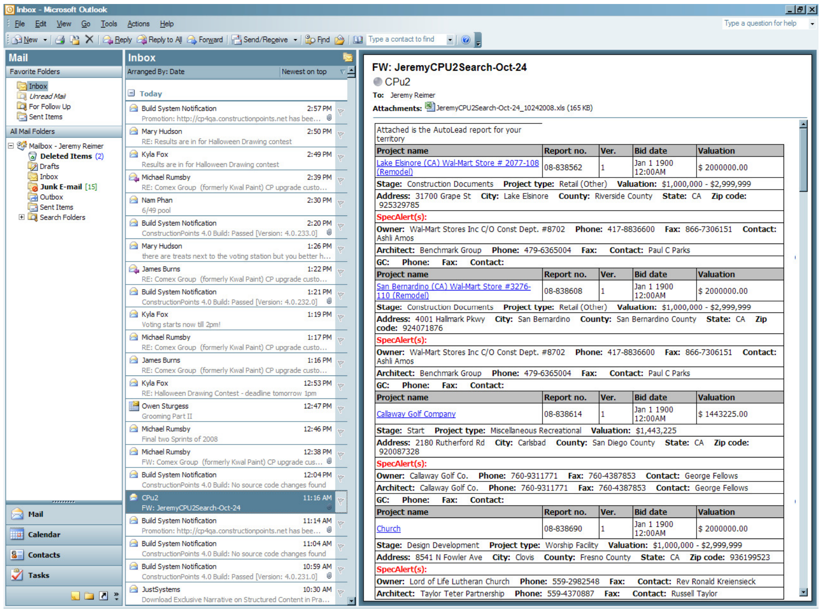


Select the Auto lead from the **Searches** drop-down list, click **Load** to open the search, then click **Edit** to edit the Auto lead settings.

Auto lead options – Email alerts

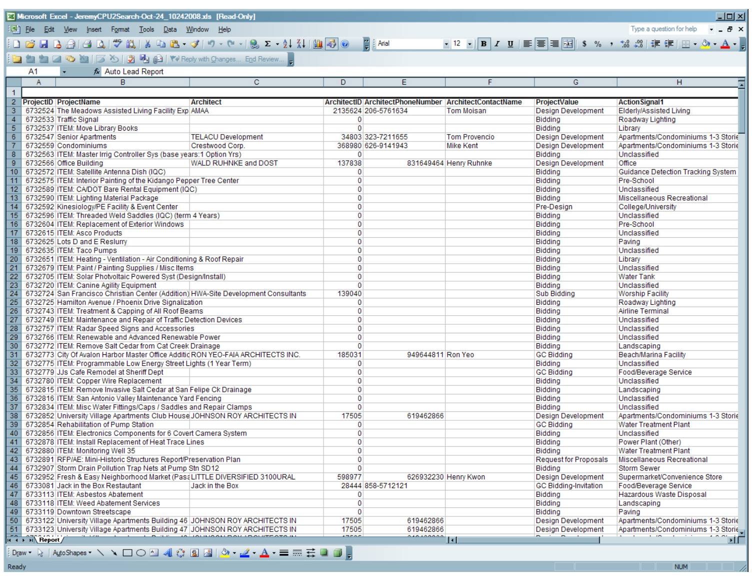
One of the most powerful features of Auto leads is the Email alert feature. You can choose to send the results of each Auto lead search directly to your Inbox. To do so, check the **Email alerts** box. The results will be automatically sent to the email address configured in your **Profile**.

The email alert looks something like this:

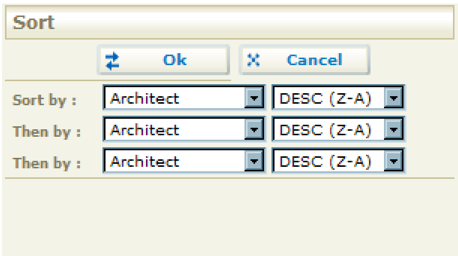


Check Include **Auto lead summary** to add a summary report of the search results to the top of the email. Check **Top [number] Results** to limit the report to only the top results (the default is 25).

Finally, check **Microsoft Excel Report** to include an Excel version of the search results as an attachment to the email message. You can also specify that the Excel attachment include all results, or only a certain number of top results (the default is 500). The Excel attachment will look like this:



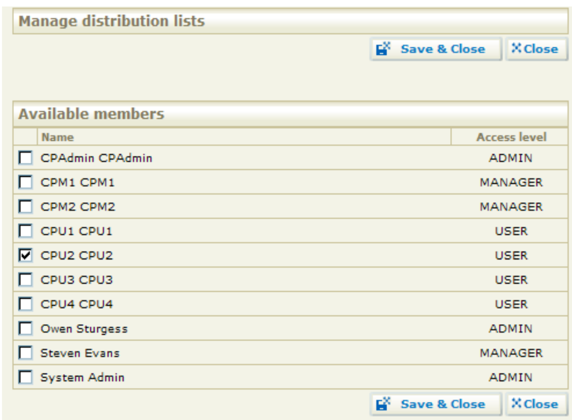
You may change the sorting order of the fields in both the Auto lead email and the Excel attachment by clicking on the Change button. This pops up a window that allows you to set three levels of sorting Each level of sorting can be set for ascending (A-Z) or descending (Z-A) order:



Access rights

As with regular searches and tracking lists, Auto leads can be kept private, shared with specific users at your company, or shared with your entire company. Click **Private** to keep the saved search to yourself. Click **Company** to share with all other users in your company.

Click **Share With** and then click **Choose Individuals** to share your saved search with other users at your company. A new pop-up window will appear:



Select as many users as you wish to share your Auto lead with, then click **Save & Close**.

By default, if you share a saved search and then edit it, the changes will be copied to all other users who have shared the search. Uncheck **If you edit this search, automatically update each individual's copy** to disable this. Similarly, check **If you delete this search, automatically remove each individual's copy** to delete other user's copies of your shared save search, if and when you delete yours.

Search projects parameters

Quick search

This feature allows you to search for Dodges or private projects by number. Enter the Dodge report number as follows:

Correct way to enter a Dodge Report Number: 99-123456
Incorrect way to enter a Dodge Report Number: 99-12456-3

You can either hit the Enter key or click the magnifying glass icon to perform the search.

NEW: You can enter multiple Dodge Project numbers separated by commas, like this:
Example: 99-123456, 99-223344, 99-553366

The last hyphen and number indicate which version, or update, of the report you are viewing. As you want the newest version, do not use the last digit when searching.

Source

You can specify project searches for either **Dodge** projects, or **Private** – projects you or your co-workers have added to the site.

Search / Save as Excel / Clear / Save search

Search will display the projects on the search results page, **Save** will display the search results in Excel or comma-delimited (CSV) format, **Clear** will reset the page if you need to change your search criteria, and **Save Search** enables you to save the criteria for use again (see below for details).

1. Select all search criteria.
2. Instead of using the **Search** button, select **Excel 2000/XP document** from the dropdown list, then click **Save**.

A new window will appear stating you have chosen to download a file. You may **Open this file from its current location,** which will open the result in an Excel spreadsheet (requires Excel to be installed on your computer) or click **Save this file to disk** which will open another window asking you to select a location to save this file to. When done, click **Save**. A third window will tell you that the download is complete. Click **Close**. You will be back at the search page.

You may also select a template for saving to Excel or CSV. Templates let you choose the information you are most interested in for inclusion in an Excel spreadsheet. For more information on templates, see the *Project Search Excel Templates and the Field Chooser* section below.

Address

The system will search for any matches containing the information you enter. For example: A search for 600 Granville Street will return projects with addresses "600 Granville St.", "3600 Granville St" etc.

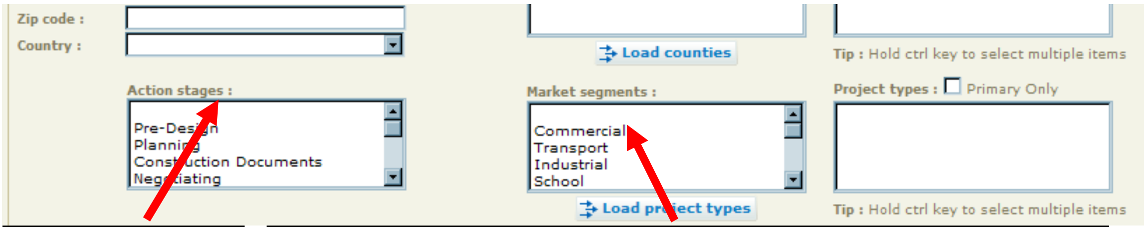
City

The system will return any project within the specified city. If you have a small territory you do not need to select the state the city is in. However, if you have a large territory the state and/or county is recommended as many states have cities with the same names, Example: Springfield.

State and County

The list boxes *State* and *County* will show your assigned territory. I.e., if you have two counties in a state you will only see those counties when you select the state and *Load* counties.

- If you do not select any states, the system will assume you wish to search all states in your territory.
- If you want to search an entire state you do not need to load the counties.
- If you load the counties for more than one state all county names will be combined in alphabetical order followed by the state abbreviations.



This menu allows you to search for projects in one or more specific stages.

You can search one or more entire market segments by selecting from the menu on the left, or Load the project types for that segment and pick one or more project types. Primary Only gives you the option of searching for project types that are the main focus of the project, thereby eliminating projects with a small element of the selected type.

Zip codes

- US zip codes may be entered with as few as two digits, Example: 98 will find all projects whose addresses begin with 98, or 980 will narrow it down slightly to all projects whose zip codes begin 980 etc. The more digits you use the more specific the search result will be.
- Multiple US zip codes should be separated by commas but do not need spaces between the commas and the next entry, Example: 982,983,984,985 or 98003,98004,98005,98006.
- Canadian postal codes must have a space within them, Example: V6H 2G1. In multiple searches each code does not need to be separated by a space, Example: V6H 2G1,V6H 3Z2,V7G 4J7 but the space within each code must remain.

Multiple market segments and/or project types

To select multiple entries in a list, hold down the **Ctrl** (control) key on your keyboard while you use your mouse to select entries.

Action stage

- You can select as many stages as you like for one search.
- If you do not select any the system will assume you wish to search on all stages.

NOTE: Action stages have changed from the old Network product. Please take note of the following changes in action stages, as it may affect your search results.

Network Premium	**ConstructionPoints**	*Parent Stage*
Pre-Planning	Request for Proposals	Pre-Design
	Request for Qualifications	Pre-Design
	Pre-Design	Pre-Design
Planning	Planning Schematics	Design
	Design Development	Design
Final Planning	Construction Documents	Design
	Pre-qualification	Design
Bidding	Bidding	Bidding/Negotiating
	GC Bidding	Bidding/Negotiating
	GC Bidding-Invitation	Bidding/Negotiating
Negotiating	Negotiating	Bidding/Negotiating

Sub-bidding	Sub bidding	Bidding/Negotiating
Bid Result	Bid Results	Bidding/Negotiating
Start	Start	Construction
Sub-Award	Subcontract Award	Construction
Construct	Construction	Construction
Permit	Permit	Construction
Occupancy	Notice of Completion Leasing Service bidding Retrofit	Operation Operation Operation Operation
Deferred	Delayed	Delayed
Abandoned	Abandoned	Abandoned

Market segments

- You can select as many segments as you like for one search.
- If you do not select any, the system will assume you wish to search all segments.
- If you do not load and select specific **Project Types** the system will search for all project types within the selected market segment.

Project types

- Project types will only display once you select one or more **Market Segments** and then click **Load**.
- You can select as many types as you like for one search.

NOTE: Project types have changed from the old Network product. Please take note of the following changes in project types, as it may affect your search results.

Network Premium		**ConstructionPoints**		
Market Segment	**Project Types**	**Project Type**	**Market Segment (Project Category)**	**Project Group**
Houses	Custom House	Custom Homes	1 & 2 Family Homes	Residential
Houses	Spec Houses	Sale/Spec Homes	1 & 2 Family Homes	Residential
Commercial	Offices	Office	Commercial	Non-Residential (General Building)
Commercial	Finance	Bank	Commercial	Non-Residential (General

				Building)
Commercial	Store-Food	Supermarket/Convenience Store	Commercial	Non-Residential (General Building)
Commercial	Store-Other	Retail (Other)	Commercial	Non-Residential (General Building)
Commercial	Shop Centre	Shopping Center/Strip Mall	Commercial	Non-Residential (General Building)
Commercial	Shop Centre	Regional Shopping Mall	Commercial	Non-Residential (General Building)
Commercial	Food Service	Food/Beverage Service	Commercial	Non-Residential (General Building)
Industrial	Gas Plant	Gas/Chemical Plant	Industrial	Non-Residential (General Building)
Industrial	Chem-Indoor	Gas/Chemical Plant	Industrial	Non-Residential (General Building)
Industrial	Refineries	Refinery	Industrial	Non-Residential (General Building)
Industrial	Chem-Outdoor	Gas/Chemical Plant	Industrial	Non-Residential (General Building)
Industrial	Factories	Manufacturing Building	Industrial	Non-Residential (General Building)
Industrial	Warehouse-Refrigerated	Warehouse (Refrigerated)	Industrial	Non-Residential (General Building)
Industrial	Warehouse-Other	Warehouse	Industrial	Non-Residential (General Building)
Industrial	Freight	Freight Terminal	Industrial	Non-Residential (General Building)
Leisure	Theaters	Theater/Auditorium	Recreation	Non-Residential (General

				Building)
Leisure	Auditorium	Theater/Auditorium	Recreation	Non-Residential (General Building)
Leisure	Stadium	Stadium	Recreation	Non-Residential (General Building)
Leisure	Exhib Hall	Convention & Exhibit Center	Recreation	Non-Residential (General Building)
Leisure	Arenas	Indoor Arena	Recreation	Non-Residential (General Building)
Leisure	Swim Pools	Swimming Pool	Recreation	Non-Residential (General Building)
Leisure	Gyms	Athletic Facility	Recreation	Non-Residential (General Building)
Leisure	Club/Lodge	Social Club	Recreation	Non-Residential (General Building)
Leisure	Bowling	Bowling Alley	Recreation	Non-Residential (General Building)
Leisure	Bath/Beach	Beach/Marina Facility	Recreation	Non-Residential (General Building)
Leisure	Other Rec	Miscellaneous Recreational	Recreation	Non-Residential (General Building)
Leisure	Other Rec	Casino	Recreation	Non-Residential (General Building)
Medical	Hospitals	Hospital	Medical	Non-Residential (General Building)
Medical	Clinics	Clinic/Medical Office	Medical	Non-Residential (General Building)
Medical	Nurs/Conv	Nursing/Convalescent Center	Medical	Non-Residential (General

				Building)
Medical	Nurs/Conv	Elderly/Assisted Living	Elderly/Assisted Living	Residential
Medical	Labs	Testing/Research/Development Lab	Medical	Non-Residential (General Building)
Public	Armories	Military Facility	Federal Facilities	Non-Residential (General Building)
Public	Capital/Court	Capitol/ Courthouse/City Hall	Public Buildings	Non-Residential (General Building)
Public	Post Office	Post Office	Public Buildings	Non-Residential (General Building)
Public	Police/Fire	Fire/Police Station	Public Buildings	Non-Residential (General Building)
Public	Prisons	Prison/Jail	Public Buildings	Non-Residential (General Building)
Public	Military	Military Facility	Federal Facilities	Non-Residential (General Building)
Public	Space	Space Facility	Federal Facilities	Non-Residential (General Building)
Multi-Residential	1-3 Story Apartment	Apartments/Condominiums 1-3 Stories	Apartments/Condominiums	Residential
Multi-Residential	Town Houses	Apartments/Condominiums 1-3 Stories	Apartments/Condominiums	Residential
Multi-Residential	4+ Story Apartment	Apartments/Condominiums 4+ Stories	Apartments/Condominiums	Residential
Multi-Residential	Hotel/Motel	Hotel/Motel	Hotels & Motels	Non-Residential (General Building)
Multi-Residential	Dormitories	Dormitory	Dormitories	Non-Residential (General Building)
School	Primary School	Primary School	Education	Non-Residential (General Building)
School	Primary School	Kindergarten	Education	Non-Residential (General

				Building)
School	Junior High School	Middle/Senior High School	Education	Non-Residential (General Building)
School	Senior High School	Middle/Senior High School	Education	Non-Residential (General Building)
School	College/University	College/University	Education	Non-Residential (General Building)
School	Community College	College/University	Education	Non-Residential (General Building)
School	Vocational	Vocational School	Education	Non-Residential (General Building)
School	Special	Miscellaneous Education Building	Education	Non-Residential (General Building)
School	Special	Pre-School	Education	Non-Residential (General Building)
School	Library	Library	Education	Non-Residential (General Building)
School	Museum	Museum	Recreation	Non-Residential (General Building)
Transport	Air Terminal	Airline Terminal	Transportation	Non-Residential (General Building)
Transport	Other Terminal	Passenger Terminal (Other)	Transportation	Non-Residential (General Building)
Transport	Parking Garage	Parking Garage	Transportation	Non-Residential (General Building)
Transport	Car Sales/Service	Vehicle Sales/Service	Transportation	Non-Residential (General Building)
Transport	Bus/Truck	Vehicle Sales/Service	Transportation	Non-Residential (General

				Building)
Transport	Air Service	Aircraft Sales/Service	Transportation	Non-Residential (General Building)
Transport	Other Service	Vehicle Sales/Service	Transportation	Non-Residential (General Building)
Worship	Church	Worship Facility	Religious & Funeral	Non-Residential (General Building)
Worship	Religious Education	Worship Facility	Religious & Funeral	Non-Residential (General Building)
Funeral	Funeral	Funeral/Interment Facility	Religious & Funeral	Non-Residential (General Building)
Animal/Plant	Animal/Plant	Animal/Plant/Fish Facility	Animal/Plant/Fish Facilities	Non-Residential (General Building)
Utilities	Cogen Power	Cogeneration Plant	Power Plants	Utilities
Utilities	Nuclear Power	Nuclear Power Plant	Power Plants	Utilities
Utilities	Hydro Power	Hydroelectric Plant	Power Plants	Utilities
Utilities	Fossil Power	Power Plant (Other)	Power Plants	Utilities
Utilities	Electrical Substation	Electric Substation	Electric Substations	Utilities
Utilities	Heating/Cooling Plant	Heating/Cooling Plant	Heating & Cooling Plants	Utilities
Utilities	Other Power	Power Plant (Other)	Power Plants	Utilities
Utilities	Communications	Communication Building	Communications Buildings	Non-Residential (General Building)
Utilities	Radio/TV Transmitter	Tower/Signal System	Tower & Signal Systems	Utilities
Utilities	Guidance/Tracking	Guidance Detection Tracking System	Guidance Detection Tracking Systems	Utilities
Utilities	Tower/Signal System	Tower/Signal System	Tower & Signal Systems	Utilities
Utilities	Water Treatment	Water Treatment Plant	Water Treatment Plant	Utilities
Utilities	Sewage Treatment	Sewage Treatment Plant	Sewage Treatment Plants	Utilities
Utilities	Industrial Waste	Industrial Waste Disposal	Industrial Waste	Utilities

Utilities	Dry Waste Treat	Dry Waste Treatment Plant	Disposal Dry Waste Treatment Plant	Utilities
Utilities	Air Pollution	Air Pollution Control	Air Pollution Control	Utilities
Utilities	Hazardous Waste	Hazardous Waste Disposal	Hazardous Waste Disposal	Utilities
Engineering	Paving	Paving	Paving	Non-Building (Engineering)
Engineering	Runways	Runway/Taxiway	Runways & Taxiways	Non-Building (Engineering)
Engineering	Parking Lots	Sidewalk/Parking Lot	Sidewalks & Parking Lots	Non-Building (Engineering)
Engineering	Highway Sign/Rail	Highway Signs/Guardrails	Highway Signs & Guardrails	Non-Building (Engineering)
Engineering	Bridges	Bridge	Bridges	Non-Building (Engineering)
Engineering	Tunnels	Vehicle Tunnel	Tunnels	Non-Building (Engineering)
Engineering	Utility Tunnels	Utility Tunnel	Tunnels	Non-Building (Engineering)
Engineering	Railroad Tunnel	Vehicle Tunnel	Tunnels	Non-Building (Engineering)
Engineering	Railroads	Railroad	Railroads	Non-Building (Engineering)
Engineering	Parks/Playground	Park/Playground	Parks & Playgrounds	Non-Building (Engineering)
Engineering	Parks/Playground	Site Development	Site Development	Non-Building (Engineering)
Engineering	Landscaping	Landscaping	Landscaping	Non-Building (Engineering)
Engineering	Trailer Parks	Mobile Home Park	Mobile Home Parks	Non-Building (Engineering)
Engineering	Lights (Road/Air)	Airport Lighting	Outdoor Lighting	Utilities
Engineering	Lights (Road/Air)	Roadway Lighting	Outdoor Lighting	Utilities
Engineering	Lights (Field)	Athletic Lighting	Outdoor Lighting	Utilities
Engineering	Power Lines	Power Lines	Power Lines	Utilities
Engineering	Communication Lines	Communication Lines	Communicatio n Lines	Utilities
Engineering	Dam/Reservoir	Water Supply	Dams	Utilities
Engineering	Hydro Dam	Hydroelectric	Dams	Utilities
Engineering	Flood Dam	Flood Control	Dams	Utilities
Engineering	Docks/Piers	Dock/Pier	Docks & Piers	Non-Building (Engineering)
Engineering	Dredging	Dredging	Dredging	Non-Building (Engineering)
Engineering	Shoreline Maintenance	Shoreline Maintenance	Shoreline Maintenance	Non-Building (Engineering)
Engineering	Sewer/Flood Control	Storm Sewer	Storm Sewers	Non-Building (Engineering)
Engineering	Sani Sewers	Sanitary Sewer	Sanitary	Non-Building

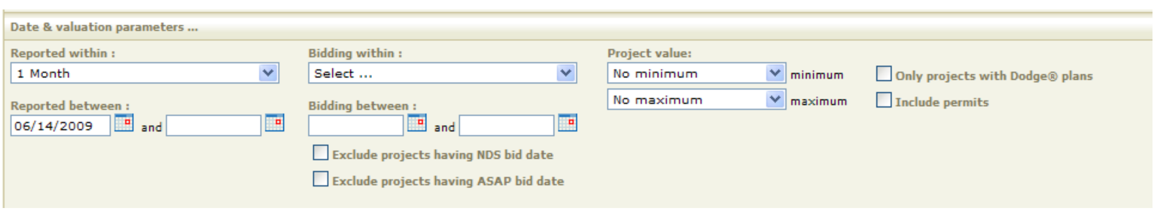
			Sewers	(Engineering)
Engineering	Water Lines	Water Line	Water Lines	Non-Building (Engineering)
Engineering	Fuel/Chemical Lines	Fuel/Chemical Line	Fuel & Chemical Lines	Non-Building (Engineering)
Engineering	Water Tanks	Water Tank	Water Tanks	Non-Building (Engineering)
Engineering	Tanks (Oil/Other)	Storage Tank (Other)	Storage Tanks (Other)	Non-Building (Engineering)
		All Project Types	All Project Types	All Project Types

Project types – primary only

Projects are often assigned multiple types, for example a report may display:
Project type 4+ Sty Apt
Secondary project type(s): Offices; Store-Food; Store-Other; Parking Garage

Example: A search for project type 4+Sty Apt would return the above project, but so would any search on offices, store-food, store-other, or parking garage.

If you were searching for large office projects you may want to select **Offices** from the **Project Types** field, and then click once in the box **Primary Only** to rule out projects that have only a small office component.



Reported within

The report date is listed in all search results, and at the top of the project report. The date shows when the project either entered the system (version 1 reports) or when it was last updated.

- The drop-down list lets you select time periods such as 1 day; 1 week, 1 month, etc.
- To include all data in your search, or if you wish to search Bid Dates, select the option **4 Years** from the **Reported Within** drop-down list.
- If you wish to search specific dates select the blank option at the top of the drop-down list to clear the displayed time frame and then enter your own criteria in the fields **between** and **and**.

Bid date

Bid dates may be searched using only those dates, or including **Reported between** dates.

- To search specific bid dates only select the option **4 Years** from the **Reported Within** drop-down list to include all projects in your search and then enter your own criteria in the **Bid Date** fields **between** and **and**. Your search will return projects whose listed bid dates fall within your criteria.
- To search bid dates based also on **Reported Within** make the appropriate selection from the **Reported Within** drop-down list, and then enter your criteria in the **Bid Date** fields **between** and **and**. Your search will return projects whose bid dates and report dates fall within the specified criteria.
- You can exclude projects having an NDS bid date (No Date Set) from your search by clicking the appropriate checkbox.
- You can exclude projects having an ASAP bid date (As Soon As Possible) by clicking the appropriate checkbox.

Valuation

Valuation enables you to search for projects with a minimum valuation, a specified range of value, or up to a maximum value.

- Search for projects with a minimum value: select the required amount from the drop-down list **Min**. You do not need to select a maximum value.
- Search for projects that fall between two values: select both a minimum and maximum value from the drop-down lists.
- Search for projects up to a certain value: select a maximum value from the drop-down list. You do not need to select a minimum value.

Dodge Plans

Clicking the **Only projects with Dodge Plans** check box will filter your results to only include projects with Dodge Plans / Specs / Addenda available. These plans can be accessed by clicking on the Plans link within the Project Result List page.

Include permits

Permit projects will only be included in your search results if this check box is marked.

Manage Field Templates and the Field Chooser

When you save a search as an Excel or CSV file, you have the option of selecting an existing template or creating a new one.

Templates are a list of fields that you would like to include in your Excel spreadsheet. An example would be: *Project name, Architect, ArchitectID, Architect phone number*, and *Architect contact name*. Select an existing template from the **Template** drop-down list, then click **Save** to export your search result to an Excel spreadsheet or CSV file.

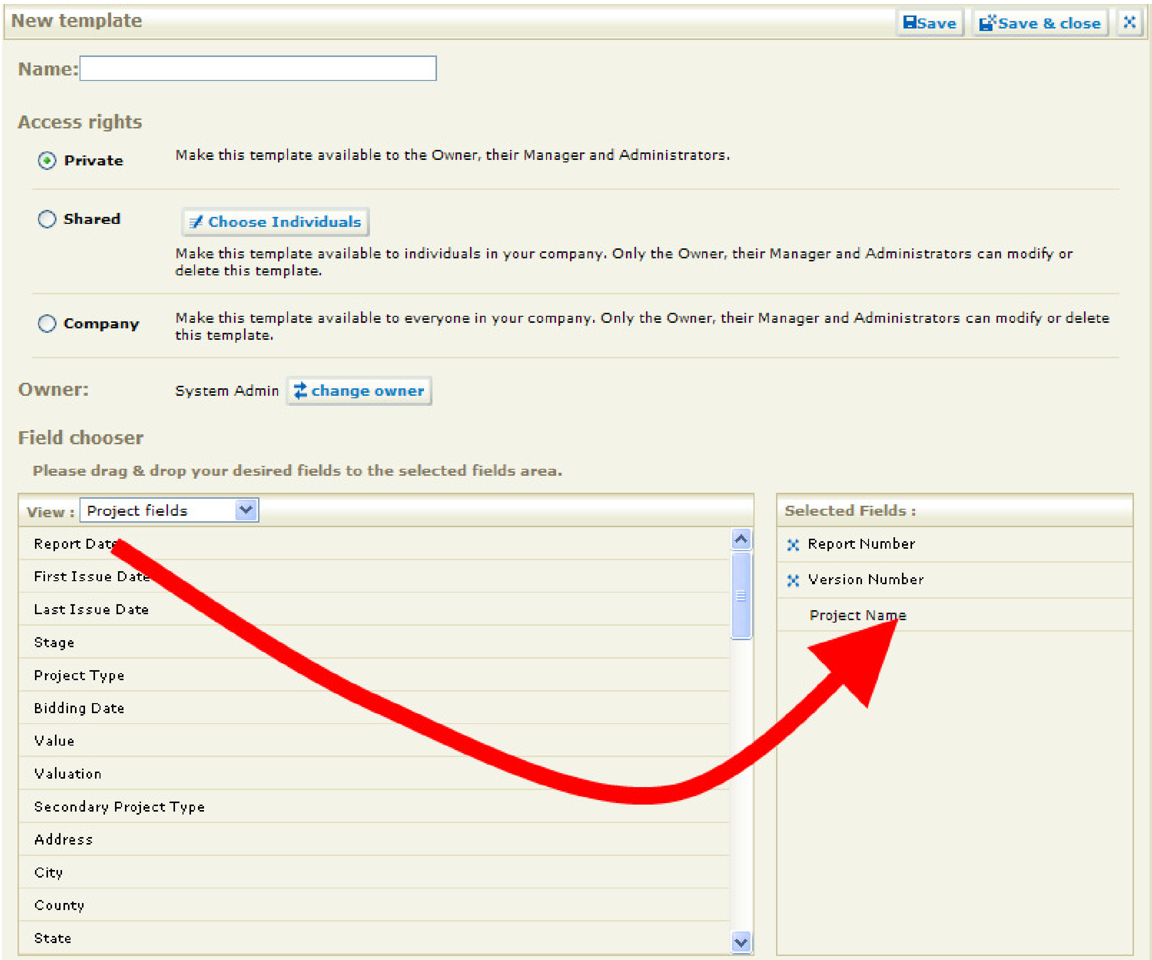
You can also browse and edit templates, and even create new ones. To do this, click **Browse templates**:

You will see a list of field templates, in alphabetical order. Click **Refresh** to refresh the list.

Clicking the name of a field template will close the **Browse field templates** window and return to the **Search Projects** page, with that field template selected for saving to Excel.

To create a new template, click **Create new template**. This will open the **New template** window.

To edit an existing field template, click the Edit button ( ) to the left of the field template name. This will open the **Edit template** window.



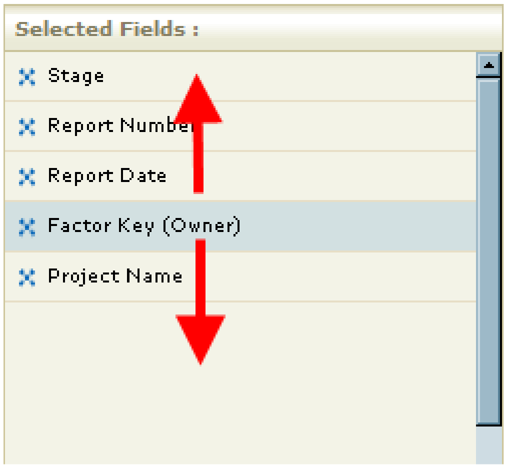
Enter or edit the name of your template in the Name text box. You may select **Private** (the template is viewable only to yourself), **Shared** (viewable to individuals that you select by clicking **Choose Individuals**) or **Company** (viewable by any member of your company).

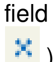
Administrators may also select the **Owner** of the template. Only the owner may change a template's access rights.

You may select fields to include in your Excel spreadsheet by using the **Field chooser**. For a new template, the Field chooser is displayed automatically. If you are editing an existing template, you will need to click the **Edit selected fields** button first.

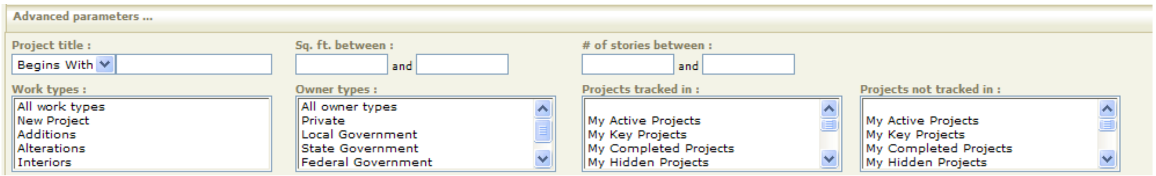
Choose between a list of Project fields and Company fields using the drop-down list. From either the Project field or Company field list, click and hold down the left mouse button on top of a field name (such as *Valuation*). Then, with the mouse button held down, drag the name from the left-hand side to the right-hand side (**Selected Fields**) and let go of the mouse button to drop it in place (see above).

Once the field is in place on the right-hand column, you can change the order by dragging it up or down:



You cannot drag a field name back to the left-hand column. To get rid of a field that you do not want, click the Delete button () located to the left of the field name.

Advanced parameters and Keyword searches



Project title

If you are searching a project by name you do not have to enter the entire name of the report into the search field. If the name is unique, the first word or two will be sufficient for searching. If the name is generic, or similar to other projects, you may wish to include more of the name.
The drop-down list beneath the *Project Title* field gives you the options of searching:

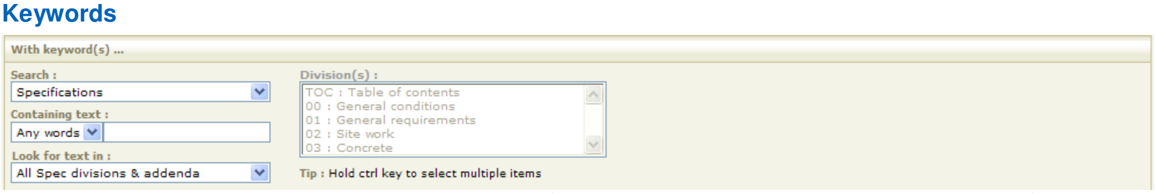
- **Begins With** – any project name beginning with the characters you enter. *Example*, "Qu" returns: Queen Anne Apartments; Quayside Towers; Quillayute River Navigation Project, etc.
- **Contains** – any project that includes the characters you have entered, anywhere in the title. *Example*: "Lake" returns: Big Lake Church Addition; Denny and Westlake Towers; AutoZone Retail Parts Store (Bonney Lake WA); etc.
- **Equals** – will find projects whose titles match every character you have entered, exactly as entered.

Project tracking lists

Searching for tracked projects involves two drop-down lists: the **Projects (in/not in)** drop-down list and the drop-down list directly to the right which displays each list separately, including the **All (lists)** option.

- To find projects within a list use the **in** option and select a tracking list from the drop-down list.
- To find projects not on any list use the **not in** option combined with the tracking list option **All** which will exclude every tracked project from your search.
- To view updates for tracked projects, select the **in** option and then a tracking list from the drop-down list.
- Select an appropriate time frame from the **Reported Within** drop-down list.
- If you have tracked a large number of projects you can search within that list for groups of projects such as a certain type, by bid date, entered opportunities or any other criteria selected on the search form.

Keywords



With keyword (s) … searches the details section of a project report. Results are based on the information added to the project reports. Please be aware that some project stages may not have a lot of details known at that point in the project. It is suggested that keyword searches be conducted on specific project territories, as they require searching through a significant amount of data.

- Do not use commas or semi-colons, as they will be ignored.
- Do not use quotations (Example: "brick house") as they will be inserted automatically.
- Select **Containing text** to be **Any words**, **All words** or **Phrase**:

Example:

- If you select **Any words** and type in "brick concrete" the system will look for projects with the words "brick" **OR** "concrete" in them.
- If you select **All words** and type in "brick concrete" the system will look for projects with both "brick" **AND** "concrete" in them.
- If you select **Phrase** and type in "brick concrete" the system will look for projects that have the complete phrase "brick concrete" in them, with no words in between.

Please note: You cannot use wildcards using the keyword search service. Please use whole words only. If you wish to search for both “locker” and “lockers”, use both words and select **Any words**.

Look for text in

The default text search is **all Specification divisions & addenda**. You can select two other options here: **selected Specification divisions & addenda**, and **addenda only**.

If you choose **selected Specification divisions & addenda,** you can decide which divisions to search in under the **Division:** menu directly below. Use the Ctrl key to select multiple items.

Owner types

Use this drop-down list to quickly find projects built in your area by Local / State / Federal governments, the Military, or by private owners.

Work types

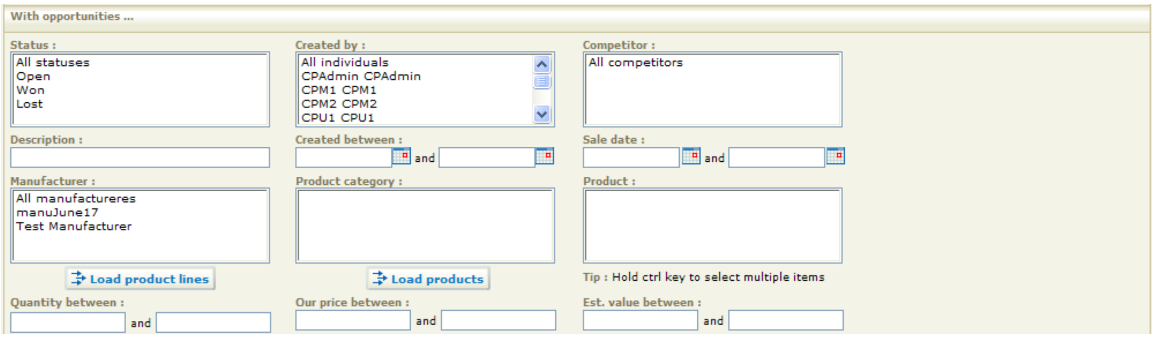
Projects may be searched by work types such as New Construction, Building Additions, Renovation / Retrofit, and Interior Completion.

Square footage and story height

You can include either of these, or both, in your search.

- For a specific range enter both a minimum and a maximum value.
- If you are searching for a minimum you do not need to enter a maximum value.
- Conversely, if you are searching for a maximum you do not need to enter a minimum value.

With opportunities



Select any combination of opportunity parameters. To select multiple items, hold down the Ctrl key.

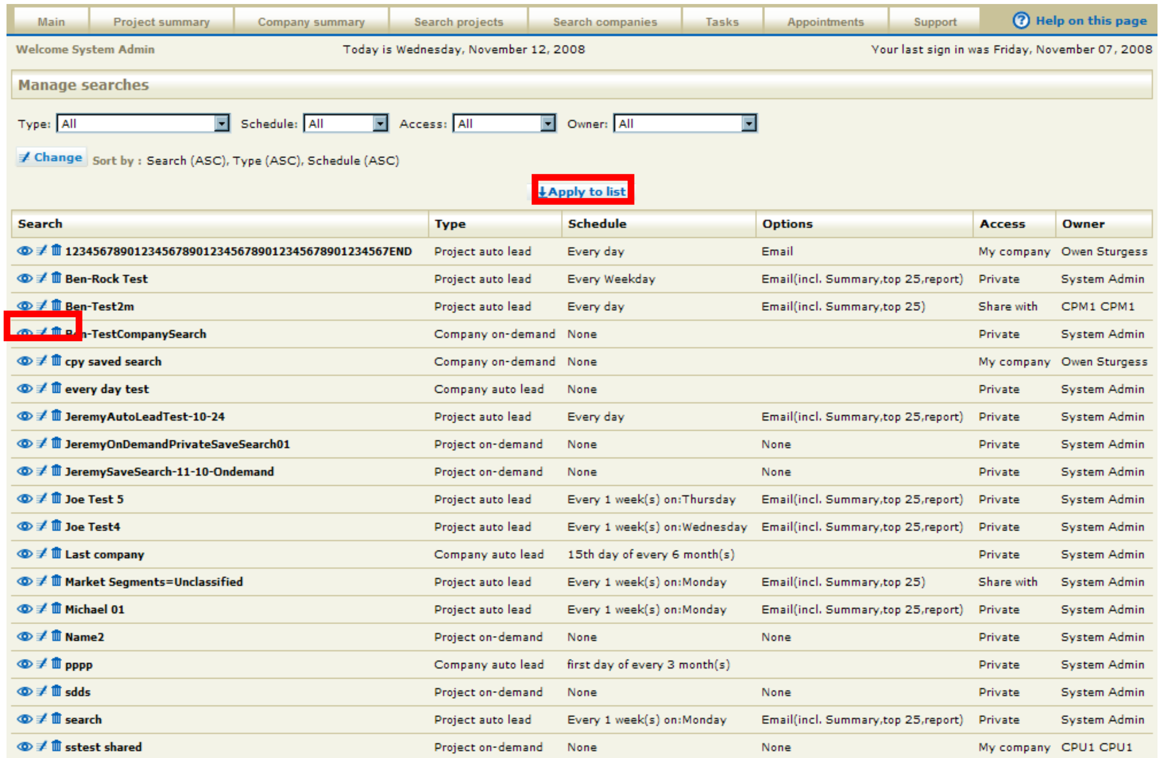
Opportunity information can be added to both company and project reports and then be related to each other so that the sales information appears in both reports. Once opportunities are related to both projects and companies they will be returned for opportunity searches using either Search Projects or Search Companies.

If a project opportunity is not related to a company it will only be returned for an opportunity search on the Search Projects page. You can search for opportunity information you have added to projects with or without selecting other project search criteria. If you want to find opportunities independent of project information be sure the **Reported Within** drop-down list displays the selection **4 Years** to ensure you are including all possible projects in your search, and use only the **With Opportunities** search fields. Your search will return projects whose opportunity information matches your search criteria.

Field names on the opportunity form and the search opportunity page can be changed to reflect your business process. Please call your account rep for more details.

Manage searches

You can view and edit your saved searches and Auto leads by clicking on **Manage searches** from the Main Menu.



If you have a lot of saved searches, you can filter the list by selecting Type (On-demand searches, Auto leads, etc.), Schedule, Access, and Owner. Click **Apply to list** to refresh the list with your new filter.

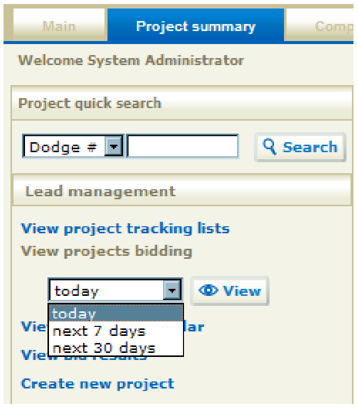
You may also change the sort order of the list of searches. Click **Change** and select up to three levels of sorting for the page (higher levels are applied first). Then click **Ok** and **Apply to list**.

To view the results of a search instantly, click the View results icon (the small eye) to the left of the search name.

To edit a search, click the Edit icon (the paper with pencil) to the left of the search name. The **Save Search** popup window will appear. This allows you to edit the details of the On-demand or Auto lead search, such as the schedule and Email alert options. To edit the actual details of the search, click **Edit Search** at the top of the Save Search popup window.

To delete a search, click the Delete icon (the garbage can) to the left of the search name. A message window will pop up asking if you really want to delete the search. Click **Ok** to delete, or **Cancel** to leave the list alone.

Project bidding: Today, 7 days, or 30 days



The **View Projects Bidding** link is found on the **Main menu**. You can elect to see projects with bid dates for today, over the next 7 days, or over the next 30 days. This will retrieve all projects in your assigned territory that have bid dates falling within the specified time frame.

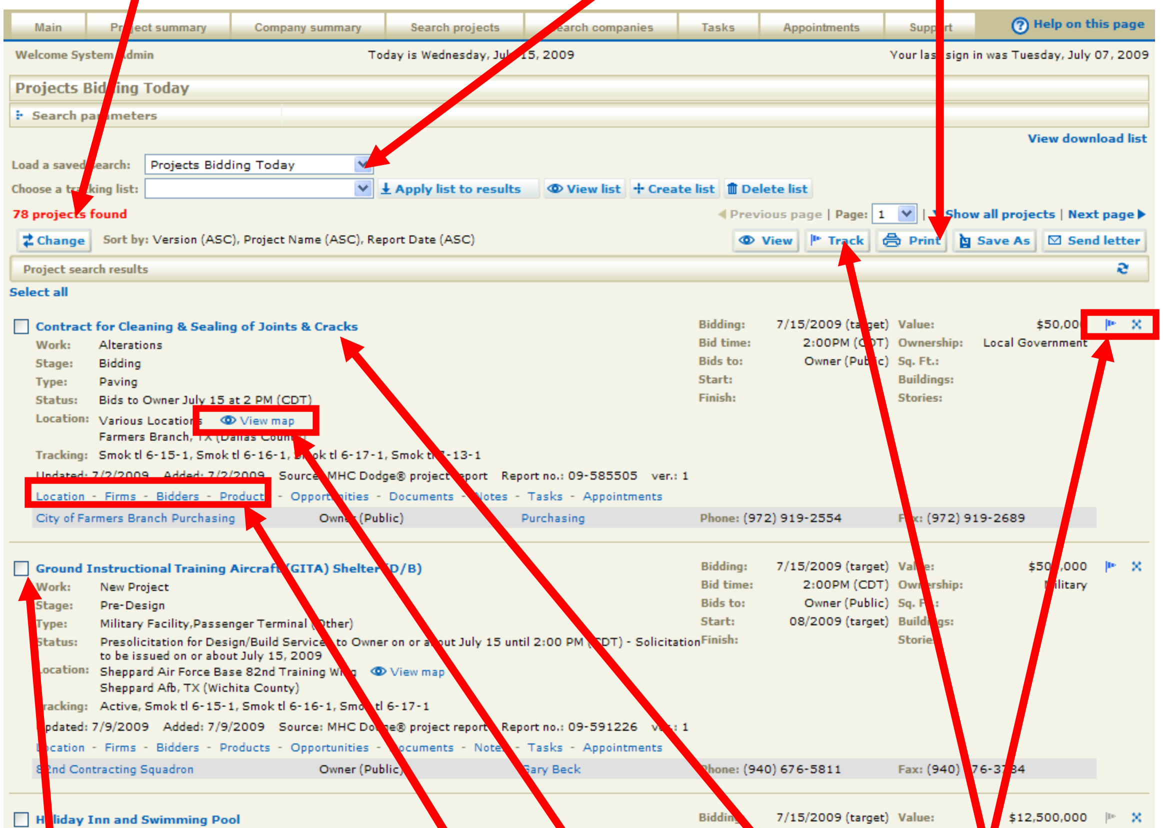
Selecting an entry and clicking the **Go** button will generate a search. You will get the search results page. From here you may add projects to a tracking list, or print/export selected projects.

Search results page

This shows the number of projects returned by the result. If the number of results exceed the maximum allowed for a single search, it will display the maximum number.

The projects bidding queries are also found in the **Load a Saved Search** drop-down list and can be run from this page.

Print and Save As allow you to print the list, or export it to Word, Excel, HTML, or Text. Exported information includes project name, report number, version number, bid date, report date, valuation, stage and project address.



You can select specific projects for **Print** or **Save As** by clicking in the selection column and then include all or some of the information contained in the reports for printing, or exporting to Word, Excel., HTML or text.

Clicking **Location, Firms, Bidders, Products, Opportunities, Documents, Notes, Tasks, or Appointments** or **Bidders** will take you into the project report to display this information.

Click **View Map** to see a map of the project's location in a pop-up window.

The project name is a link to the project report, where full details may be viewed.

You can track your projects by selecting a list and clicking **Track**. Alternatively, you can track one project at a time by clicking the track icon that looks like a flag. To hide a project, click the hide icon that looks like an X.

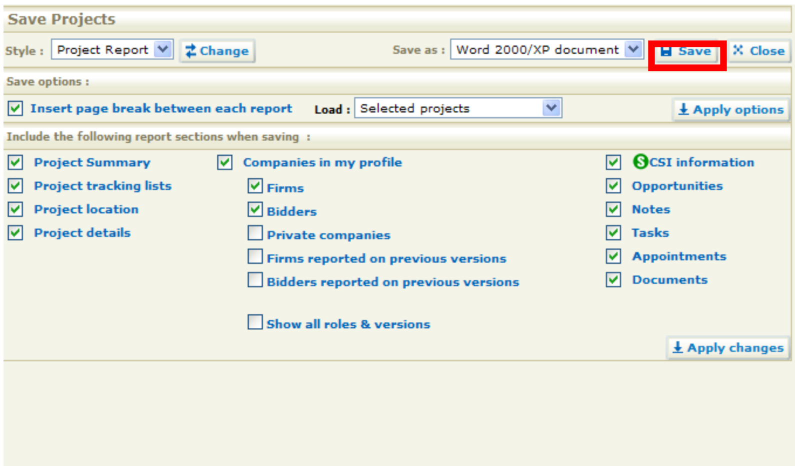
You can select multiple projects by clicking in the checkboxes to the left of each project name, or clicking the **Select all** link. Note that there is a maximum number of projects that can be selected by clicking **Select all**.

When you have chosen the projects you are interested in, you have the option of saving the results in Word, Excel, HTML, or Text. Entire reports can be saved, or just the search result list view.

Selecting projects

If you wish to save the entire result list as Word, Excel, HTML or Text, click **Save as…** and the system will automatically include all reports. If you wish to save specific projects and not the entire list then use the selection boxes at the far left of the page to indicate which projects you want. Then click the **Save As…** button. This brings up the Preview window, shown below.

Save Projects / Print Projects (PrintSaveProjectsOptions)



You can select which parts of the reports to include in Word or Excel, for example firms and bidders, opportunity or tracking information, tasks notes and appointments. The check boxes on the bottom of the page indicate which information you'd like to save or print.

The drop-down list **Load**: will display either **Selected Projects** if you specified which projects you wanted, or **Projects 1 – 25 from results** if you did not. The menu references all projects from your result and allows you to save projects 1-25, then 26– 50, then 76–100 etc. When you select an entry from this menu, click **Apply Options** to the right of it to load the next group of projects.

To export the projects click the **Save** button (center right of the preview window). You will be asked if you'd like to save the file or open it. Select an option:

Save this file to disk…. Another window will open asking you to select a location to save this file to. When done, click *Save*. A third window will tell you that the download is complete. Click **Close**.

Open this file…. Your search result will open in an Excel spreadsheet or as a Word document. Once the file opens in Word, go to **File,** then click **Page Set-up** and change the paper orientation to landscape so that all project information fits on the page.

Save or Print as list view

If you change the **Style** drop-down list to **List** view and click **Change**, the results that you save or print will be in a more condensed format. Use this format if you wish to save paper when printing.

Tracking projects *(NEW!)*

Tracking lists are groups of projects that you are particularly interested in. For example the tracking list **My Active Projects** would contain projects that you are currently working with. **My Key Projects** would contain the reports you are following very closely.

Typically, you add projects to tracking lists manually. However, some tracking lists may be created automatically and shared with your company. They offer a quick way to find new and updated projects, manage potential business, create job lists for reps, or track specific opportunities.

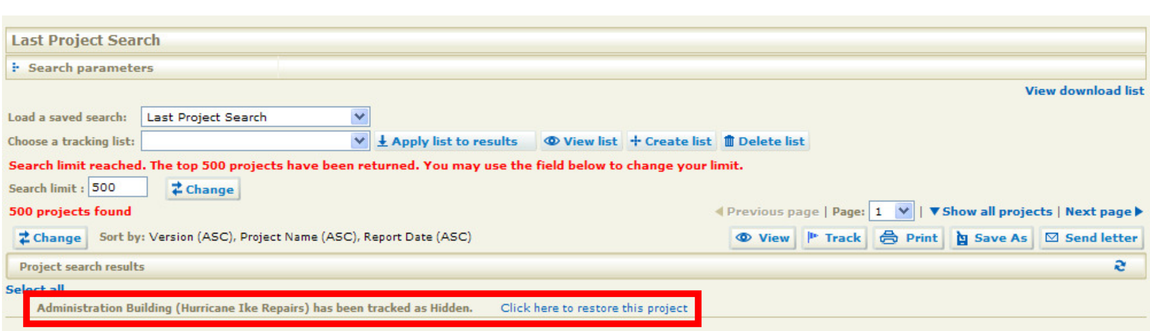
The way projects are added to tracking lists has changed significantly in the July release of ConstructionPoints. Please read the section below for an explanation of how the new tracking interface works.

Hide projects

The tracking list **Hide** enables you to refine your personal view even further. Once you have identified the projects you are interested in, you may place the rest of them in the **Hide** tracking list. This effectively removes them from all searches, and the **Projects Bidding** (Today or in 7/30 days) saved searches. The projects haven't vanished--they are still in the system, but are excluded from your regular searches.

To Hide a project, click the Hide ( ) button on the right-hand side of the Project Results List:

The project listing will collapse to show you that it is now hidden, with a blue link to restore the project if you clicked on the Hide button accidentally:



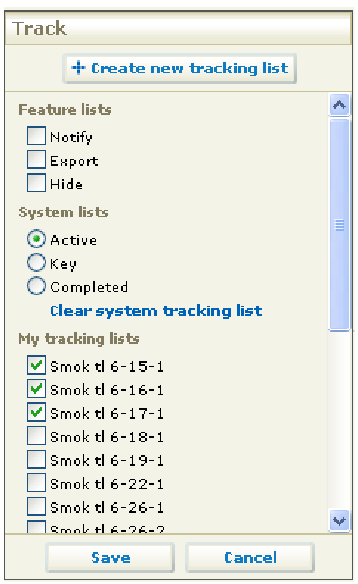
You can view all your Hidden projects at any time by selecting **View Project tracking lists** from the main menu and then selecting **My Hidden Projects** from the drop-down list **Choose a tracking list**. Projects on this list still receive updates and can be returned to your personal view by removing them from the Hide list.

Adding a project to a tracking list

To add a project to a tracking list, click the small flag icon ( ) on the right hand side of the screen in the Project Results List page:

The flag icon will be gray ( ) if the project is not currently on a tracking list. The flag icon is blue ( ) if the project is on one or more tracking lists already.

Clicking the flag icon brings up a small pop-up window. The window will have additional options if you are a manager or administrator (see *Changing Users*, below)



From this window, you can assign (or unassign) projects to various tracking lists, or create new a tracking list. There are three types of tracking list: **Feature lists**, **System lists**, **and User-defined lists**.

Feature lists

Feature lists are tracking lists that are tied to specific features of the system, and will thus trigger additional actions when you assign a project to one of these lists. You can assign a project to any number or combination of feature lists.

Feature	Action
Notify	When a project is added to the Notify list, any changes or updates to this project will be sent via email to the address listed in your Profile.
Export	When a project is added to the Export list, the project will automatically be exported to a CSV or XML file and optionally sent to a remote destination such as an FTP site or a mailing list. *NOTE: This option is not enabled for all customers. Please contact your Dodge representative if you would like to enable Export functionality.*
Hide	As described above, projects added to the Hide tracking list will no longer appear in your searches, although they still exist in the system.

System lists

System lists are lists that are built into ConstructionPoints. Every user has access to these tracking lists.

There are three system lists: **Active**, **Key**, and **Completed.**

Because they represent different stages for a typical workflow, you can only assign a project to one of these lists at a time.

Custom tracking lists (My tracking lists)

In addition to the system lists, you can create your own tracking lists. You may create as many tracking lists as you like, and give them any name you wish.

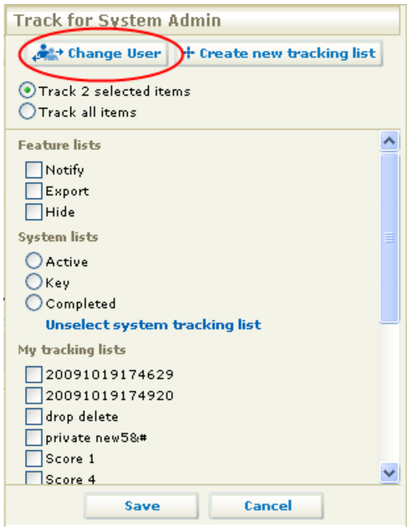
You may assign a project to any number or combination of custom tracking lists that you want.

These same lists are found in the project report, at the top right of the page. They can also be found in the **Company report – related projects** section.

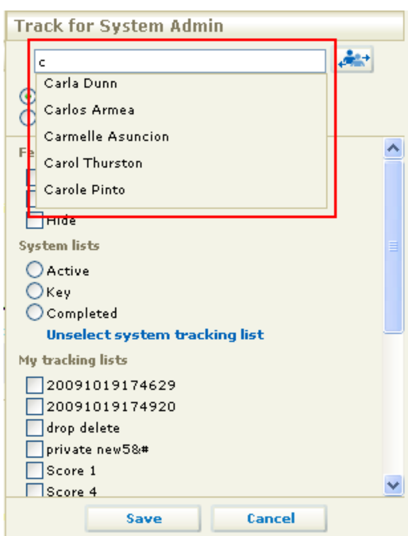
The tracking lists are also available when viewing a Project Report. The lists are displayed on the right-hand side of the project summary section.

Changing Users (Managers and Administrators only)

If you are a manager or an administrator of your site, you have an additional feature enabled when tracking projects. You may change the user temporarily, in order to assign a project to that user's tracking list.



Click **Change User** to temporarily switch to another user's tracking lists. A text box will appear where you can type in the name of the user you wish to switch to. You only need to type in the first few letters of the user, and then a drop-down list will appear with all matching names listed:

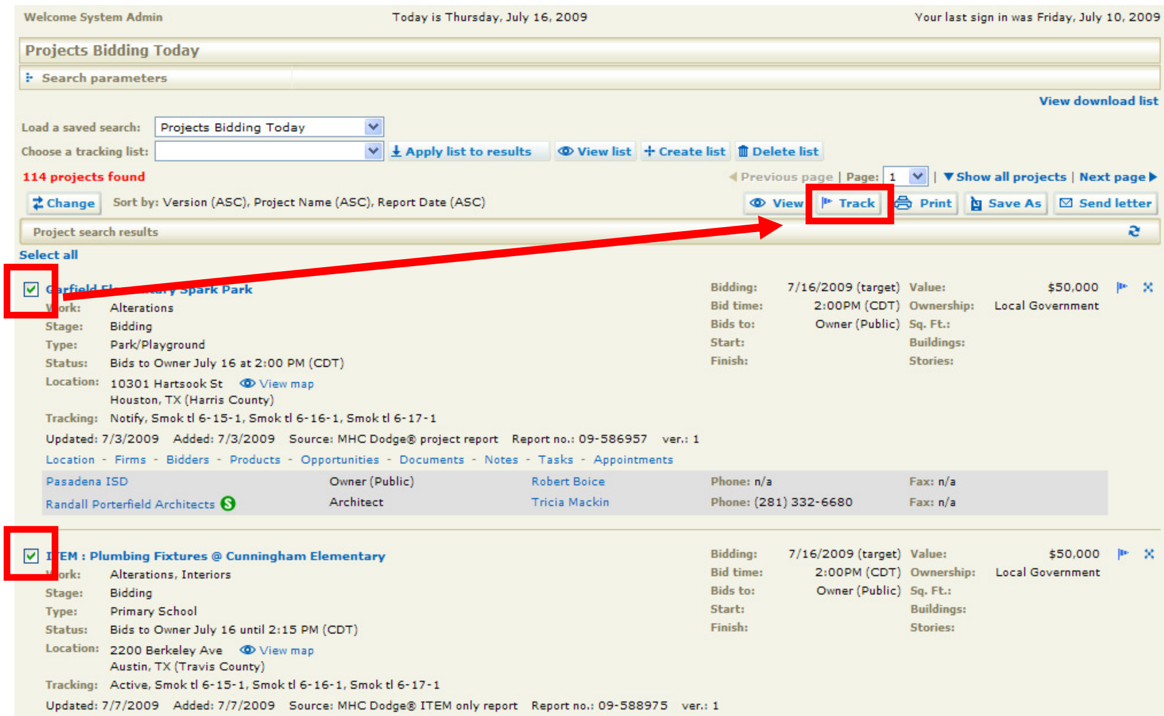


Select the name of the user you wish to switch to, and then click the change user button (). The window will change to display all the tracking lists currently used by that user. Select a tracking list, and hit **Save** as before. The tracking popup will change to indicate the new user:

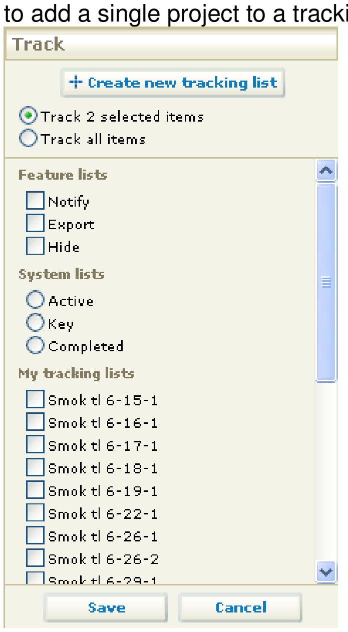
Adding multiple projects to a tracking list at the same time

You can add multiple projects to a tracking list all at once.

To do this, select the projects from the Project Result List page by clicking the checkboxes on the left-hand side of the screen. Then, click the **Track** button:



When you click the **Track** button, a similar pop-up window appears as when you clicked the Flag icon ( ) to add a single project to a tracking list, with two extra options:



If you have already selected projects by clicking on the check boxes to the left of the project name, the default action will be **Track N selected items**, where N is the number of items you have selected.

The other option available is **Track all items**, which will apply your tracking changes to all the items on the Project Search Results page.

Select the tracking lists you wish to assign to these multiple projects, then click **Save**. You will be asked to confirm that you want to apply the new tracking information.

Please note: Using the **Track** button ***adds*** new tracking information to the existing tracking information that may have already existed on the selected projects, except in the case of System Lists (Active, Key, and Completed). Because each project can only be assigned to one System List, any tracking changes to System Lists will replace existing System List tracking information.

Example: I have two projects, both tracked to “Active” and “My Custom List #1”.

I select the two projects and click the **Track** button. I click on “Key” and “My Custom List #2”, then click **Save**.

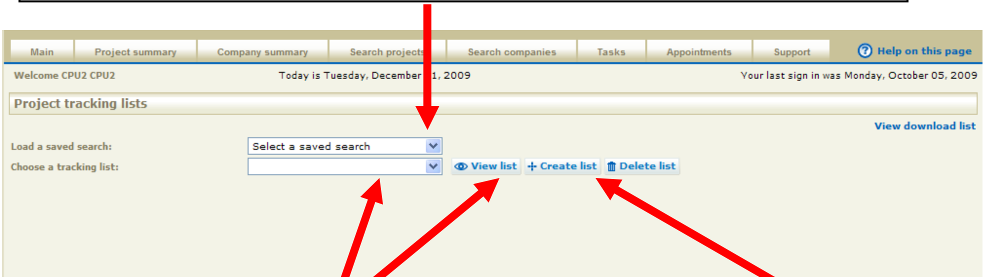
The two projects will now be tracked to “Key”, “My Custom List #1”, and “My Custom List #2”.

If you would like to remove these projects from, say, “My Custom List #1”, you will have to do so manually, clicking on the flag ( ) button on each project one at a time, then removing the check mark from “My Custom List #1”.

Viewing Project Tracking Lists

When you select the link **View Project Tracking Lists** from the main menu the page will load with the following image:

Run a saved search from this page by selecting it from the drop-down list. **Load a saved search** or select **Last Project Search** to view your last query.

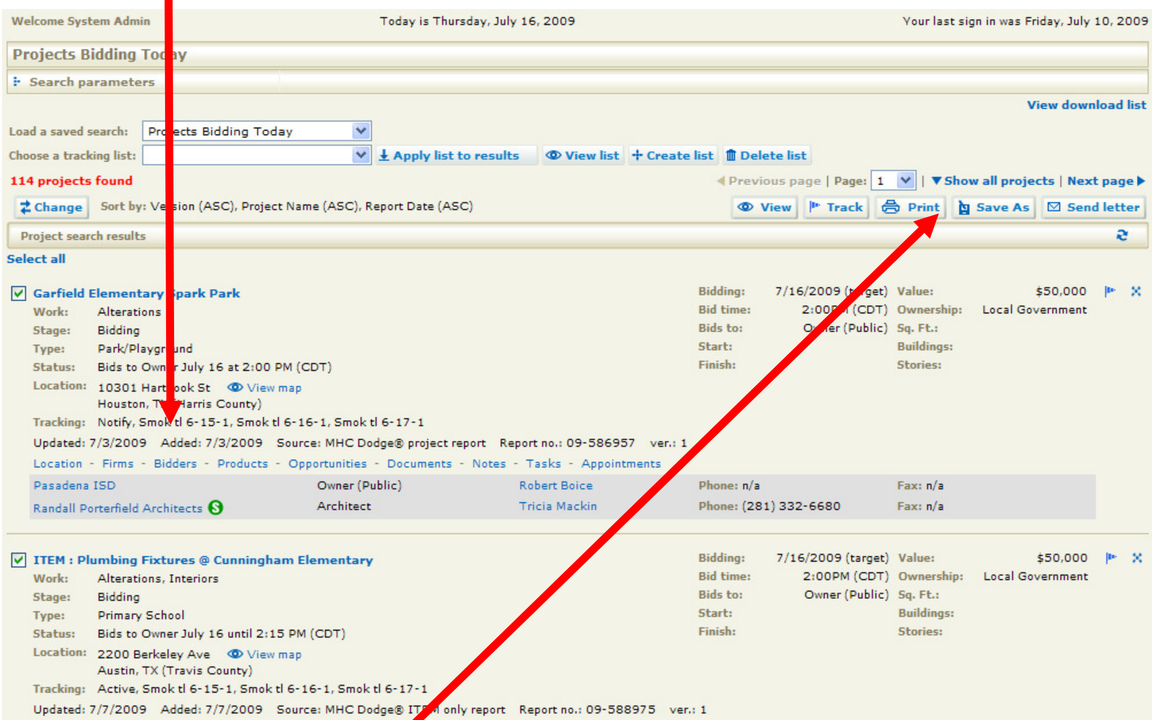


To view a complete list of tracked projects, select the list name from the drop-down list **Choose a tracking list**. Then click the **View list** button to display the projects.

These buttons let you create a **New List**, or **Delete** a privately created list.

Once the project information displays on this page, the image changes slightly to include the number of projects, number of pages, and links to access them.

A list of all tracking lists that a project has been assigned to is shown on the left-hand side under Location information.

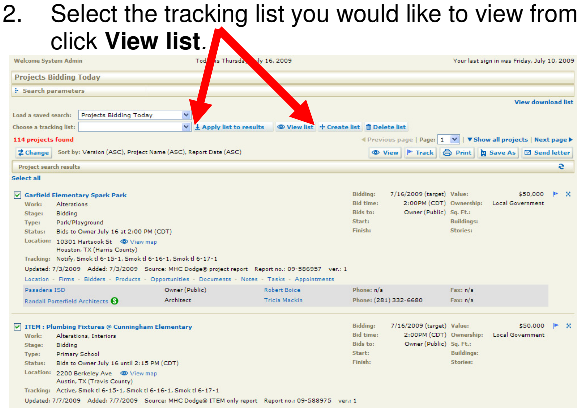


Print and **Save as** give you the options to print, or save as Word, Excel, HTML, or Text. You can print and save some of the reports with full details, or all of the reports in list form with fewer details. To select specific reports only use the selection boxes at the far left of the page before clicking the **Print** or **Save as** buttons.

View a list, add or remove projects

This is used to view projects already on a tracking list.

1. From the main menu select *Project Tracking Lists.*
2. Select the tracking list you would like to view from the drop-down list **Choose a tracking list** and click **View list**.



3. The projects on that list will be displayed.

Add Projects to a List

1. To add projects to a list, click the flag icon ( ) for a single project, or select multiple projects and click the **Track** button. See Tracking Projects for more details.
2. When finished, click Save to save your tracking changes or Cancel to abandon them.

Remove Projects From a List

1. To remove projects from a list click the flag icon ( ) for a single project, or select multiple projects and click the **Track** button.
2. When finished, click Save to save your tracking changes or Cancel to abandon them.

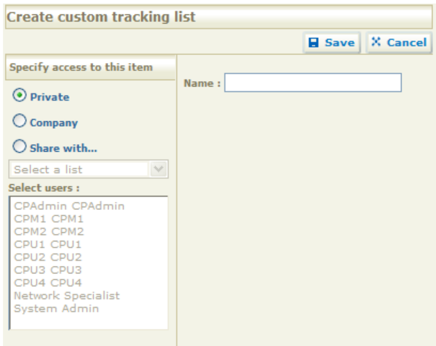
Move Projects From One List to Another

1. To change the tracking list a project is on click the flag icon ( ) for a single project, or select multiple projects and click the **Track** button.
2. When finished, click Save to save your tracking changes or Cancel to abandon them.

Create Tracking List, Viewing Updates to tracked Projects

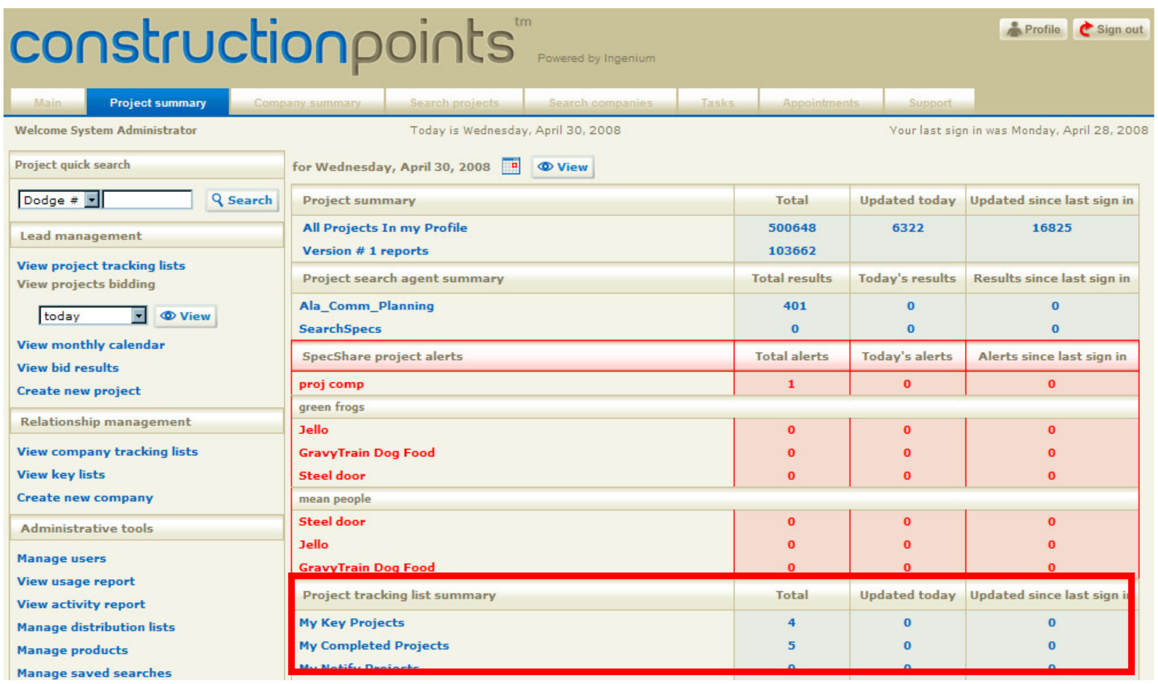
You may create custom tracking lists to reflect the type of projects you have grouped together.

1. Custom tracking lists may be created from the search results/tracking page, within the project report, and within the company report – related projects section.
2. Click the button **Create List**.



3. A new window will open, asking you to name your custom list. **Type** allows you to create a **Private** list, which only you may see, or a **Shared** list that select members of your company may view.
4. When you have named your new list, click the *Save* button at the top right of the window.
5. A new window will tell you that the list has been saved. Click **Close**. Your list will be shown in the drop-down list for custom tracking lists.

Finding updates to tracked projects



Once a project has been placed in a tracking list the **Project Summary** view from the main menu will show any updates to those projects for **Today** or **Since last login**. Clicking on the number of projects under each column heading for **Today** or **Since last login** will load/display only the projects that have received an update.

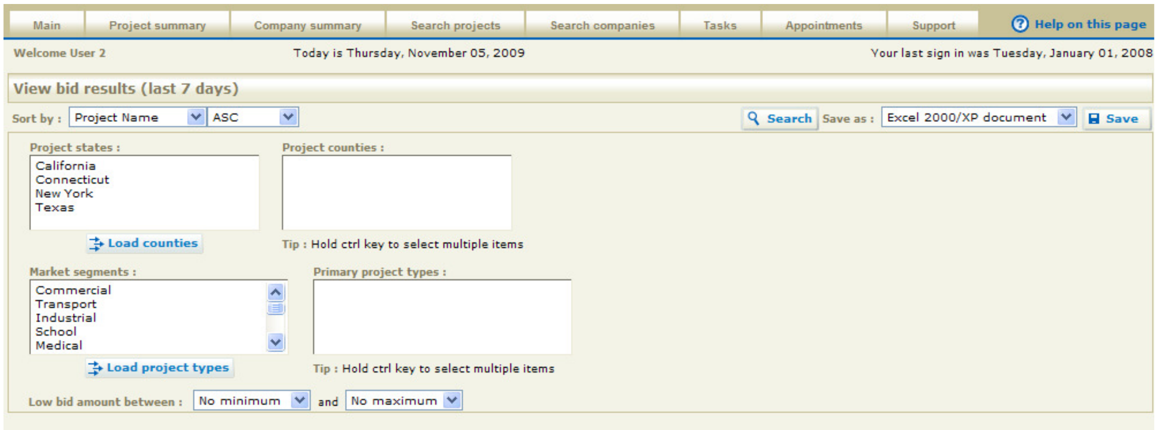
If you do not use the system on a daily basis there are two ways to find updates to tracked projects:

1. Select **Search Projects** from the main navigation bar.
2. Run a search where **Reported Within** reflects the length of time since you last logged in, ex. 1 week. Select **Search**. You will end up on the search results page, with the tracking list options at the top of the screen.
3. You can scroll through the search result and see which tracked projects have been updated, or from the drop-down list **Choose a tracking List** select the first list you would like to check and then click **Apply list to results**. The page will refresh and you will only see projects which are on that list AND which have been updated within the time frame you specified on the search page. Continue with each list – you do not need to rerun the search - only the projects on each list that have been updated will display.

OR

1. Select **Search Projects** from the main navigation bar.
2. Select a tracking list from the drop-down list **Projects In**. (Please note, if you wish to check more than one tracking list you will have to repeat this process with each one.)
3. Change **Reported Within** to reflect the length of time since you last logged in.
4. The search result will include only projects which are on the selected list AND which have been updated within the specified time frame.

Search Bid results – last 7 days



View Bid Results (for the last 7 Days) is available from the main menu navigation options. This list allows you to identify the successful bidders in your area for the last week. The list will give you quick access to all bid projects, including low bidder information, next lowest bid, percentage difference, and quick access to all project information. Links to the company and project reports are also provided.

You may save the list as an Excel file or as a Comma Delimited File (CSV) by clicking on the link **Save as Excel** or **Save as CSV.** This link is also available on the search results page.

The function **Send Letter** allows you to create marketing letters auto-addressed to the low bidder and referencing the specific Dodge report number. (Please see **Send Letter** for full instructions.)
When the page loads you have search options that include minimum and maximum bid amounts, states and counties, market segments and project types. If you have a small territory and simply want a full list of bid results for the last week do not select any criteria – just select the **Search** button. If you have a large territory then searching by state is recommended.

You can view your search (click *Search*) or export it directly to Excel or to a Comma Delimited File (CSV) using the link **Save as Excel** or **Save as CSV**.

Search results

Click once on a company or project name to view that report.

Click **Save** to save the list as an Excel spreadsheet or CSV file, , or click **New Search** to run another query.

View bid results (last 7 ays)

14 bid results found | Show 10 bid results per page |Show all — New Sea ch

Sort by : Project Name / ESC — Prev page 1 Next page — Save as : Excel 2000/XP document — Save

Project name	Report no.	Project type	Company	Low bid	Next bid	% diff
Water Treatment Plant (Ad tion) City : Section County : Jackso County State : AL	07-698886	Water Treatment	Sam Construction Co City : Ft Payne State : AL Phone : 256-845-7677 Send Letter	$735,600	$808,649	10%
Water Mains - Wells - Water Lines (City of York) City : York County : Sumter County State : AL	05-681258	Water Treatment	Big Warrior Construction City : Cleveland State : AL Phone : 205-625-6600 Send Letter	$1,760,506	$1,903,816	8%
Water Mains - Wells - Water Lines (City of York) City : York County : Sumter County State : AL	05-681258	Water Treatment	Goldman Contractors City : Livingston State : AL Phone : 205-652-1616 Send Letter	$425,328	$613,116	44%
Water Mains - Wells - Water Lines (City of York) City : York County : Sumter County State : AL	05-681258	Water Treatment	Griner Drilling City : Spanish Ft State : AL Phone : 251-621-9355 Send Letter	$1,851,422	$2,534,086	37%
Tuxedo Court HOPE VI (Phase II) City : Birmingham County : Jefferson County State : AL	03-909330	1-3 Story Apartment	Russo Corporation City : Birmingham State : AL Phone : 205-923-4434 Send Letter	$0	$0	0%
Tuxedo Court HOPE VI (Phase II) City : Birmingham County : Jefferson County State : AL	03-909330	1-3 Story Apartment	Trawick Contractors Inc City : Birmingham State : AL Phone : 205-591-2056 Send Letter	$13,297,000	$18,538,898	39%
The Montgomery Academy (Additions and Renovations) City : Montgomery County : Montgomery County State : AL	07-740178	Vocational	Pemberton Inc City : Montgomery State : AL Phone : 334-272-6929 Send Letter	$0	$0	0%
Sportsplex (Addition) City : Gulf Shores County : Baldwin County State : AL	07-709841	Gyms	Gadcon, Inc City : Foley State : AL Phone : 251-943-9299 Send Letter	$5,100,000	$0	0%
Spillway Overlay (Big Creek Lake Dam) City : Mobile County : Mobile County State : AL	07-741727	Flood Dam	Remedial Services City : Satsuma State : AL Phone : 251-675-1235 Send Letter	$2,787,833	$3,687,000	32%
Interstate 65 Sewer Extension and Utility Crossings City : Hartselle County : Morgan County State : AL	07-676370	Fuel/Chemical Lines	Morgan Contracting, Inc City : Baker State : FL Phone : 850-537-5000 Send Letter	$1,645,260	$1,858,340	13%

Sort by : Project Name / DESC — Prev page 1 Next page — Save as : Excel 2000/XP document — Save

14 bid results found | Show 10 bid results per page |Show all — New Search

The results page displays: project name, report number, project type, address, company name of low bidder, low bid amount, next lowest bid, percentage difference, company's city/state and telephone number, and the *Send Letter* link.

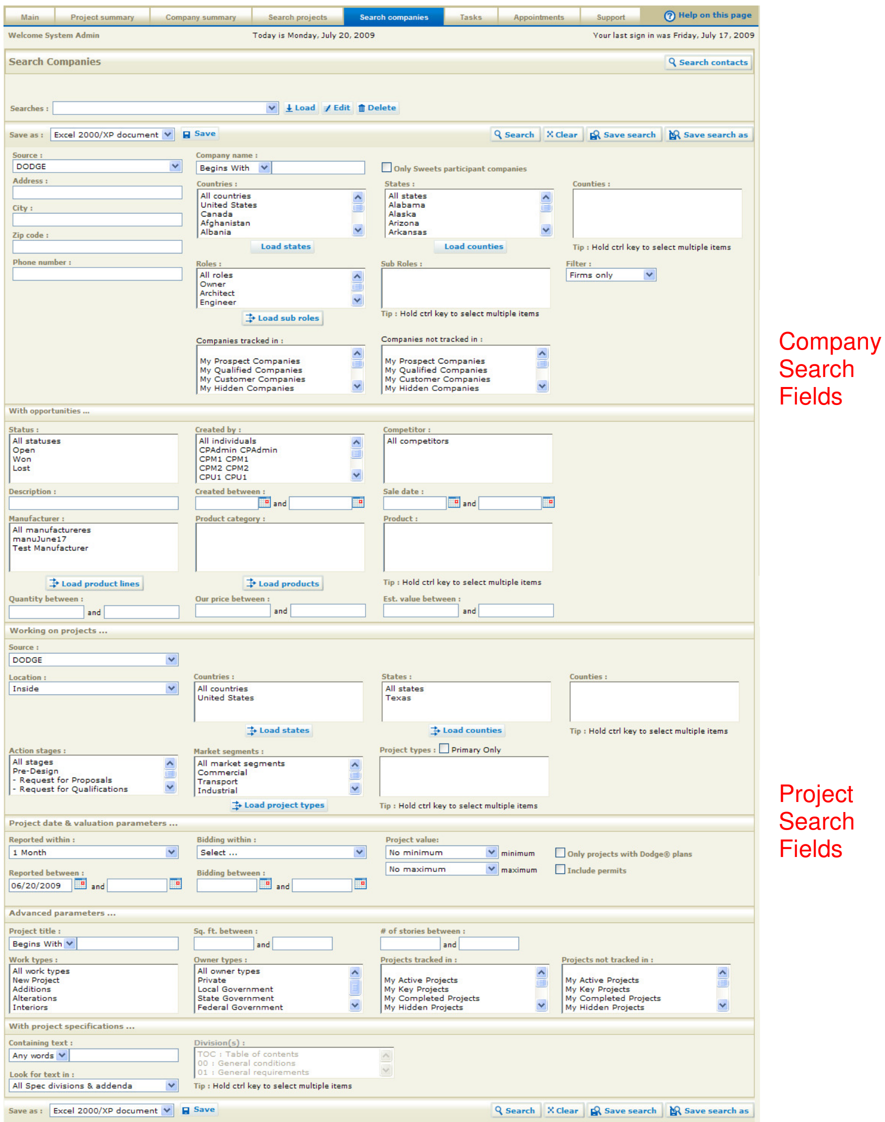
Save as Excel or Save as CSV

1. Click once on the link **Save as** and choose either Excel 2000/XP document or CSV from the drop-down list directly to the left of the Save
2. A new window will appear asking if you would like to *open this file from its current location*, or *save this file to disk* . Select an option. Click **OK**. When asked, click **Open this file….** The report will open in Word or Excel. Alternatively, click **Save this file to disk …** and another window will open asking you to select a location to save this file to. When done, click **Save**.

Search companies

Search Companies (and contacts) allows you to search for companies alone, or combine a company search with project information. Your search result will list the found company names, and within the reports you can find the requested project information. Company searches are confined to companies whose contact addresses are within your assigned territory, and/or companies who are working on projects within your assigned territory.

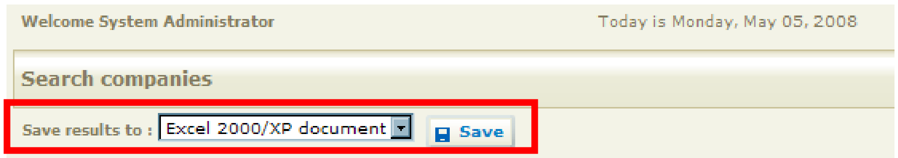
Each of the sections of the search form will be explained in detail in the following pages.



A separate area is provided for searching contacts you have entered into the company reports. You can access it by clicking the **Search contacts** button found at top right corner of the page.

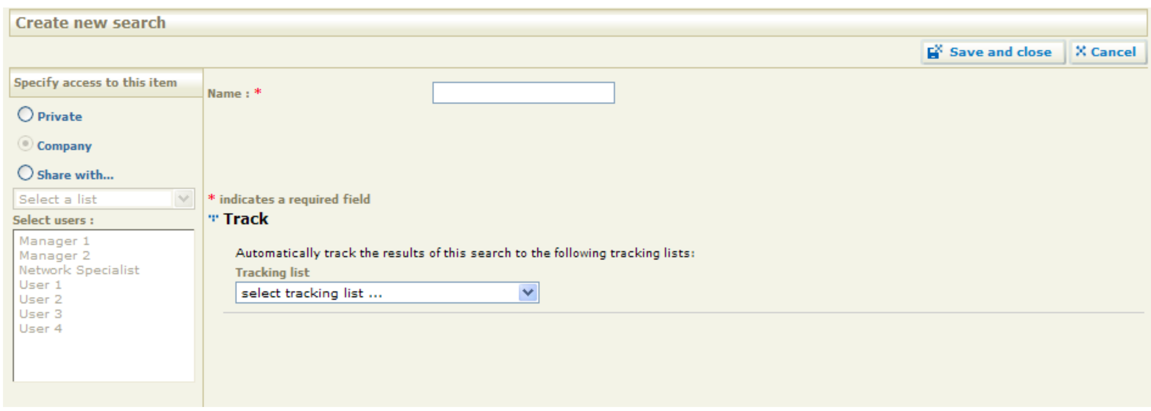
Company Saved searches

If you regularly search for same type of professional, or company/project criteria you may wish to set-up saved queries. Once saved, they will appear in the drop-down list **Saved Queries**, at the top of the **Search Companies** page.



Saved queries may also be run from the search results page/**Company Tracking Lists** page. Select the search from the drop-down list **Saved Queries** – your results will be displayed on the same page.

Create a saved search/query



1. From the **Search Companies** page select all search criteria.
2. Click the **Save search** button.
3. A new window will appear asking you to enter a name for your query.
4. You have the option of making this search **Private** (only available to you), **Company** (available to everyone in your company, or **Share with…** (available to selected users). The default is **Company**.
5. You can, optionally, save the results of this search to an existing tracking lust.
6. When done, click **Save and Close**.
7. Your search will now be displayed in the drop-down list **Saved Queries**. Clicking it will load those criteria on the search page.

Edit and run a saved search

1. On the **Search Companies** page, select the query from the drop-down list **Saved Queries**.
2. After the page loads the information you have the option of changing any criteria. (If you wish to keep the new criteria as the saved query, click **Save**.)
3. Click **Search** from the bottom of the page to run your query.

Delete a saved search/query

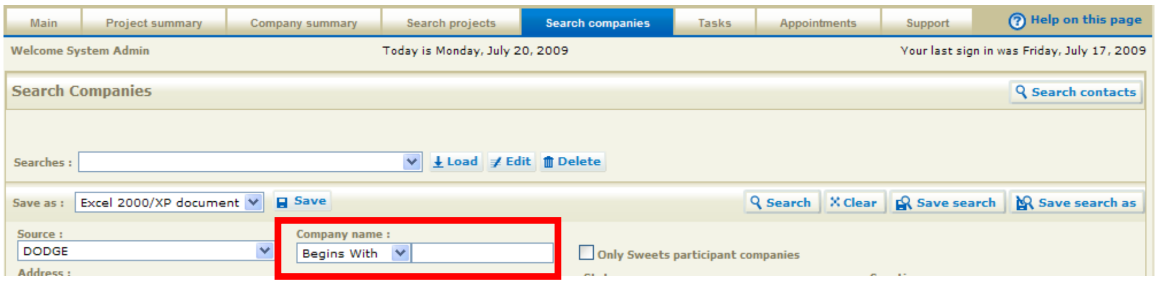
1. From the **Search Companies** page select the saved search from the drop-down list **Saved Queries**.
2. After the search loads click **Delete Saved Query** from beneath the displayed query name.
3. The page will reset itself and the search will be gone.

Export to Excel or CSV Document

You have the option of exporting a search directly to Excel, bypassing the search results page.

1. Select all search criteria. Instead of using the **Search** button, select **Excel 2000/XP document** from the drop-down list and click **Save**. If you wish to save in Comma-Delimited File (CSV) format, select CSV from the drop-down list instead.
2. A new window will appear stating you have chosen to download a file. You may **Open this file from its current location**, which opens the search directly in Excel (requires Excel on your computer) or **Save this file to disk**, which opens another window asking you to select a location to save this file to. When done, click **Save**. A third window will tell you that the download is complete. Click **Close**. You will be back at the search page.

Company Name



If you are searching a company by name you do not have to enter the entire name into the search field. If the name is unique, the first word or two will be sufficient for searching. If the name is generic, or similar to other companies, you may wish to include more of the name. The drop-down list beneath the **Company Name** field gives you the options of searching:

- **Begins With** – any company name beginning with the characters you enter. *Example*: “Bos” returns: Bos Construction; Bosa Construction; Boston Pizza; etc.
- **Contains** – any company that includes the characters you have entered, anywhere in the title. *Example*: “Lake” returns: Kal Lake Consulting; Lake Mechanical; Westlake Paving and Aggregates Ltd.; Williams Lake Housing Development; etc.
- **Equals** – will find companies whose names match every character you have entered, exactly as entered.

Address

The system will search for any matches containing the information you enter. *Example*: A search for 600 Granville Street will return companies with addresses “600 Granville St.”, “2600 Granville St.”, “3600 Granville St” and so forth.

City

The system will return any company within the specified city. If you have a small territory you do not need to select the state the city is in. However, if you have a large territory, the state and/or county is recommended as many states have cities with the same names (such as Springfield).

Telephone

You can search a specific telephone number or all companies by a certain area code.

State

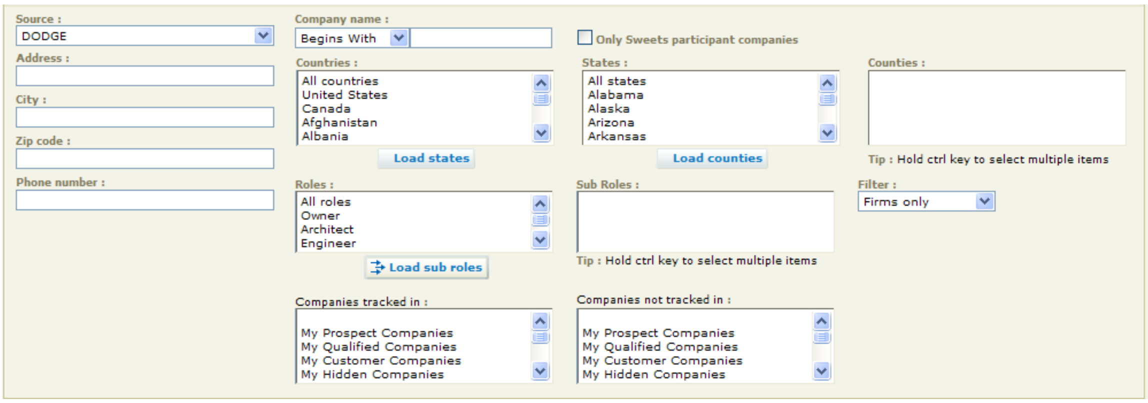
The **State** field displays all of the United States and Canada but searches will only return companies working on projects within your assigned territory, or companies whose addresses are within your territory.

- If you do not select one or more states the system will assume you wish to search all states.
- You can select a state and load the counties to search companies in a specific county location.

Zip Codes

- US zip codes may be entered with as few as two digits, ex. 98 will find all projects whose addresses begin with 98, or 980 will narrow it down slightly to all projects whose zip codes begin 980 etc. The more digits you use the more specific the search result will be.

- Multiple US zip codes should be separated by commas but do not need spaces between the commas and the next entry, ex. 982,983,984,985 or 98003,98004,98005,98006.
- Canadian postal codes must have a space within them, ex. V6H 2G1. In multiple searches each code does not need to be separated by a space, ex. V6H 2G1,V6H 3Z2,V7G 4J7 but the space within each code must remain.



Company Tracking Lists

Selecting a tracking list from the drop-down list will run a search for all selected criteria within that list of companies only. For example, if you have tracked a lot of companies you can search within each list for all owners or architects or contractors working on projects in specific stages, by project type, valuation etc. The search will return the companies whose project information matches your search criteria.

You can also click the **Only** **Companies** check box to only search for companies that are part of the **Sweets Network**.

Filter

This drop-down list allows you to search for professionals listed as **Firms and Bidders**; **Firms Only**; or **Bidders Only**. Using the filter will speed up your search. *Example*: if you are searching for owners or architects use **Firms Only** as these roles will never be bidders.

Role

A company does not have one permanent role assigned to it as it may play different roles in different projects. Searching by role will return companies who are currently involved in projects as the selected role. For example, a company may be the architect for one project, the owner for a second, and a mechanical engineer for a third. The company reports returned in your search would each have at least one project where the company role matches what you have searched for, but the reports will also display all other projects that each company is involved with and their roles for those projects.

- You may select as many roles as you like for one search.
- To search for a specific sub-role select a role from the **Roles** menu and then click **Load the Sub-Roles**. Select one or more for your search.

With opportunities

Opportunity information can be added to both company and project reports and then be related to each other so that the sales information appears in both reports. Once opportunities are related to both projects and companies they will be returned for opportunity searches using either **Search Projects** or **Search Companies**. If a company opportunity is not related to a project it will only be returned for an opportunity search on the **Search Companies** page. You can search for opportunity information you have added to companies with or without selecting other search criteria.

If you want to find opportunities independent of other company information select 4 years from the **Reported Within** drop-down list to ensure you are including all possible companies in your search, and use only the **With Opportunities** search fields. Your search will return companies whose opportunity information matches your search criteria.

Field names on the opportunity form and the search opportunity page can be changed to reflect your business process. Please call your account rep for more details.

Source

You can search for companies related to private projects, or to Dodge projects, but not both at the same time.

Located "Inside" drop-down list

This drop-down list applies to the states and counties menus for project location. To begin, select/enter your company information, and then use this menu to specify where that company is working. Please remember that you will only see projects that fall within your assigned territory.

Inside: working on projects located within the selected state.
Example: **Role** = owner; Company **State** = California; **Inside**; Project **State** = California
Find owners with a company location in California and display any projects they are working on that are located within California (they may also have projects outside of the state).

Outside: working on projects located outside of the selected state.
Example: **Role** = owner; Company **State** = California; **Outside**; Project **State** = California
Find owners with a company location in California and display any projects they are working on that are located outside of California (they may also have projects within the state).

Only Inside : working only on projects within the selected state (and in no other state).
Example: **Role** = owner; Company **State** = California; **Only Inside;** Project **State** = California
Find owners with a company location in California who only work on projects within California.

Only Outside: working only on projects outside of the selected state (and not within it).
Example: **Role** = owner; Company **State** = California; **Only Outside**; Project **State** = California
Find owners with a company location in California who only work on projects outside of California.

Inside AND Outside: working on projects both within and outside of the selected state.
Example: **Role** = owner; Company **State** = California; **Inside and Outside**; Project **State** = California. Find owners with a company location in California who are working on projects within and outside of California.

States

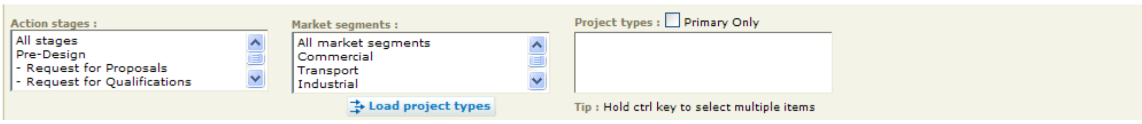
This will only display your assigned project territory.

Counties

You can select one or more states and load the counties menu to search for projects within a more specific territory.

Action stage

- You can select as many stages as you like for one search.
- If you do not select any the system will assume you wish to search on all stages.



Market segments

- You can select as many segments as you like for one search.
- If you do not select any, the system will assume you wish to search all segments.
- If you do not load and select **Project Types** the system will search for all project types within the selected market segment.

Project types

- Project types will only display once you select one or more **Market Segments** and then click the **Load** button.
- You can select as many types as you like for one search.

Project types – primary only

Projects are often assigned multiple types, for example a report may display:

Project Type 4+ Sty Apt
Secondary Project Type(s): Offices; Store-Food; Store-Other; Parking Garage

A search for project type 4+Sty Apt would return the above project, but so would any search on offices, store-food, store-other, or parking garage. If you were searching for companies working on large office projects you may want to select **Offices** from the **Project Types** field, and then click once in the box **Primary Only** to rule out companies associated with projects that have only a small office component.

Report date within

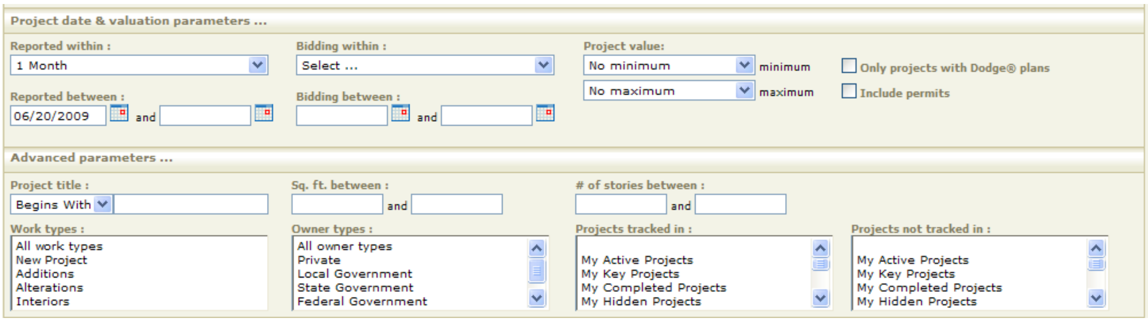
The report date is listed in all search results, and at the top of the project report. The date shows when the project either entered the system (version 1 reports) or when it was last updated.

- The drop-down list lets you select time periods such as 1 day; 1 week, 1 month, etc.
- To include all data in your search, or if you wish to search Bid Dates, select the option **4 Years** from the **Reported Within** drop-down list.
- If you wish to search specific dates select the blank option at the top of the drop-down list to clear the displayed time frame and then enter your own criteria in the fields **Between** and **And**.

Bid date

Bid dates may be searched using only those dates, or including the **Reported Within** range.

- To search specific bid dates only select the option **4 Years** from drop-down list **Reported Within** to include all projects in your search and then enter your own criteria in the **Bidding** fields **Between** and **And**. Your search will return companies with projects whose listed bid dates fall within your criteria.
- To search bid dates based also on **Reported Within** make the appropriate selection from the **Reported Within** list, and then enter your criteria in the **Bidding** fields **Between** and **And**. Your search will return companies with projects whose bid dates and report dates fall within the specified criteria.



Valuation

Valuation allows you to search for projects with a minimum valuation, a specified range of value, or up to a maximum value.

- Search for companies working on projects with a minimum value: select the minimum required amount from the drop-down list **$ value between**. You do not need to select a maximum value.
- Search for companies working on projects that fall between two values: select both a minimum and maximum value from the drop-down lists.
- Search for companies working on projects up to a certain value: select a maximum value from the drop-down list. You do not need to select a minimum value.

Dodge plans available

Indicating Dodge Plans will filter your results to only include projects with Dodge Plans / Specs / Addenda available.

Include dodge permits

This check box will include Permit projects in your search result.

Project tracking lists

Selecting a tracking list from the drop-down list will run a search for all selected criteria within that list of projects only. For example, if you have tracked a lot of projects you can search within each list for all owners, architects, contractors, etc. to create mailing lists, or find a list of professionals working on projects you are following by specific stages or market segments etc. The search will return the companies whose project information matches your search criteria.

Owner types

Quickly find projects built in your area by Local / State / Federal governments, the Military, or by private owners.

Work types

Projects may be searched by work types such as New Construction, Building Additions, Renovation / Retrofit, and Interior Completion.

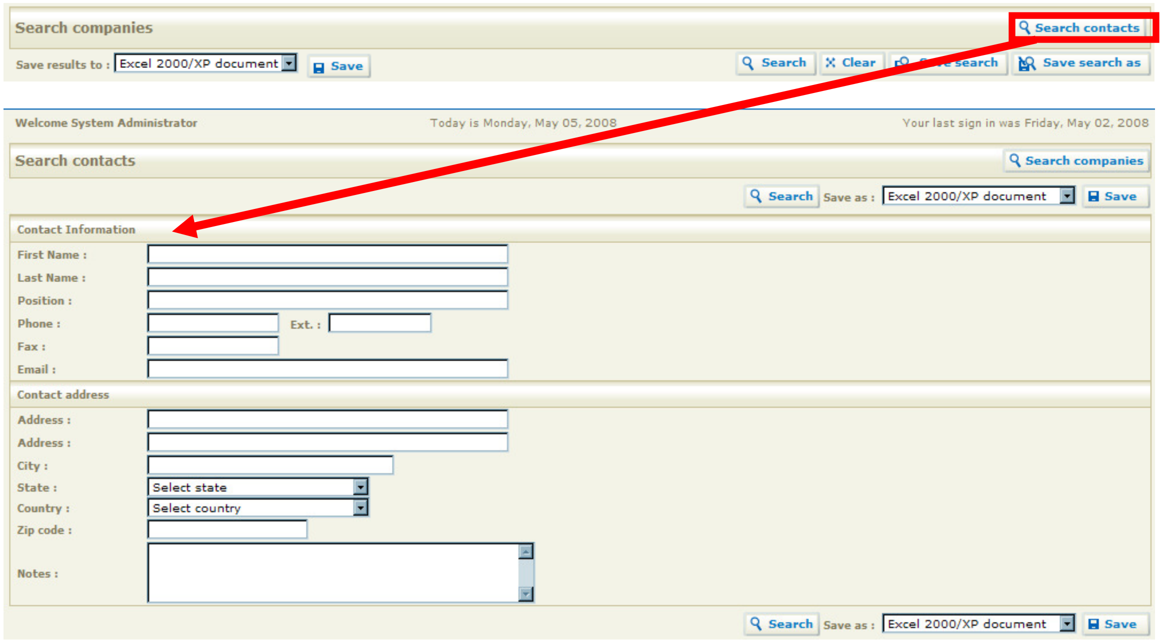
Square footage and story height

You can include either of these, or both, in your search.

- For a specific range enter both a minimum and a maximum value.
- If you are searching for a minimum you do not need to enter a maximum.
- If you are searching for a maximum you do not need to enter a minimum.

Search Contacts

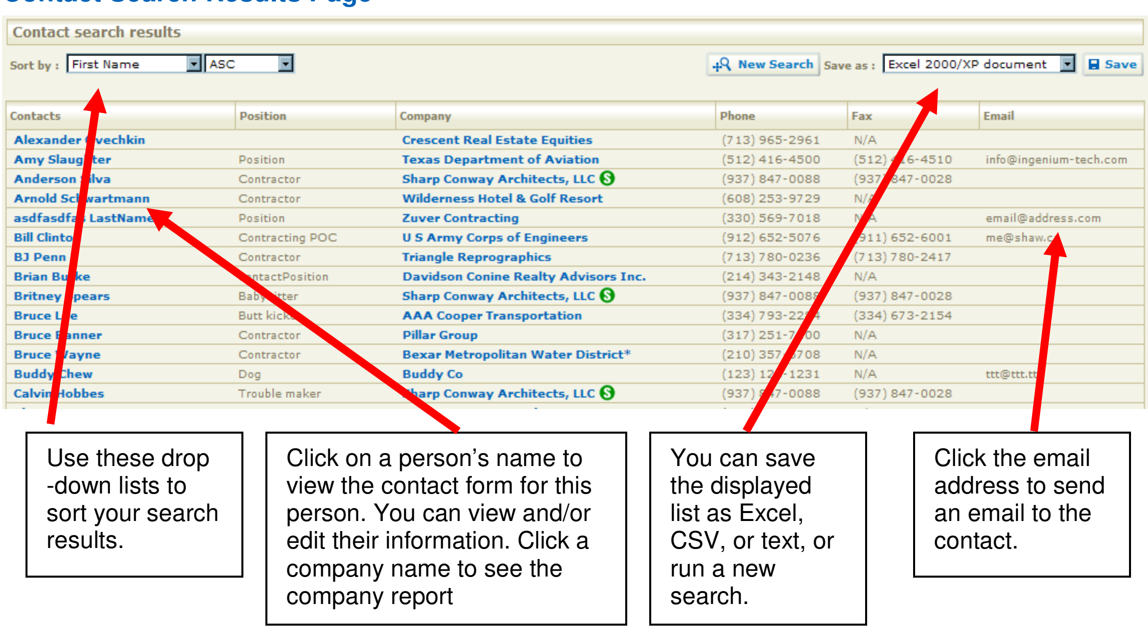
From the Search companies page, click **Search contacts**.



1) Enter all search criteria.
2) Click the **Search** button to run your query, or **select Excel 2000/XP Document, CSV,** or **Text**, then click **Save** to bypass the search results page and send all information to an Excel spreadsheet, a Comma-Delimited format (CSV), or a text file.

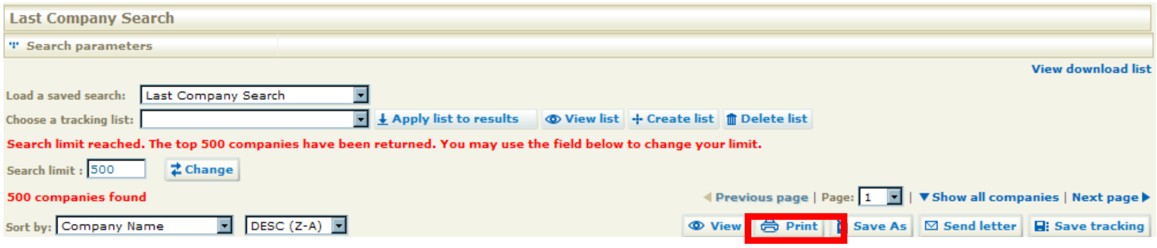
If you want to view all contacts entered into the system, do not enter any search criteria. Click the **Search** button only.

Contact Search Results Page



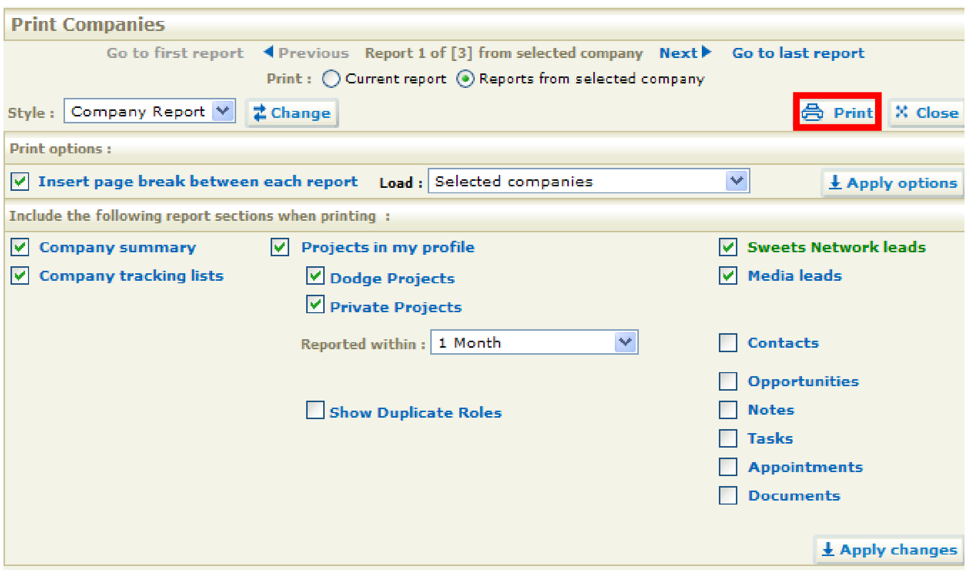
Print (PrintSaveCompaniesOptions)

Selecting companies



If you wish to print the entire result list click the **Print** button and the system will automatically include all reports. If you wish to print specific companies and not the entire list then use the selection boxes at the far left of the page to indicate which companies you want. Then click the **Print…**button.

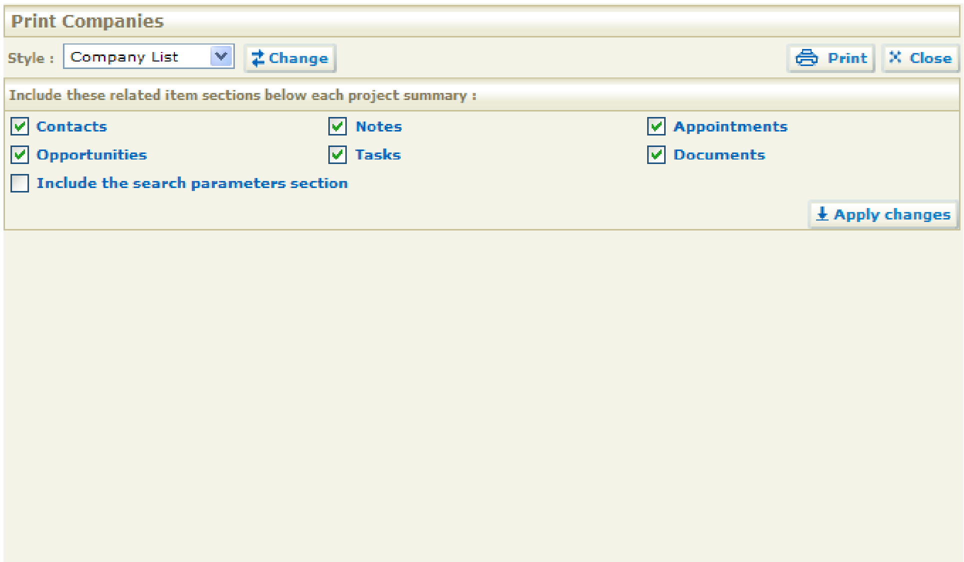
The preview window – Print full reports



The Print Companies window allows you to set your options before printing. You can select which parts of the reports to include, for example related projects, Buyline leads, Architectural Record leads, opportunity or tracking information, contacts, tasks, notes and appointments. Add check marks to the bottom of the page to indicate which information you'd like to see. The center of the window has the options for selecting either **Report** style or **List** style, and whether you'd like to print the company currently displayed on the top half of the preview window or all companies. You can use the links **Next** and **Previous** to scroll through the reports. The drop-down list **Load:** will display either **Selected Companies** if you specified which companies you wanted or **Companies 1 – 25 from results** if you did not. The list references all companies from your result and allows you to print companies 1-25, then 26–50, then 76–100 etc. When you select an entry from this list, click the **Apply Options** button to the right of it to load the next group of companies.

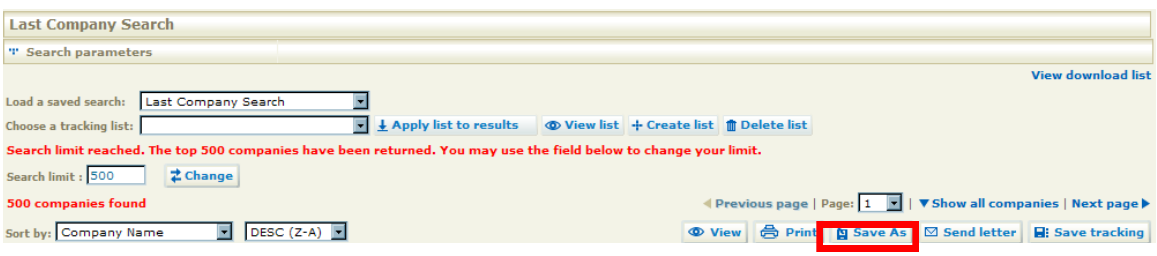
To print the companies click the **Print** button (center right of the preview window).

Print List View



If you change the **Style** drop-down list to **List** view the preview window will change. Here you can select which sections you would like to include in your printed report. The **Company List** view is more compact than the **Company Report** view, so it is more suitable if you wish to save paper.

Saving in Word, Excel, HTML, or Text

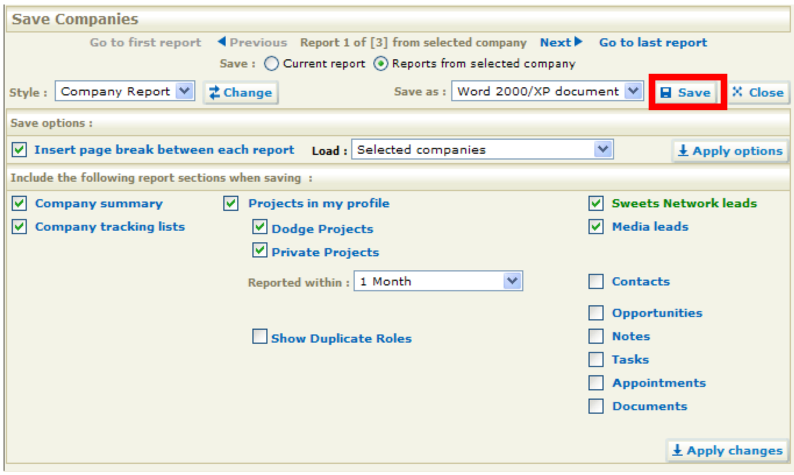


Once a search result or tracking list is displayed, you have the option of saving the results in Word or Excel. Entire reports can be saved, or just the search result list view.

Selecting Companies

If you wish to save the entire result list as Word or Excel click the **Save As** button and the system will automatically include all reports. If you wish to save specific companies and not the entire list then use the selection boxes at the far left of the page to indicate which companies you want. Then click the **Save As** button.

The preview window – Save full reports



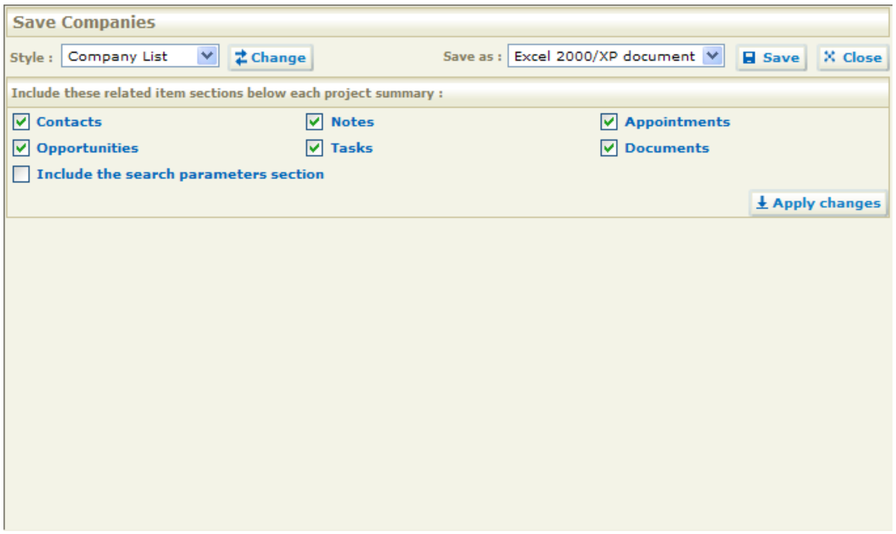
The **Save Companies** window lets you set your options before saving the results of a Company Search as a Word, HTML, Excel, or Text file. You can select which parts of the reports to include, for example related projects, Buyline leads, Architectural Record leads, opportunity or tracking information, contacts, tasks, notes and appointments. Add check marks to the bottom of the page to indicate which information you'd like to see.

There are options for selecting either **Report** style or **List** style, and whether you'd like to save the company currently displayed on the top half of the preview window or all companies. You can use the links **Next** and **Previous** to scroll through the reports.

The drop-down list **Load**: will display either **Selected Companies** if you specified which companies you wanted, or **Companies 1 – 25 from results** if you did not. The menu references all companies from your result and allows you to save companies 1-25, then 26–50, then 76–100 etc. When you select an entry from this menu, click the **Apply Options** button to the right of it to load the next group of companies.

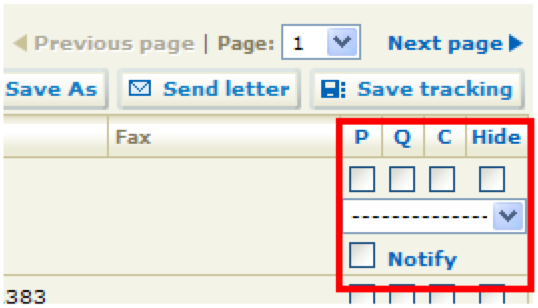
To export the companies, select either Excel 2000/XP document, Word 200/XP document, HTML, Excel 2000/XP, or Text, and then click the **Save** button (see screenshot above). You will be asked if you'd like to save the file or open it. If you select **Save this file to disk….**, *a*nother window will open asking you to select a location to save this file to. When done, click **Save**. A third window will tell you that the download is complete. Click **Close**. If you had selected **Open this file….**, *y*our search result will open in an Excel spreadsheet, a Word document, a web page in your browser, or a text file. If you have selected Word, go **to File-Page Setup** and change the paper orientation to landscape so that all project information fits on the page.

Save as List View



If you change the **Style** drop-down list to **List** view the preview window will change. You can select which related item sections you would like to include in the report.

Tracking companies

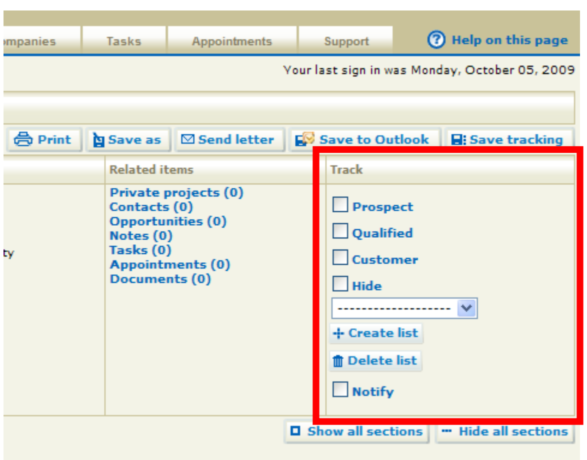


Tracking companies allows you to quickly access information on specific companies that are important to your business. There are four lists that come with the system: **My Prospect**, **My Qualified**, **My Customers, My Hide,** and **Notify**. These are displayed as **P**, **Q**, **C**, **Hide,** and **Notify**. You can place a company on only one of these lists at a time.

You can create custom tracking lists. These may be named anything you like. The lists are displayed in a drop-down list beneath the system lists.

A company may be saved to ONE system list and ONE custom list at the same time, but not two system lists, or two custom lists at the same time.

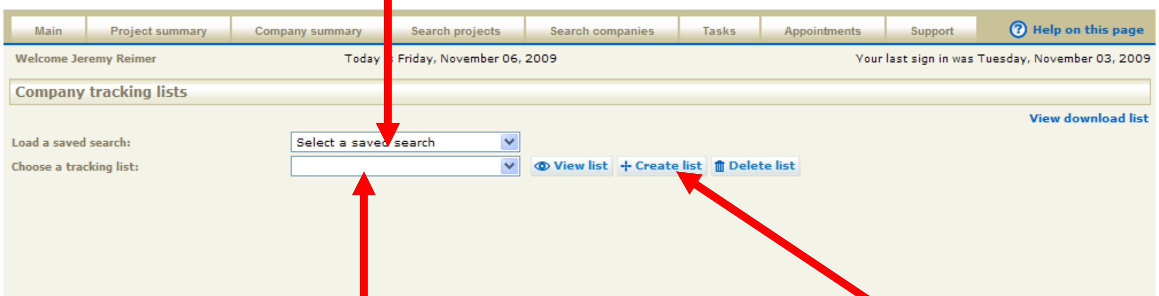
These same lists are found within the company report, at the top right corner of the page.



Company tracking lists

When you select the link **View company tracking lists** from the main menu, the page will load with the following image:

Run a saved search from this page by selecting it from the drop-down list **Load a saved search** or select **Last Company Search** to view your last query.

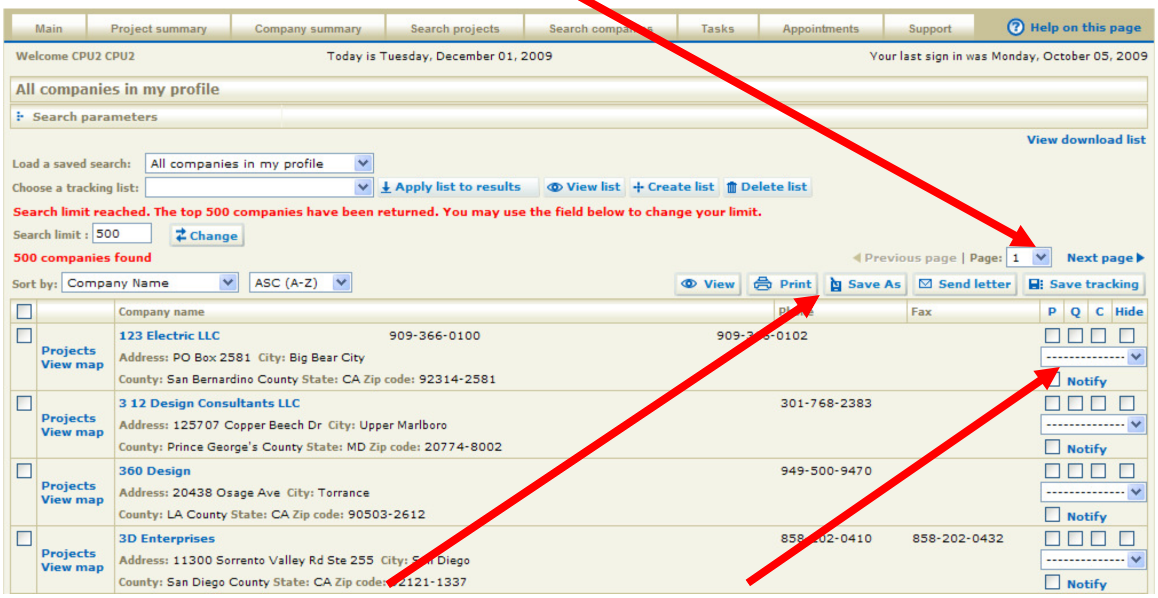


To view a complete list of tracked companies, select the list name from the list **Choose a tracking list**. Then click the **View list** button to display the projects.

These buttons let you create a **New List**, or **Delete** a privately created list.

Once company information displays on this page the image changes slightly to include the number of companies found, the total number of pages, and links to access them.

Move from page to page using these links, or select a Page Number from the drop-down list. Use the link **Show All Companies** to display all of your results on one page.



Print and Save as give you the options to print, or save as Word or Excel, some of the reports with full details, or all of the reports in list form with fewer details. To select specific reports only use the selection boxes at the far left of the page before clicking the Print or Save as buttons.

Tracking boxes and custom list drop-down lists are shown to the right of the list of companies.

View a List, Add or Remove Companies

View a company tracking list

This is used to view companies already on a tracking list.

1. From the main menu select View Company Tracking Lists.
2. Select the tracking list you would like to view from the drop-down list **Choose a tracking list**.
3. The companies on that list will be displayed. All check marks will be in the same column, or all custom drop-down lists will display the same list name.

Add companies to a list

1. To add companies to a list, use your mouse to click once in the appropriate tracking box **P**, **Q**, **C**, or Hide, to produce a check mark or select a custom list from the drop-down list.
2. When you are done selecting projects, click **Save Tracking**.

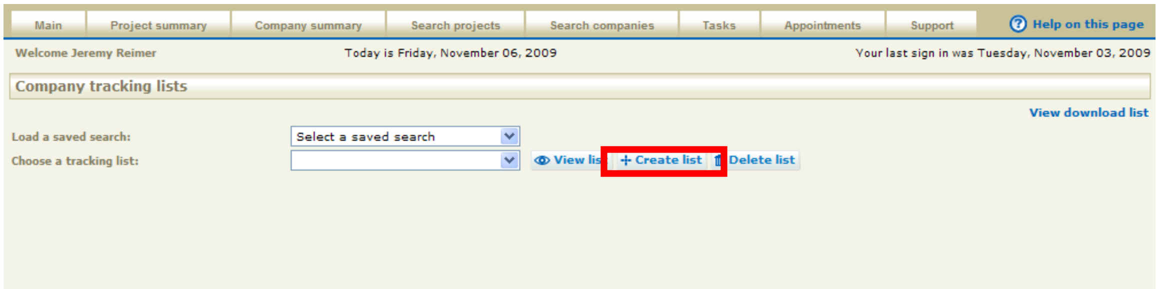
Remove companies from a list

1. To remove companies from a list, use your mouse to click once in the tracking box to remove the check mark. For custom lists, select the blank field at the top of the drop-down list.
2. When you are done, click **Save Tracking**.

Move companies from one list to another

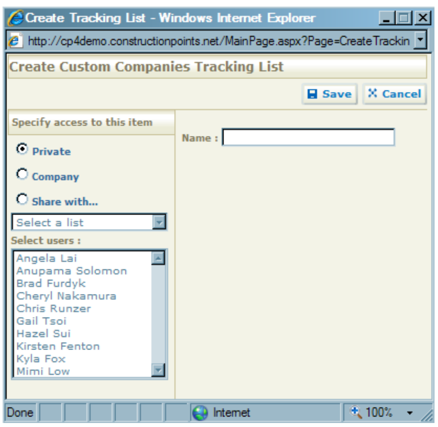
1. To change the tracking list a company is on, simply click in the tracking box you want the company to be on, or select a new custom list from the drop-down list.
2. When you have made your changes, click **Save Tracking**. The companies will automatically be removed from the original list and are now only on the new selection(s).

Create a new list



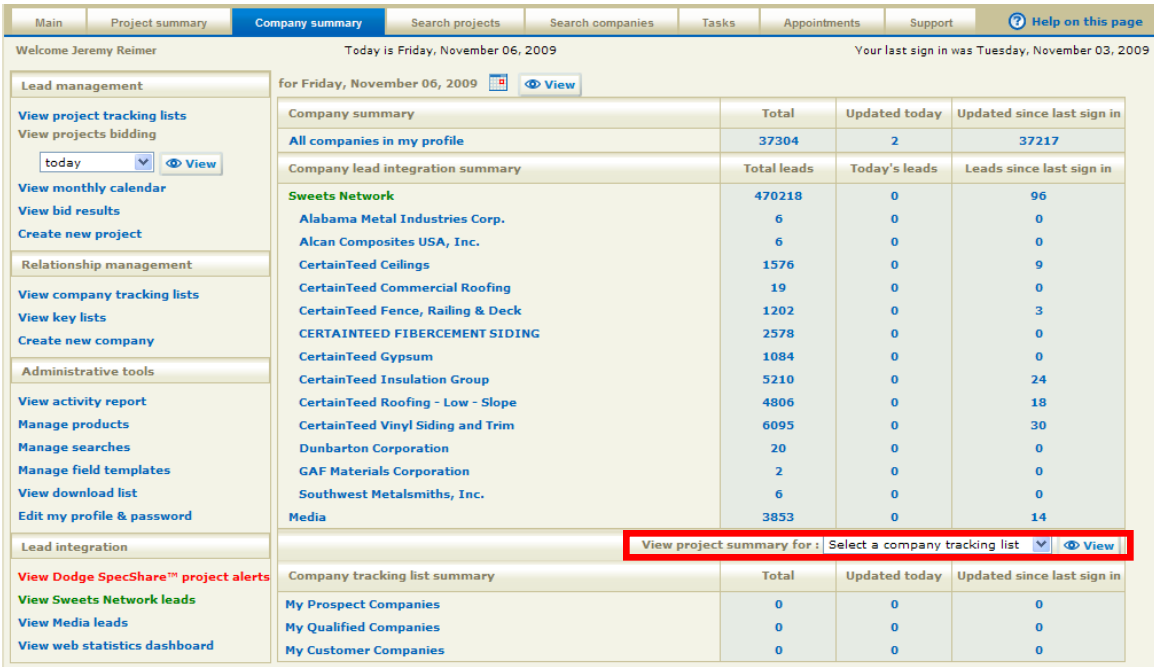
Custom tracking lists may be created to organize your companies. Lists may be added from the company search results page, within the company report, and within the project report – related companies section.

1. Click **Create list**.
2. A new window will open, asking you to name your custom list. **Type** allows you to create a **Private** list, which only you may see, or a **Shared** list that select members of your company may view.

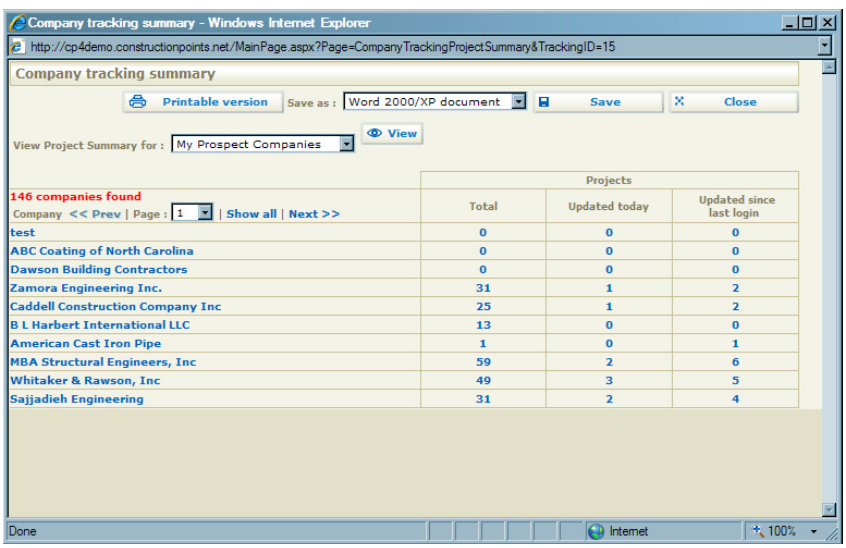


3. When you have named your list, click the **Save** button at the top right of the window.
4. A new window will tell you that the list has been saved. Click **Close**. Your list will be shown in the drop-down list for custom tracking lists.

Viewing updates for tracked companies



You can quickly find out which of your company reports has received new projects, or have had their existing projects updated. Once a company has been placed in a tracking list the **Company summary** page from the main menu will show any updates to those companies for **Today** or **Since last login**. Clicking on the number of companies under each column heading for **Today** or **Since last login** will load/display only the companies that have received an update. To view the new or updated projects open the company report.

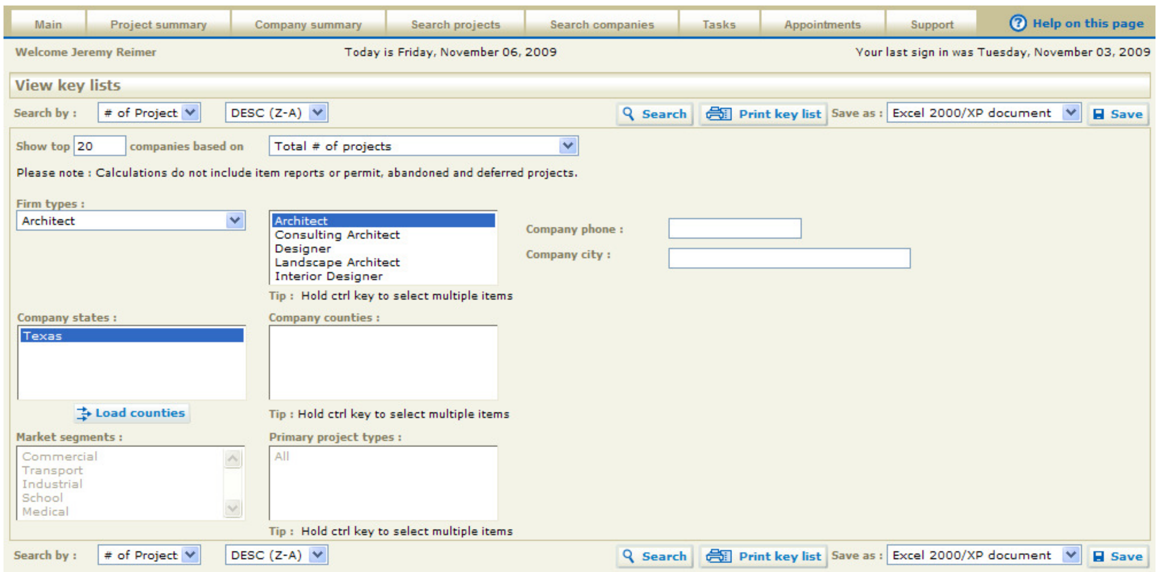


To go directly to the new or updated projects for each company, select a tracking list from the drop-down list **View project summary for** and click the **View** button. A pop-up window will appear with each company's name and the counts for how many of each company's related projects have been updated either today or since last login. Clicking a project count will display the updated projects on the project search results page. Clicking on a company name will take you to that company report. You have the option of printing the list, or saving it as a Word, Text, Excel or Comma-Delimited (CSV) file.

View key lists (Search Key List)

View Key Lists includes architects, engineers, contractors, manufacturers, distributors etc. It is particularly useful for organizations whose business process focuses on companies for leads. **Key Lists** allows you to easily identify the most active companies based on types of projects. You can have your results displayed by the number of projects, total value of projects, or company name. Use the **Sort By** options before running your search as they will determine what companies are returned. *Example:* Show me the Top 10 architects, based on number of projects, in California.

Each list provides you with the names of the most active companies in the entire database, based on the last year's worth of projects. The number of active projects for each company is shown in the far left column. A company must have at least three projects within the market segment or project type selected in order to be on this list. Hyperlinks from the company names provide quick access to each company's report. Within the report, all projects this company is involved with (that fall within your assigned territory) will be listed.



Key list search

1. Select **View Key Lists** from the main menu page.
2. You can select a professional and search on one or all sub-roles. You can also specify whether you would like to see the top professionals in a state (do not select any market segments), or top professionals by project type (select a market segment and then load the project types).

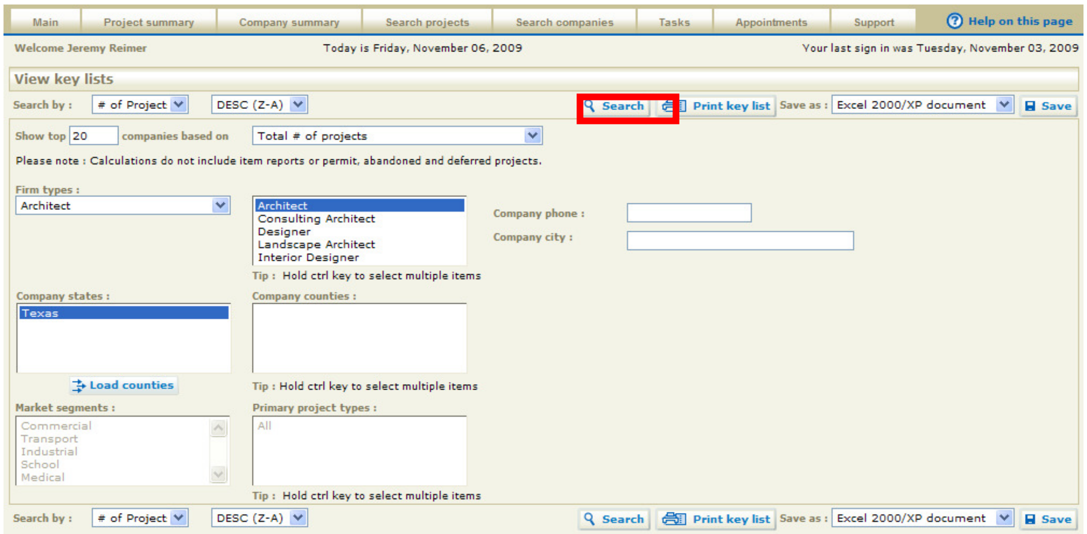
   NOTE: To select a market segment, choose **# of projects for selected market segment(s)** *from the drop-down list at the top of the screen.*

3. You can search for a specific number of professionals by changing the entry in the text field **Top**. By default this will search for the **Top 500** but you can specify the number of professionals you'd like to see by entering a number in this field. You can set a new default number by changing this entry on your **Edit my profile & password - Company preferences** page.
4. You have three options for viewing your results:
5. **Search** will display a list of companies.
6. **Print Key List** will display your search results in another window, ready for printing.
7. **Save** will open or save the list as an Excel file or Comma-Delimited (CSV) file.

Export to Excel or CSV

1. Select your search criteria.
2. Select Excel 2000/XP Document or CSV, then click **Save**.
3. A new window will appear asking if you would like to **open this file from its current location**, which will open the file directly in Microsoft Excel (requires Excel to be installed on your computer), or **save this file to disk**, which will open another window asking you to select a location to save the file to.

Search



If you click **Search** you will get a results page on the screen that allows you to track companies, print and view company reports or use the **Send Letter** feature. You can change the number of companies displayed by editing the text field **Top** and clicking **Change Limit**.

Viewing company reports

In order to view each of these companies in detail you will have to open each report. This is easily done by opening the reports in a separate window that can then be closed – returning you to this list.

Hold your mouse over the first company name and RIGHT click. Then, LEFT Click on **Open in a new window** in the pop-up menu that appears under the mouse cursor. The report will then open in a new window. When you are done viewing the report close it by clicking once on the **X** in the very top right corner of the window.

Once you open a company report, be sure to:

1. Click **Show All Roles** (if a company plays more than one role it will be displayed as **Multiple** unless you click this link)
2. Change the drop-down list for **Report Date Within** to one year to reflect the time period of the **Key List** search.

Sort by options

You can re-sort your results by using the drop down options at the top of the list.

Tracking companies

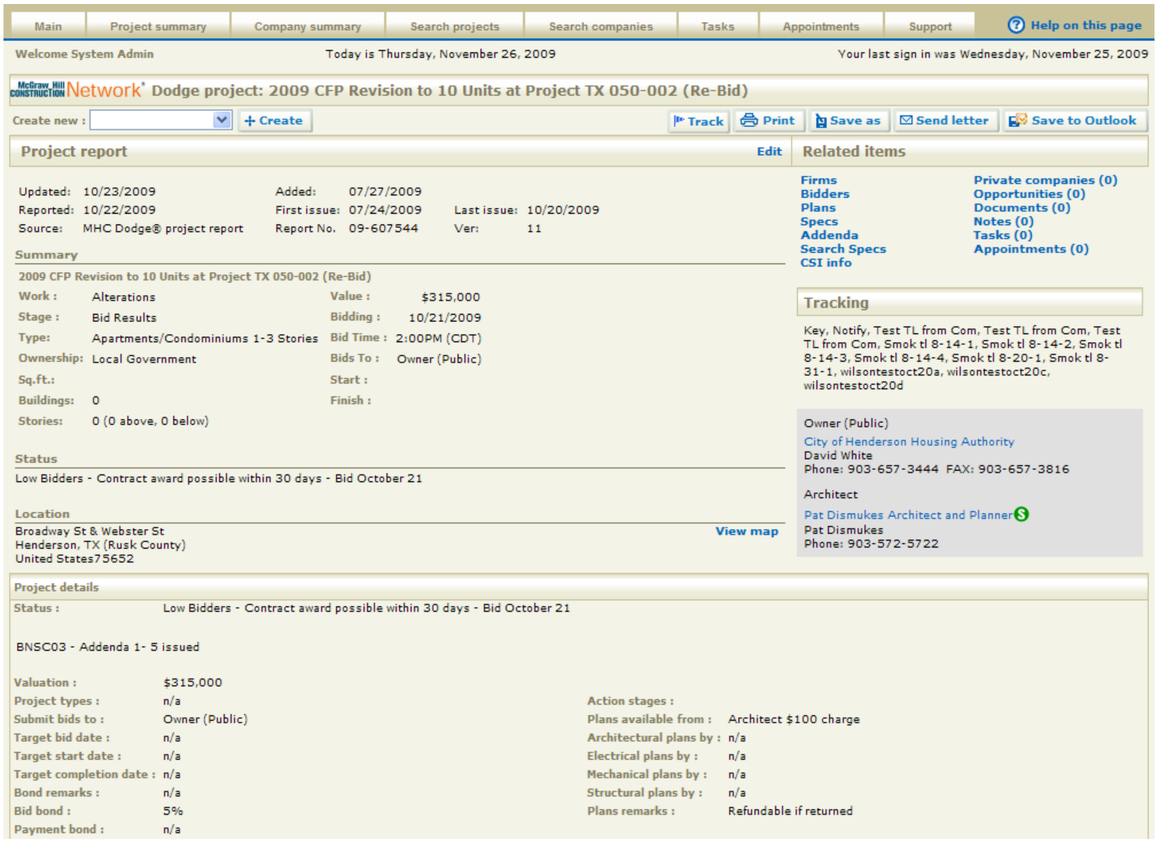
Select a tracking list (**P**, **Q**, **C**, **Hide** or custom) and click **Save Tracking**.

Print company reports

For detailed information on printing these companies please see the other sections that cover Printing.

Project report

A Project Report displays all currently available information on a project.

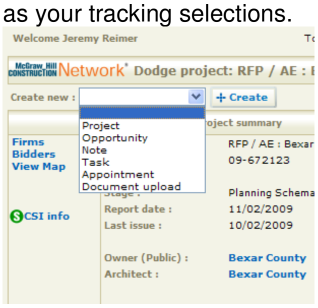


At the top right are **Related items** - links to take you to the Firms or Bidders section of the project, and links to Dodge Plans and Spec information as well as CSI Info (these are separate services, please contact your Dodge Rep if you are not currently accessing this data and would like to).

Beneath that are the dates the project was added, updated, and reported, and the version number of the project. A version 1 project indicates this report is new to the system. The Report Date indicates the last date the report received new information from Dodge.

Any professionals you have chosen to display on the project search results pages are displayed at the bottom right of the report, with a gray background. Clicking a company name will take you to the company report.

At the top right is a summary of the private data (*Related Items*) that has been added to this report, as well as your tracking selections.

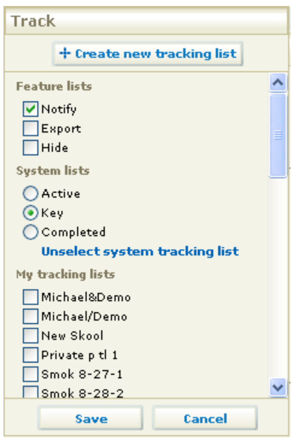


The **Project Details** area contains the specifics of the project. (When performing a search, the function **With keyword (s) …** will scan this area of the project reports for the specified criteria.)

Contained within the report are a list of Related Companies and sections for adding Opportunities, Tasks, Notes Appointments, and Related Documents. The drop-down list **Create New**, at the top left of the report, allows you to easily add private information to the report. Select an option and click the *Go* button to access each form.

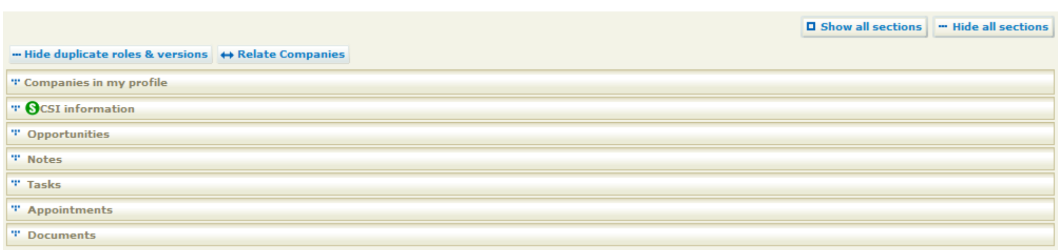
Project tracking list

If this project is part of one or more tracking lists, these lists will be displayed on the **Tracking** section of the report. You may track or un-track a project by clicking the **Track** button on the top of the report. This brings up a multi-tracking window:



From this window, you can assign one or more **Feature** lists (Notify, Export, and Hide), a single **System List** (Active, Key, or Completed), and one or more custom tracking lists (under **My tracking lists**). Select the lists you want (or click **Unselect system tracking list** to remove the project from a System List) and click **Save** to save your changes or **Cancel** to discard them.

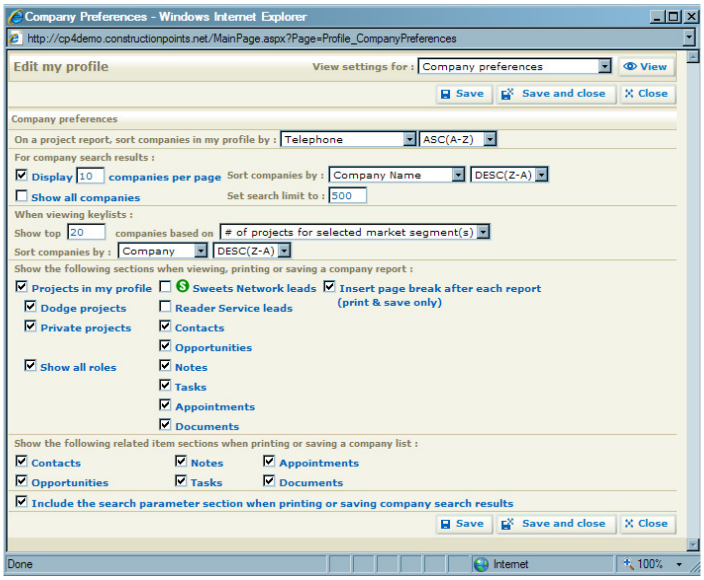
Sub-sections



The report contains sub-sections for information associated with this project: Related Companies; Tasks; Notes; Appointments, and Related Documents. Each sub-section of the report may be viewed or hidden individually by clicking on the plus/minus sign icon at the far left of each header. Above the sections, to the far right, are the options **Show all Sections** /**Hide all sections**. When you select one of these, the system will remember your choice and apply it to all project reports, until you log out.

To add information to these sections either click **New opportunity, New note,** or **New task**.

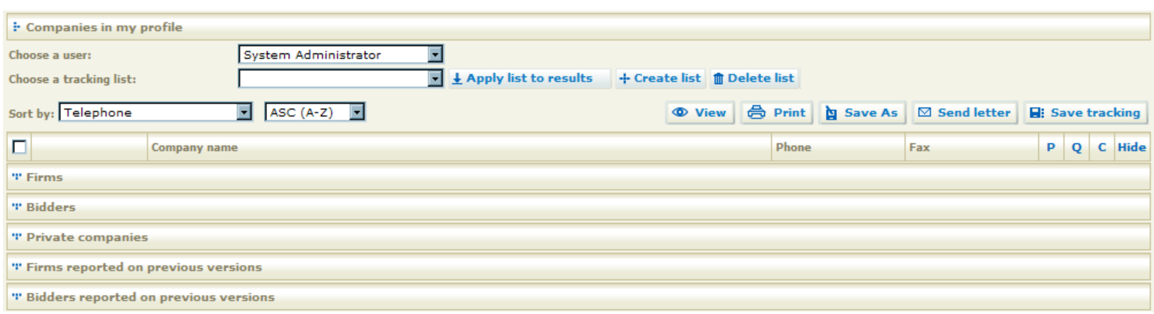
If you always want to view particular section(s) of the report select **Edit My Profile & Password** from the main menu, and then select **Project preferences** from the drop-down list **View Settings For**. Add checkmarks to the options you would like to have displayed each time you view a project report.



Click **Save and close** to update your view.

Companies (related to project)

The first sub-section of the project report is **Companies (related to project)**. The dodge project number is listed if available: eg: **Companies (related to 09-491569)** All known companies associated with a project *that are accessible from the user's profile* are listed in this section. Their role in the project is indicated and the basic contact information given. The company name is a hyperlink to the company report where more detailed contact information may be found, as well as a list of other projects the company is working on. Companies may be manually added to this list using the function **Relate companies** from the list of navigation options.



Within the **Companies in my profile** section are five sub-sections for

- Firms: professionals associated with the project.
- Bidders: once a project reaches the bidding stage, all known bidders will be listed here.
- Related Companies (Private): if you manually add/relate companies to this project they will appear here.
- Previously Reported Firms: professionals once listed as **Firms** who are no longer associated with the project.
- Previously Reported Bidders: If a project has more than one round of bidding this is a cumulative list of all known bidders from the first round(s) of bid results.

Tracking related companies

Companies may be tracked from within the project report. Any companies already tracked will automatically display that information when viewing the *Related Companies* section. The system comes with four lists: **P – My Prospect Companies**; **Q – My Qualified Companies**; **C – My Customers**; and **Hide – My Hidden companies**. Custom lists may be created and named to reflect how you group your companies together. A company may be saved to ONE system list and ONE custom list at a time.

Track a related company

1. To add companies to a list, use your mouse to click once in the appropriate tracking box **P**, **Q**, **C**, **Hide**, or **Notify** to produce a check mark, or select a custom list from the drop-down list.
2. When you have finished selecting tracking lists, click the button **Save tracking** at the top (or bottom) of the column.

Untrack a related company

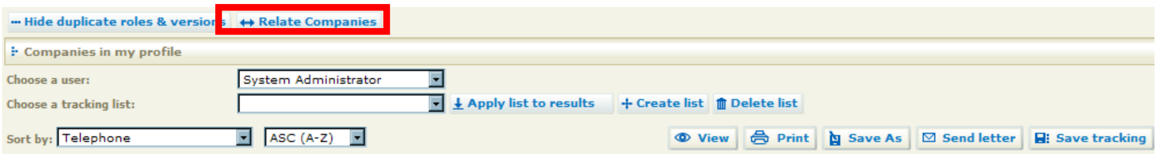
1. Click once on the check mark to remove it, or select the blank line from the custom drop-down list.
2. Click the button **Save Tracking**.

Create a new company tracking list from within the Project report

You may create custom tracking lists to reflect the type of companies you have grouped together.

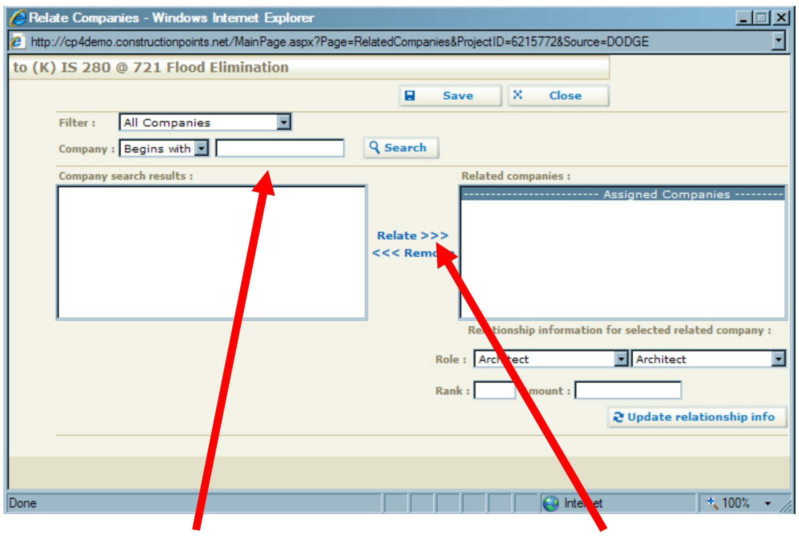
1. Select the link **Create List**, found above the sorting options in the related companies section.
2. A new window will open, asking you to name your custom list. **Type** allows you to create a **Private** list, which only you may see, or a **Shared** list that select members of your company may view.
3. When you have named your list, click **Save**.
4. A new window will tell you that the list has been saved. Click **Close**. Your list will be shown in the drop- down list for custom tracking lists.

Relate Companies to this Report



Any company in the database may be manually related to a project. If you enter your own companies using **Add New Company**, you may relate that company to a project. All additions will be displayed under the section **Companies in my profile – Private**.

1. Open the project report.
2. Within the companies sub-section is the button **Relate companies**.
3. A new window will open. This lets you search for companies, assign them to the report, and enter the Role they are taking on this project.



Enter a company name, or partial name using the text field. Click the Search button to generate your search. Your results will be displayed here. Select a company by clicking on it once – it will be highlighted.

To relate this company, click **Relate**. The company will then appear in the field on the right. When you are done, click the **Save** button at the top right of the window. If you do not want to change the **Role** of any company, click **Close** to return to the report.

Change the role of a privately related company

1. If you are in the project report, click the link **Relate company**. When the window opens, the privately related companies appear in the field on the right. Select a company by clicking on it.
2. Select a role for this company from the drop-down list **Role**. Enter a **Rank** and **Amount** if appropriate.
3. Click the button **Update relationship**.

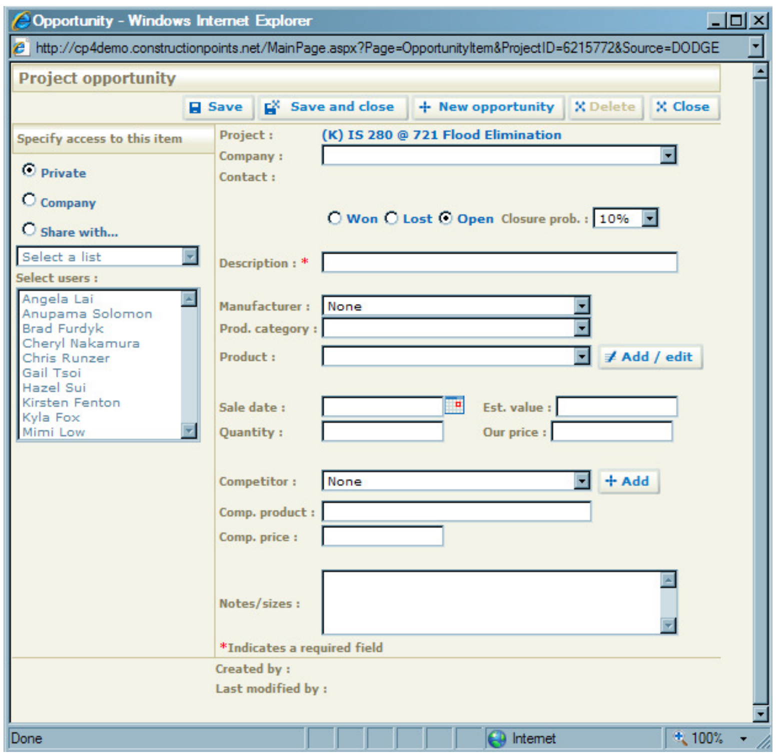
Remove privately related companies

1. From within the project report select **Relate Companies**.
2. Your privately related companies will appear on the right side of the window. Click once on the company you wish to remove from this project. The name will be highlighted.
3. Click once on **Remove**. The name will no longer be displayed.
4. Click **Save**, and then **Close**.

Opportunity form

Opportunities can be shared with other members of your team or remain private to yourself. They allow you to document your sales potential and run searches based on this information. The form fields can be tailored to suit your business process, please call your Dodge Rep for details.

Opportunities that are related to a company will appear in the company report as well as the project report and may be searched from either Search Projects or Search Companies.



Add a new opportunity

1. Select the link **New Opportunity** from the opportunity section of the report or use the drop-down list **Create new Opportunity** at the top left of the project report. A new opportunity form will open.
2. Enter all information.
3. Click **Save** and Close. Your new opportunity will now be displayed in the project report – opportunity section.

View and/or edit an opportunity

1. From within the project report, open the section **Opportunities**. Any opportunities entered for this project will be displayed.
2. Click once on the name of the opportunity you would like to view or edit (text in the far left column of the opportunity section).
3. If you want to edit/update the opportunity, make all changes. Click **Save and Close**.

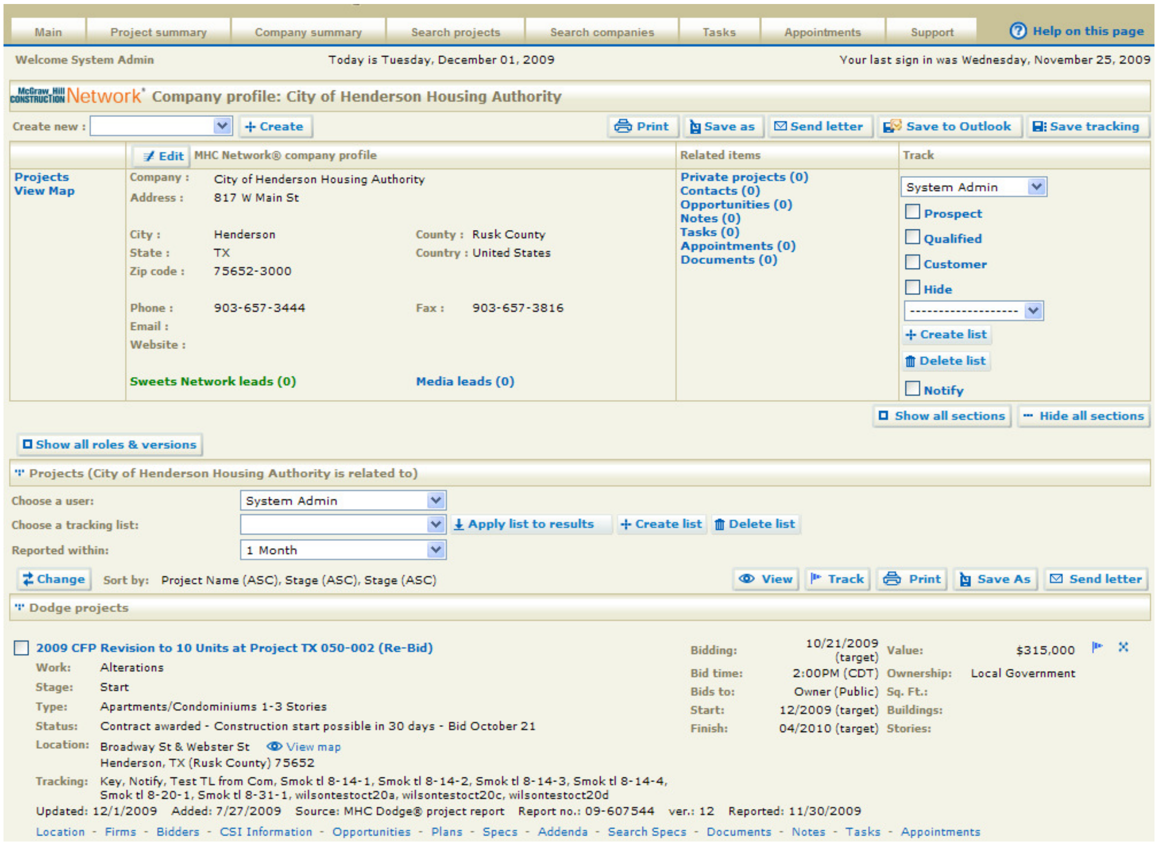
Delete an opportunity

1. From within the project report, open the section **Opportunities**. Any opportunities entered for this project will be displayed.
2. Click once on the name of the opportunity you would like to delete (text in the far left column of the opportunity section).
3. When it opens, click **Delete** on the bottom of the page. You will be asked to confirm that you wish to delete the opportunity. Click **OK**.
4. Click **Close** to return to the project report.

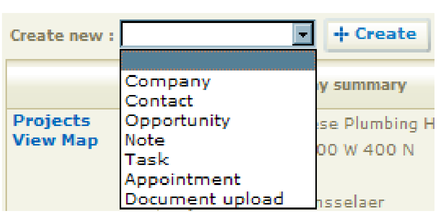
Search projects

The **Search Projects** page contains an area to search the fields on the Opportunity form. You can search for just the opportunity information or combine it with the project search criteria. Your search will return projects whose opportunities contain the information you searched for.

Company report



A company report contains all known company and contact information, and a list of all projects within your assigned territory that a company is associated with. The reports are shared throughout the system allowing you to benefit from company and contact information entered by other employees, past or present. The full Name, Type of business, Telephone and Fax numbers, Email and Web-site addresses are usually provided. Buyline Leads and Arch Record Leads are separate Dodge services - please contact your Dodge Rep if you are not currently accessing this data and would like to.

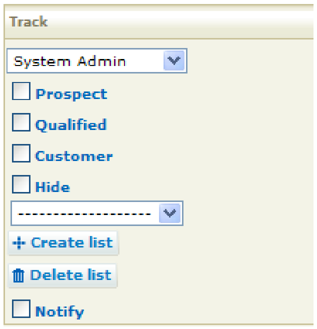


At the top left are links to take you to the related projects section of this report, or provide you with a map view of the company's location.

The **Related Items** section at the top right shows you any private data added to the report, and also provides links to take you to those sections. Within those sections you can add new items. You can also add them by accessing the **Create New** drop-down list at the top left of the report. Select an item from the list and click the **Go** button.

The tracking list options are displayed at the top right of the report. If the company has already been tracked a checkmark or a list name will be displayed when the viewing the report. You may track or un-track a project by placing/removing a checkmark in a tracking box or selecting a list from the drop-down list and clicking **Save Tracking** above the menu. The tracking lists **Prospect**, **Qualified**, **Customer** and **Hide** included with the system. Other lists may be manually created by selecting the link **Create List**, entering a name, and saving your addition.

Company tracking list



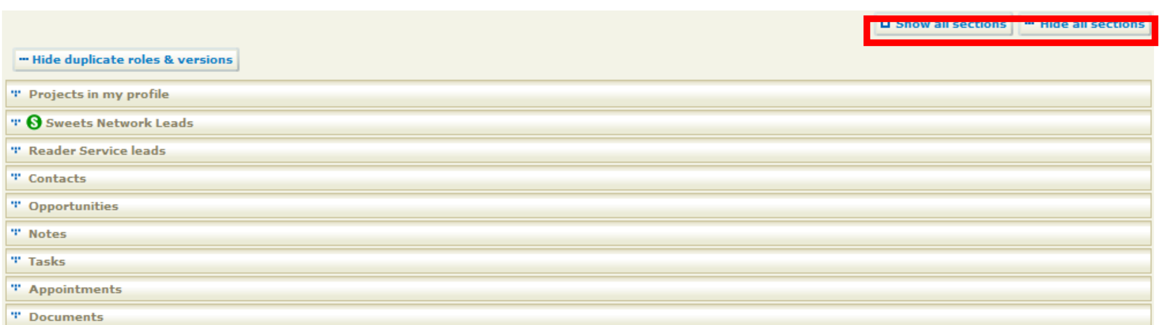
The **Tracking List** options are displayed under the company information. If the company has already been tracked, a checkmark or a list name will be displayed when the viewing the report. You may track or un-track a company by placing/removing a checkmark in a tracking box or selecting a list from the drop-down list and clicking the **Save tracking** command at the top of the menu. The tracking lists **Prospect**, **Qualified**, **Customers**, **Hide** and **Notify** are included with the system. Other lists may be manually created.

NEW: The **Notify** company tracking list will send an email reminder to the address in your profile whenever information about this company is updated.

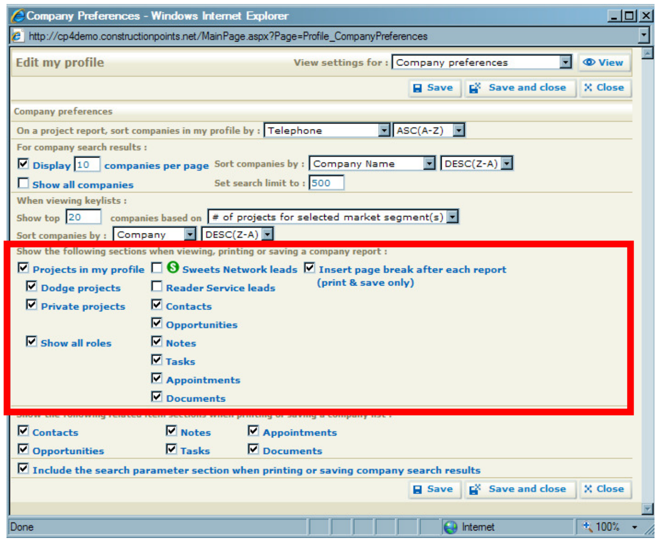
Create a new list

1. Click on **Create list**.
2. A new window will open, asking you to name your custom list. **Type** allows you to create a **Private** list, which only you may see, or a **Shared** list that select members of your company may view.
3. When you have named your list, click the **Save** button at the top right of the window.
4. A new window will tell you that the list has been saved. Click **Close**. Your list will be shown in the drop-down list for custom tracking lists.

Sub-sections: show / side

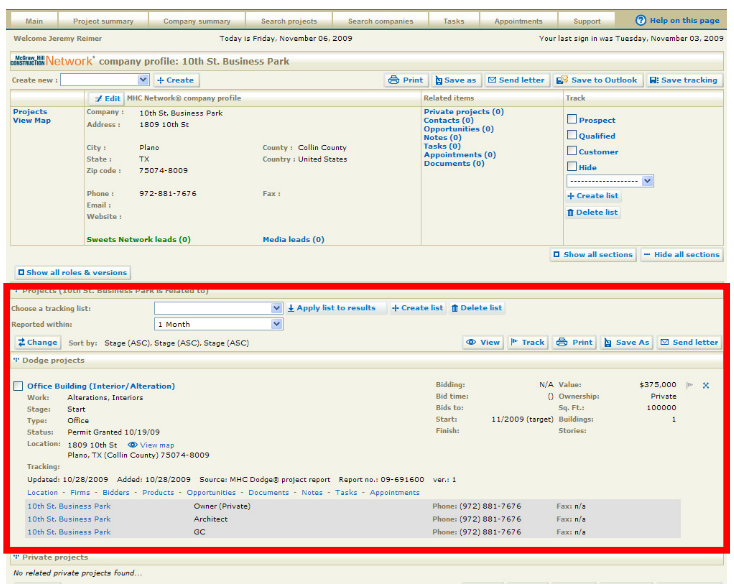


Above the sub-sections, at the right, are the options **Show All Sections** / **Hide All Sections**. Each sub-section of the report may also be viewed or hidden individually by clicking on the icon at the far left of each header. When you select one of these, the system will remember your choice and apply it to all company reports, until you log out.



If you always want to view particular section(s) of the report you may click **Edit my profile/password** from the main menu, change the view to **Company preferences** and click **Go**, then change your preferences as outlined by the red box in the screenshot. Each time you open a company report the sections you selected will automatically be shown. The system will remember your choice and apply it each time you login.

Related projects: report date within menu, tracking



Project and company reports link together to provide a complete overview of all known information about a project or a company. The role the company plays for each project is displayed. Project reports may be accessed as links from company reports, allowing you to immediately identify the specifics of projects a company is involved with.

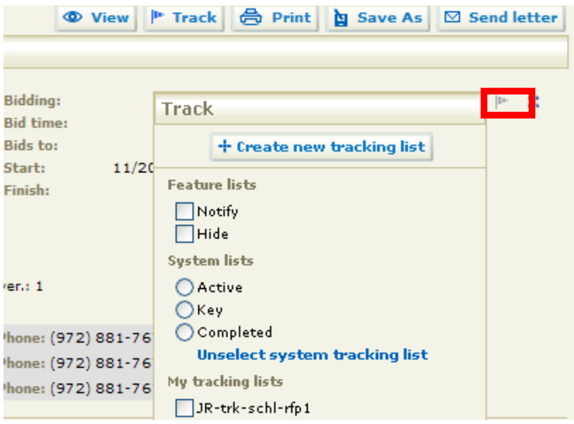
All projects that a company is working on, *that are within your assigned territory*, will be shown in the **Projects (company is related to)** section. Be aware that the default setting for this section is "**Reported Within 1 month**". To view all projects select **"4 years**" from the drop-down list. Clicking on the project name will open the project report.

Tracking related projects

Projects may be tracked from within the company report. Any projects already tracked will automatically display that information when viewing the **Projects in my profile** section.

The system comes with five lists: **A** – My Active Projects; **K** – My Key Projects; **C** – My Completed Projects, **Notify** – Sends email when the project is updated, and **Hide** – My Hidden Projects. Custom lists may be created and named to reflect how you group your projects together. A project may be saved to ONE system list at a time, but can be added to MULTIPLE custom tracking lists.

Track projects



1. To add projects to a list, use your mouse to click the flag icon ( ) then select the appropriate list from the **Track** popup window that appears.
2. When you have finished selecting tracking lists, click once on **Save** on the popup window.

Remove projects from a list

1. Click the flag icon to bring up the Track popup window, then click **Unselect system tracking list**.
2. Click once on **Save**.

Create a new project tracking list from within the company report

You may create custom tracking lists to reflect the type of projects you have grouped together.

1. Click the flag icon to bring up the Track popup window, then click **Create new tracking list**.
2. A new window will open, asking you to name your custom list. **Type** allows you to create a **Private** list, which only you may see, or a **Shared** list that select members of your company may view.
3. When you have named your list, click **Save and Close**.
4. A new window will tell you that the list has been saved. Click **Close**.

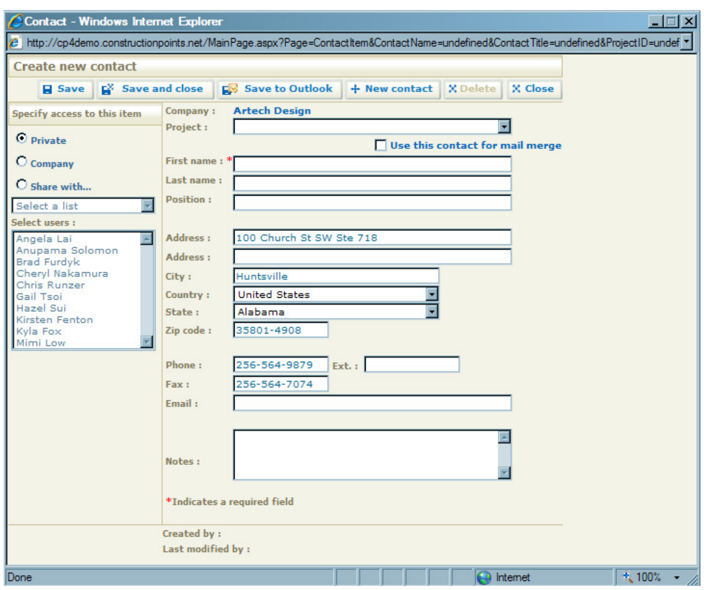
Add a contact

Contacts allow you to create portfolios of information about specific people within a company. This information may be shared with your team or remain private to you. Contacts may also be saved to Outlook. You can add a contact from a company report, or if a contact is listed on a Dodge project convert that contact to a record within the company report and use it for the Send Letter feature.

Add a contact within the company report

1. Use the drop-down list **Create new: Contact** at the top left of the report.
2. The contacts editing page will display. The fields for address, telephone and fax are already filled in with the same information found in the company report. These may be manually changed if necessary.
3. Enter the first and last names of your contact. Add the contact's position, email and any notes you wish to include.
4. If you want to use this contact as the primary name for Send Letter check the **Use this contact for mail merge** box. When you send a letter to this company this contact name will automatically be placed in the **Dear**: field.
5. Select **Save** or **Save to Outlook**.
6. You may add additional contacts from this location by selecting the button **New**.
7. Return to the company report by clicking once on **Close**.

Edit a contact



1. Open the company report **Contacts** section, OR conduct a contact search.
2. Select the contact by clicking once on their displayed name.
3. When the contact page opens, make all necessary changes.
4. Select **Save and Close**.

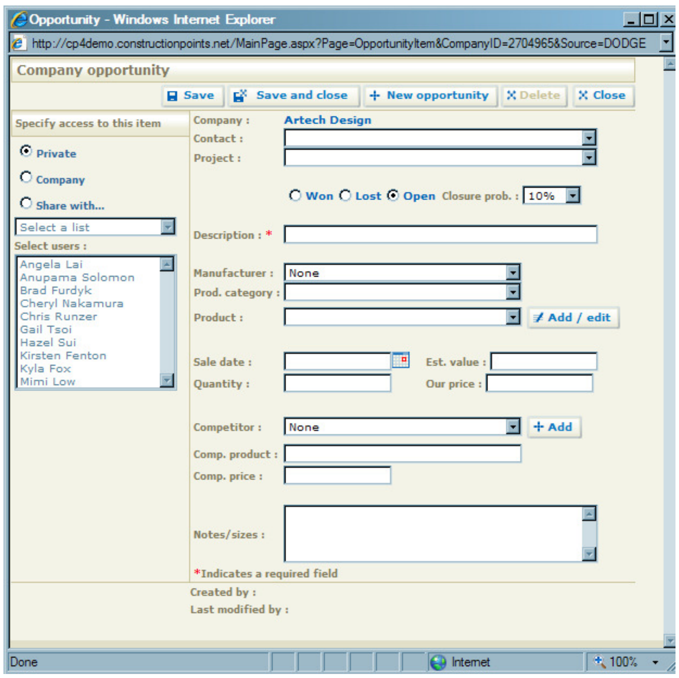
Delete a contact

1. Open the company report **Contacts** section, OR conduct a contact search.
2. Select the contact by clicking once on their displayed name.
3. When the contact page opens, click on the **Delete** button. Click OK when you are asked to confirm the deletion.
4. Click **Close**.

Opportunity

Opportunities can be shared with other members of your team or remain private to yourself. They allow you to document your sales potential and run searches based on this information. The form fields can be tailored to suit your business process, please call your Dodge Rep for details.

Opportunities that are related to a project will appear in the project report as well as the company report and may be searched from either Search Projects or Search Companies.



Add a new opportunity

1. Select the link **New Opportunity** from the opportunity section of the report or use the drop-down list item **Create new Opportunity** at the top left of the project report. A new opportunity form will open.
2. Enter all information.
3. Click **Save and Close**. Your new opportunity will now be displayed in the company report – opportunity section.

View and/or edit an opportunity

1. From within the company report, open the section **Opportunities**. Any opportunities entered for this company will be displayed.
2. Click once on the name of the opportunity you would like to view or edit (text in the far left column of the opportunity section).
3. If you want to edit/update the opportunity, make all changes. Click **Save and Close**.

Delete an opportunity

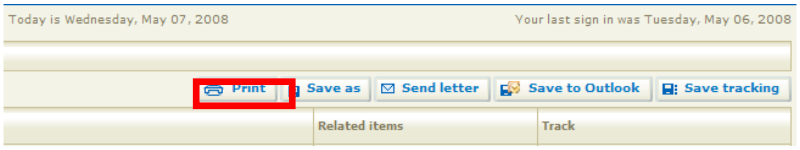
1. From within the company report, open the section **Opportunities**. Any opportunities entered for this company will be displayed.
2. Click once on the name of the opportunity you would like to delete (text in the far left column of the opportunity section).
3. When it opens, click *Delete* from the bottom of the page. You will be asked to confirm that you wish to delete the opportunity. Click *OK*.
4. Click *Close* to return to the project report.

Search projects

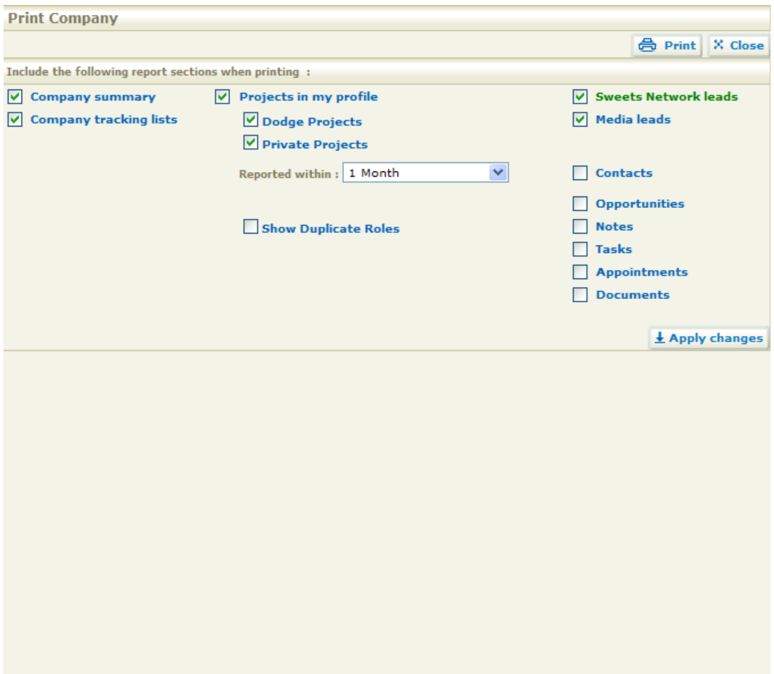
The **Search Companies** page contains an area to search the fields on the **Opportunity** form. You can search for just the opportunity information or combine it with other company search criteria. Your search will return companies whose opportunities contain the information you searched for.

Print the report, print related projects/companies

The Print option within the company and project reports will reformat the page to black and white and it will fit an 8 ½ x 11 page.

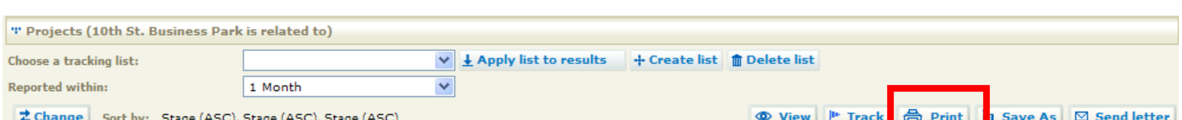


1. Select the **Print** button from the top of the report.
2. The print preview window will open:



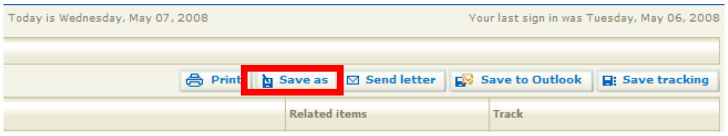
3. Use the options at the bottom of the screen to choose what information you would like to print. A check mark indicates that section will be printed.
4. When you have made your selections, click once on the **Apply changes** button at the bottom right of the window. This updates the top half of the window – the report will now show only the information you have selected.
5. **Print** will open your computer's regular print window. Continue as you would when printing any document.
6. When done, click the **Close** button to exit the print preview window.

Print related projects / companies

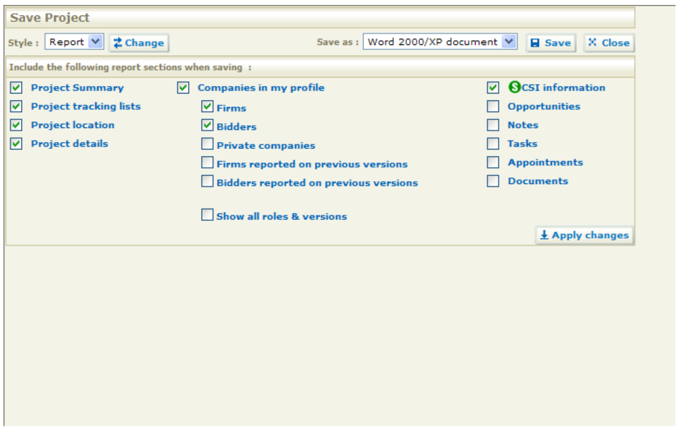


Under the **Projects in my profile** sub-section, use the selection column to the left of the company and project names to select reports to print. The sections have their own **Print** button that will let you print the full project or company report.

Save the report as Word or Excel

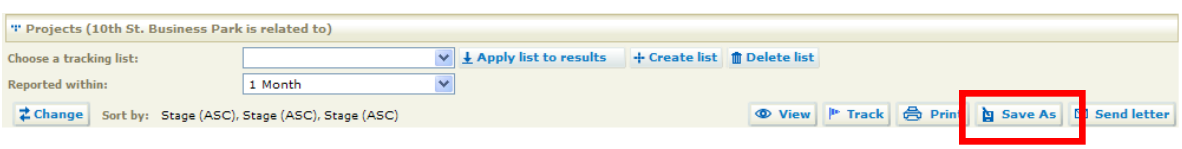


1. Click the **Save as…** button from the top of the report.
2. The Save Project preview window will open:



3. Use the options at the bottom of the screen to choose what information you would like to save. A check mark indicates that section will be included.
4. When you have made your selections, click once on the **Apply changes** button at the bottom right of the window. This updates the top half of the window – the report will now show only the information you have selected.
5. From the drop-down list **Save as** select one of: **Word 2000/XP Document, HTML document, Excel 2000/XP Document**, or **Text Document**. Click **Save**. A new window will appear stating you have chosen to download a file. You may **Open this file from its current location**, which will open the file in Word, your web browser, Excel, or Notepad, or select **Save this file to disk**, which will open another window asking you to select a location to save the file to.
6. Click the **Close** button to exit the print preview window.

Save related projects / companies to Word or Excel



Use the selection column to the left of the company and project names to select reports to print.

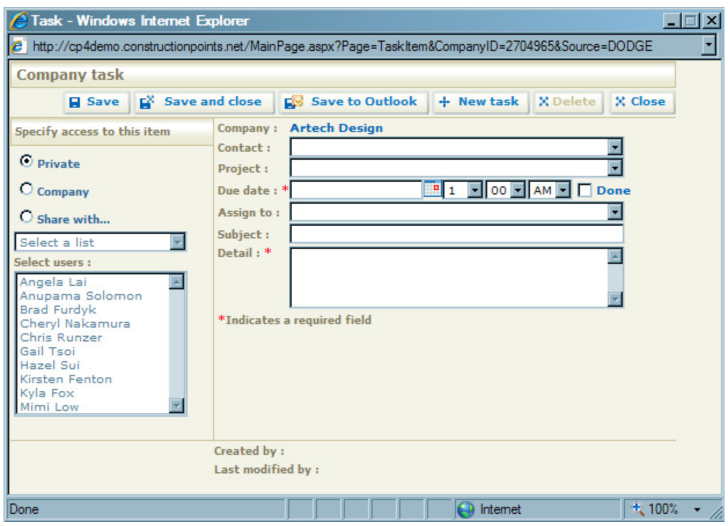
The sections have their own **Print** button that will let you print the full project or company report.

Tasks

The Tasks section allows you to record "to do" items regarding a project or company, such as sales calls, correspondence, or RFIs. You may assign tasks to other users in the system. The drop-down list *Project/Company* displays the names of projects or companies associated with this report. You can relate this task to one of these other reports by selecting it from the menu. The project/company name(s) are displayed in the *Tasks* list and are hyperlinks to the report(s) where the task will also be displayed. The remainder of the tasks section provides space for recording when the task was entered, when it is due, and who created it. Tasks may also be sent to Outlook once the Construction Network has been made a secure site. Tasks may remain private to you, or can be marked *Shared* to allow the coworkers you specify to have access to the information.

• All outstanding tasks remain in the system until completed or manually deleted.
• Completed tasks will display in the **My Tasks-Completed** list for only one month but will remain in the reports unless deleted.
• You have the option of breaking up one large task into smaller **Sub-Tasks**. However, all **Sub-Tasks** belong to the parent task. If the parent task is deleted, all **Subtasks** will automatically be deleted with it.

Enter a task



1. From the company report page, click **+** under the tasks section to open it up, then click once on **New Task.**
2. A task entry page will open.
3. Use the drop-down lists to select your start and end times, type of task, priority etc.
4. The list **Assigned To** allows your manager or team members to assign a task to you, or you to them. Your name will automatically be displayed in this field when the page opens. The task is automatically assigned to yourself unless you assign it to another user. If the **Assigned To** person is not you, the selected user will receive an email notifying them that they have a new task.
5. Select a project/company name to relate to this task.
6. Click **Save and Close** from the top of the page, or **Save to Outlook** to save the task in the system and in Outlook.
7. Scroll down the report to the tasks section. Your new task will be displayed. To view it, simply click once on the description of the task on the **Detail** line.

Complete a Task

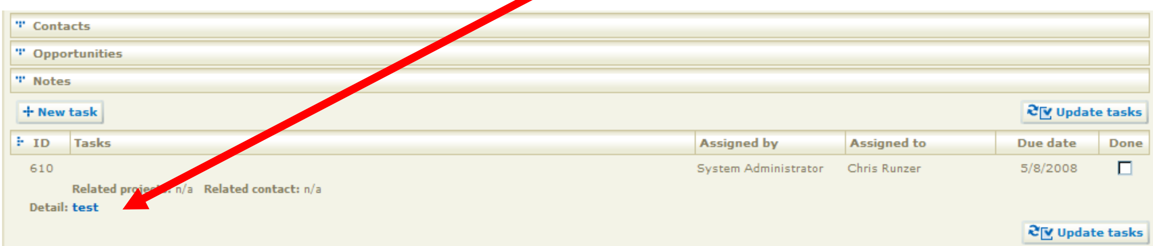
1. Open a task list or a project or company report tasks sub-section.
2. At the far right of the displayed task is a column heading **Done** and a check box for each task. Add a check mark to the completed task and click **Update Tasks.**

Enter a sub-task

1. Open a task list or a project/company report.
2. Select the task you wish to create a sub task from by clicking on the **Detail** line.
3. When the task opens, click **Create Sub Task**.
4. A new task page will appear. Enter all new information.
5. Click **Save and Close**.
6. The subtask will be saved in the same report or personal list from which it was created.

Edit a task or sub-task

1. Open a task list or a project or company report tasks sub-section.
2. Select the task you wish to edit by clicking on the **Detail** line.
3. Make all changes.
4. Click **Save and Close**.



Delete a task or sub-task

You may only delete tasks and subtasks that you have created.

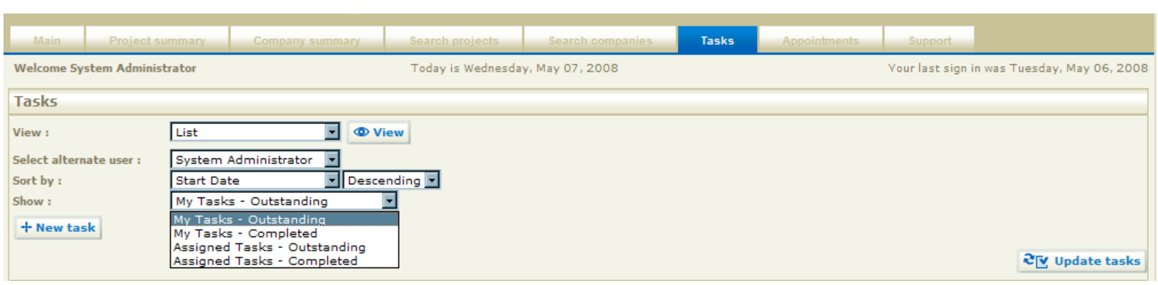
1. Open a task list, or a project or company report tasks sub-section.
2. Select the task or subtask you wish to delete by clicking on the **Detail** line.
3. Once the task opens, click **Delete** from the top of the page. If you do not see a Delete button then the selected task was not created by you and you cannot delete it.
4. You will be asked to confirm that you wish to delete the task. Click **OK**.
5. Click **Close** to exit the window.

Options for viewing tasks

On the main menu, **Today's Summary** will display any tasks due today that have been assigned to you, or that you have assigned to other users.

The main navigational bar, across the top of every page, includes a **Tasks** link. On this page is a drop-down menu that displays:

- **My Tasks – Outstanding**: tasks that are assigned to you which are outstanding.
- **My Tasks – Completed**: tasks assigned to you, which have been marked completed.
- **Assigned Tasks** – Outstanding: any tasks you have assigned to other users that are outstanding
- **Assigned Tasks** – Completed: any tasks you have assigned to other users, which have been marked completed.

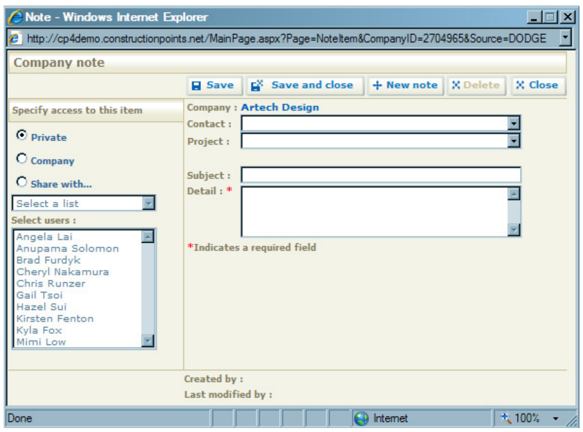


Notes

The Notes section provides an area to record work progress, help needed and descriptive comments relevant to a report. It also allows you to track interactions with projects, companies or contacts related to the report. Each time the report is accessed the Notes section will appear, allowing you to see a complete historical record. Any time you send a letter to a company a record of that is stored in the notes section.

The drop-down list **Project**/**Company** allows you to record the names of companies or projects connected to the note. These names can act as links to project or company reports, where the note will also be displayed. Notes may remain private to you, or can be marked **Shared** to allow the co-workers you specify to have access to the information.

Add a note



1. From the drop-down list **Create new…** at the top left of the report, select **Note**, and click **Go**. Or, from the **Notes** sub-section of the report click **New Note.**
2. A notes entry page will open.
3. Select a company or project name to relate to this note.
4. Enter your information. The **Detail** area will display in the report.
5. Click **Save and Close**.

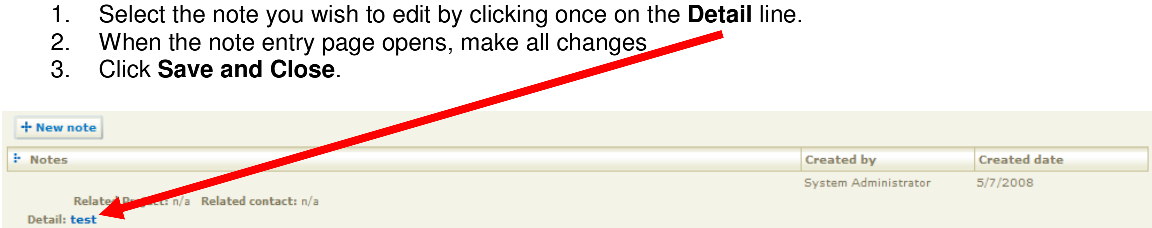
Viewing notes

In a report the **Detail** area of the note will be displayed. Clicking once on it will open the note's entry page. Notes are only accessible from within a report.

Any time you use the **Send Letter** function a copy of the letter will be saved in the notes section.

Edit a note

1. Select the note you wish to edit by clicking once on the **Detail** line.
2. When the note entry page opens, make all changes
3. Click **Save and Close**.



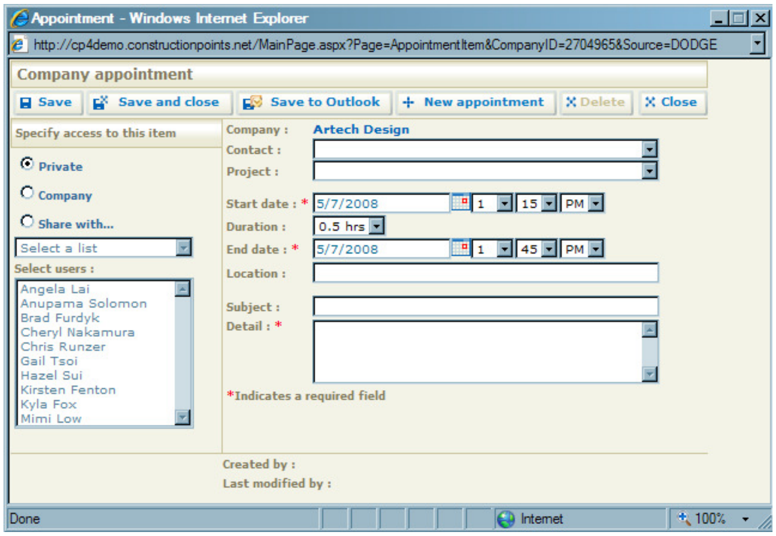
Delete a note

1. Select the note you wish to delete by clicking once on the **Detail** line.
2. When the note entry page opens, click **Delete**.
3. You will be asked to confirm that you wish to delete this note. Click **OK**.
4. Click **Close** to exit the window.

Appointments

Appointments are scheduled meetings that can be associated with a particular company or project. They can be saved to Microsoft Outlook for integration with your own personal calendar.

Enter an appointment



1. Either:
    - From the drop-down list **Create new…** at the top left of the report, select **Appointment**, and click **Go**, or
    - From the **Appointments** sub-section of the report click **New Appointment**.
2. An entry page will open.
3. Enter your information.
4. Select a project or company to relate to this appointment, and a contact if available.
5. Click **Save and Close**, or if you wish to save this in both the system and in Outlook, click **Save to Outlook.**

Edit an appointment

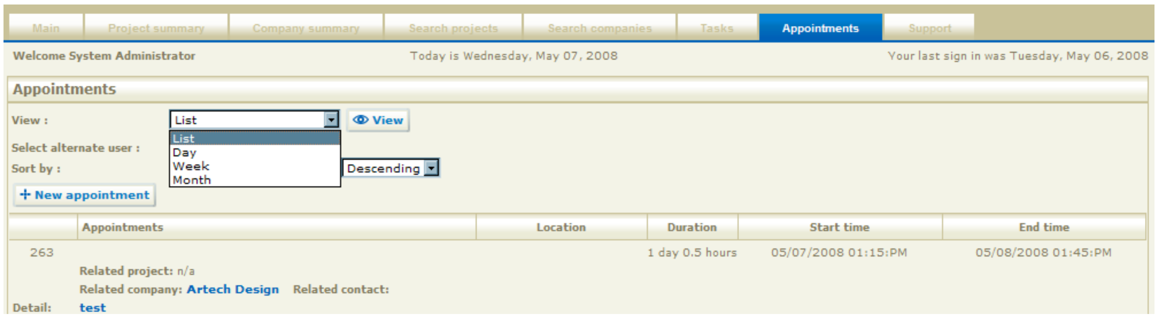
1. Select the appointment you wish to edit by going to the **Appointments** sub-section of the report and clicking on the **Details** line.
2. When the entry page opens, make all changes.
3. Click **Save and Close**.

Delete an appointment

1. Select the appointment you wish to edit by going to the **Appointments** sub-section of the report and clicking on the **Details** line.
2. When the entry page opens, click **Delete**.
3. You will be asked to confirm that you wish to delete this appointment. Click **OK**.
4. Click **Close** to exit the window.

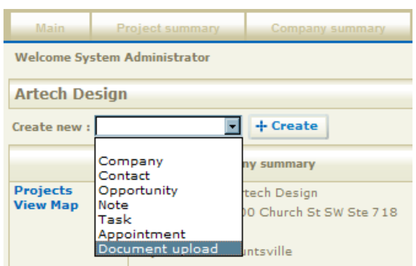
Viewing appointments

- The reports will display any appointments in the **Appointments** sub-section.
- **Appointments**, from the main navigation bar, will display a list of all of your appointments. The drop-down list *Sort By* allows you to view your appointments in ascending or descending order for **Start**/**End Time**, **Location**, **Subject**, or **Start**/**End Date**. You can view your appointments in a list, by month, week or day. Select an option from the drop-down list and click **Go**.



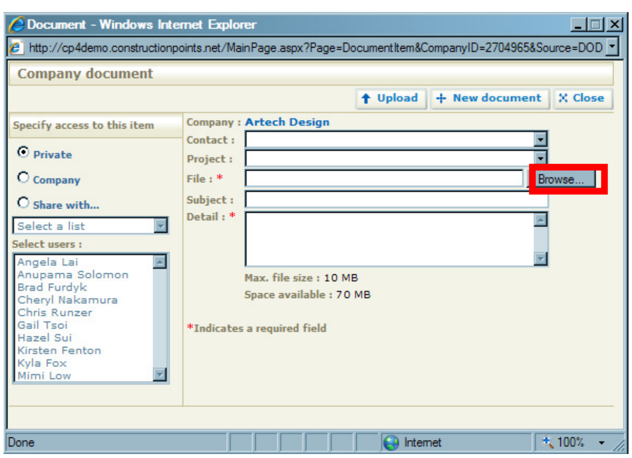
Document upload

If you create documents related to a project or company you can store a copy of them within the report.



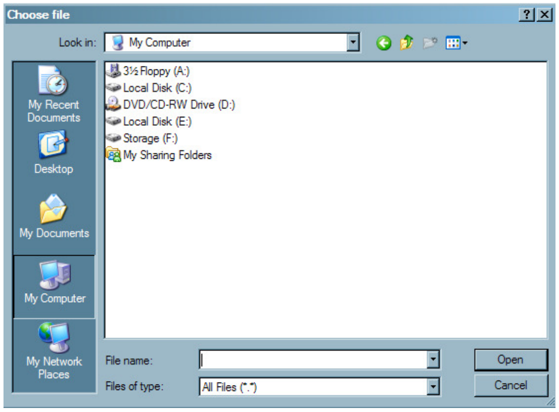
To upload a document

1. Either:
   - From the drop-down list **Create new…** at the top left of the report, select **Document Upload**, and click **Go**, or
   - From the **Documents** sub-section of the report click **New Document**.
2. A new window will open:

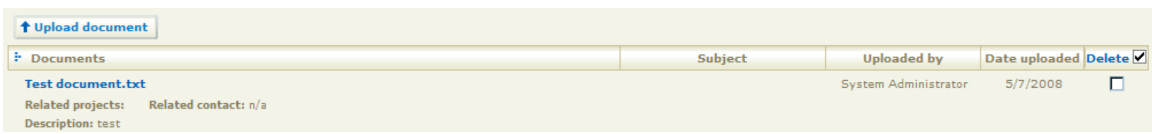


3. To find the document you wish to attach to this report click **Browse**.

4. You will then be able to select a file from your computer. When you have found the document you wish to upload, click **Open**.



5. Give the file a name and a description and then click **Upload** to attach the document to the report. When the process is complete the pop-up window will display a confirmation that the document was uploaded successfully. Click **Close**.
6. Documents are viewed by going to the **Documents** sub-section of the reports and clicking on the file name.



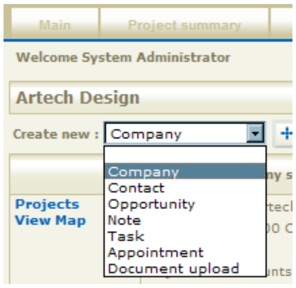
To delete a file

1. Open the sub-section **Documents**. At the far right of the section is the heading **Delete** and beneath it is a check box. To delete the file click once in the box to produce a check mark, then click **Delete**.
2. You will be asked to confirm that you wish to delete this file. Click **OK**. The page will refresh and the file will be deleted from the report.

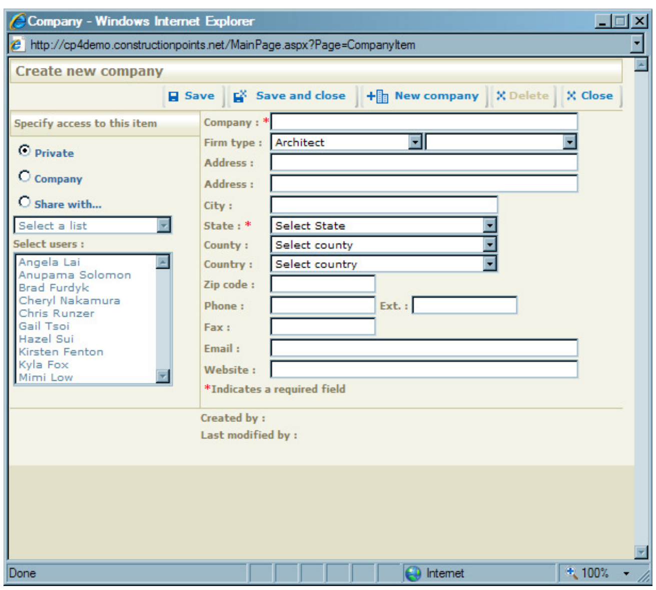
Create new company

Company reports may be manually added to the system. They may remain private to you, or can be marked *Shared* to allow the co-workers you specify to have access to the report.

Add a new company report



1. From the main menu page select **Create New Company** or from within a company report use the **Create New** drop-down list and select **Company**.
2. A company entry form will open. If you accessed this form from a company report click the *New Company* button to clear the page.
3. Enter your information. When done, click **Save and Close**.
4. The screen will refresh itself and a new company report will open with your new information. You may now add contacts, tasks, notes, appointments, or attach documents.



Edit a private company report

From within the company report, use the **Create New** drop-down list to select **Company**. A window will open with the company information displayed.

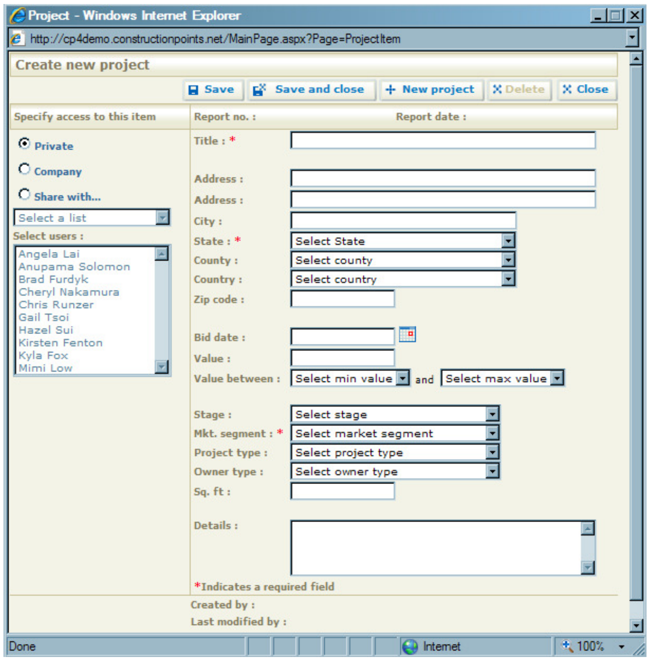
Update the information and click **Save and Close**.

Delete a private company report

To delete the report click the **Delete** button. You will be asked to confirm that you want to delete this company, click **OK**. The page will refresh to a blank form. Click the **Close** button to exit the window.

Create new project

Project reports may be manually added to the system. They may remain private to you, or can be marked **Shared** to allow the co-workers you specify to have access to the report.



On the main menu page, select **Create New Project**.

1. A project entry form will open.
2. Enter all information. Unlike the Dodge reports, which are read only, you may return to this project at a later date and change information as necessary using the **Create New Project** link found in the drop-down list at the top left corner of the report.
3. Click **Save and Close**. The window will close and your new project will be displayed. You may now add opportunities, relate companies, or add tasks, notes and appointments (please refer to the section **Project Report** for all details).

Edit a manually created project

1. From within the project report, go to the top left drop-down list **Create New** and select **Project**.
2. The original project entry form/window will open. Make any changes necessary to this form.
3. When done click **Save and Close**. You will be returned to the updated project report.

Delete a manually created project

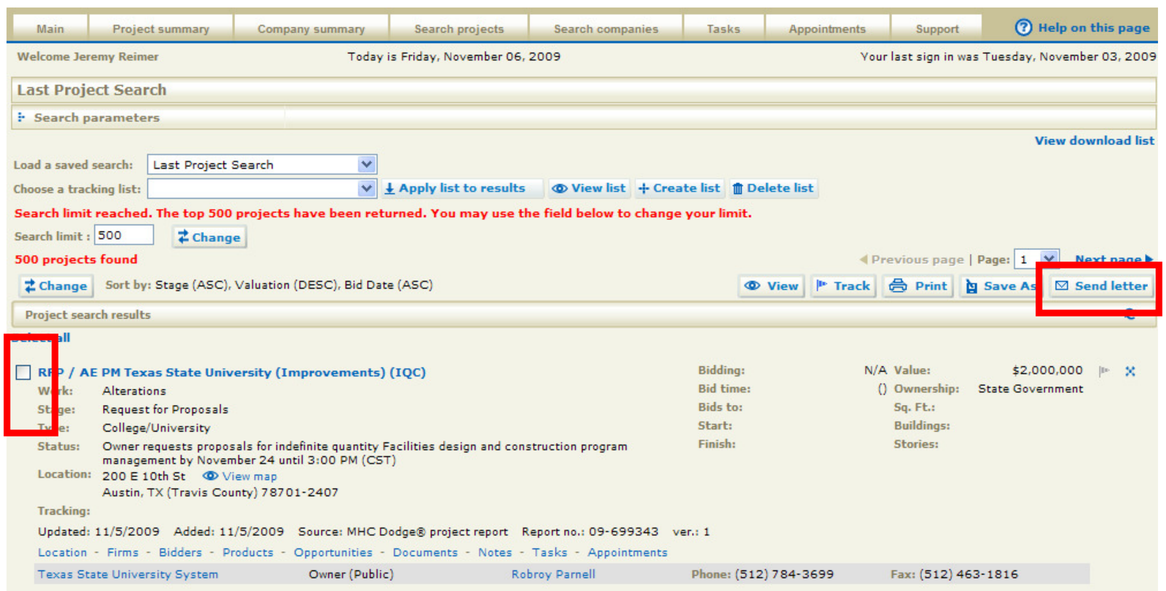
1. From within the project report, go to the top left drop-down list **Create New** and select **Project**.
2. The original project entry form/window will open. Click **Delete** on the top right of the window. You will be asked to confirm that you wish to delete this report. Click **OK**. The screen will refresh to the main menu page.

Send letter

Send Letter allows you to create templates for letters. These may be within the company report, the project report, and from a project or company search results list. The *Notes* section of the selected company reports, and any project reports that the letter(s) is related to, will automatically receive an entry that a letter has been sent, by whom, and on what date.

View bid results

Once the result list loads, you will see the button **Send Letter** within the company information. This will send a letter to the one company, referencing the project it is associated with on the Bid Results list.



Company search result or project report – Related companies section

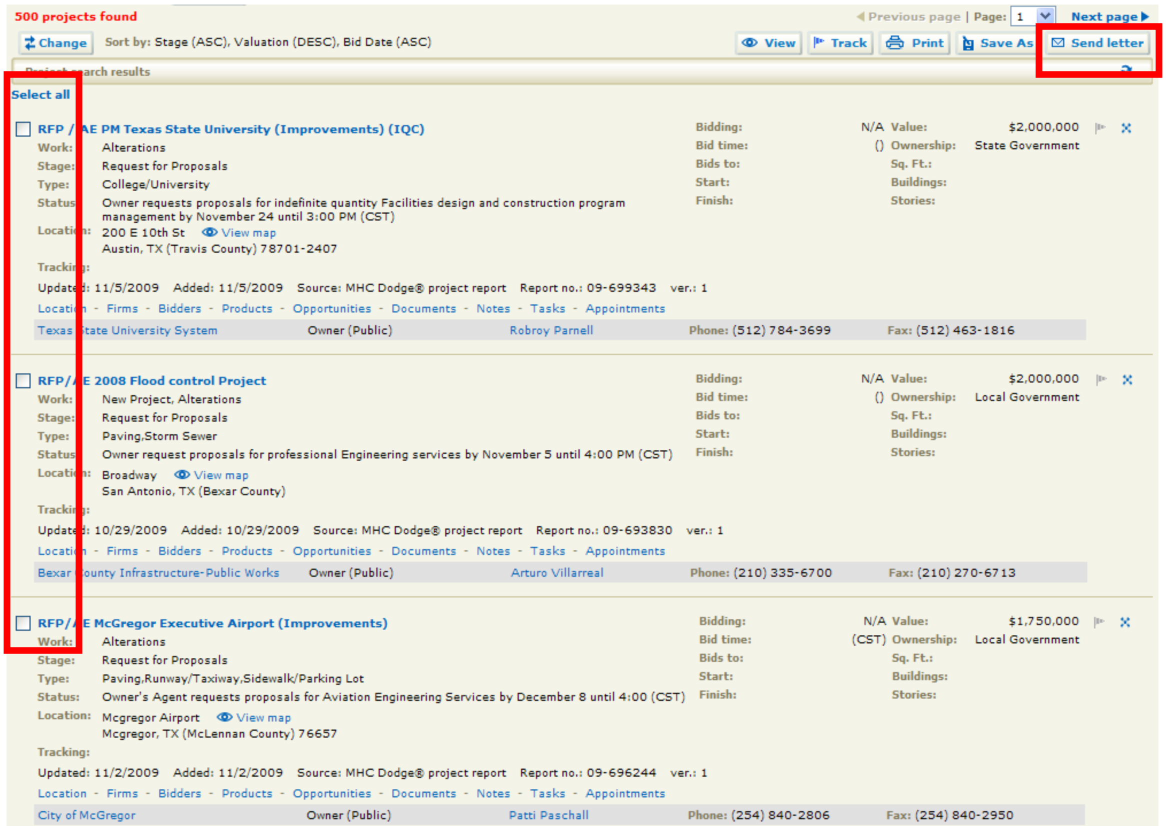
Once you have run a search, selected a company tracking list to view, or are in the project report – related companies section you may send a letter to one or more displayed companies.

To the left of the company names is a column of selection boxes - use your mouse to click once in a box, producing a check mark. Once you have made your selections click **Send Letter.**

Within a company or project report

Within a company or project report, **Send Letter** is found in the list of buttons near the top right of the page.

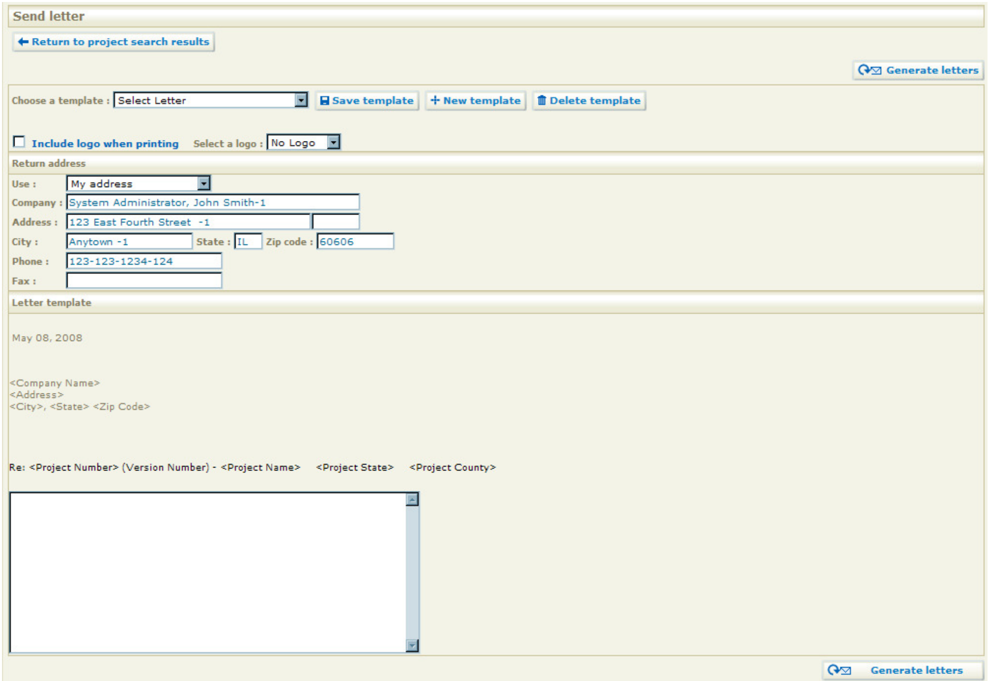
Project search results list or Company report – related projects



Once you have run a search, selected a project tracking list to view, or are in the company report – related projects section you may send a letter to one or more firms associated with the displayed projects. To the left of the project names is a column of selection boxes - use your mouse to click once in a box, producing a check mark. Once you have made your selections click **Send Letter**.

Note: Because you are printing from within a browser you must set up your print options to EXCLUDE the header and footer (these contain the URL, the date and the specific page reference in your site.) To do this, make sure you are on the template window, and then go to the top of your screen and click **File** then click **Page Setup** from your browser. Once the window opens, delete the header and footer, and then click **OK**. You are now ready to print.

Once you click on the **Send Letter** button, the template window will open.



At the top left is a drop-down list entitled **Choose a template**. Once you have entered and saved letters this menu allows you to quickly pull them up again. If necessary, you can edit the letter before printing.

Beneath that is a box entitled **Include logo when printing**. If your site has your company logo displaying, use this box to add that logo to your letter. Click once in the box to select this option.

Your return address options include:

- **My Address**, which uses the information on the **Edit my profile & password** page,
- **My company's address**, which is generally your company's head office, and
- **Do not display a return address**, which will leave the address fields blank.

The link **Use broadcast fax layout** allows you to display one or multiple company names and their fax numbers above one copy of a letter, as opposed to the one letter per name format used for mailing.

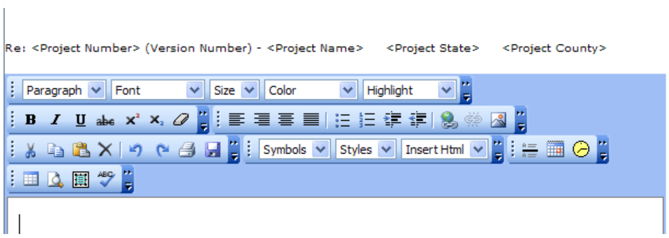
The large bottom field is the text field for adding the body of the letter. The row of buttons at the top right of the page allows you to save a new letter, view previously saved letters, access the print/Save as Word preview window, delete a letter, or create mailing labels.

If you started from a company report or from the bid results list, or selected only one related company name from within a project report, the template will open with a company name and address displayed. The "re." line will also be filled in with the project/Dodge number and project name.

If you started in a project report and selected multiple companies the template will open without a company name or address displayed. The "re." line will reference the project name and report number. The selected company names will appear once you click **Generate letters**.

If you started from a list of projects the template will open without a company name or address displayed. The "re." line will be blank. Once you click **Generate letters** you will be given the option of which type of firm to send the letter to, for example architects, and each separate project name and number will then be displayed with the company name and address.

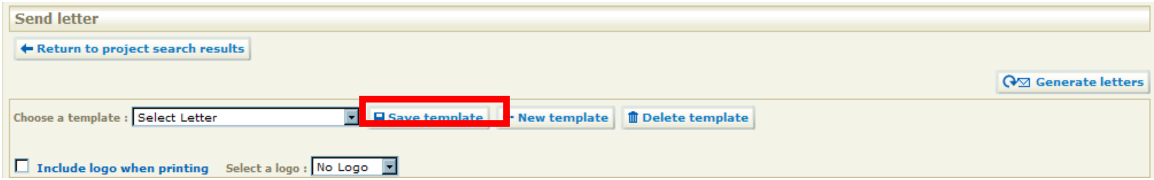
Formatting letters; save and delete letters



Because you are working within a browser window the rules for spacing are different than if you were working within a Word document:

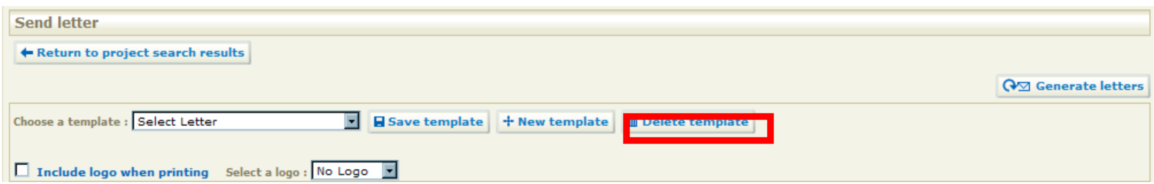
- The *Enter* key on your keyboard will produce two line breaks instead of the usual single line break that you get in Word. To produce a single line break in the letter text field, hold down the *Shift* key and then click the *Enter* key.
- For bullet points or numbers, enter the text and separate each line with the *Enter* key. Highlight the text with your mouse and then select the bullet or number option from the tool bar.

Save a new letter template



1. Enter a new letter in the text field.
2. At the top center of the page, click **Save template**.
3. A new window will open asking you to name your letter. Once done click **Save**. The drop-down list **Type** allows you to create **Private** letters that only you will see, or **Shared** to be shared with selected coworkers.
4. Another window will open telling you that the letter has been saved. Click **Close**.
5. The drop-down list **Choose a template** will now show the name of your new saved letter.

To delete a saved letter

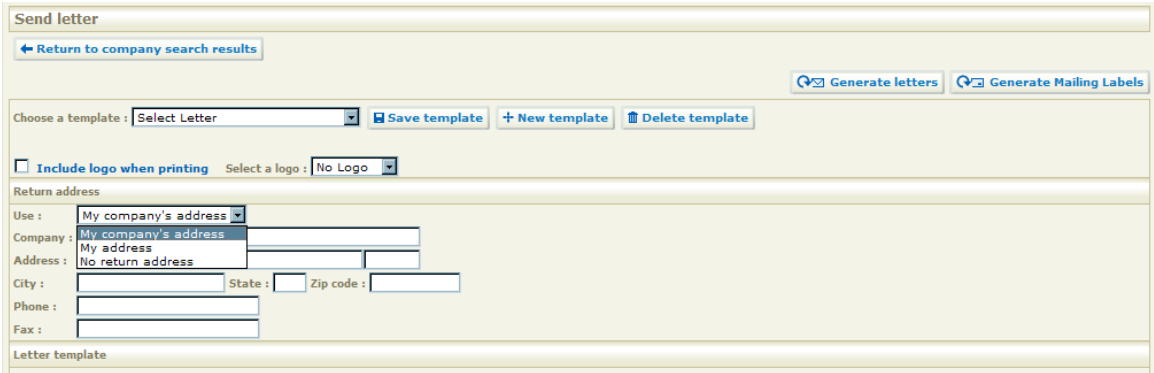


1. From the template page, open the drop-down list **Choose a template** and select the letter you wish to delete. The letter template is loaded automatically.
2. To the right of the drop-down list Choose a template is **Delete Template**. You will be asked to confirm that you wish to delete this letter. Click **OK**.
3. The window will reset itself. The saved letter will no longer show in the drop-down list.

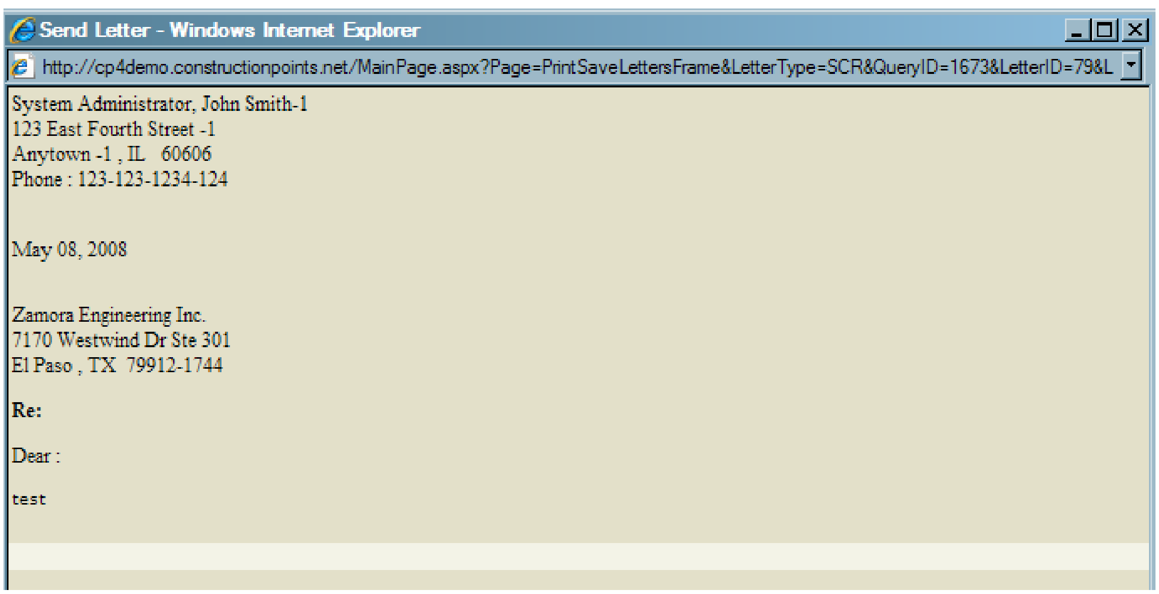
Send letter for one company name

1. When the template window opens, the company name and address will be shown on the page.
2. Select a letter from the drop-down list **Choose a template** and then click **View template**, or enter a new letter in the text field.
3. Click once on **Generate letters**. A new window will open. The top half shows the layout of your letter, as it will print. The bottom half shows your print options. **Print** will send the letter to your printer. **Save as Word** will display the letter as a Word document, which may then be formatted, and printed or saved.
4. **Print** will cause your computer’s print preview window to open. Continue as you would with printing any document.
5. **Save** (you can select either Word 2000/XP Document or Text as an output format) will cause a new window to open, asking if you would like to **Open this file from its current location**, which will open the file directly in Word, or **Save this file to disk**, which will save the file to your computer. Select an option, and then click **OK**.
6. Close the send letter preview window. You will now be back at the template window. Click once on the company name (top left) to return to the report.

Send letter for multiple company names.



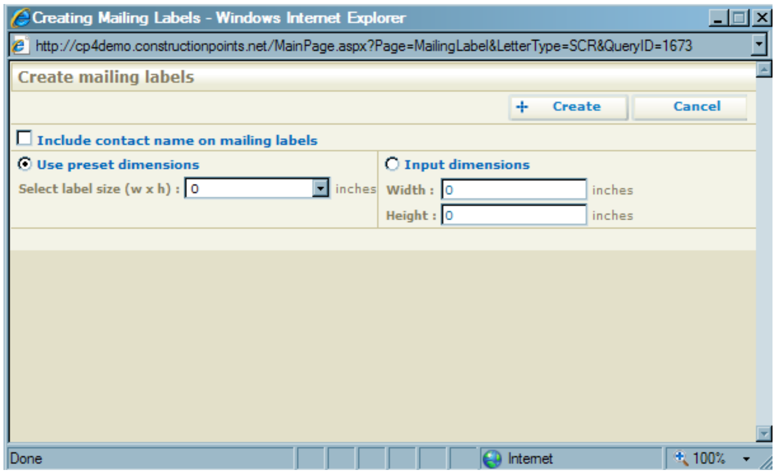
1. From a company search result, or from within a project report, select the companies you would like to send a letter to (max of 25 at a time). Click the **Send Letter** button to access the template window. When the window opens, you will not see any company names displayed.
2. Select a return address option.
3. Select either a saved letter from the drop-down list **Choose a template** and then click **View template**, or enter a new letter in the text field.



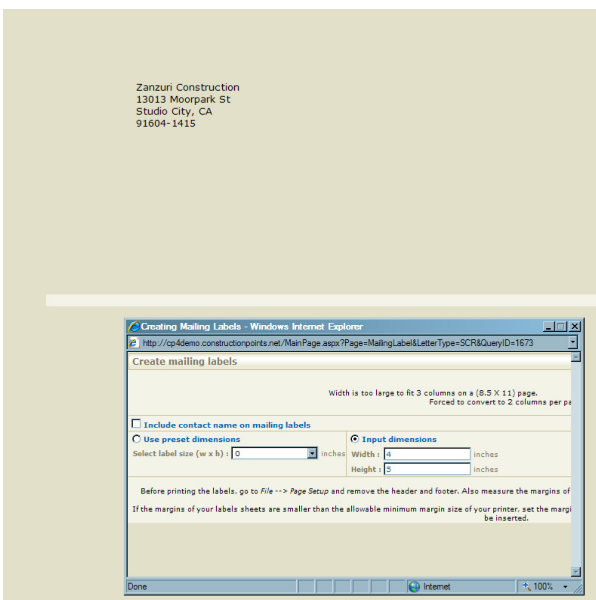
4. Click **Generate letters…** from the top right of the page. A new window will open. The top half will show the name and address of the first company you selected. The bottom half shows you the total number of letters, and your print options. If you had selected more than one company, the **Previous** and **Next** links will allow you to go from one letter to the next. (These links do not appear if you had selected only one company). The bottom row includes the option to **Print** or **Save** for either the letter you are viewing (select **Current letter**) or all of them (select **Letters for selected companies**).
5. If you click **Print** your computer's print preview window will open. Continue as though printing any document. If you click **Save**, selecting either Word 2000/XP document or Text format, a new window to open, asking if you would like to **Open this file from its current location** or **Save this file to disk**. Select an option, and then click **OK**.
6. Close the letter preview window by either clicking on the window's close **[X]** button, or clicking **Close**.

Create Mailing labels

Mailing labels are also an option for single or multiple company names. Mailing labels cannot be created if you are accessing the **Send Letter** page from a list of project reports.



1. From within a company report, click **Send Letter**. From a company search result, company tracking list or project report **Related Companies** section select your companies (follow the same steps as though you were selecting companies for **Send Letter**) and then click **Send Letter**.
2. When the letter template window opens go to the top right and click **Generate Mailing Labels.**
3. A new window will open. Either select a label size from the left hand drop down menu, or enter your required size on the right side of the window. When done, click **Create**.

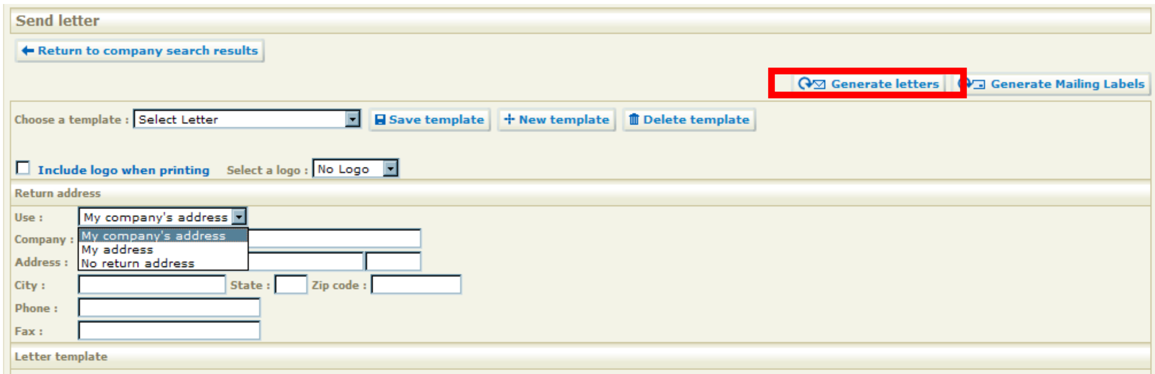


4. A message will now appear reminding you to go to your browser's **File – Page Setup** and remove the header and footer before printing, and to check for margin size. Close this window. The screen behind this window will display your labels.
5. Continue your print process as you would with any document (From your web browser's **File** menu, click **Print**).
6. Once the labels have printed, close the window (click once on the **[X]** in the top right corner of the window). You will be back at the template window.
7. You can return to the company or project report using the link in the top left corner, or select a new option from the main navigation bar.

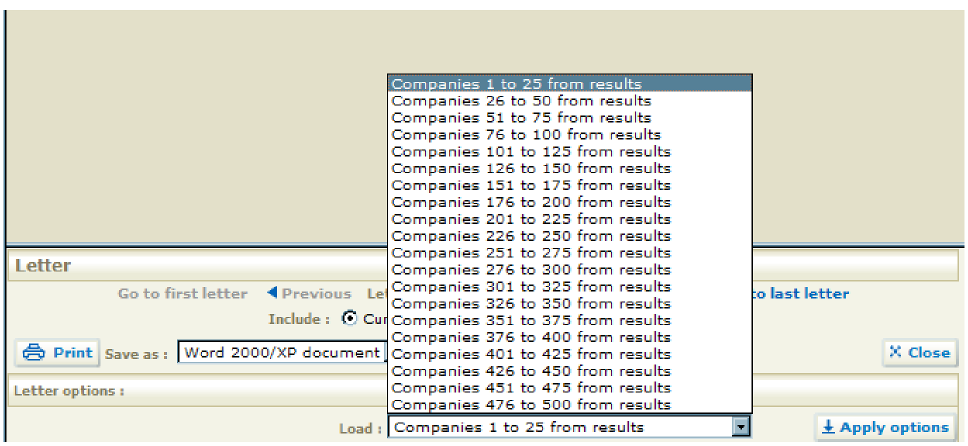
Project search results – related firms

From a project search results page, or within a company report – related projects lists, you have the option of sending letters to various firms related to the projects. *Example*: Owner, Architect, Contractor.

1. Select the projects you wish to work with by clicking once in the selection boxes to the right of the project names. Click **Send letter**.



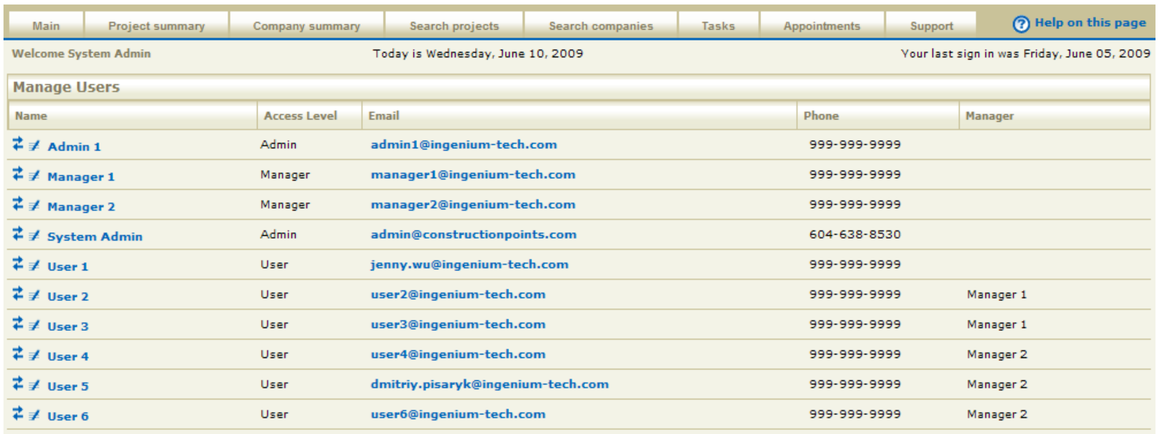
2. Select a letter, the return address you wish to use, your logo if appropriate, and click **Generate letters**.
3. The first window you see will ask you to pick what type of firm you wish to send the letters to. Open the drop down menu and select a firm, then click **Apply options**.
4. Once you select a firm the window changes to display the company names and their related project names and numbers.



5. From this window you can change the type of firm selected, or choose to send a letter to the next group of 25 projects without having to return to the project list. If you make a selection from either of these drop-down lists you must click **Apply options** to update the page.
6. If you select **Print** your computer's print preview window will open. Continue as though printing any document. **Save** will cause a new window to open, asking if you would like to **Open this file from its current location** or **Save this file to disk**. Select an option, and then click **OK**.
7. When done with the preview window, click **Close** to return to the **Send Letter** page.

Manage User

Note: This page is only accessible to users who have Administrator privileges.



Name	Access Level	Email	Phone	Manager
Admin 1	Admin	admin1@ingenium-tech.com	999-999-9999	
Manager 1	Manager	manager1@ingenium-tech.com	999-999-9999	
Manager 2	Manager	manager2@ingenium-tech.com	999-999-9999	
System Admin	Admin	admin@constructionpoints.com	604-638-8530	
User 1	User	jenny.wu@ingenium-tech.com	999-999-9999	
User 2	User	user2@ingenium-tech.com	999-999-9999	Manager 1
User 3	User	user3@ingenium-tech.com	999-999-9999	Manager 1
User 4	User	user4@ingenium-tech.com	999-999-9999	Manager 2
User 5	User	dmitriy.pisaryk@ingenium-tech.com	999-999-9999	Manager 2
User 6	User	user6@ingenium-tech.com	999-999-9999	Manager 2

From this page, administrators can manage user accounts and temporarily simulate being another user for testing purposes.

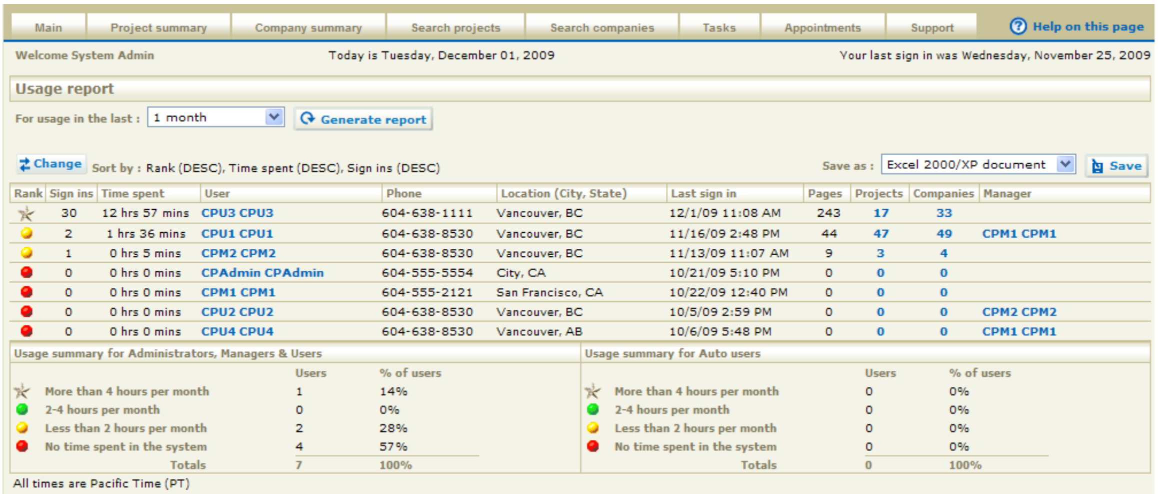
To switch to a user, click the **Change User** icon: (You will be able to switch back by returning to the Manage User screen)

To edit a user's profile, click the **Edit** icon or click the user's name.

To send an email to a user, click their email address.

Usage report

Note: This page is only accessible to users who have Administrator privileges.



Main | Project summary | Company summary | Search projects | Search companies | Tasks | Appointments | Support | Help on this page

Welcome System Admin — Today is Tuesday, December 01, 2009 — Your last sign in was Wednesday, November 25, 2009

Usage report

For usage in the last : 1 month — Generate report

Change — Sort by : Rank (DESC), Time spent (DESC), Sign ins (DESC) — Save as : Excel 2000/XP document — Save

Rank	Sign ins	Time spent	User	Phone	Location (City, State)	Last sign in	Pages	Projects	Companies	Manager
	30	12 hrs 57 mins	CPU3 CPU3	604-638-1111	Vancouver, BC	12/1/09 11:08 AM	243	17	33	
	2	1 hrs 36 mins	CPU1 CPU1	604-638-8530	Vancouver, BC	11/16/09 2:48 PM	44	47	49	CPM1 CPM1
	1	0 hrs 5 mins	CPM2 CPM2	604-638-8530	Vancouver, BC	11/13/09 11:07 AM	9	3	4	
	0	0 hrs 0 mins	CPAdmin CPAdmin	604-555-5554	City, CA	10/21/09 5:10 PM	0	0	0	
	0	0 hrs 0 mins	CPM1 CPM1	604-555-2121	San Francisco, CA	10/22/09 12:40 PM	0	0	0	
	0	0 hrs 0 mins	CPU2 CPU2	604-638-8530	Vancouver, BC	10/5/09 2:59 PM	0	0	0	CPM2 CPM2
	0	0 hrs 0 mins	CPU4 CPU4	604-638-8530	Vancouver, AB	10/6/09 5:48 PM	0	0	0	CPM1 CPM1

Usage summary for Administrators, Managers & Users

	Users	% of users
More than 4 hours per month	1	14%
2-4 hours per month	0	0%
Less than 2 hours per month	2	28%
No time spent in the system	4	57%
Totals	7	100%

Usage summary for Auto users

	Users	% of users
More than 4 hours per month	0	0%
2-4 hours per month	0	0%
Less than 2 hours per month	0	0%
No time spent in the system	0	0%
Totals	0	100%

All times are Pacific Time (PT)

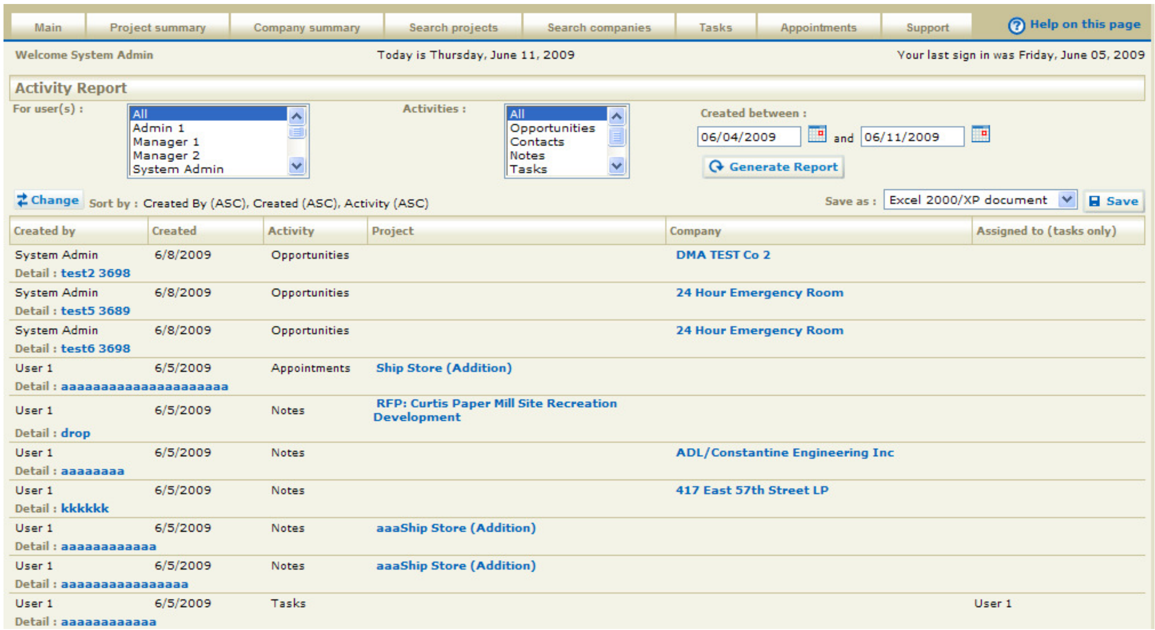
The Usage report page allows administrators to track who is using the system and for what length of time, as well as showing the number of projects and companies currently being tracked by those users.

You can also see who is the direct manager of each user.

The report from this page may be saved as an Excel or CSV document.

Activity report

Note: This page is only accessible to users who have Administrator privileges.



The Activity report page allows administrators to see which users have been participating in which activities. Tracked activities include:

- Creating or editing Opportunities
- Creating or editing Contacts
- Creating or editing Notes
- Creating or editing Tasks
- Creating or editing Appointments
- Uploading Documents

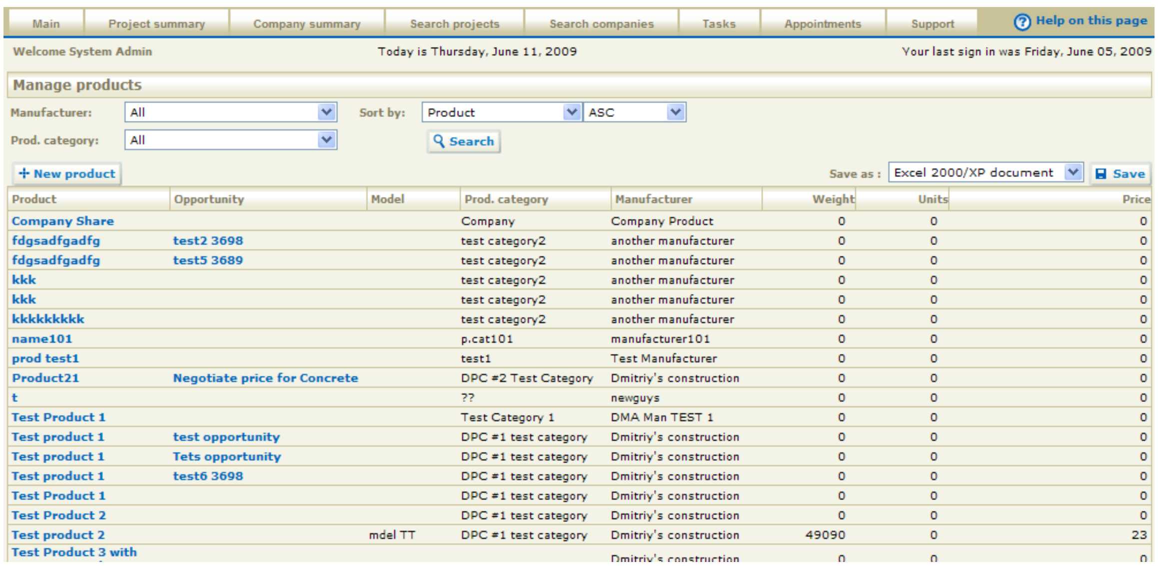
An administrator can generate a report for any given time period, and save it as an Excel or CSV document.

Manage products

Note: This page may or may not be accessible to non-administrative users, depending on your site setup.

The Manage products page lets you view all the products that your company has to sell. These products may be associated with Opportunities (see the Opportunities section for details)

You can select a specific Manufacturer and Product Category, or just leave them as **All** and click **Search** to display a list of products that match:



Product	Opportunity	Model	Prod. category	Manufacturer	Weight	Units	Price
Company Share			Company	Company Product	0	0	0
fdgsadfgadfg	test2 3698		test category2	another manufacturer	0	0	0
fdgsadfgadfg	test5 3689		test category2	another manufacturer	0	0	0
kkk			test category2	another manufacturer	0	0	0
kkk			test category2	another manufacturer	0	0	0
kkkkkkkkk			test category2	another manufacturer	0	0	0
name101			p.cat101	manufacturer101	0	0	0
prod test1			test1	Test Manufacturer	0	0	0
Product21	Negotiate price for Concrete		DPC #2 Test Category	Dmitriy's construction	0	0	0
t			??	newguys	0	0	0
Test Product 1			Test Category 1	DMA Man TEST 1	0	0	0
Test product 1	test opportunity		DPC #1 test category	Dmitriy's construction	0	0	0
Test product 1	Tets opportunity		DPC #1 test category	Dmitriy's construction	0	0	0
Test product 1	test6 3698		DPC #1 test category	Dmitriy's construction	0	0	0
Test Product 1			DPC #1 test category	Dmitriy's construction	0	0	0
Test Product 2			DPC #1 test category	Dmitriy's construction	0	0	0
Test product 2		mdel TT	DPC #1 test category	Dmitriy's construction	49090	0	23
Test Product 3 with				Dmitriy's construction	0	0	0

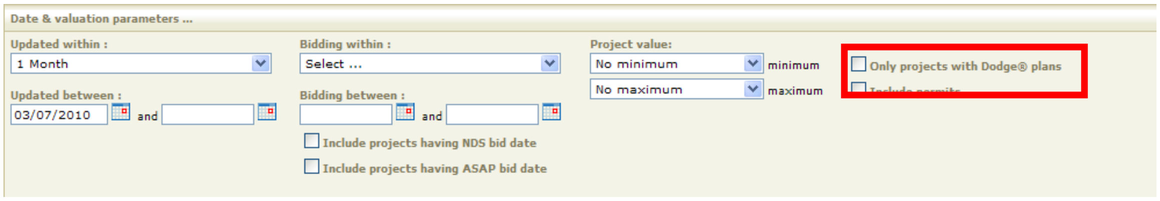
From the results list, you may click on a Product name to edit it, or the Opportunity name to edit the associated Opportunity.

You can also save the results list as an Excel or CSV file by selecting the file type and clicking **Save**.

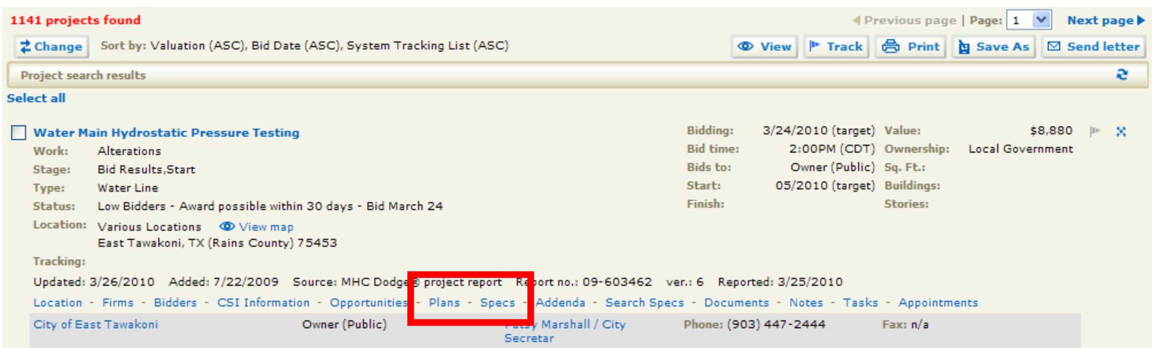
Dodge plans and specs

If you are a Dodge Plans and Specs subscriber you have a seamless connection between ConstructionPoints and the DPS database.

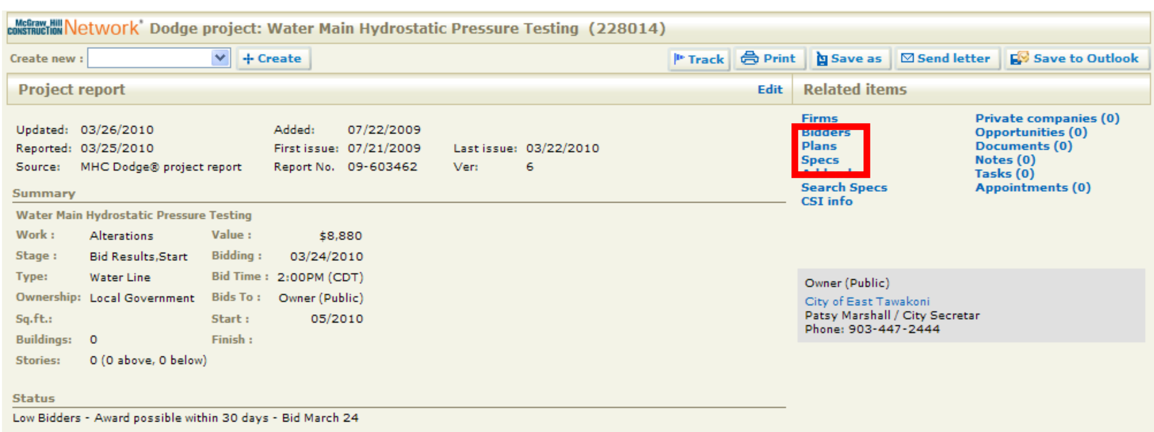
Finding DPS projects



On the Search Projects page is a checkbox called **Only Projects with Dodge® plans**. The results page will display projects with the links for Plans, Specs and Addenda at the bottom of each project listing:

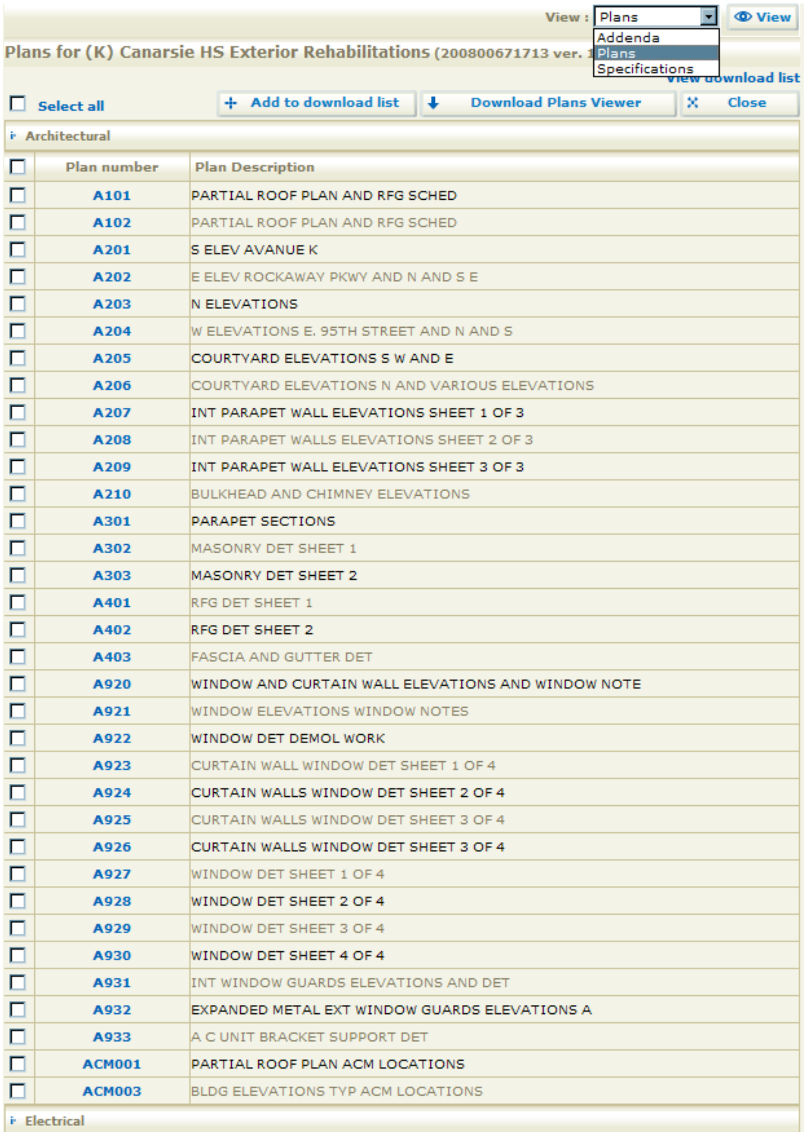


These same links appear in the project report at the top right corner (under **Related Items**), and in the **Company report – Projects in my profile** section.



Once you click Plans, Specs or Addenda you will see a new window pop-up. Each of these windows has the drop down menu **View** at the top right, allowing you to switch from Plans, to Specs to Addenda. Select an option from the menu and click **Go**.

For each **View** the Plans, Specs or Addenda numbers are listed and clicking on a number will open the requested information.



Plan number	Plan Description
A101	PARTIAL ROOF PLAN AND RFG SCHED
A102	PARTIAL ROOF PLAN AND RFG SCHED
A201	S ELEV AVANUE K
A202	E ELEV ROCKAWAY PKWY AND N AND S E
A203	N ELEVATIONS
A204	W ELEVATIONS E. 95TH STREET AND N AND S
A205	COURTYARD ELEVATIONS S W AND E
A206	COURTYARD ELEVATIONS N AND VARIOUS ELEVATIONS
A207	INT PARAPET WALL ELEVATIONS SHEET 1 OF 3
A208	INT PARAPET WALLS ELEVATIONS SHEET 2 OF 3
A209	INT PARAPET WALL ELEVATIONS SHEET 3 OF 3
A210	BULKHEAD AND CHIMNEY ELEVATIONS
A301	PARAPET SECTIONS
A302	MASONRY DET SHEET 1
A303	MASONRY DET SHEET 2
A401	RFG DET SHEET 1
A402	RFG DET SHEET 2
A403	FASCIA AND GUTTER DET
A920	WINDOW AND CURTAIN WALL ELEVATIONS AND WINDOW NOTE
A921	WINDOW ELEVATIONS WINDOW NOTES
A922	WINDOW DET DEMOL WORK
A923	CURTAIN WALL WINDOW DET SHEET 1 OF 4
A924	CURTAIN WALLS WINDOW DET SHEET 2 OF 4
A925	CURTAIN WALLS WINDOW DET SHEET 3 OF 4
A926	CURTAIN WALLS WINDOW DET SHEET 3 OF 4
A927	WINDOW DET SHEET 1 OF 4
A928	WINDOW DET SHEET 2 OF 4
A929	WINDOW DET SHEET 3 OF 4
A930	WINDOW DET SHEET 4 OF 4
A931	INT WINDOW GUARDS ELEVATIONS AND DET
A932	EXPANDED METAL EXT WINDOW GUARDS ELEVATIONS A
A933	A C UNIT BRACKET SUPPORT DET
ACM001	PARTIAL ROOF PLAN ACM LOCATIONS
ACM003	BLDG ELEVATIONS TYP ACM LOCATIONS

To open the Plans you need the Plans Viewer. To open the Specs or Addenda you need Acrobat Reader. The Dodge Plan viewer may be downloaded from the pop-up window using the button **Download Plans Viewer**.

PLEASE NOTE:
If you are using a company computer (rather than a home office computer or a personal laptop) please consult your IT department before downloading any programs. The Dodge Plan Viewer requires Windows 2000, XP, or Vista, and requires Administrative privileges to install.

Support

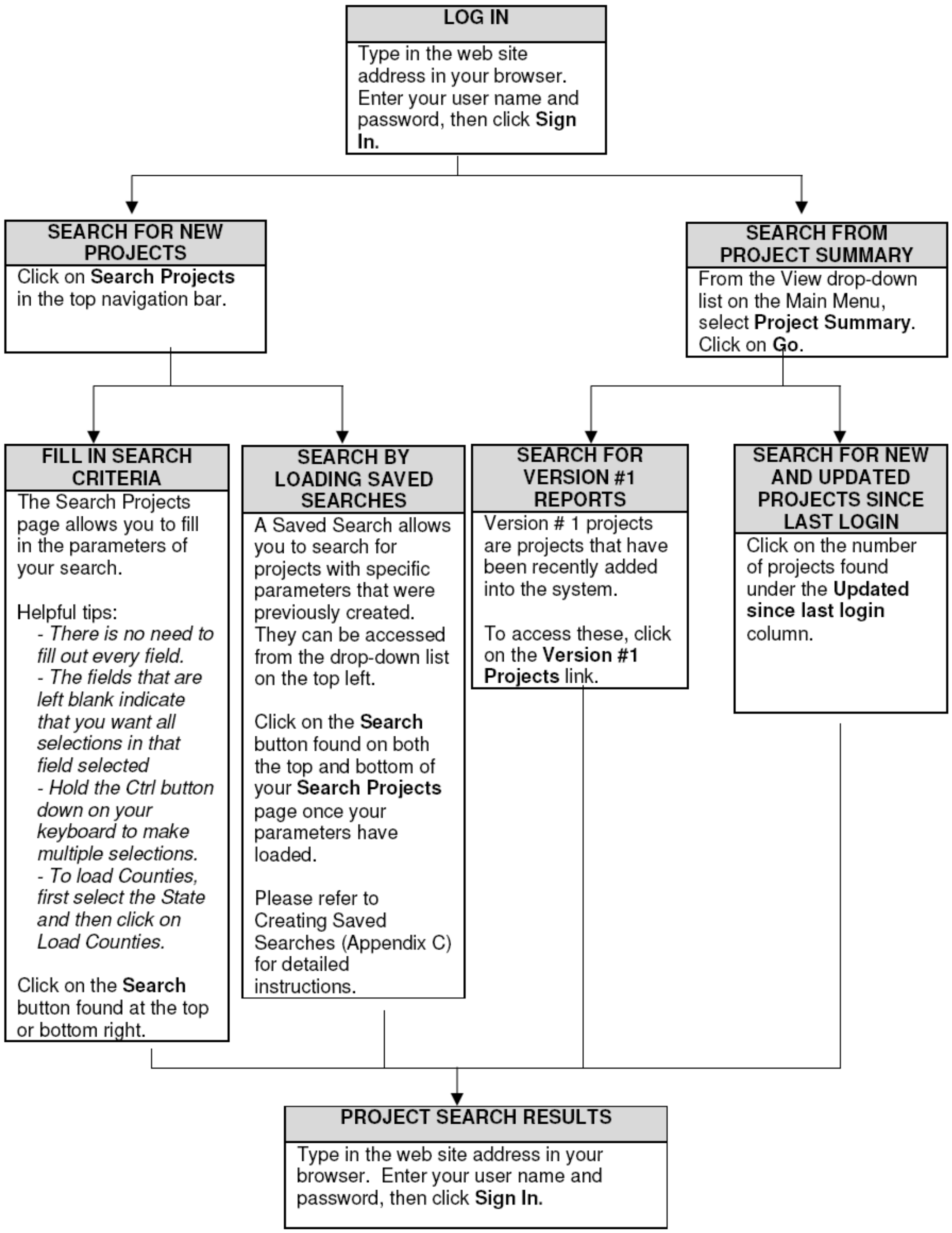
Clicking on the **Support** tab will display the support page.

Here you can view support information, access the online ConstructionPoints Help Guide, view video tutorials for Constructionpoints, or download the manual in printable (PDF) format.

You can also click on the email link support@constructionpoints.com to send an email question to the Ingenium Technical Support Team.

Appendices

Appendix A – Searching for projects



Appendix B – Tracking your projects

SEARCH FOR PROJECTS

For instructions on how to search for new and updated projects, please refer to Searching for Projects (Appendix A)

A list of projects will appear when your search is complete.

TRACK YOUR PROJECTS FROM THE LIST OF RESULTS

To the right of each **Project**, you will see four columns of check boxes labeled **A**, **K**, **C**, and **Hide**, and a drop-down list directly below for any **Custom Tracking Lists** you've created. See below for a detailed description.

These are known as **Tracking Lists**: folders designed to help you track your projects.

TRACK YOUR PROJECTS WITHIN A PROJECT REPORT

To open up a detailed project report, right click on the NAME of the Project and click **Open in New Window**.

Once the Project Report is open, you will find four check boxes labeled **A**,**K**,**C**, and **Hide**, and a drop-down list for **Custom Tracking Lists** (see below for a detailed description).

These are called Tracking Lists: folders designed to help you track your projects.

REVIEW AND TRACK YOUR PROJECTS

Review the Projects and select the desired **Tracking List**:

Click on one of the boxes provided (**A**, **K**, **C**, or **Hide**), or select a **Custom Tracking List** of your choice (make sure the name of the tracking list is inside the **Custom** box once selected).

Click on **Save Changes**

Tracking List Descriptions:

A: Active
K: Key
C: Completed
Hide: A project that you do not want to see in your future searches

To create a Custom Tracking List:

1. Click on **Create List** in the **Project Search Results** page.
2. In the Create **Custom Projects Tracking List** pop-up screen, type in a name of your choice
3. Select **Private**, **Share With**, or **My Company**.
4. Click **Save**.

Your Custom Tracking List can now be found in the drop-down list under **A**, **K**, **C**, and **Hide**.

To retrieve saved Projects: Click on **View Project Tracking Lists** and select the list of your choice.

Appendix C – Creating saved searches

Click on **Search Projects** or **Search Companies** on the top navigation

↓

FILL IN SEARCH CRITERIA

In the **Search Projects** or **Search Companies** page, fill in your search criteria.

↓

Click on the **Save Search** button found on the top or bottom right.

↓

REVIEW AND TRACK YOUR PROJECTS

At this time, a **Create new Saved Search** pop-up window will appear.

1. Name your search.
2. Select type:
   Private – only you can use this Search
   Share with – a group of users
   My company – all users can use this search
3. Optional: Select "Auto lead" under the Type heading. Select a schedule and optional email alert for your auto lead.

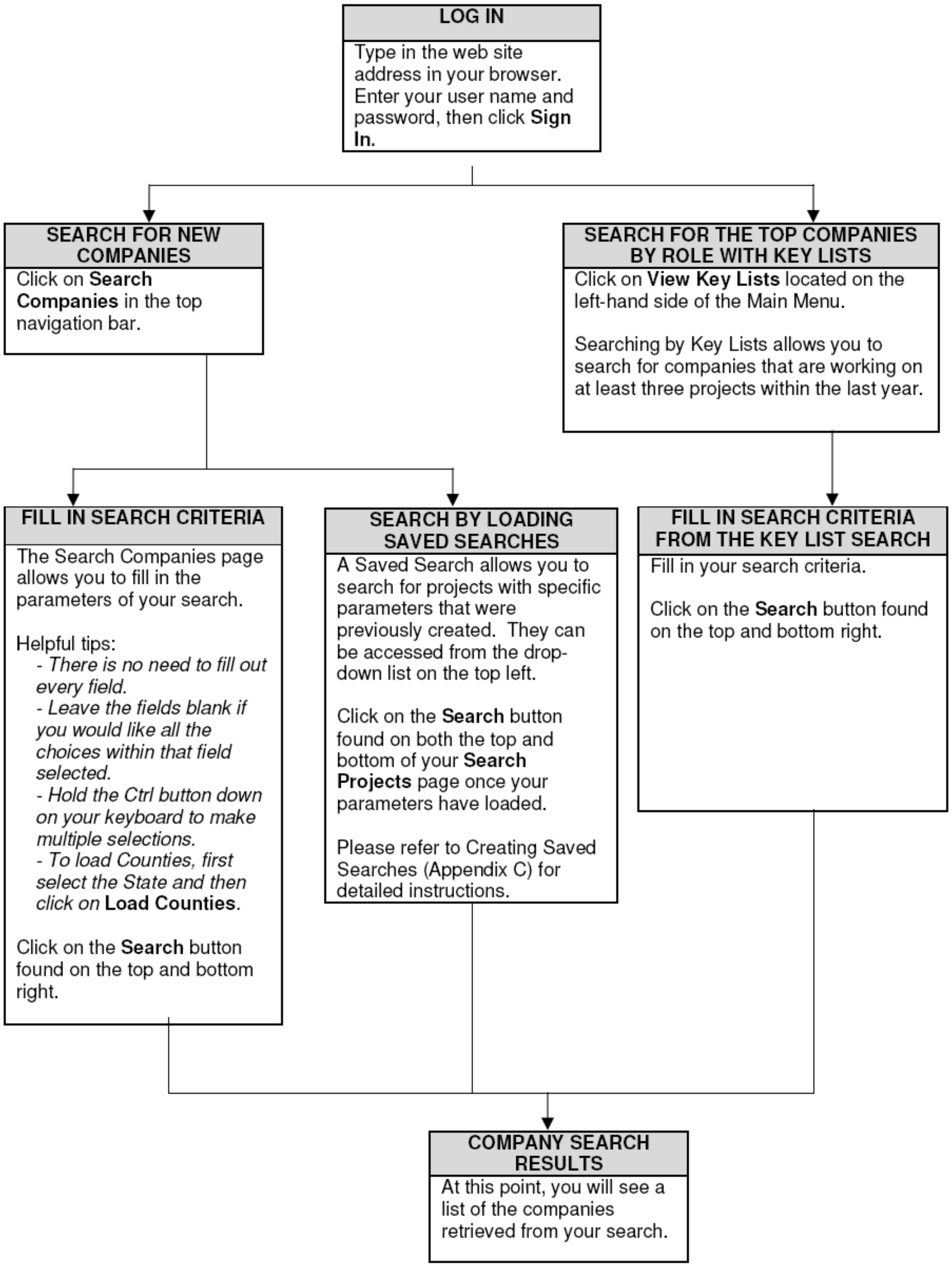
↓

SAVE YOUR QUERY

Click on **Save and Close** inside the Create new Saved Search pop-up window.

The current page will refresh and you are now able to see your new Saved Query in the Load Saved Search drop-down list on the top left. You may also access this search in the future from this drop-down list.

Appendix D – Searching for companies



Appendix E – Tracking your companies

SEARCH FOR COMPANIES

For instructions on how to search for new and updated projects, please refer to Searching for Companies (Appendix D)

A list of companies will appear when your search is complete.

TRACK YOUR COMPANIES FROM THE LIST OF RESULTS

To the right of each **Company**, you will see four columns of check boxes labeled **P**, **Q**, **C**, and **Hide**, and a drop-down list directly below for any **Custom Tracking Lists** you've created. See below for a detailed description.

These are known as **Tracking Lists**: folders designed to help you track your projects.

TRACK YOUR PROJECTS WITHIN A COMPANY REPORT

To open up a detailed Company report, right click on the NAME of the Company and click **Open in New Window**.

Once the **Company Report** is open, you will find four check boxes labeled **P**, **Q**, **C**, and **Hide**, and a drop-down list for **Custom Tracking Lists** (see below for a detailed description).

These are called Tracking Lists: folders designed to help you track your projects.

REVIEW AND TRACK YOUR COMPANIES

Review the Companies and select the desired **Tracking List**:

Click on one of the boxes provided (**P**, **Q**, **C**, or **Hide**), or select a **Custom Tracking List** of your choice (make sure the name of the tracking list is inside the **Custom** box once selected).

Click on **Save Changes**

Tracking List Descriptions:

P: Prospect
Q: Qualified
C: Customer
Hide: A project that you do not want to see in your future searches

To create a Custom Tracking List:

1. Click on **Create List** in the **Company Search Results** page.
2. In the Create **Custom Projects Tracking List** pop-up screen, type in a name of your choice
3. Select **Private**, **Share With**, or **My Company**.
4. Click **Save**.

Your Custom Tracking List can now be found in the drop-down list under **P**, **Q**, **C**, and **Hide**.

To retrieve saved Projects: Click on **View Company Tracking Lists** and select the list of your choice.

Appendix F – Print / Save as (Word, Excel, HTML, Text)

SEARCH FOR PROJECTS OR COMPANIES

For instructions on how to search for new and updated Projects or Companies, refer to the Searching for Projects (Appendix A) or Searching for Companies (Appendix D) diagrams.

A list of results will appear when your search is complete.

PRINT OR SAVE YOUR RESULTS

Print or **Save** your Projects or Companies from your list of results or from within an individual report.

PRINT / SAVE AS A DETAILED REPORT FROM YOUR LIST OF RESULTS

1. Select the Projects or Companies you would like to Print or Save by using the check boxes to the left of its name. (If you would like to select all of them, leave all boxes un-checked)
2. To print, click on the **Print** button found above and blow the list of results
3. To save as a Word, Excel, Web, or Text document, select the format from the drop-down list, then click the **Save** As button located above and below the list of results.

PRINT / SAVE AS FROM AN INDIVIDUAL REPORT

1. Right-click on the name of the Project or Company and select Open in a New Window.
2. Within the detailed report, click on the **Print** button if you would like to Print. To save as a Word, Excel, Web, or Text document, select the format from the drop-down list, then click the **Save As** button located above and below the list of results.

PRINT PREVIEW OPTIONS

The **Print Preview** appears when you choose to Print or Save your reports.

The top half displays the projects or company report information. The bottom half displays your options for what information to include when printing.

PRINT

1. Use the options at the bottom of the screen to choose what information you would like to print. A check mark indicates that the information will be printed.
2. When you have made your selections, click once on the **Apply Changes** button at the bottom right of the window. This updates the top half of the window.
3. Click on **Print**.

SAVE

1. Use the options at the bottom of the screen to choose what information you would like to save.
2. When you have made your selections, click once on the **Apply Changes** button at the bottom right of the window. This updates the top half of the window.
3. From the **Save As** drop-down list, select Word, Excel, HTML, or Text.
4. Click **Save**. A window will appear stating you have chosen to download the file.