Trimble Unity Construct - Project Issues

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About Project Issues

The Project Issues feature gives inspectors a quick and easy way to log the violations they encounter on construction sites. Project Issues facilitates the communication and exchange between the inspector, contractor/subcontractors, and the project manager. With the mobile application, inspectors Inspectors are able to record and send issues to contractors, with just the click of a button. The contractor can then assign these issues to subcontractors for further action. Having a single system that allows all parties to collaborate on the inspection process helps reduce the time it takes to inspect a site, which essentially reduces project costs.

Supporting features have also been added, such as the ability to predefine locations for the inspector's convenience. Contractors, administrators and inspectors can also flag issues that they see occur often, to eliminate the repetitive input of similar issues. The collaborative aspect of this feature results in increased efficiency and speed. It also adds convenience, flexibility and practicality to the inspection process for all parties involved.

Setup Process

As part of the setup process, project managers must first create "project issue" form types, otherwise the Project Issues link won't be accessible from the Project Menu. A list of locations should also be created for the inspector to log issues for. Project managers can flag recurring issues during the setup process or they can be saved in an ad hoc fashion, by the inspector.

Below is a list of configuration steps that should be completed in chronological order:

1. Create Project Issues Form(s)
2. Define Project Issue Locations
3. Add Recurring Project Issues (Optional)

Create Project Issues Forms

To get started with Project Issues, you need to first create a project issues form type. This form type differs from the standard e-Builder form in that there are three default field names that cannot be changed one of which is Issue Category. Edit the options of this data field to include your different issue categories. Instructions are provided below.

To create a project issue form

1. Go to Forms Settings.

    For instructions, see Access Forms Settings.

2. Click **Manage Forms**.

3. Click **Create New Form Type**.

    Create New Form Type

    The Create New Form Type page is displayed.

4. Complete all required fields, and specifically, the following:

○ In the **Interpret Form As** field, select the **Project Issue** radio button.

5. Click **Create**.

   The Add Form Section(s) page is displayed.

6. Click **Add New Section**.

7. Enter a name and description of the section, and then click **Save**.

8. Repeat steps 6 and 7 to add more sections to the project issue form.

9. Click **Next**. The Add Form Field(s) page is displayed.

10. Enter field names and specify the sections each field belongs to.

    Note: The first three field names are required and display by default: Issue Category, Location, and Event Name.

11. Click the **edit options** link to specify issue category options such as *Mechanical, Electrical, and Safety,* for example.

    Note: Users will be required to choose an issue category when completing the form.

12. Enter category options, and then click **Save**.

13. On the Add Form Field(s) page, specify whether each field is required or optional by selecting the appropriate check boxes.

14. Click **Next**. The Form Type Permissions page is displayed.

15. Specify permissions for accessing this form.

    Tip

    Click the **Preview** tab to review the form and if necessary, navigate to other tabs to make changes. Once completed, click the **Permissions** tab.

16. Click **OK** to save the completed the form.

Access the Project Issues Page

Go to the Project Issues page to filter for project issues in various statuses. From here you are able to take a number of actions with project issues such as adding, forwarding, deleting, closing, sending and much more. The Project Issues module has project-specific access. You can access this module from the Project Menu located on the left side of the page. The Project Menu displays when you are within a project. The procedure below describes accessing the Submittal module before a project is selected.

To access the Project Issues page

1. From the Home page, click the **All Projects** drop-down menu to select a project.
2. Click the **Project Issues** link located in the Left Navigation Bar.

Add Project Issues

Project issues can be added via the40 Mobile or Trimble Unity Construct Enterprise (web-based application). The procedure below details the steps for adding an issue via Trimble Unity Construct Enterprise. Typically, this task is performed by the inspector when creating a single issue, not as part of a batch of issues created during an inspection event. In some cases, this task may be performed by the project manager.

To add a project issue

1. Go to the Project Issues page.

   For more information, Access the Project Issues Page.

2. Click **Add Issue**.

   The Fill Out Form dialog displays.

3. Select the project issue form type you would like to add.

   The Fill Out Form dialog displays.

4. Complete all required fields.

5. Click **Post Form** to send the form.

   —Or—

   Click **Save Draft** to save the form as a draft.

Save Issue as Recurring

You might choose to save an issue as a recurring issue if you notice the same issue occurring on a regular basis. Recurring issues must have a unique subject within its specific form type in order to be saved. Recurring issues with duplicate subjects will generate an error message.

To save an issue as a recurring issue

1. Go to the Project Issues page.

   For more information, see Access the Project Issues Page.

2. Filter for the issue you would like to save as recurring.

3. Click the title of the issue.

   The [Form Name] dialog box displays.

4. Complete all required fields.

5. Click **Save Recurring Issue**.

Delete Project Issues

As part of the review of draft project issues, the inspector may need to delete issues that were duplicates or were otherwise flawed in some way. Only draft issues can be deleted.

To delete project issues

1. Go to the Project Issues page.

   For more information, see Access the Project Issues Page.

2. Filter for the issue(s) you would like to delete.

3. Select the check box(es) next to the project issue(s) you want to delete.

4. Click **Delete**.

Send Project Issues

After reviewing and confirming draft project issues, the inspector must distribute the items so that they move into the recipient's court. Draft issues can be sent en masse or individually by opening the issue, saving, and then sending it. The following instructions are included below:

Send Single Draft Project Issue

Send Multiple Draft Project Issues

Send Single Draft Project Issue

To send a single draft project issue

1. Go to the Project Issues page.

   For more information, see Access the Project Issues Page.

2. Filter for the issue you would like to send.

3. Click the title of the issues you want to send.

   [Form Name] dialog box displays.

4. Complete all required fields.

5. Click **Post Form**.

Send Multiple Draft Project Issues

To send multiple draft project issues

1. Go to the Project Issues page.

   For more information, see Access the Project Issues Page.

2. Select the My Draft Issues radio button located in the filter.

3. Click **Filter**.

   > **Note:** When sending multiple issues, it is important to filter issues My Draft Issues so that the Send button displays on the page. If qualifying issues display in mixed results of both draft and open issues that are not in your court, the Send button will not display. In such as case you can send single draft project issues by following the procedure above.

4. Select the check box next to the issue(s) you want to send.

5. Click **Send**.

Forward Project Issues

Not all project issues can be forwarded. Issues that are able to be forwarded adhere to one or more of the following criteria:

- The issue is in your court
- The issue is closed
- Forwarding is not restricted for the particular issue type

To forward a project issue

1. Go to the Project Issues page.

   For more information, see Access the Project Issues Page.

2. Filter for the issue(s) you would like to forward.

3. Select the check box(es) next to the issues you want to send.

4. Click **Send**.

   > **Note:** If the Forward button does not display, the project issue does not meet one of the criteria listed above.

Print Project Issues

The print project issue option sends the project issue forms details to a Microsoft Word® file where you are able to take further action such as modifying the document further, saving it, and printing it.

To print project issues

1. Go to the Project Issues page.

   For more information, see Access the Project Issues Page.

2. Filter for the issue you would like to print.

3. Click the title of the issue.

   [Form Name] dialog box displays.

4. Click **Print**.

Close Project Issues

Once an issue has been addressed by the assignee and the item is marked as completed, the inspector needs to review the resolution/disposition, confirm that the item is completed, and close the item. Issues can be closed individually or en masse. The instructions for each of these tasks are provided below:

> **Note:**
> Not all project issues can be closed. Issues that are able to be closed adhere to the following criteria:
> - The issue is in your court
> - Closing is not restricted for the particular issue type

The following instructions are included below:

> Close a Single Project Issue
>
> Close Multiple Project Issues

Close a Single Project Issue

To close a single project issue

1. Go to the Project Issues page.

   For more information, see Access the Project Issues Page.

2. Filter for the issue you would like to close.

3. Click the title of the issue.

   [Form Name] dialog box displays.

4. Complete all required fields.

5. Click **Close**.

Close Multiple Project Issues

To close multiple project issues

1. Go to the Project Issues page.

   For more information, see Access the Project Issues Page.

2. Select the In My Court radio button located in the filter.

   > **Note:** When closing multiple issues, it is important to filter by issues In My Court so that the Close button displays on the page. If qualifying issues display in mixed results of both draft and open issues, the Close button will not display.

3. Click **Filter**.

4. Select the check box(es) next to the issue(s) you want to close.

5. Click **Close**.

About Project Issue Locations

Before using Trimble Unity Construct to create and manage project issues, the project manager defines the list of locations and the documents associated with each. This enables the user to select a location and have it auto-fill any newly created issues. The list of locations will be editable through the life of the project so that new locations can be added as they become viable selections and old locations can be removed as they become deprecated.

The following is a list of tasks for working with project issue locations:

- Define Project Issue Locations
- Edit Project Issue Locations
- Delete Project Issue Locations
- Import Project Issue Locations
- Export Project Issue Locations
- Attach Documents to Project Issue Locations

Access the Manage Project Issue Locations Page

The Manage Project Issues Location Page gives you access to functions that enable you to add, modify or delete project issue locations.

To access the Manage Project Issues Location page

1. From the Home page, click the **Please select a project...**drop-down arrow and select a project.
2. Click the **Project Issue Locations** link located on the left navigation bar.

Related Topics:

- About Project Issue Locations

Import Project Issue Locations

To save time, project issue locations can be imported using a Microsoft Excel® spreadsheet. During the import process you will have the opportunity to download a template to ensure locations are uploaded in the proper format. If there are existing locations that you would like to keep, add these to the spreadsheet as well. Existing locations that are NOT added to the spreadsheet will be deleted.

To import project issue locations

1. Go to the Manage Project Issue Locations page.

   For more information, see Access the Manage Project Issue Locations Page.

2. Click the **Import Locations** link.

   The Import Locations dialog displays.

   Note: Click **Download Template** for a template of the appropriate format of the locations.

3. Click **Browse**.
4. Search for and select the spreadsheet.
5. Click **Next**.

6. If there are errors, they display in the **Import Exceptions** section and the Import button is disabled. Click **Previous** to go back and import a new spreadsheet.

   —Or—

   If there are no errors, click **Import**.

Define Project Issue Locations

Before using e-Builder to create and manage project issues, the project manager must define the list of locations and the documents associated with each. This enables the user to select a location and have it auto-fill any newly created issues.

Note: Issue locations can also be imported. See Import Project Issue Locations for more information.

To define project issue locations

1. Go to the Manage Project Issue Locations page.

   For more information, see Access the Manage Project Issue Locations page.

2. Click **Add Locations**.

   The Add Locations dialog box displays.

3. Complete the required fields.

4. Click **Save**.

Related Topics:

- About Project Issue Locations

Edit Project Issue Locations

The project manager can modify project issue locations by changing location names or the item's nested location, but you cannot reorder items.

The following procedures are located below:

   Change Location Name

   Modify Nested Location

Change Location Name

To change the name of a location

1. Go to the Manage Project Issue Locations Page.

   For more information, see Access the Manage Project Issue Locations Page.

2. Select the location you want to modify.

3. Click the **Edit Location** link.

   The Quick Add Location dialog box displays.

4. Make all necessary changes.

5. Click **Save**.

Modify Nested Location

Project issue locations are saved in the way they display in the mobile application. You have the ability arrange locations such that the appropriate locations are nested where they need to be or display in the order that you choose.

To change an item's nested location

1. Go to the Manage Project Issue Locations page.

   For more information, see Access the Manage Project Issue Locations Page.

2. Select a location to move.

3. Click the **Edit Location** link.

   The Quick Add Location dialog box displays.

4. Click the **Lookup** link to select where you would like to nest the selected location.

   The Lookup Locations dialog box displays.

5. Select the location you'd like to nest the selected item.

6. Click **Save**.

Related Topics:

- Delete Project Issue Locations

Delete Project Issue Locations

If locations have been added in error or have become obsolete, they may have to be deleted by the project manager.

To delete project issue locations

1. Go to the Manage Project Issue Locations Page.

   For more information, see Access the Manage Project Issue Locations Page.

2. Select the location you want to modify.

3. Click the **Remove Location** link.

Related Topics:

- Edit Project Issue Locations

Export Project Issue Locations

If needed, project issue locations can be exported to an Excel™ spreadsheet. This can be used as another way to modify locations, by rearranging, adding or deleting locations and then importing the spreadsheet back into e-Builder.

To export project issue locations

1. Go to the Manage Project Issue Locations page.

   For more information, see Access the Manage Project Issue Locations Page.

2. Click the **Export Locations** link.

Attach Documents to Project Issue Locations

Documents such as site plans, schematics, and other drawings might be pertinent to the inspector while combing construction sites. Attaching these documents to issue locations makes them readily available for inspector and helps facilitate a smoother inspection process.

Tip

> In IE 10, Firefox, Chrome, and Safari browsers, you can simply drag and drop documents from your local directory onto the Attached Documents tab. This can be done to attach documents throughout e-Builder Enterprise.

To attach documents to project issue locations

1. Go to the Manage Project Issue Locations page.

   For more information, see Access the Manage Project Issue Locations Page.

2. Select the location you'd like to attach documents to.

3. Scroll beneath the fold and click **Attach Documents**.

   The Attach Documents dialog box displays.

4. In the **Select Attachment Method** section, select your method of attachment.

5. Click **Browse For Files...**

6. Search for and select the file you want to attach.

   You are returned to the Attach Documents dialog box.

7. If you are attaching files from e-Builder, go to step 8.

   —Or—

   If you are uploading files from your computer, in the **Select an e-Builder Destination folder** field, click **Browse**.

8. Search for and select the e-Builder destination folder.

9. Click **Attach Selected**.

About Recurring Project Issues

Recurring issues are used as a template and can be reused throughout the life of a project and across different projects. By creating recurring issues, the project manager saves the inspector time when logging issues that are regularly found during walkthroughs. Recurring project issues can also be created on the fly by the inspector or contractor as issues are being added. Each recurring issue must have a unique subject within its specific form type in order to be saved, otherwise an error will occur.

Below is a list of tasks related to working with recurring project issues:

- Access Recurring Project Issues Page
- Add Recurring Issues
- Copy Recurring Issues to Different Projects
- Edit Recurring Issues
- Delete Recurring Issues

Access Recurring Project Issues Page

From the Recurring Project Issues page you are able to copy recurring issues to other projects, add, modify, and delete recurring issues.

To access the Recurring Project Issues page

1. From the Home page, click the **Please select a project** drop-down arrow and select a project.
2. Click the **Recurring Project Issues** link located on the Side Navigation Bar.

Related Topic:

- About Recurring Project Issues

Add Recurring Project Issues

To add a recurring project issue

1. Go to the Recurring Project Issues page.

   For more information, see Access Recurring Project Issues Page.

2. Click **Add Issue**.

   A list of project issues display.

3. Select an issue from the list.

   The Fill Out Form dialog box displays.

4. Enter all required fields.

5. Click **Save Recurring Issue**.

   If you entered a due date, the Confirm Due Date Offset page is displayed.

   > **Note:** The due date offset refers to the number of days from the present day that the item is due. This number is automatically populated in this field. In addition, if a workflow due date offset is configured for the project, this number of days is automatically added to the current due date. For more information on the workflow due date offset setting in the Project Settings, see Workflow Settings.

6. To change the due date, enter the number of days from the present in this field. To leave it the same, go to the next step.

7. Click **Save.**

Related Topics:

- About Recurring Project Issues

Copy Recurring Issue to Different Projects

To reduce data entry efforts, recurring issues can be copied across projects.

To copy a recurring issue to a different project

1. Go to the Recurring Project Issues page.

   For more information, see Access Recurring Project Issues Page.

2. Select the check box next to the issue(s) you want to copy.

3. Click **Copy To**.

   The Select a Project submenu displays.

4. Click the drop-down arrow to select the project to copy the recurring issue to.

5. Click **Copy**.

Edit Recurring Issues

To edit a recurring issue

1. Go to the Recurring Project Issues page.

   For more information, see Access Recurring Project Issues Page.

2. Click the title of the issue you want to edit.

   The Fill Out Form dialog box displays.

3. Make all necessary changes.

4. Click **Save Recurring Issue**.

Delete Recurring Issues

To delete a recurring issue

1. Go to the Recurring Project Issues page.

   For more information, see Access Recurring Project Issues Page.

2. Select the check box next to the issue(s) you want to delete.

3. Click **Delete**.

Project Issues Page Overview

The Project Issues page gives you access to all non-recurring project issues. This page is integral for working with project issues. You are able to take a number of actions from this page, including the following:

- Add project issues
- Send project issues
- Forward project issues
- Delete project issues
- Save issues as recurring

Fields and Buttons

The fields and buttons located on the Project Issues page are:

- **Project Issues for**: Displays the name of the project you are viewing project issues for. Click this drop-down arrow to select a different project to view project issues for.

Filter Project Issues

The Project Issues filter allows you to quickly filter for specific project issues based on certain criteria.

- **Hide Filter Options**: Click to hide the filter and increase the view of the project issues table.
- **Clear**: Click to clear all filter options.
- **Filter**: Click to filter by selected options.
- **All**: Select to filter by all issue types.
- **In My Court**: Select to filter by issues in your court only.
- **My Draft Issues**: Select to filter by your draft issues only.
- **Event Name**: Enter an event name to filter by.
- **Subject**: Enter a subject name to filter by.
- **Held By**: Click to filter by a specific user who has the issue in their court.
- **Priority**: Click an issue priority to filter by.
- **Open**: Select to filter by open project issues.
- **Closed**: Select to filter by closed project issues.
- **Overdue**: Select to filter by overdue project issues.
- **Issue Location**: Click to filter by a specific location.
- **Issue Type**: Click to filter by a specific issue type.
- **Due Date Range**: Enter a due date range to filter by due date, or click the calendar icon to select dates on the calendar.
- **Containing Text**: Enter some text that is also available in the project issue you are searching for. Click the drop-down arrow to select what part of the form to search for the containing text. Select from the following options:
  - Anywhere in the form
  - In the subject only
  - In the prefix only

Project Issues

The Project Issues table contains filtered results. Use the page navigation options to adjust the amount of data that appears on the page.

- **Page**: Click to jump to a different page of results.
- **Show**: Click to select a range of results to view per page.
- **Add Issue**: Click to add an issue. The Fill Out Form dialog box displays for you to select a form type to complete.
- **Send**: Click to send selected issues.

  Note: Only draft issues can be sent and the only way to send these issues is by filtering for My Draft Issues by selecting this radio button located in the filter. If draft issues display as a result of any type of other search, the Send button will not display, but you can still send it by opening the issue and then clicking Post Form, see Send Project Issues for detailed steps.

- **Forward**: Click to forward selected issues.

  > **Note:**
  > Not all project issues can be forwarded. Issues that are able to be forwarded adhere to one or more of the following criteria:
  >
  > - The issue is in your court
  > - The issue is closed
  > - Forwarding is not restricted for the particular issue type

- **Close**: Click to close selected issues.

  > **Note:** Not all project issues can be closed. Issues that are able to be closed adhere to the following criteria:
  >
  > ○ The issue is in your court
  > ○ Closing is not restricted for the particular issue type

- **Delete**: Click to delete selected issues. Only draft issues can be deleted.
- **Subject**: Displays the subject of the project issue.
- **Issue Type**: Displays the issue type as determined by the account administrator.
- **Issue Category**: Displays the issue type as determined by the account administrator.
- **Location**: Displays the issue location as determined by the account administrator.
- **Help By**: Displays the name of the person whose court the issue is in currently.
- **Due Date**: Displays the date the issue is due to be resolved.
- **Event Name**: Displays the name of the event.

Manage Project Issue Locations Page

The Manage Project Issue Locations page is used by the project manager to define the list of locations and associated documents that will be used on construction sites. Locations can be added singly or en masse. Add locations in the order you want them to appear on the mobile application, or rearrange the locations manually. The following actions can be taken from this page:

- Add Project Issue Locations
- Edit Project Issue Locations
- Import Project Issue Locations
- Export Project Issue Locations
- Attach Documents to Project Issue Locations
- Delete Project Issue Locations

Fields and Buttons

The fields and buttons on this page are:

- **Cancel**: Click to cancel any unsaved changes and be redirected to the Project Details page.
- **Defined Locations**: Lists all existing locations.

- **Add Locations**: Click to add project issue locations. The Add Locations dialog box displays. Enter one location per line. From here you're able to change the order of the locations by clicking the **Lookup** link and nesting one location under the other.
- **Remove Selected Location**: Click to delete selected location.
- **Import Locations**: Click to import locations using an Excel spreadsheet. The Import Locations dialog box displays.
- **Export Locations**: Click to export the list of project locations to an Excel spreadsheet.
- **View**: Click to view the attached file.
- **Download**: Click to download the attached file.
- **Redline**: Click to add markups to the document. The number in parentheses represents the amount of times that the document has been marked up.
- **File Name**: Displays the name of the attached file.
- **Attached By**: Displays the name of the person that attached the file to the selected location.
- **Date Attached**: Displays the date the file was attached to the selected location.

Recurring Project Issues Page

The Recurring Project Issues page is used by the project manager to create the recurring issues that will be used throughout the life of the project. Recurring project issues can also be created by saving an existing issue as recurring. From this page you are able to take the following actions:

- Add Recurring Issues
- Copy Recurring Issue to Different Projects
- Edit Recurring Issues
- Delete Recurring Issues

Fields and Buttons

The fields and buttons located on this page are:

- **Project Issues for**: Displays the name of the project you are viewing project issues for. Click this drop-down arrow to select a different project to view project issues for.

Filter Recurring Project Issues

The Recurring Project Issues filter allows you to quickly filter for specific recurring issues based on certain criteria.

- **Hide Filter Options**: Click to hide filter and increase the view of the project issues table.
- **Clear**: Click to clear filter options.
- **Filter**: Click to filter by selected criteria.
- **Issue Type**: Click to filter by specific issue type.
- **Subject**: Enter the subject of the issue to filter by.
- **Containing Text**: Enter some text that is also available in the project issue you are searching for. Click the adjacent drop-down arrow to select what part of the form to search for the containing text. Select from the following options:

- ◦ Anywhere in the form
- ◦ In the subject only
- ◦ In the prefix only
- **Held By**: Click to filter by a specific user who has the issue in their court.
- **Priority**: Click an issue priority to filter by.
- **Due Date Offset**: Enter the number of days from the present day that the recurring project issue should be due.

Project Issues

The Project Issues table contains filtered results. Use the page navigation options to adjust the amount of data appears on the page.

- **Page**: Click to jump to a different page of results.
- **Show**: Click to select a range of results to view per page.
- **Add Issue**: Click to add an issue. The Fill Out Form dialog box displays for you to select a form type to complete.
- **Copy To**: Click to copy selected recurring issues to a different project.
- **Delete**: Click to delete selected recurring issues.
- **Subject**: Displays the subject of the project issue.
- **Issue Type**: Displays the issue type as determined by the account administrator.
- **Issue Category**: Displays the issue type as determined by the account administrator.
- **Help By**: Displays the name of the person whose court the issue is in currently.
- **Due Date Offset**: Displays the number of days from the present day that the recurring issue is due.
- **Priority**: Displays the priority of the recurring issue.