



PM4+

PM4 + Partners Knowledge Articles

Change Management: Working with Packages for Consultants and the Design Team

R11

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Working with packages & documents

In PM4+, the Documents module provides a way to manage the information about construction and contract documents (such as the specifications and drawing sheets) and updates to them. The documents themselves reside in the Electronic Plan Room (EPR). The EPR is the source for the documents that have been approved for construction.

The Package log is used to maintain and track the information about the construction drawings and specifications. Changes to these documents, contained in a “package” file, are provided by the design team, consultants, engineers, architects, and/or clients. They are uploaded into PM4+ to create a “package record”. Packages can be associated with the other documents and records (such as CRXs) used in PM4+ to communicate changes in the contractual documents including drawings and specifications.

The Document log displays the most recent version of the changed documents, even those still under review.

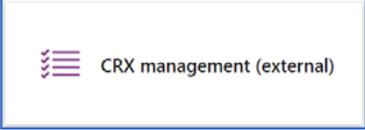
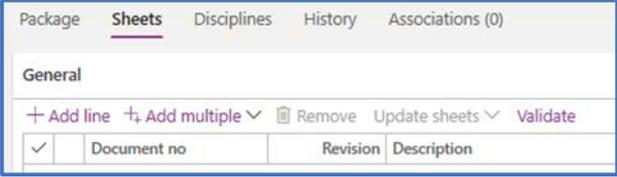
Before you begin

As a project team, it is important to define the processes for the teams providing and receiving specification and drawing packages. These processes impact the activities described here for uploading document packages to PM4+. Before uploading packages in PM4+, contact your project manager to discuss where the files should be dropped.

Quick Start

What you need to know to get started without delay

Packages containing revised drawings or other changes are issued to PCL as a package record.

Step	Action
Open workspace	
Create package record	
Input header fields for package	<ul style="list-style-type: none"> • Document type – select from drop-down • Document no – from the document • Description – type a description for the record • Document date – select from calendar • Action – indicates how you want PCL to proceed. This selection may trigger a warning dialog. Review and confirm as necessary.
Upload document	
Confirm package creation	Select OK
Update Package	Optional – complete with any relevant package information
Add sheets	<p>Add one or more sheets to package</p> 

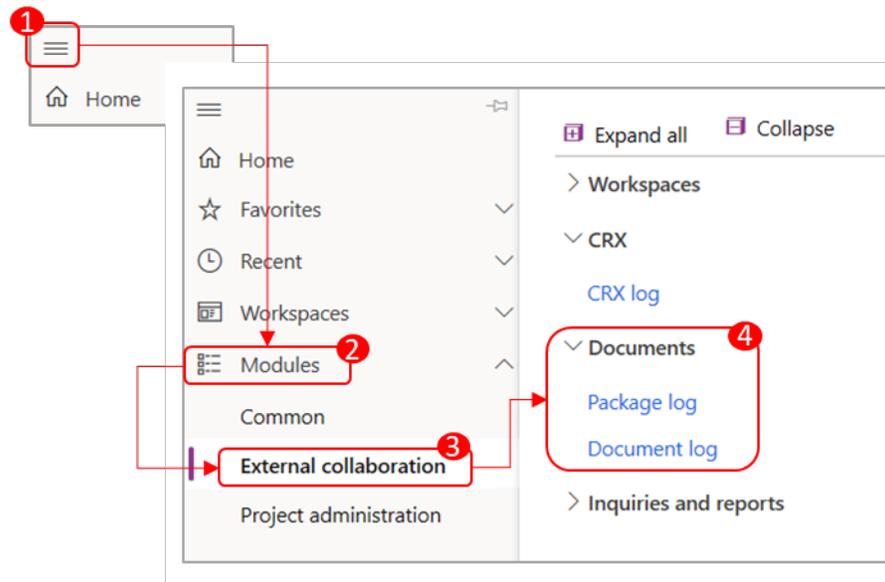
Viewing Packages and sheets in Packages

You can view the list of change packages and the documents in the change packages using the navigation pane path. Two logs are available:

Navigation path	Displays ...
External collaboration > Documents > Package log	The list of Package records for the project The Package log is used for managing the packages and sheets they contain; sheets and packages
External collaboration > Documents > Document log	The most recent versions for documents such as drawings, specifications, and other documents in the EPR

Navigation pane

1	Select the “hamburger” menu to open the Navigation pane
2	Select Modules to view the modules available
3	Select External collaboration to show the list of available screens for collaboration
4	Under the Documents tab, select the log list to view



Viewing record details for packages in the Package log

External collaboration > Documents > Package log

To view the details of any log record, open the log, and select the ID link for the record. The details view for the record appears. The change package details pane has five tabs:

Package log

409 : Ramp extension - electricals

[Package](#)
[Sheets](#)
[Disciplines](#)
[History](#)
[Associations \(0\)](#)

General

CLASSIFICATION	PACKAGE DATES	STATUS	INFORMATION	COMMENTS
Document no 409	Document date 11/22/2019	Package status Draft	Action Pricing only	Comment
Document type PCN	Received date 11/22/2019	Calculated CRX status	Consultant company Prime Architecture	
Description Ramp extension - electricals	Issued to field		Consultant contact Erica Hiu	
	Posted date		PCL coordinator	
URL			Posted N/R	
Primary discipline			Posting required <input type="radio"/> No	

Select the tab to view different details about the change package.

Tab	Displays...
Package	Header information about the package including the status and posting information
Sheets	List of document sheets included in the package and their published status Use this tab to add more information and sheet details to the package Note: Packages and sheets in packages are published to the Document log by PCL.
Disciplines	List of disciplines affected by the changes recorded in the documents in the package
History	Actions and status changes in reverse chronological order - with the latest item at the top of the list Can be sorted to change the order.
Associations	List of records associated with the package such as CRXs, RFQs, and RFIs. If there are items under the Associations tab, PM4+ shows the number of items in brackets beside the tab label.

Viewing record details for items in the Document log

External collaboration > Documents > Document log

Sheets and packages are published to the Document log. The Document log provides view-only access to all the published sheets and packages and their revisions for the project.

To view the details of a document record, open the log, and select the ID link for the document. The details view for the document appears.

The details pane for a document record has three tabs:

A612 : Architectural-STAIR 2 & 3 PLANS & SECTIONS

Header Revisions Associations (0)

General

CLASSIFICATION	LATEST REVISION
Document no A612	Latest revision 0
Description Architectural-STAIR 2 & 3 PLANS & SECTIONS	Latest revision document date 11/13/2019
Document URL https://pcldev.egnyte.com/dl...	
Discipline Architectural	

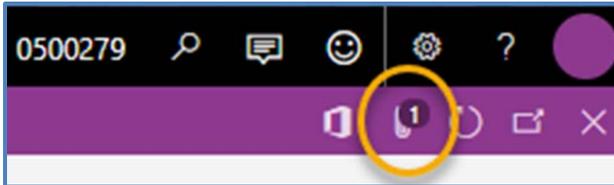
Select the tab to view different details about the change package.

Tab	Displays...
Header	General header information about the referenced document
Revisions	Details about the document revisions such as dates, package number, and package status Hidden if there is only one revision available
Associations	List of records associated with the document

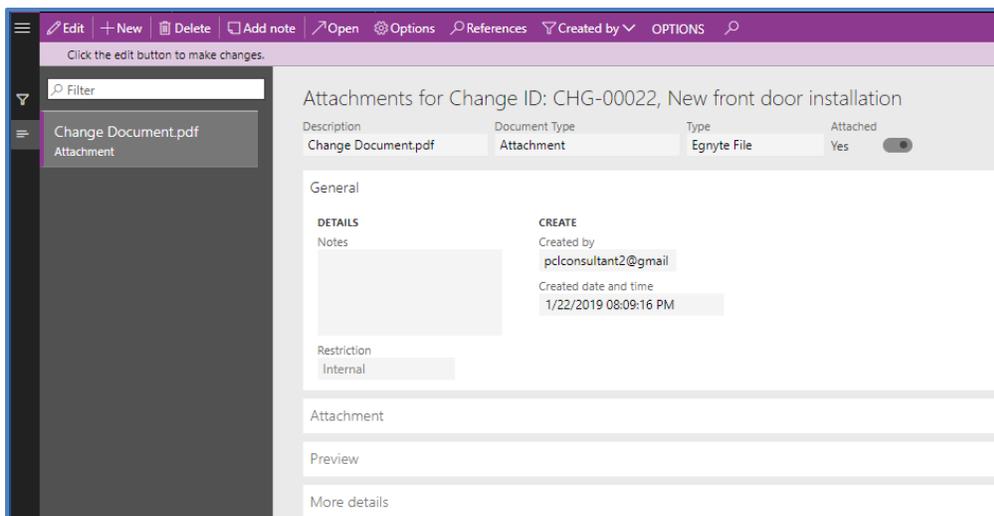
Viewing attachments

Attachments are files that may be associated with a record in PM4+. To create a change document record in PM4+, a change document is uploaded to PM4+. You can view this document as an attachment to the details view for the document.

From the details view for the change document, select the attachments icon (📎) in the action pane.



The list of attached files for the selected change document displays. This screen provides options for editing the attachment, creating another attachment, or adding notes to the attachment.



Viewing the Revision Inquiry

An alternate view for seeing the changes to the project documents listed on the Document log is to use the document revision inquiry. This report shows all the versions of the project change documents and where they are in the change management process.

1. To view the revision inquiry, use the navigation pane to go to:

External collaboration > Inquiries and reports > Revision inquiry

The list of documents displays.

Revision inquiry							
Filter	Discipline	Revision	Posting	Package	Package status		
✓ Document no ↑	Revision no	Description	Revision document date	Discipline	Package no	Package status	
E201	0	Electrical-FIRST FLOOR LIGHTING PLAN	11/13/2019	Electrical	004	Issued to field	
E201	1	Electrical-FIRST FLOOR LIGHTING PLAN	11/16/2019	Electrical	019	In PCL review	
E201	2	Electrical-FIRST FLOOR LIGHTING PLAN	11/16/2019	Electrical	023	In PCL review	
E201	2	Electrical-FIRST FLOOR LIGHTING PLAN	11/16/2019	Electrical	092	In PCL review	
E202	0	Electrical-SECOND FLOOR LIGHTING PLAN	11/13/2019	Electrical	004	Issued to field	
E202	1	Electrical-SECOND FLOOR LIGHTING PLAN	11/17/2019	Electrical	092	In PCL review	
E300	0	Electrical-BASEMENT POWER PLAN	11/13/2019	Electrical	004	Issued to field	
E300	1	Electrical-BASEMENT POWER PLAN	11/16/2019	Electrical	019	In PCL review	
E300	2	Electrical-BASEMENT POWER PLAN	11/17/2019	Electrical	063	In PCL review	
E301	0	Electrical-FIRST FLOOR POWER PLAN	11/13/2019	Electrical	004	Issued to field	
E301	1	Electrical-FIRST FLOOR POWER PLAN	11/16/2019	Electrical	019	In PCL review	
E302	0	Electrical-SECOND FLOOR POWER PLAN	11/13/2019	Electrical	004	Issued to field	
E310	0	Electrical-ENLARGED ROOMS POWER & AUX LAYOUTS	11/13/2019	Electrical	004	Issued to field	
E400	0	Electrical-LUMINAIRE SCHEDULE	11/13/2019	Electrical	004	Issued to field	
E400	1	Electrical-LUMINAIRE SCHEDULE	11/16/2019	Electrical	019	In PCL review	
E400	2	Electrical-LUMINAIRE SCHEDULE	11/16/2019	Electrical	022	Draft	

2. To view the details for a specific revision, select the **Document no** link.

Creating and updating Package records

In PM4+ creating a change package log record and uploading your sheets is done through the package log.

From your workspace you can initiate this process from two different starting points:

- (Recommended) Open the **CRX management** workspace and then select the **Upload package** action tile
 - From the navigation pane: **External collaboration > Documents > Package log** and choose **New**
1. From the dashboard, select the CRX management (external) workspace tile.
 2. Choose the **Upload package** action tile.

CRX management (external) – Phillip J. Currie Dino Museum 0501102

Job contact company
Prime Architecture

1 Outstanding CRX approvals

Upload package

My company's outstanding RFQs

Outstanding CRX approvals

All CRX

Urgency	CRX no ↑	Type	Description	CRX status
✓	CRX-0030	Subcontractor	Electrical provisions to accom...	Quoted

or

Navigate to **External collaboration > Documents > Package log** and choose **New** from the action pane when the log list or a record detail is displayed.

The Create package dialog opens.

- In the **Create package** dialog, complete the following:

- Document type** Select a value from the drop-down list or begin typing until your choice appears and is highlighted, then press **Enter**
Note: Mandatory fields are indicated by a red asterisk (*) and red border.
- Document no (number)** Enter the document number as found on the change document.
- Description** Add a short description as found on the change document. This description is also used as the name of the record.
- Document date** The date value defaults to the current date. Input or select the calendar icon to change. This date is the date that the change document was written and is on the change document.
- Action** Select the action PCL is to take to handle the change documented in the package and its sheets. If the action is set to any type of "Proceed" action, PM4+ displays a confirmation dialog when **OK** is selected:
Choose **Yes** to continue with creating the package; or **No** to cancel. A **No** response returns you to the Create package dialog where you can choose to **Cancel** the 'Create....' process.
- File (to upload)** Choose **Browse** and select the file to upload from the Explorer dialog that opens.

- Click **OK** to create the package record or **Cancel** to cancel the create process.

The system assigns a Package ID number to the record. The new package opens with a status of "Draft" and you are in the details view for the record.

- Complete the package details as described below.

Updating package header details

You can only update packages when they are in the "Draft" status.

- If you continued from creating the package record, ensure that you are viewing the record details under the **Package** tab; otherwise, reselect and open the record to update first.
- To update a package record, select **Edit** in the action pane. Once selected, the label for this action button changes to **Save**
- Select the **Package** tab to fill in the header information for the record.

Package log

409 : Ramp extension - electricals

Package Sheets Disciplines History Associations (0)

General

CLASSIFICATION	PACKAGE DATES	STATUS	INFORMATION	COMMENTS
Document no 409	Document date 11/22/2019	Package status Draft	Action Pricing only	Comment
Document type PCN	Received date 11/22/2019	Calculated CRX status	Consultant company Prime Architecture	
Description Ramp extension - electricals	Issued to field		Consultant contact Erica Hiu	
URL	Posted date		PCL coordinator	
Primary discipline			Posted N/R	
			Posting required <input type="radio"/> No	

- In the **CLASSIFICATION** field group, update the **Document type** if needed, and complete the **Primary discipline** field by selecting a value from the drop-down list.

Note: These values should match what is found on the package.

- Complete the values in the **PACKAGE DATES** field group as required:

Document date This field contains the date entered when creating the package record. Can be updated if required.

Received date This field is populated with the date when the package was created. May be different than the **Document date**. Cannot be updated.

Issued date When the **Status** for the package changes to **Issued to field**, this field is automatically populated with the date when the status changed. Statuses update when notification is sent to the subcontractors advising them of the change and their required response. Leave this field blank until a **Status** change occurs.

Posted date Date when the **Posted** flag is set to "Yes" to indicate that the revised sheet has been slip sheeted into the package in the EPR.

The **Package status** and **Calculated CRX status** fields in the **STATUS** field group automatically update as the package and its associated CRXs are processed.

- In the **INFORMATION** field group, complete the following fields as required:

Action Populated from the action selected when the package was created. Update as needed.

Consultant company This list is populated from the Companies that are job contacts for the project.

Consultant contact If there is only one contact for the consultant company, when the company is chosen, the one contact automatically populates this field. If more than one contact exists for the company selected, then a list of those contacts are available in the drop down to be selected from.

- If the **Posting required** toggle is set to **Yes**, then it sets the values seen in the **Posted** field. If this toggle is set to **No**, the **Posted** field contains a value of **N/R** (not required).
- (Optional)** Enter more descriptive information about the change in the **Comment** field.

The package you uploaded is available as an attachment. You can view the package by selecting attachments icon (📎) in the action pane. See [Viewing Attachments](#).

Managing sheets in a package

PM4+ provides two ways to add and update the list of documents in a package: multiple sheets at one time or one sheet at a time.

Uploading multiple sheets to a package

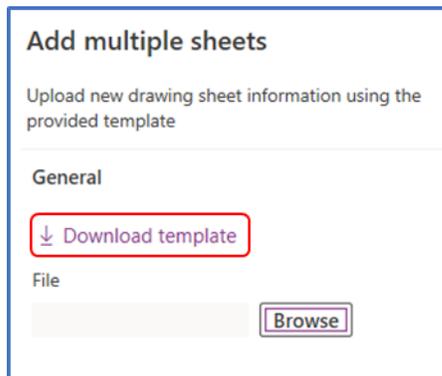
To upload multiple sheets to a package, PM4+ includes a “template” you can download and then update with the information for the sheets to upload into the package. The file is then uploaded into PM4+ and the list of sheets is added to the package.

Creating the template to import multiple sheets

1. From the Package log, select the package to update.
2. Select the **Sheets** tab.
3. Select **Add multiple > Sheets**

The Add multiple sheets dialog opens.

4. Select **Download template**



5. (Browser-dependent) Download or save the file as prompted.
6. Update the file with the document number and description for the document(s) you want to add to the package.

	A	B	C	D	E
1	Document no	Description	Revision	Revision document date	Discipline
2	A201	Architectual 1			Architecture
3	A202	Architectual 2			Architecture
4					

7. Save the template file in a location where you can upload it to PM4+.

Importing multiple sheets to a package

1. Under the **Sheets** tab, select **Add multiple > Sheets**

The Add multiple sheets dialog opens.

2. Select **Browse** and open the template file you saved in the [Creating the template](#) process above.

3. Click **OK**

The new lines for the sheets in the file are added to the grid for the **Sheets** tab.

Package Sheets Disciplines History Associations (0)							
General							
+ Add line + Add multiple Remove Update sheets Validate							
✓	Document no	Revision	Description	Revision document date	Discipline	Publish status	
	A201	1	Architectural-BASEMENT FLOOR PLAN	11/25/2019	Architectural	Draft	
+	A202	0	Architectural 2	11/25/2019		Draft	

If a sheet in the list is a new revision for an existing sheet, the Revision number increments by “1” and the rest of the line reflects the original record. In the example, above, document A201 has a new revision.

Adding individual sheets to a package

Use this process to add sheets to a package one at a time.

1. On the **Sheets** tab, select **Add line**

A new line is added to the grid.

2. Complete the following fields for the new line:

Field	Instruction
Document no	Type in the Document number for the sheet The Document number must be unique for each sheet included in the package
Revision	Automatically populated by PM4+ Original sheet is assigned revision “0”; value incremented with each revision
Description	Type a description of the document added to the package
Revision document date	Automatically populated by PM4+ Most current date when the sheet was added or updated
Discipline	Select the Discipline most affected by the change communicated in the document
Publish status	Automatically updated when the sheet or its revision is published to the Document log

3. **Save** the record

A + sign appears in the column before the Document no to indicate that the document will be updated in the Document log when it is published.

Adding revisions to sheets in a package

You can add one or more sheet revisions to the Sheets table to record updates or changes to the original documents if more current revisions are available.

Note: You can only add revisions to sheets if the package has not been published already.

1. On the **Sheets** tab, select **Add multiple > Revisions**

The Add multiple revisions dialog opens.

2. From the list of documents, select the document sheets with updated revisions.

3. Click **OK**

The new revisions are added to the table under the **Sheets** tab.

Updating sheets in a package

Sheets in a package can be updated the same way as they are added if they have not been published already. If they have been published to the Document log, a new package containing a new revision of the document is needed instead.

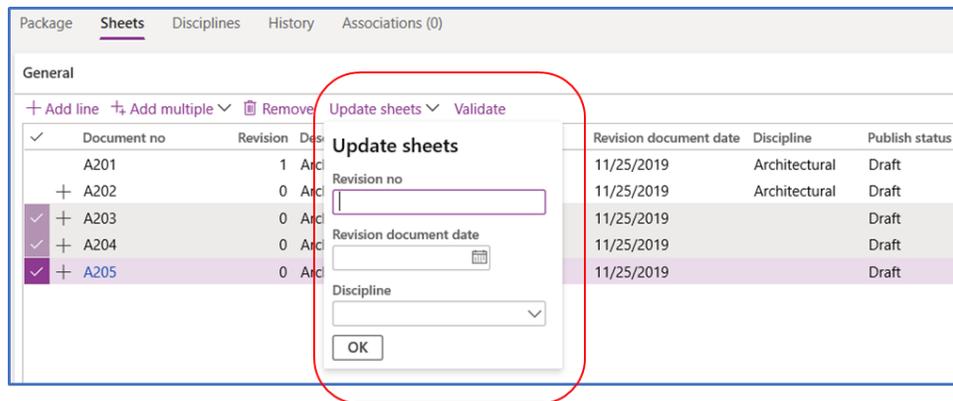
Note: A line for a sheet cannot be updated if the line has already been published to the Document log.

Alternatively, if you want to change the information for one line you can edit the fields for the sheet line.

To make the same change to the revision number, revision date, or discipline, for more than one line, do the following:

1. Select the lines to update
2. Select the **Update sheets** drop-down

The Update sheets dialog opens.



3. Set the options you want to apply to the selected sheet lines.
4. Click **OK**

The Update sheets dialog closes and the sheet lines are updated.

Document no	Revision	Description	Revision document date	Discipline	Publish status
A201	1	Architectural-BASEMENT FLOOR PLAN	11/25/2019	Architectural	Draft
+ A202	0	Architectural 2 - RAMP EXTENSION	11/25/2019	Architectural	Draft
+ A203	2	Architectural 3	11/21/2019	Architectural	Draft
+ A204	2	Architectural 4	11/21/2019	Architectural	Draft
+ A205	2	Architectural 5	11/21/2019	Architectural	Draft

5. To make sure there are no conflicts with existing document numbers and revisions, select **Validate**

The validate operation makes sure that the pairs of document numbers and their revisions are unique.

Updating disciplines for a package

A change package may affect more than the primary discipline specified on the **Package** tab. When the package is processed, it can be useful to flag these disciplines for their attention.

1. From the details view for the package record, select the **Disciplines** tab.
2. To add a discipline, open the **Add** drop-down.
3. From the list, select the discipline(s) to add to the package.
4. Click **Apply**

The selected disciplines are added to the Disciplines table.

For each discipline, update the following fields:

- | | |
|---------------------------------|--|
| Consultant company | Select the job contact company contributing to the drawing package for this discipline |
| Consultant contact | Select the job contact person at the Consultant company who will be contributing to the drawing package |
| External document number | Document number for the drawing package. Specific to the consultant company contributing to the document |
| External document date | Document date for the drawing package |
5. **(Optional)** Select the discipline to set as the primary discipline and then select the **Mark primary** action

The **Primary** field for the selected discipline shows a check mark and the **Primary discipline** field on the **Package** tab updates.