Prolog Converge Vendor Training Agenda

Overview

- What is Prolog Converge?

Access

- Training Requirements
- Login
- Support
  - Prolog.Support2@dc.gov

Navigation

- Navigation Menus
- General Use

Prolog Use

- Uploading Files
- Potential Change Orders (PCOs)
- Requests for Information (RFIs)
- Submittals
- Drawings
- Meeting Minutes
- Transmittals And Correspondence Log
- Action Items

Invoicing

- Preparing an Invoice
- File Naming Conventions – Invoices and CBE Docs

Discussion and Questions

Prolog Converge – DGS Vendor Training Important Links

- Login Address for Prolog Converge -
  https://dres.solutionguidance.com/prologconverge/webclient/

- Where to find DGS Forms and Instructions –
  https://dgs.dc.gov/page/dgs-ccs-forms-and-instructions-for-vendors

- PMO Office and Prolog Support -
  Prolog.Support2@dc.gov

Step 1 - To access Prolog Converge, go to the following address:

https://dres.solutionquidance.com/prologconverge/webclien1/

A User Name and Password will be provided by DGS or Solutions Guidance upon completion of DGS Prolog Converge training.

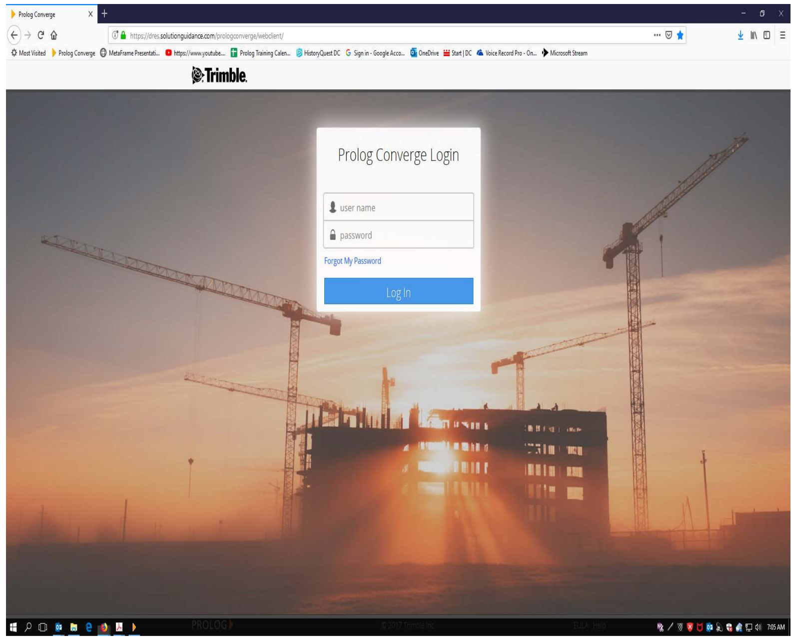


Figure 1

Step 2 - Click on the ARROW button on the left side of the project number corresponding to the project you wish to open.

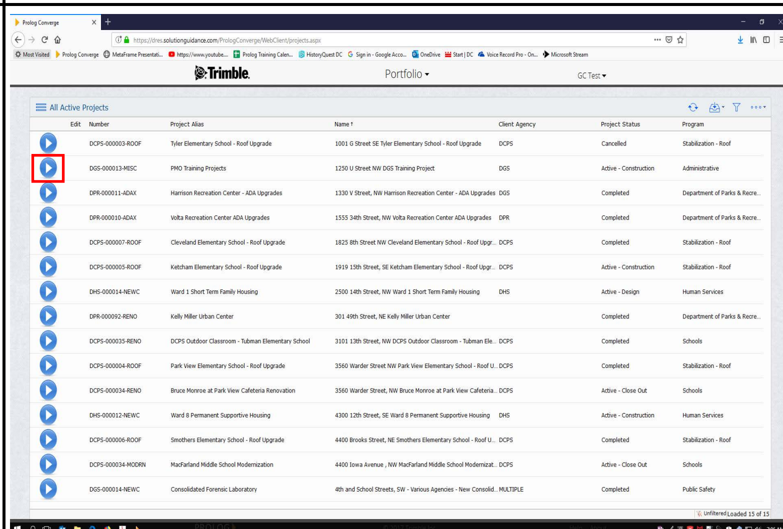


Figure 2

Step 1 - To upload files into the Prolog Converge system, begin by logging into Prolog Converge and opening the project you wish to upload files to.

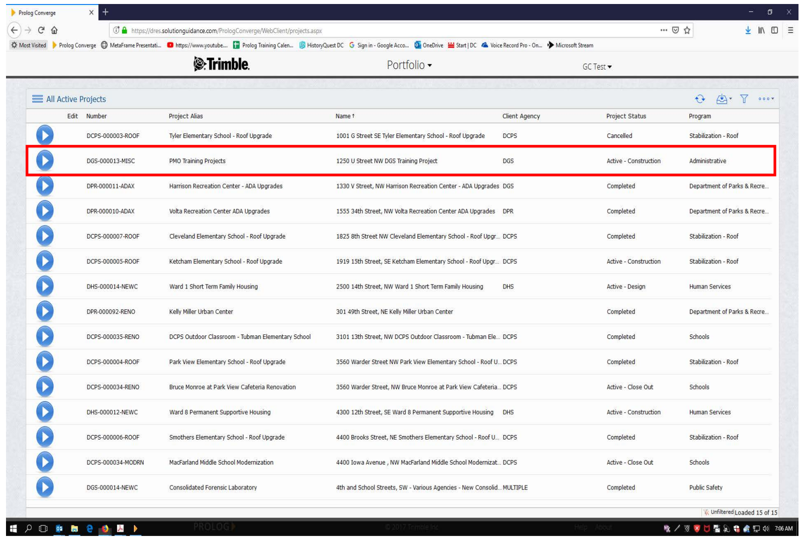


Figure 1

Step 2 - Once the project is opened, click on the "Open View Selector". This will show a list of options available.

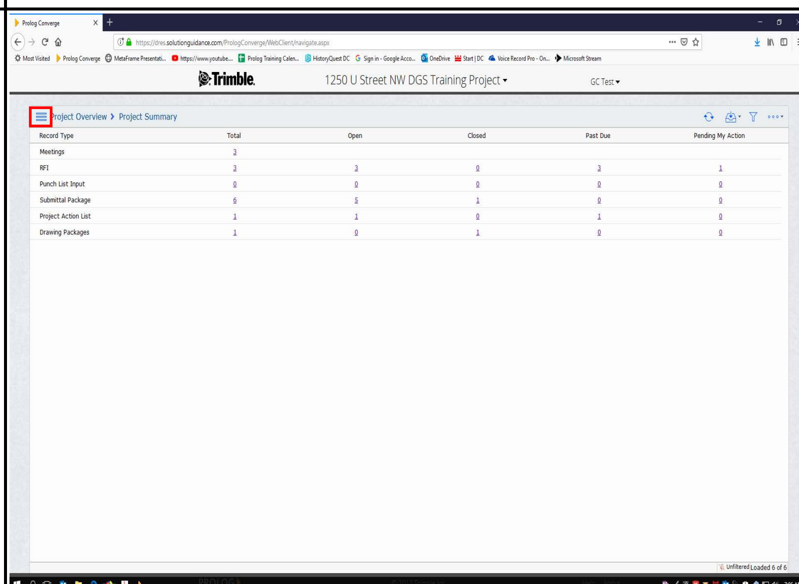


Figure 2

Step 3 - Under Project Files, click the option to View files and the Project File Management system will open…

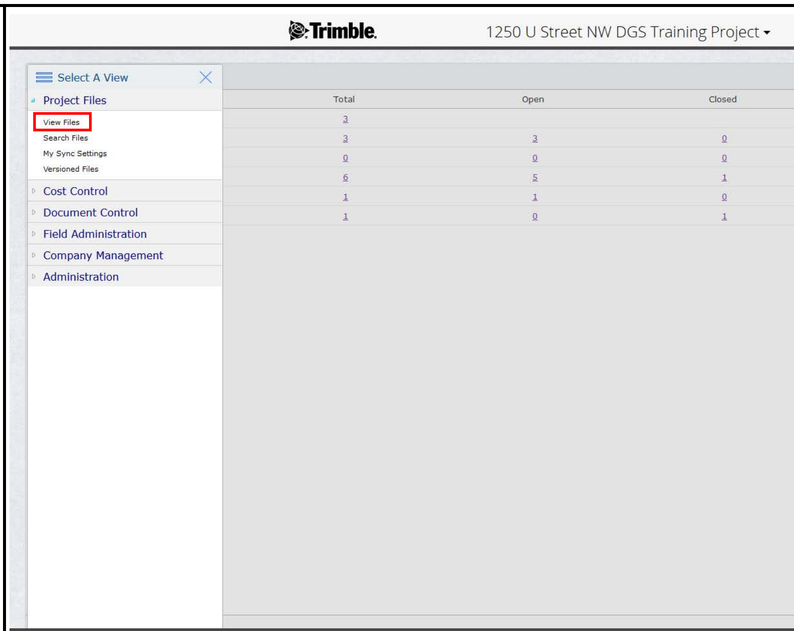


Figure 3

Step 4 - Under the Folder, click the subfolder pathway to where the upload file should go, then click on "Upload New".

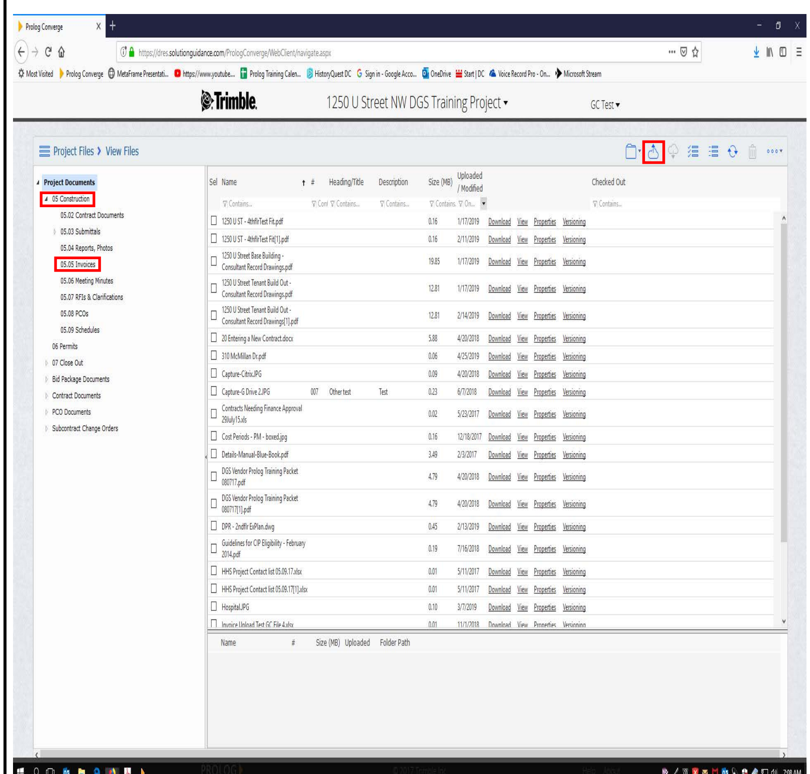


Figure 4

Step 5 - Click the "+" icon to open the File Upload window.

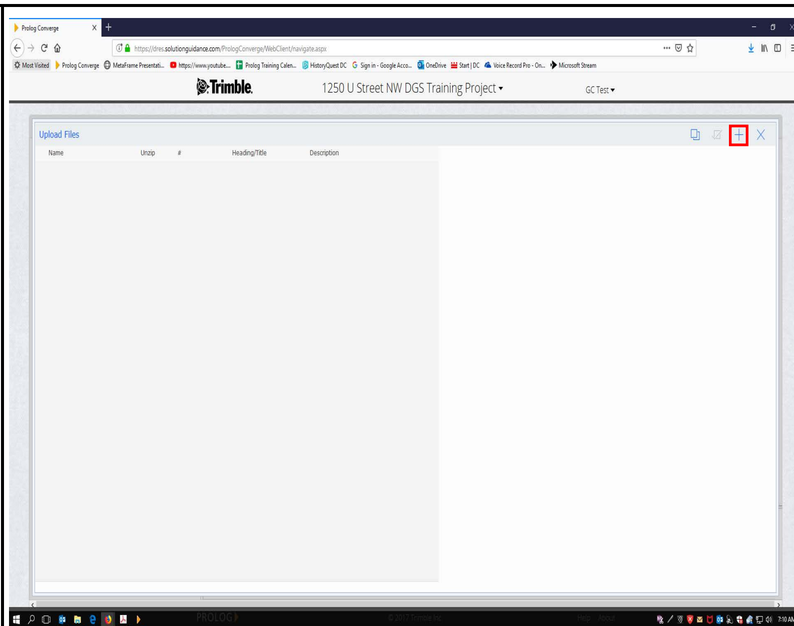


Figure 5

Step 6 - Select the file to be attached and click open. Repeat Steps 5 and 6 for each file that you wish to upload to this project folder.

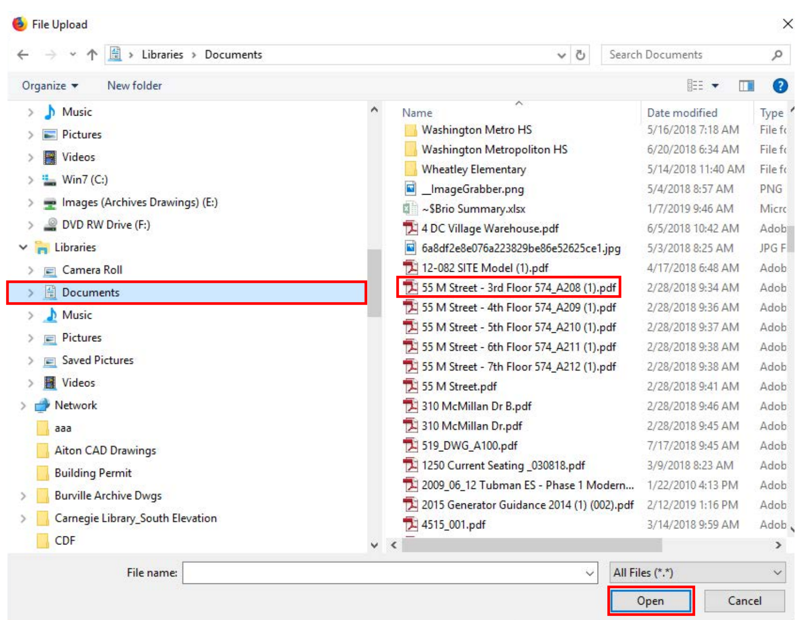


Figure 6

Step 7 - After attaching the file(s) in the Upload Files window, click the "Checkbox" icon to upload the files.

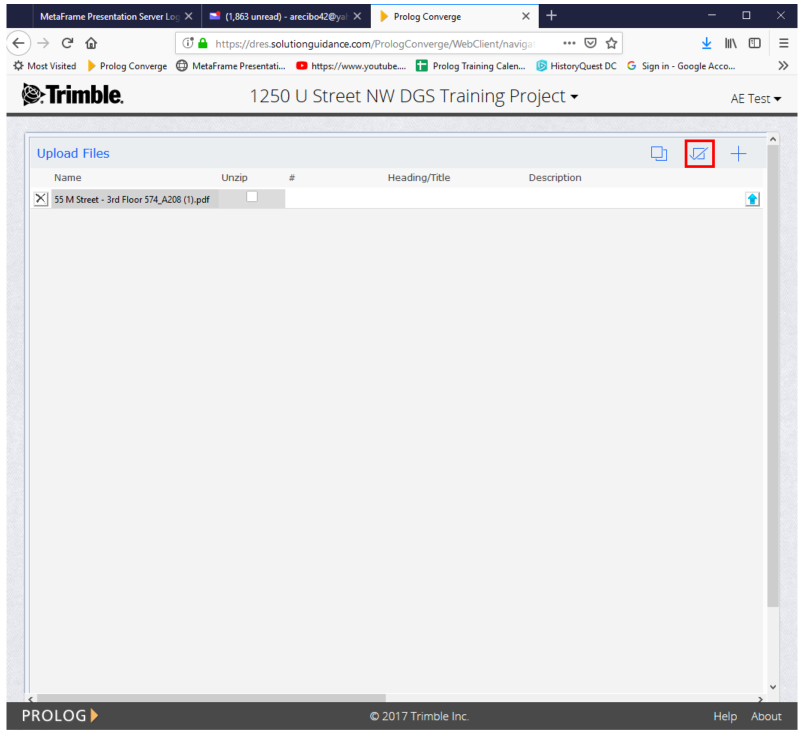


Figure 7

Step 8 - Prolog will notify you of successful or unsuccessful file upload. Click OK when prompted.

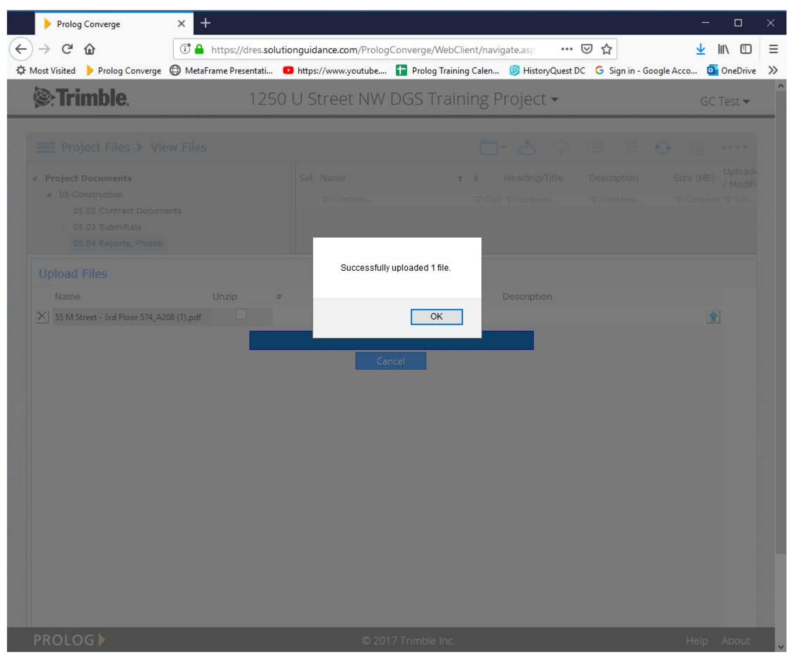


Figure 8

Step 9 - After attaching the file(s) in the Upload Files window, each will show in the bottom of the list of files for that folder on the View Files page.

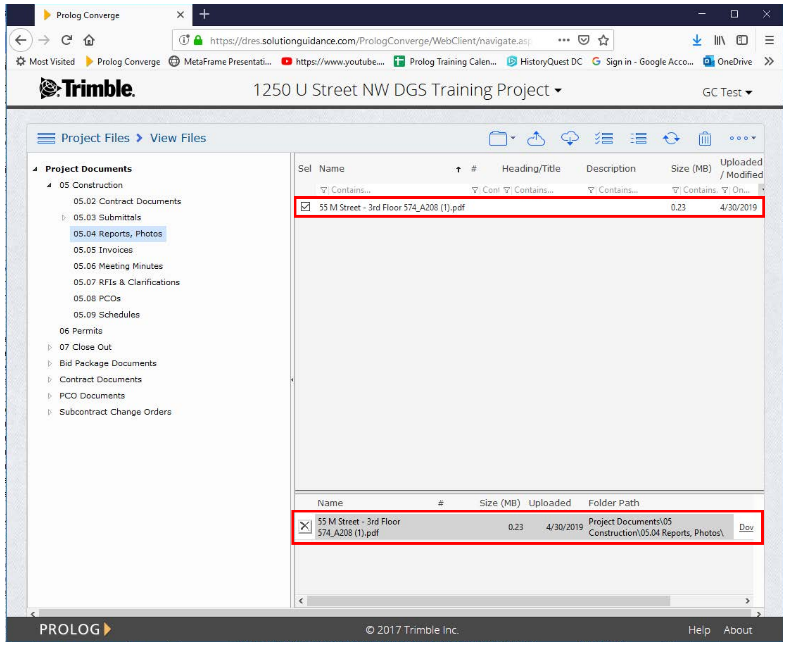
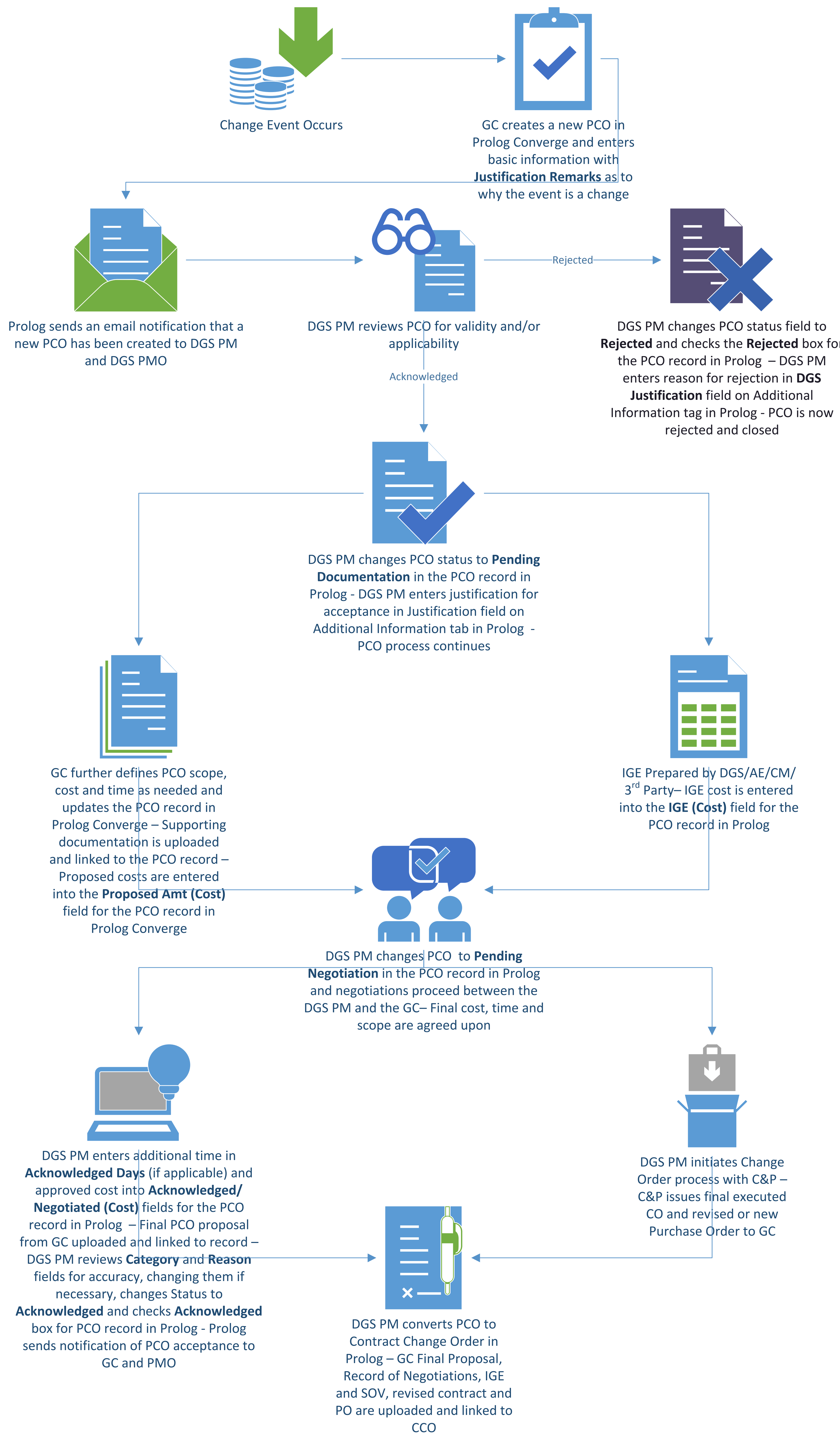


Figure 9

Files can be viewed by navigating to the file you wish to view and selecting the 'View' link to the right of the file name. You will be able to download files from the file view screen and it is reccommended that you always use View instead of Download to make sure that you download the correct file.

NOTE - You can delete files that you have uploaded. If you wish to replace an incorrect file in Prolog Converge delete the incorrect file and upload the corrected version. DO NOT EDIT DOCUMENTS IN PROLOG CONVERGE AND RESAVE OR VERSION THEM.

Potential Change Order (PCO) Tracking Process Using Prolog Systems



Step 1- Select the *Create* option under *Cost Control <Potential Change Orders* from the Prolog Converge *Select a View* menu. This option will open a window allowing you to create a new Potential Change Order (PCO). The new window will open to the *General Information* tab in the Potential Change Orders module.

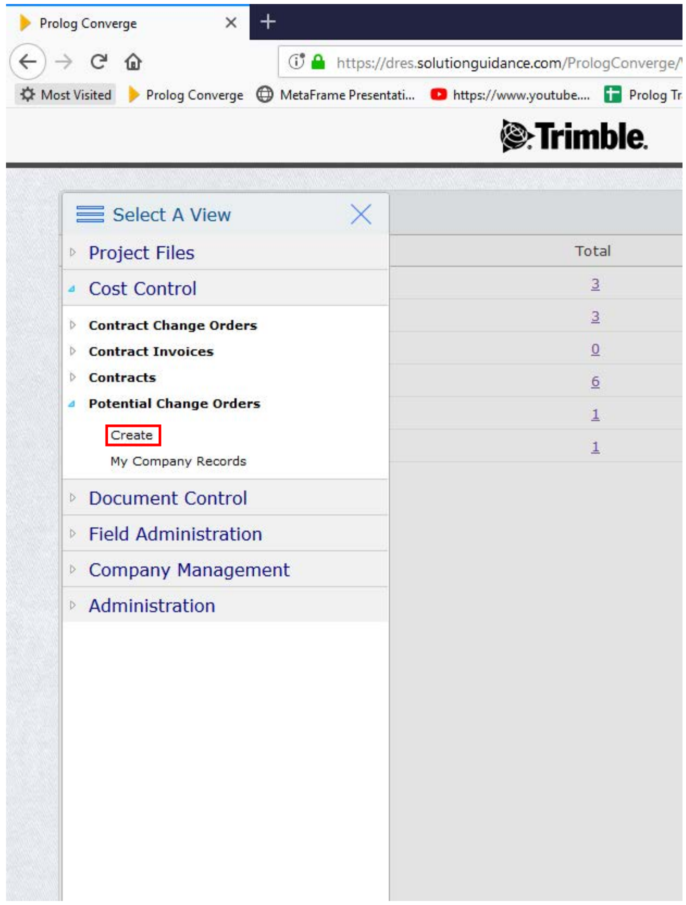


Figure 1

Step 2- In the General Information tab, enter all available information in fields 1 through 5 for the PCO that you are creating. Fields that are colored or have an asterix (*) next to their title are required and you will not be able to save the record without filling out these fields. The Number field populates automatically with the next available number. See Appendix A to this document for usage of the Category and Reason fields.

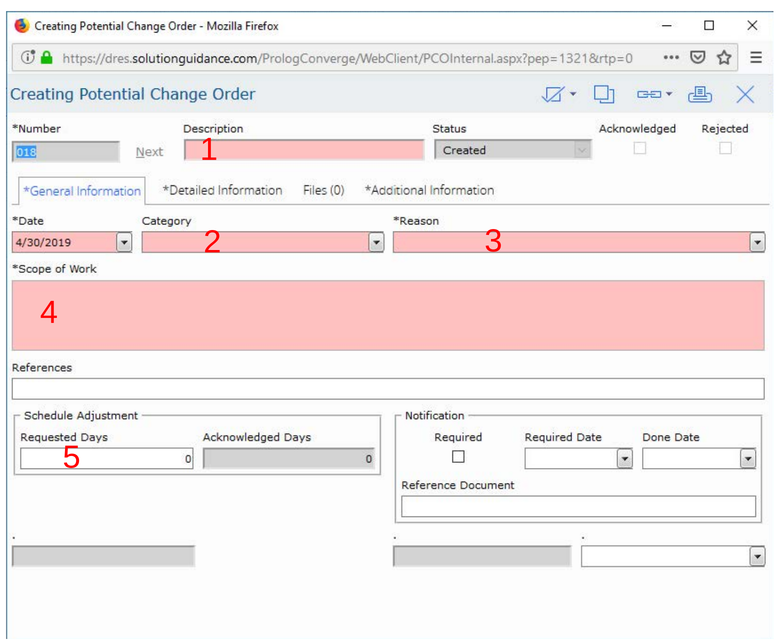


Figure 2

Step 3- On the *Detailed Information* tab, click on *New* to add a new cost line. Add a new cost line for each separate PCO cost item. An example of a separate cost items would be work in separate CSI divisions. Fill in the *Description, Proposed Amt (Cost), PO Number, Vendor,* and *Division* fields for each PCO cost item. You will need to scroll to the right using the scroll bar at the base of the window to reach all of the required fields. PCO, scope, time impacts and cost items may not be known or available upon creation of the PCO. These items can be added, or edited, as required until the PCO is negotiated and acknowledged.

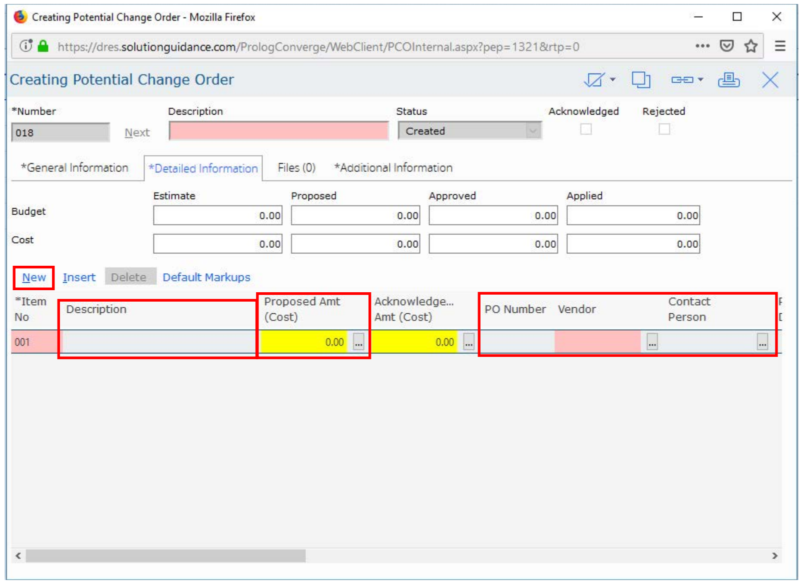


Figure 3

Step 4- Attach files such as photos, directives and proposals by attaching files to the PCO record through the *Attach* link on the Files tab. Files that have been previously uploaded into Prolog Converge can be attached to the record or you can Quick Upload a file once you click on *Attach.* Vendor files should be uploaded to the *PCOs* folder under either the *Design, Construction* or *Construction Management* folder depending on the vendor's project role.

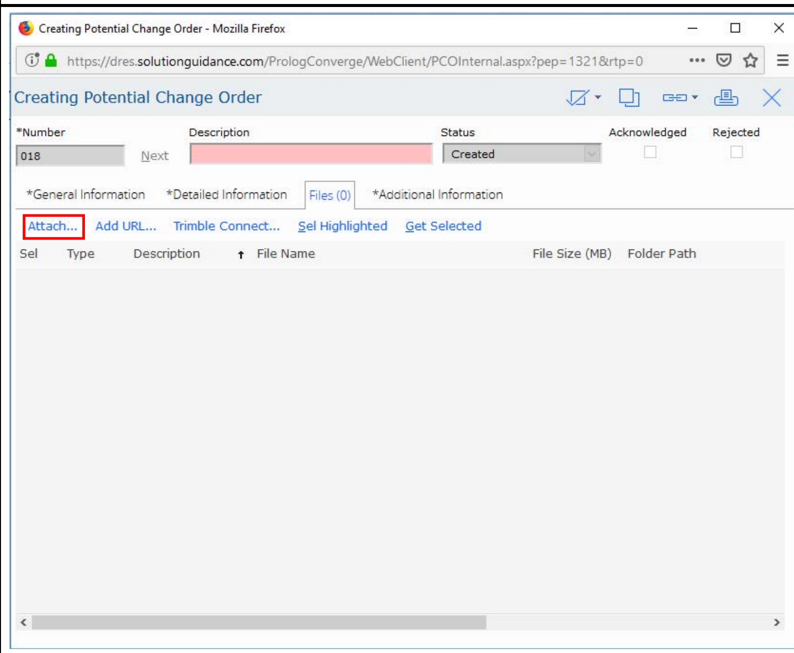


Figure 4

Step 5- On the Additional Information tab, enter the justification for why the work outlined in the PCO would require a change to the contract in the *Justification Remarks* field.

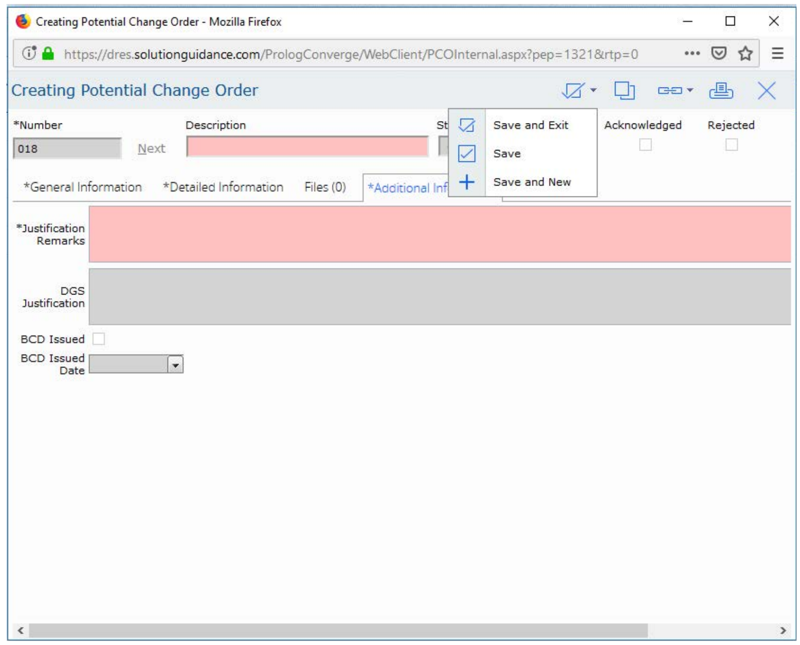


Figure 5

Step 5- Click on the small arrow next to the *Check Box* in the top-right corner of the screen and chose one of the save options to complete and save the new PCO. An automatic notification is sent to the DGS Project Manager from Prolog Converge via email letting them know that a new PCO has been created for the project. Watch your email for notifications from Prolog Converge that will let you know when a PCO has been rejected or acknowledged by the DGS Project Manager.

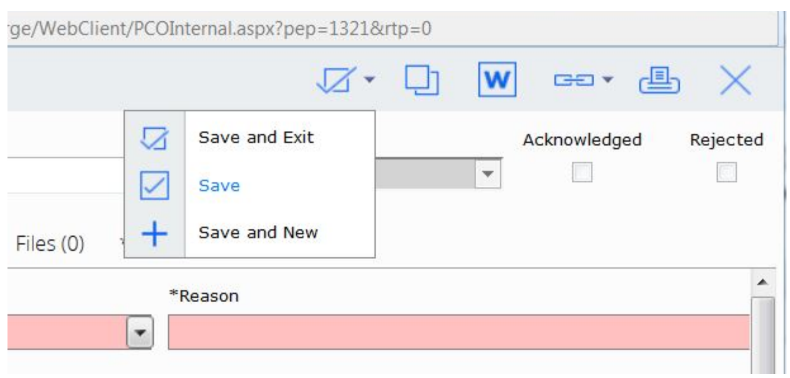


Figure 6

PCO Categories and Reasons - How to Use

Categories	Description of PCO Categories
Add Alternate	Select Add Alternate if the reason for the PCO is to award an Add Alternate for the project
Contingency	Select Contingency if the PCO is a a change that will be covered out of an existing design or construction contingency
Guaranteed Maximum Price	Select Guaranteed Maximum Price if this PCO is due to the award of a definitive contract and GMP for an exisiting letter contract
Unforeseen Conditions	Select Unforseen Conditions if the PCO is due to unforseen conditions at the project site
Client Agency Request	Select Client Agency Request if the PCO is a result of a request for additional scope from the client or using agency
Errors & Omissions	Select Errors & Omissions if the PCO is due to errors or omissions in the design
Other	Select Other if none of the other categories apply to the PCO
Legacy	DO NOT USE

Reasons	Description of PCO Reasons
Add Alternate	Select Add Alternate if the PCO Category is Add Alternate and the reason for the PCO is to award an Add Alternate for the project
Administrative Change	Select if the PCO Category is Other and the PCO is a correction of an internal error or a no cost time extension for billing purposes
Client Agency Initiated Change	Select if the PCO Category is Client Agency Request and the PCO is a result of a request for additional scope from the client or using agency
DGS Initiated Change	Select if the PCO Category is Other and the PCO is the result of a DGS request for additional scope
Errors and Omissions	Select if the PCO Category is Errors & Omissions and the PCO is due to errors or omissions in the design
Unforeseen Conditions	Select if the PCO Category is Unforseen Conditions and the PCO is due to unforseen conditions at the project site
Value Engineering	Select if the PCO Category is Other and the PCO is a result of a Value Engineering effort or suggestion
Weather Conditions	Select if the PCO Category is Other and the PCO is a result of excessive weather delay days above and beyond those normal for the District
City Leadership	Select if the PCO Category is Other and the PCO is a result of direction from the Mayor, City Council or other City Leader
Contingency	Select if PCO Category is Contingency and the cost will be covered from the Contingency
Guaranteed Maximum Price	Select Guaranteed Maximum Price if the Category is Guaranteed Maximum Price and this PCO is due to the award of a definitive contract and/or GMP for an exisiting letter contract
Other	Select if the PCO Category is Other if none of the other reasons apply to the PCO
Legacy	DO NOT USE

Step 1 - Work Instructions for the RFI Module for the GC in Prolog Converge:

Upon logging into the project a Project Summary will be presented to you on the status of all record types, including RFI's. It will show:

Total - All RFI's that have been put into the project database

Open - Number of RFI's not closed by the PM

Closed - All RFI's Closed

Past Due - All RFI's not closed by specified date

Pending My Action - All RFI's that are waiting on action by the logged in user

All numbers act as a link that will go directly to the specified section.

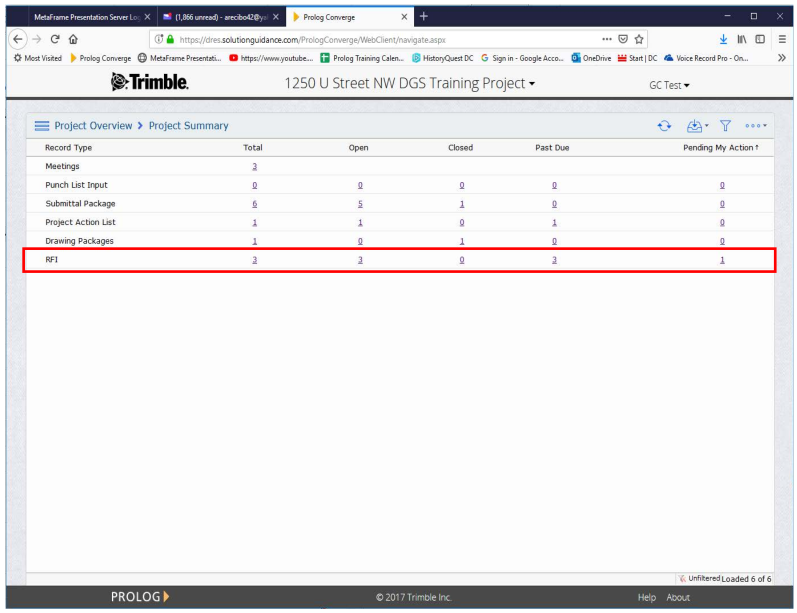


Figure 1

Step 2- Creating a New RFI Record:

To create a new RFI in Prolog on the Left Hand Side of the Screen Click on:

Select a View > Document Control > RFIs > Create

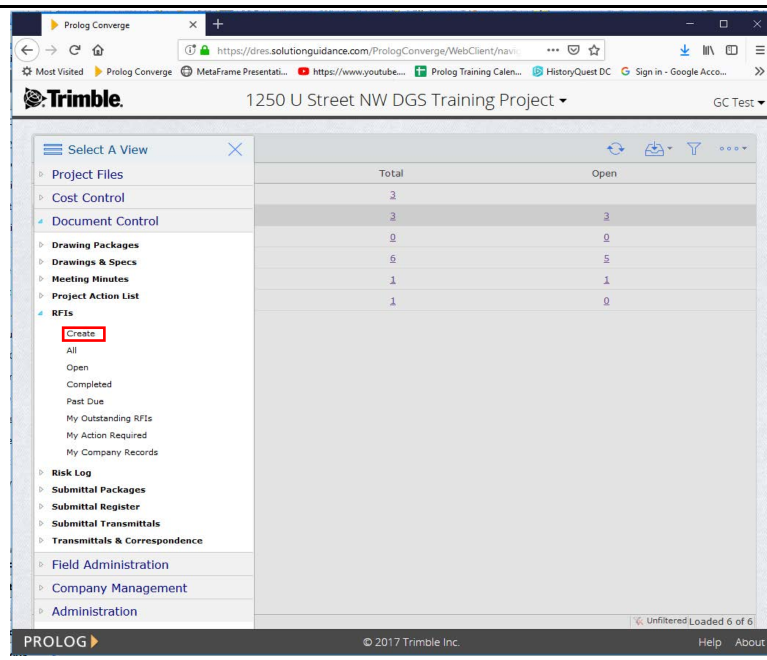


Figure 2

Step 3- Next a screen will open for **Creating Request for Information (RFI)**, that is ready to be filled in with the proper information.

All pink fields and asterisked (*) are required to save and submit the record

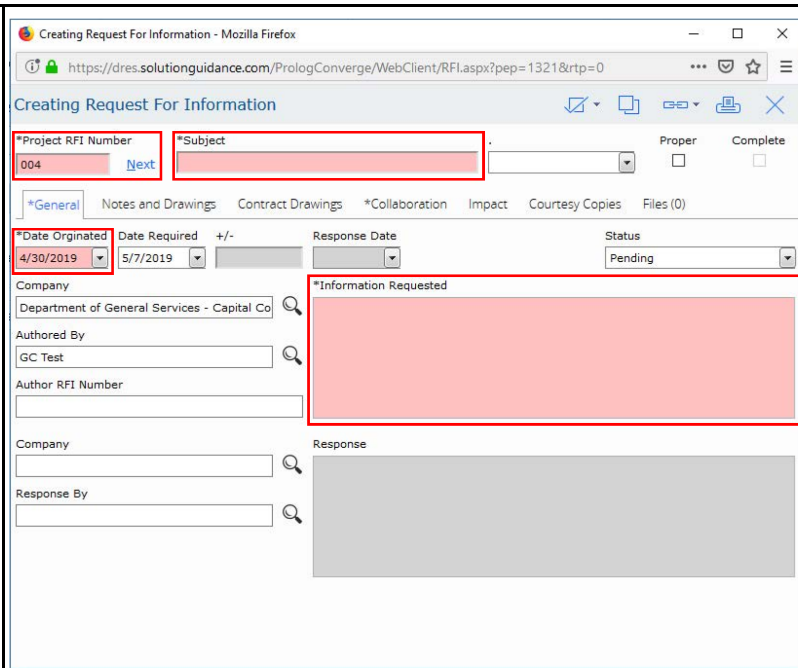


Figure 3

Step 4 - **Project RFI Number** will auto fill to the next available number. It can be changed if need be. Fill in the **Subject** with an appropriate title for the RFI.

Date Originated will auto populate to the current date this can be changed if necessary. **Date Required** will always be set at one week, but can be adjusted, unless the contract says otherwise.

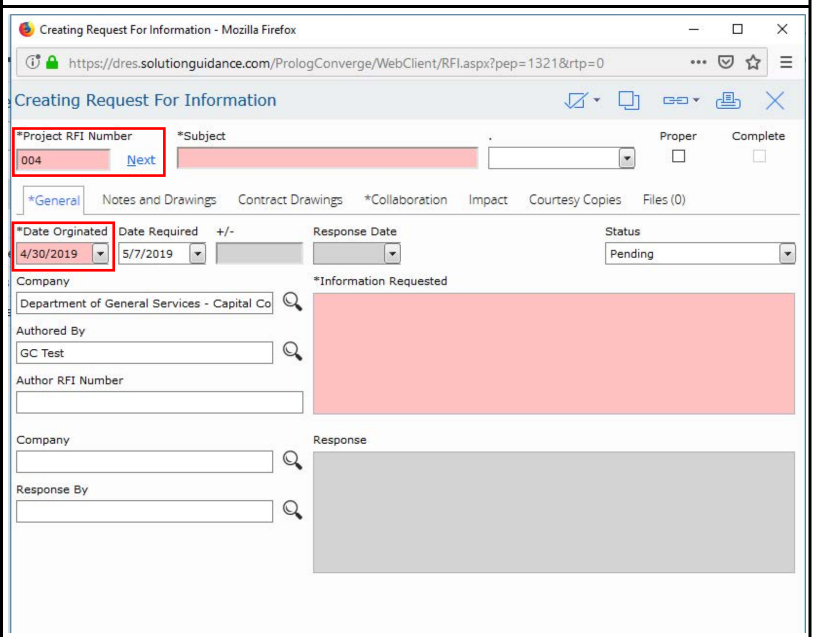


Figure 4

Step 5 - Fill in the **Information Requested** section with all the pertinent details to why the RFI is being submitted.

The **Company** and **Authored By** will auto fill to your contact information. If necessary to change see steps **8** and **9**.

Note: **"Response by**" field will be filled in once the RFI is closed by the DGS PM.

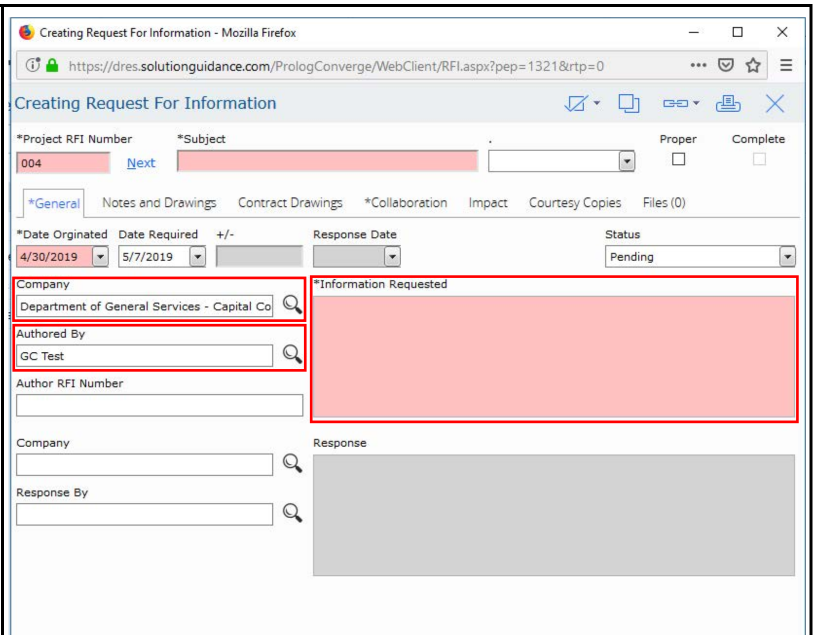


Figure 5

Step 5 - To search by company use the popup button to the right of the box this will open the **Company Search** window. Filtering by type of company, company ID, and company may be accomplished with the above three fields. Remove the check for "Limit to Project" field. Use the search icon once criteria are set. The companies will appear below. To select a company, simply double-click.

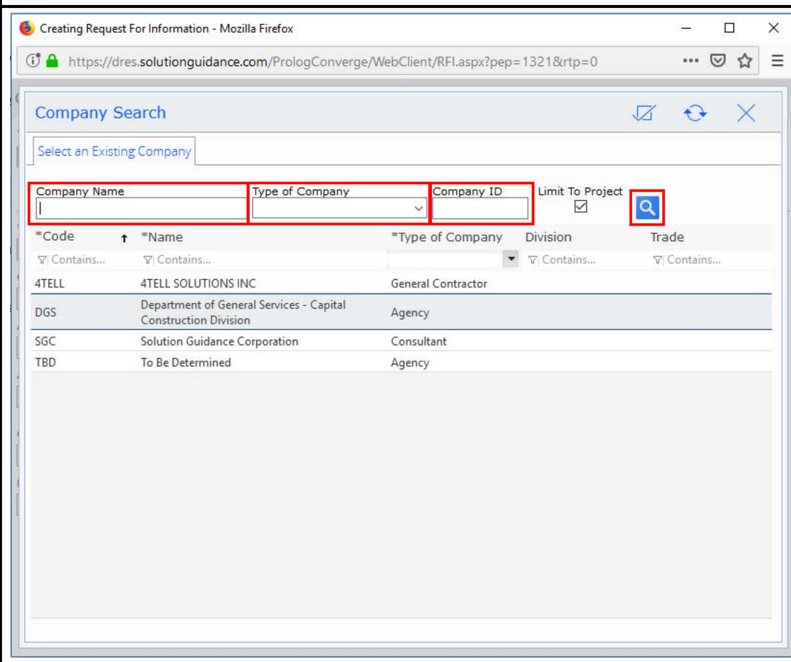


Figure 6

Step 7 - To search by author, filtering by display name may be accomplished using the field highlighted in Figure 9. Select the search icon once the display name field has been populated. Remove the check from "Limit To Project" field. The contacts will appear below. To select a contact, simply double-click (the company will auto fill in by selecting a contact).

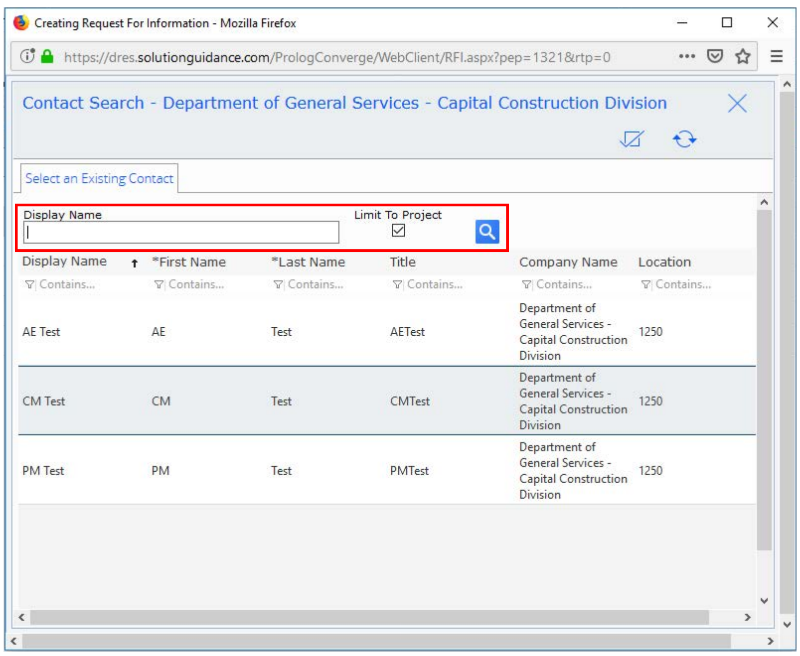


Figure 7

Step 8 - When finished with the General Tab front page proceed to **Notes and Drawings** tab. Here you can enter in the **Suggestion** box any ideas you may have to the answer of the RFI.

When done proceed to **Contract Drawings**.

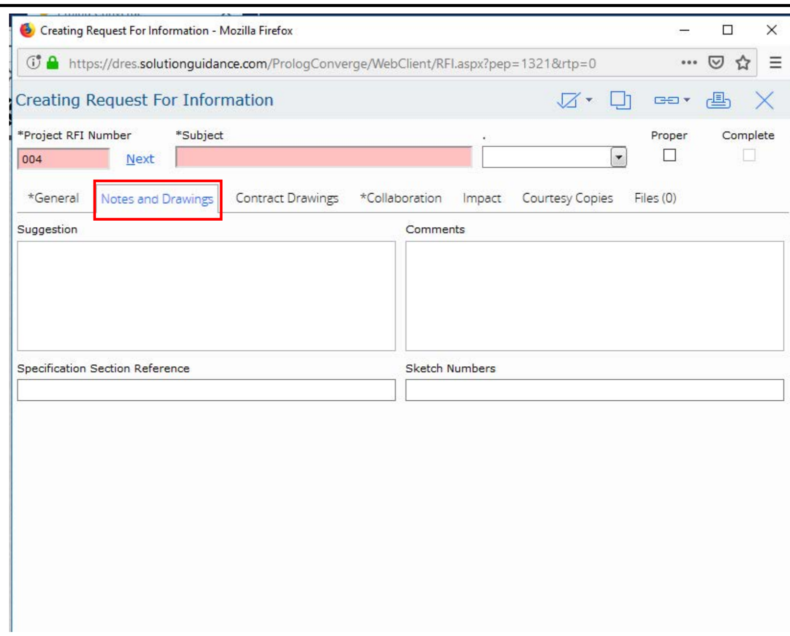


Figure 8

Step 9 - In **Contract Drawings** in the **Drawings & Specs** module, affected contract documents can be linked by click **Add**, and proceeding to Step 12.

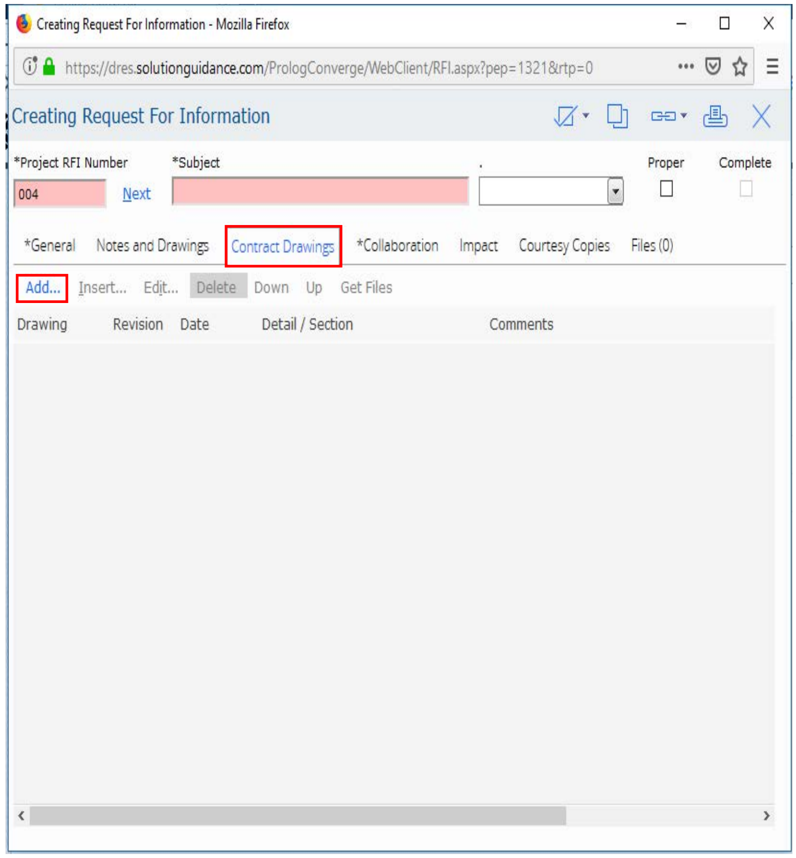


Figure 9

Step 10 - When you select **Add**, the **Drawings and Specs Search** window opens. Filter by discipline or revision date. Hit select or use the mark buttons to add multiple drawing records to the RFI.

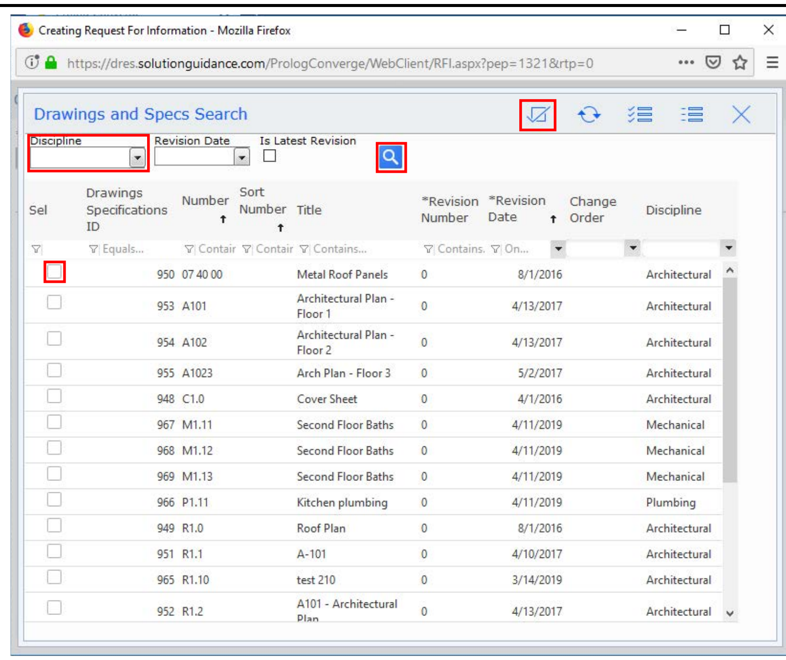


Figure 10

Step 11 - Proceed to the collaboration tab. Actions can be assigned, RFI assignments can be tracked, and response times can be monitored from this tab.

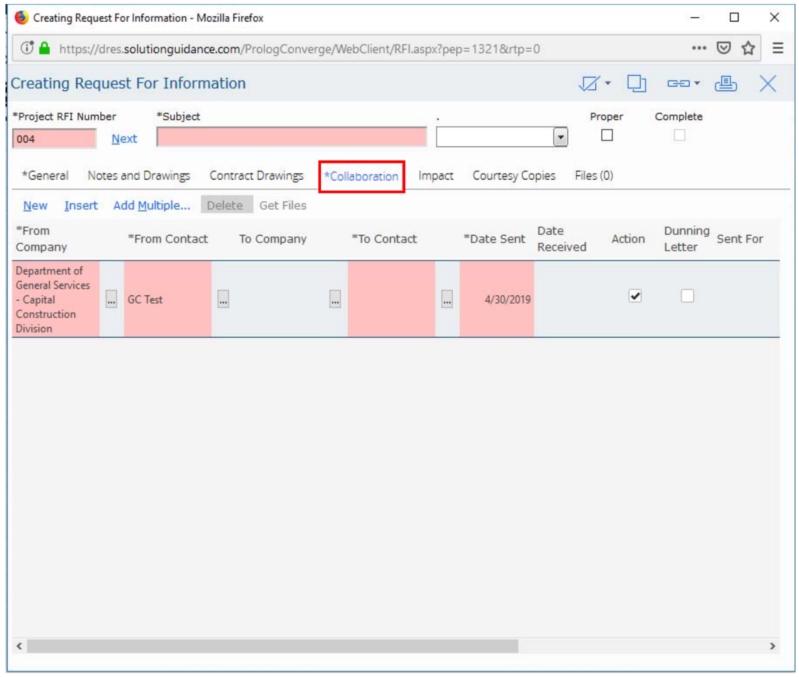


Figure 11

Step 12 - Under the collaboration tab select New to add a row for tracking the record. Select the "To Company" and the "To Contract" with the lookups buttons.

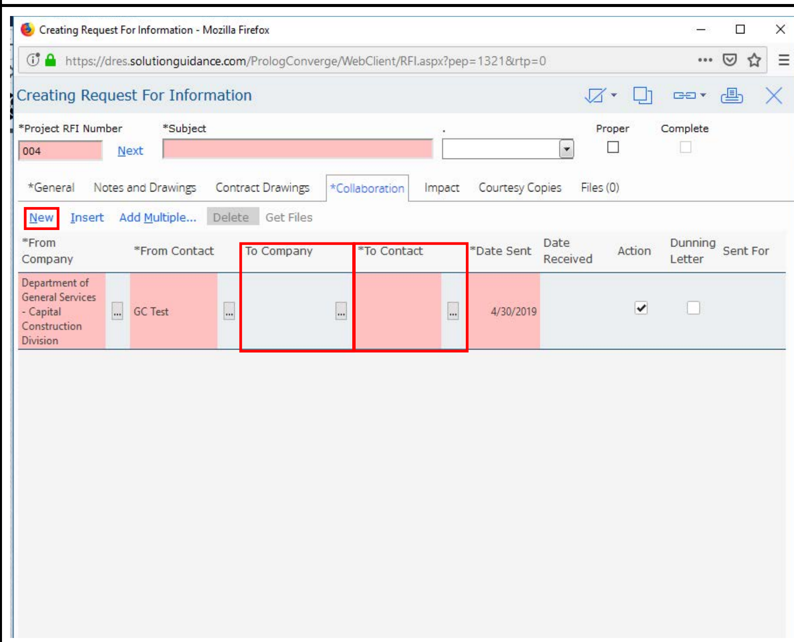


Figure 12

Step 13 - Selecting the "To Company" button opens the **Company Search** window. Filtering by company name, type of company, or by company ID, may by accomplished with the above fields. Select the search icon once the criteria are set. The companies fitting the search parameters will appear below. Double-click to select a contact. The company will auto-fill based on the selected contact.

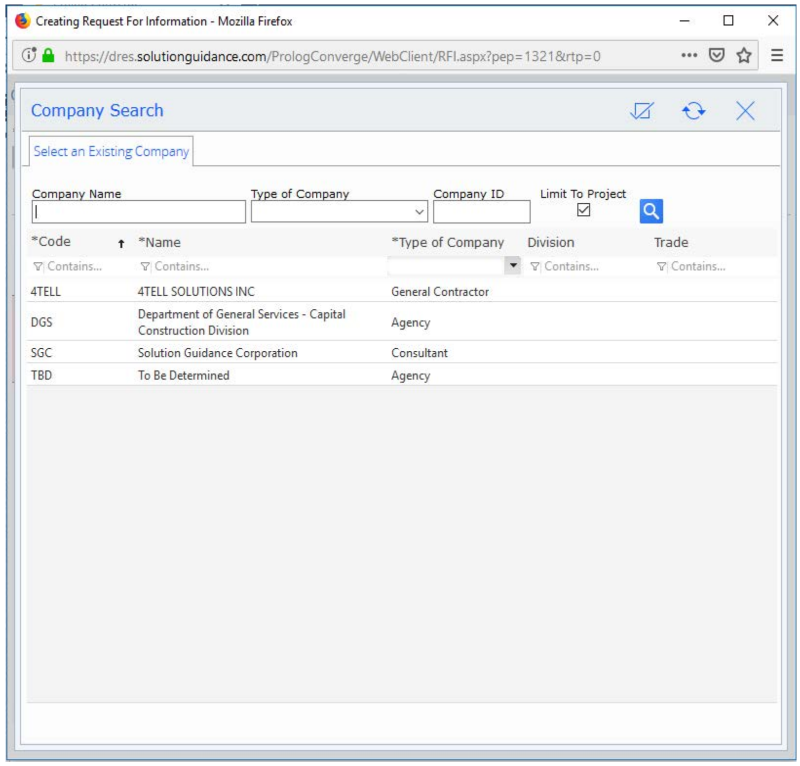


Figure 13

Step 14 - Make sure once a contact has been selected that the **Action** box is checked. This will trigger an automatic notification and show upon initially logging into the project.

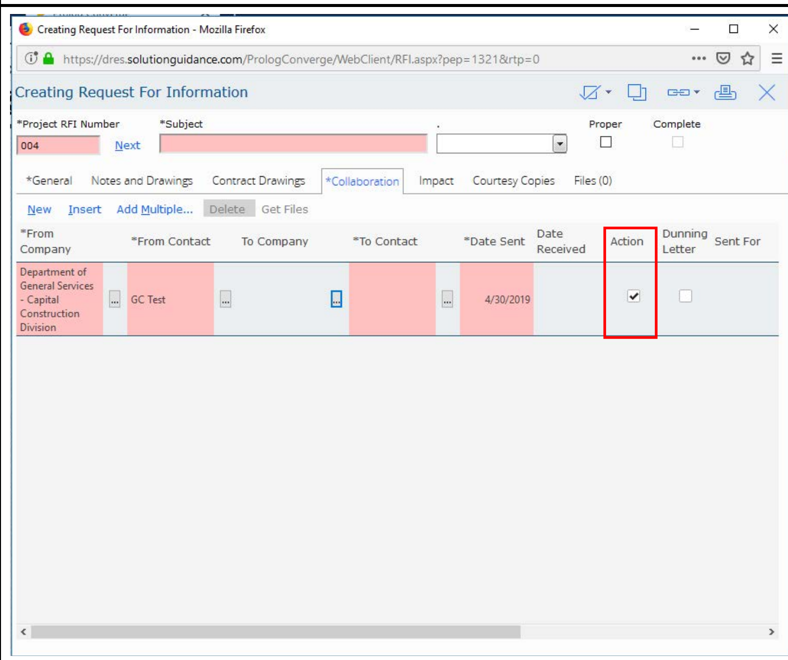


Figure 14

Step 15 - Fill in the **Sent For**, **Sent Via**, and **Comments** boxes as necessary. This can be done for as many reviewers as are required.

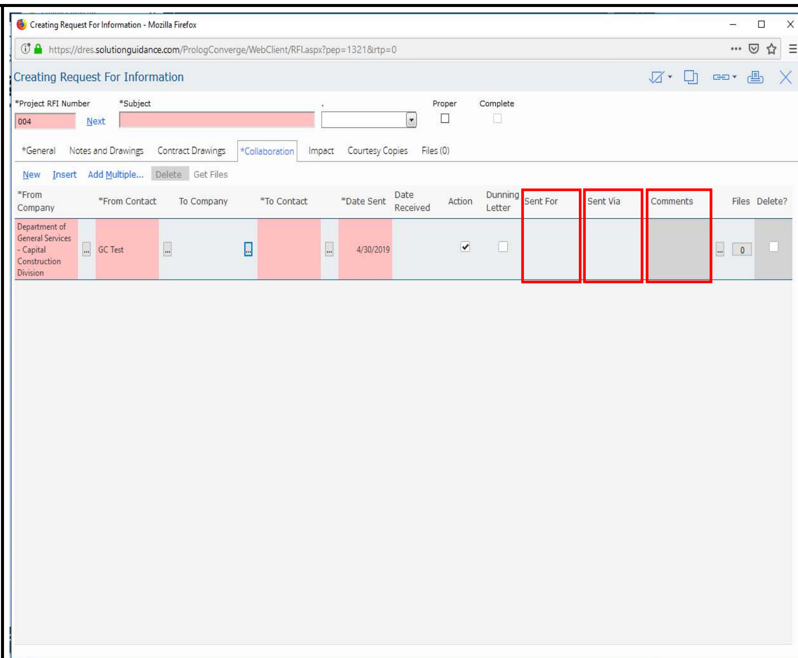


Figure 15

Step 16 - IGNORE COURTESY COPIES

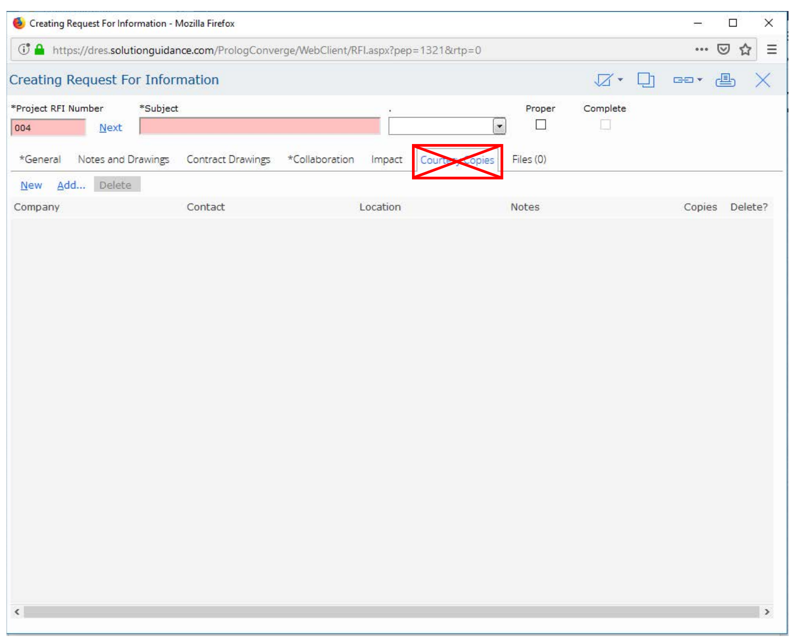


Figure 16

Step 17 - Finally proceed to the files tab to add any and all necessary documents (for example: marked up drawings or field photos) that will help in the answering of RFIs. To begin select the **Attach** field.

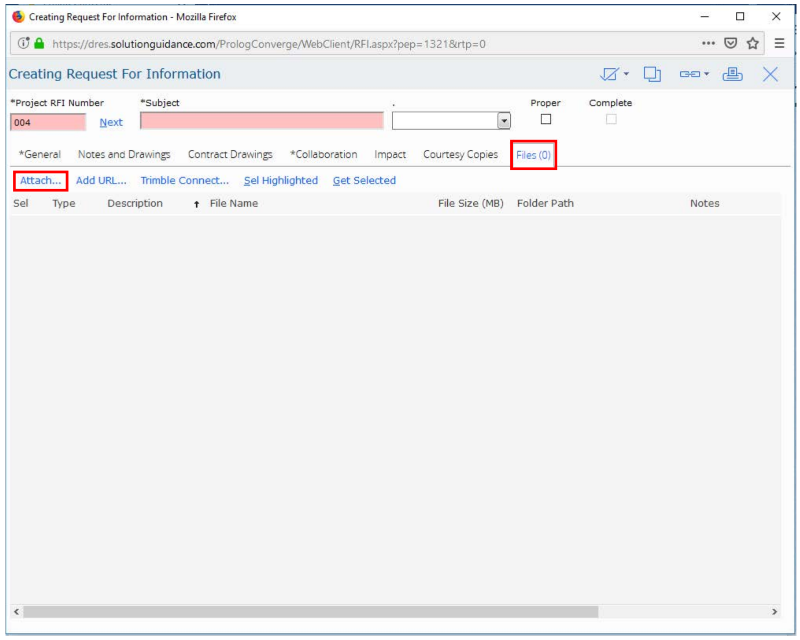


Figure 17

Step 18 - The Prolog Converge Document Management system will open in a new window.

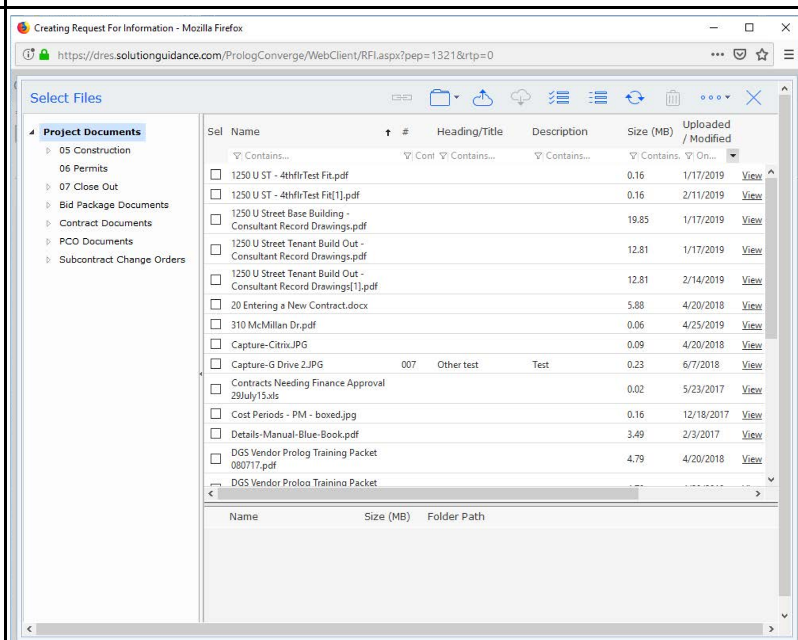


Figure 18

Step 19 - If the file to be uploaded has not been placed into the system, selecting the **Other Submittals** folder and clicking the **Upload New** icon will allow for adding said files.

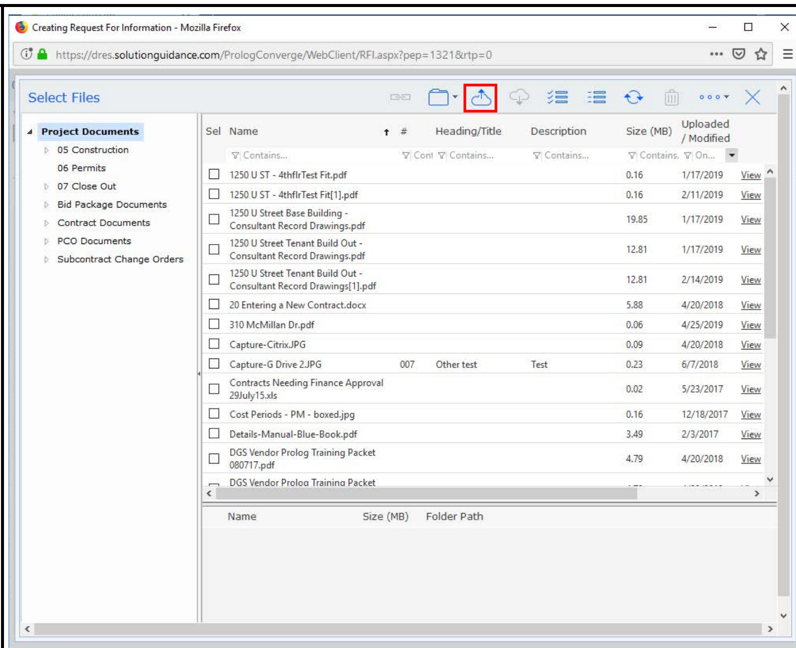


Figure 19

Step 20 - The file upload box will open. Select **Browse** then find the files to upload by selecting each and clicking **Open**.

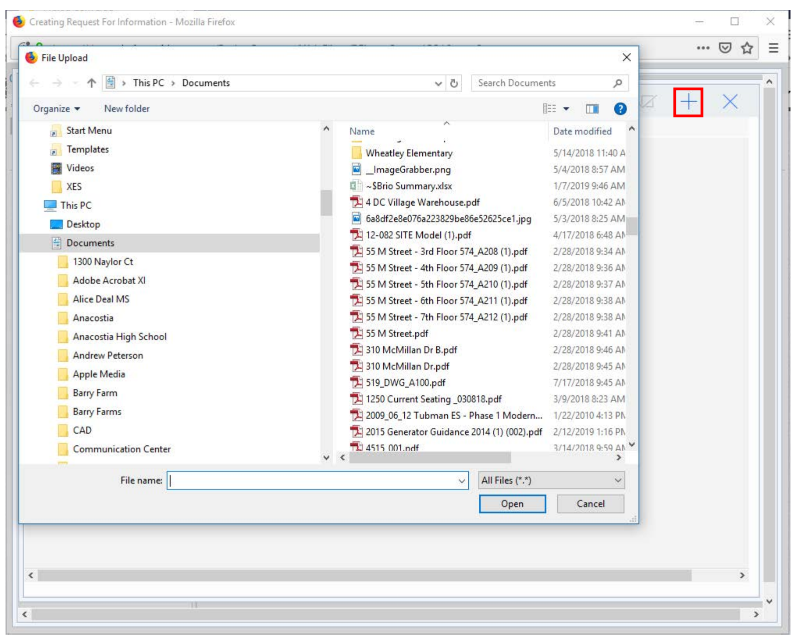


Figure 20

Step 21 - When done selecting as many files as necessary, click the **Upload** button.

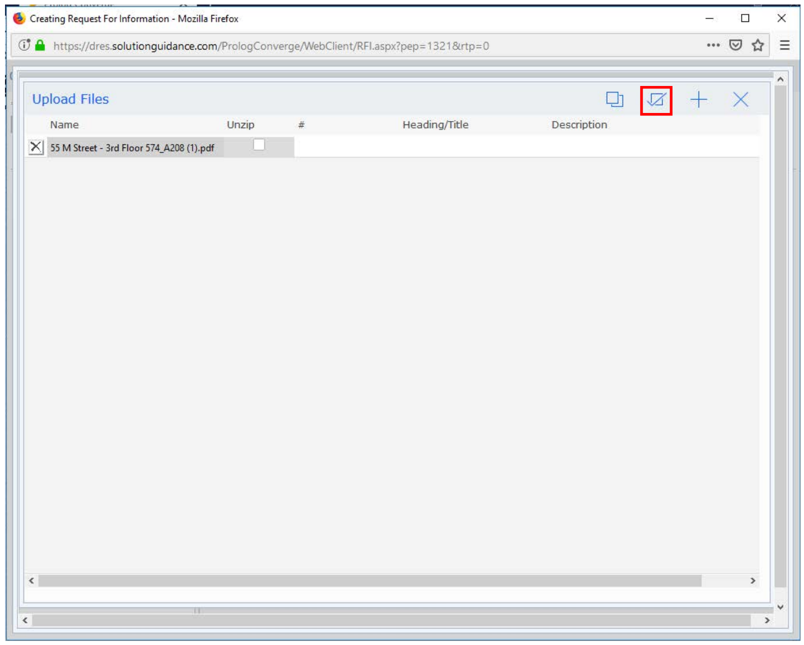


Figure 21

Step 22 - The file upload box will open. Select **Browse** then find the files to upload by selecting each and clicking **Open**.

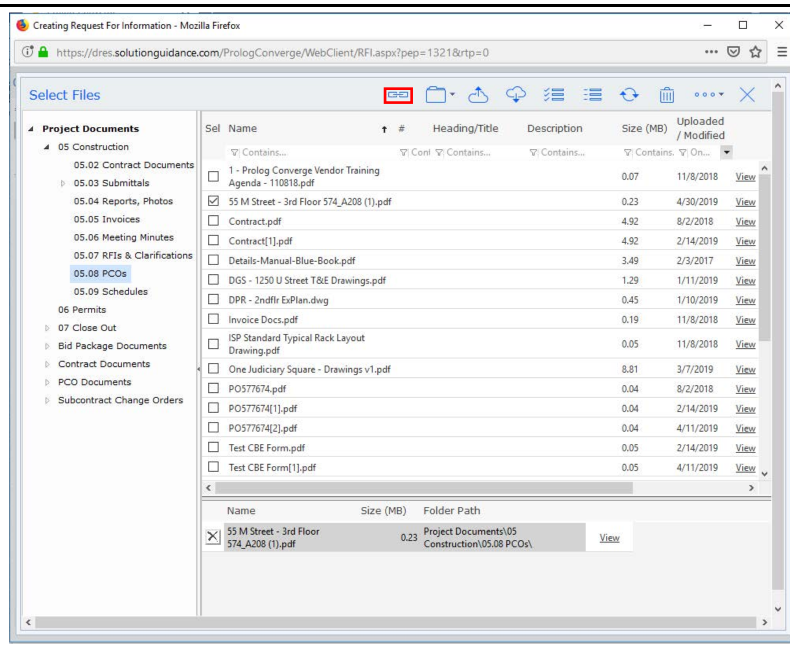


Figure 22

Step 23 - To save the record, go to the "Save and Exit" drop down, and select save.

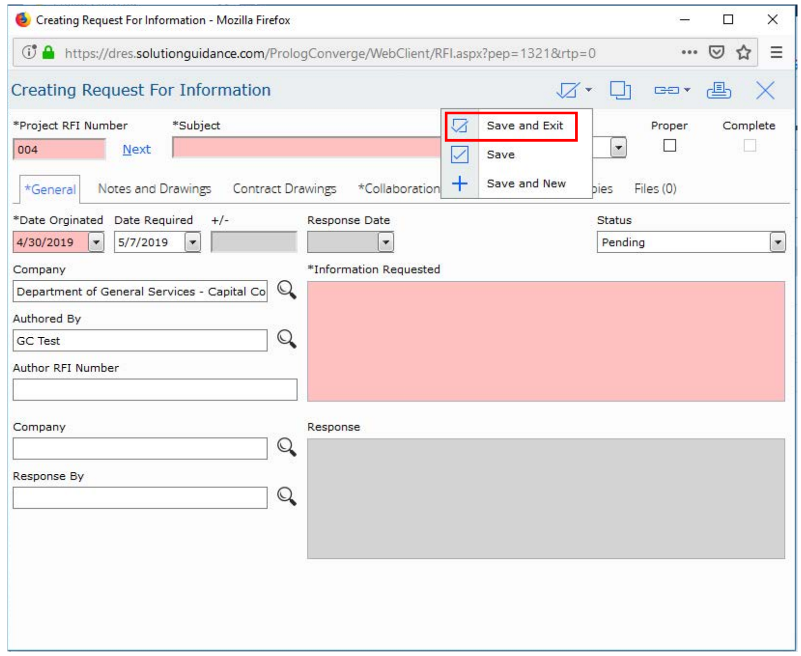


Figure 23

Step 24 - To print the record, go to the "Print" drop down and select the report that best suits what is needed. The majority of the time the default report would be at the top of the drop down list.

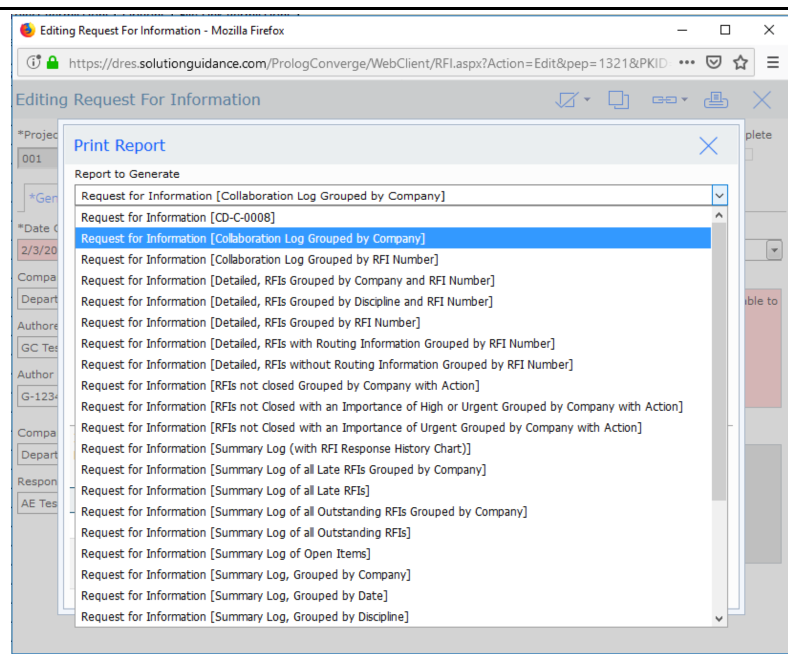


Figure 24

Step 25 - To send the record through email, go to the "Print" drop down then select the RFI report desired, then select the "Email" icon. Again, the majority of the time the report needed will be the default report at the top of the list.

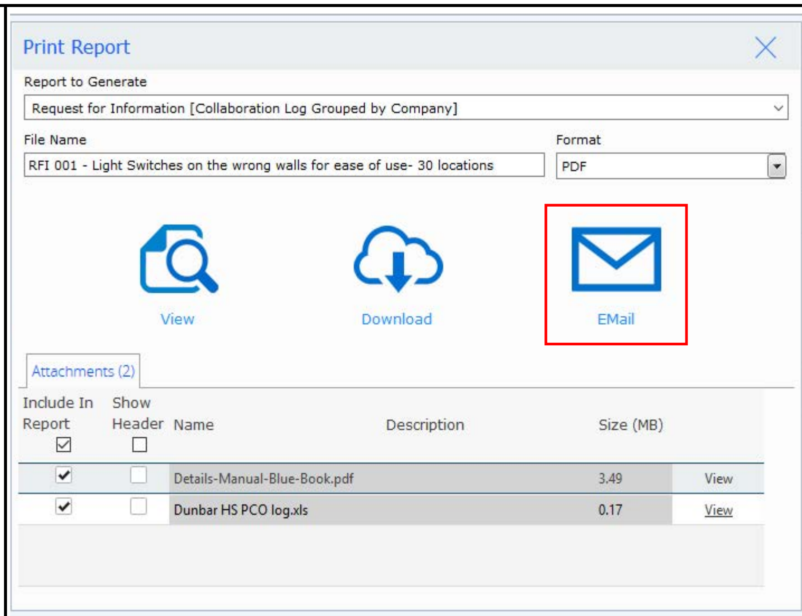


Figure 25

Step 26 - The file upload box will open. Select **Browse** then find the files to upload by selecting each and clicking **Open**.

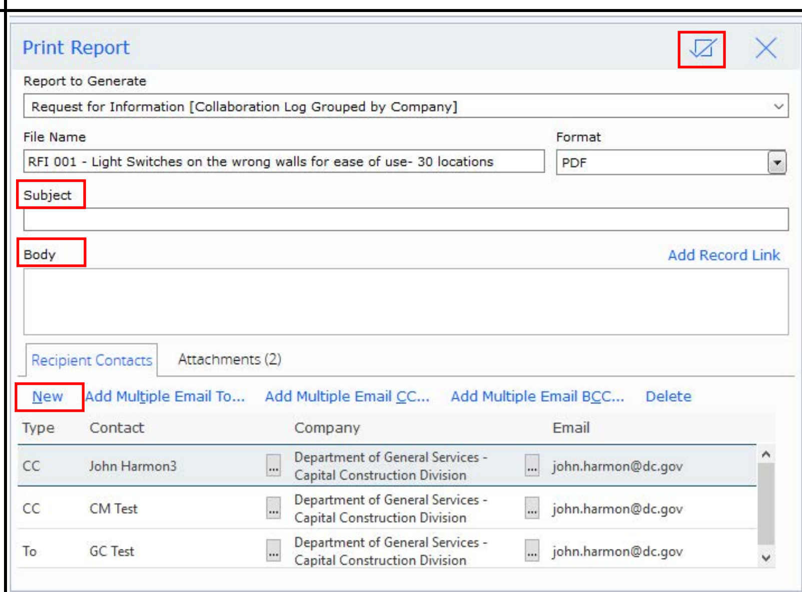


Figure 26

Step 27 - Once the record is saved, the contact with action required will receive an email with the attached link. By clicking on the link, the RFI and converge will appear.

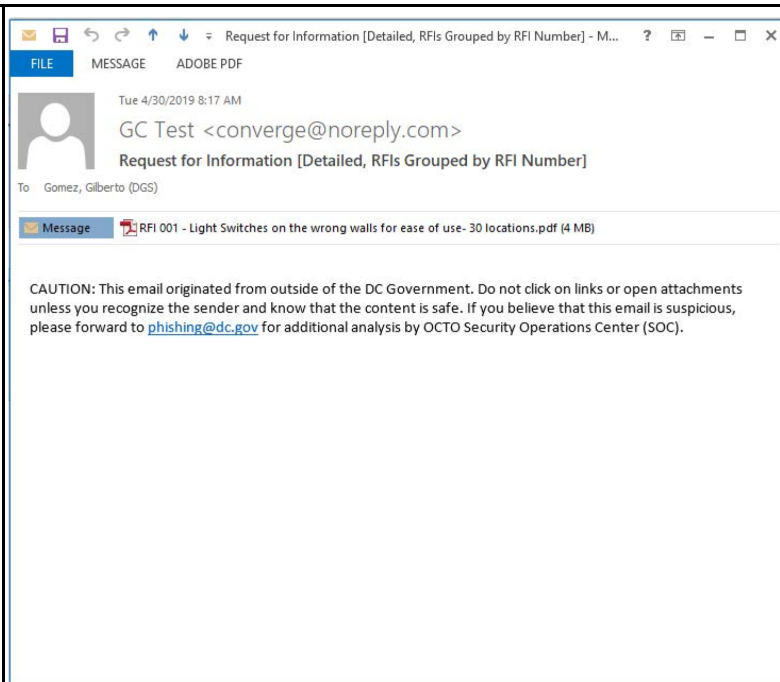


Figure 27

Step 1 - Creating Submittal Items and the Submittal Register in Prolog Converge:

In order to create this submittal item in Converge, the user must go to the Submittal Register modeule and click on:

Select A View > Submittal Register > Create

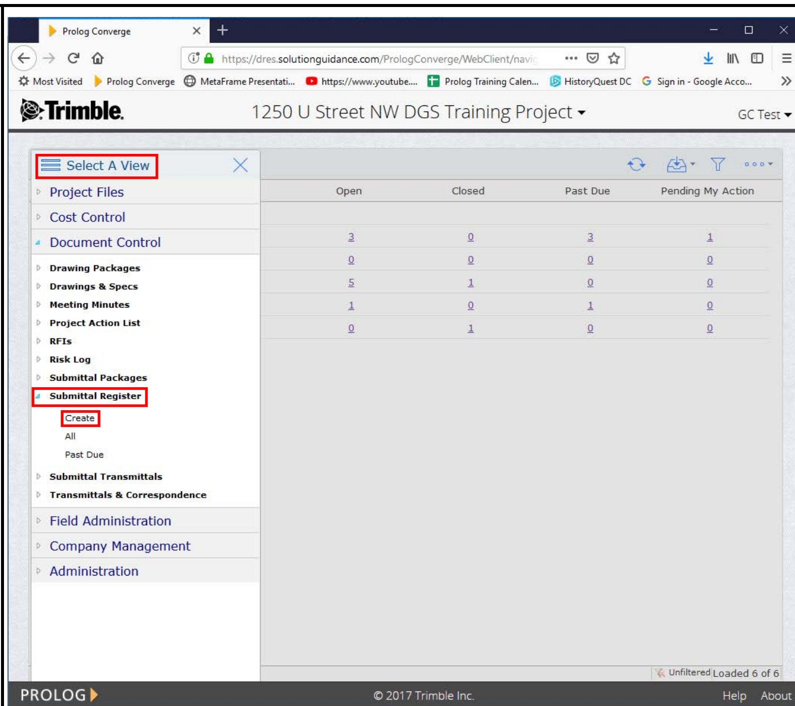


Figure 1

Step 2- A blank Submittal Register form will open up in Prolog Converge. Each submittal must have the required information (identified with an asterisk and/or a pink field) displayed clearly and visibly on the submitted documents; if not possible, a separate transmittal must be created for each individual register item.

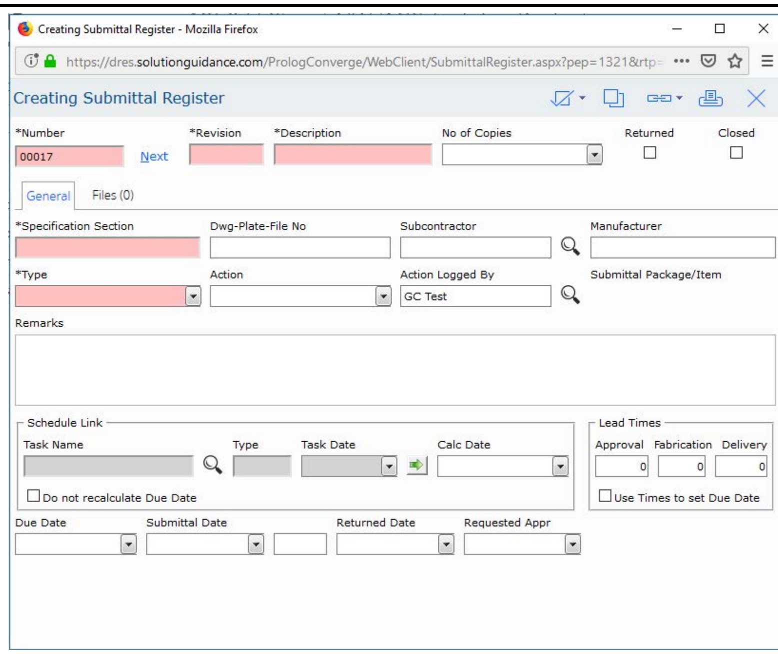


Figure 2

Step 3- Required fields are as follows:

- **Number**: This auto-generates to the lowest available number but can be changed as necessary.

- **Revision**: The revision will always be zero (0) for the original item.

- **Description**: A brief description of the submittal item as called out in the specifications.

- **Specification Section**: This is the area where the item is called out in the specifications. For Example: 08115-1.3A

- **Type**: Selection the appropriate submittal type from the drop down.

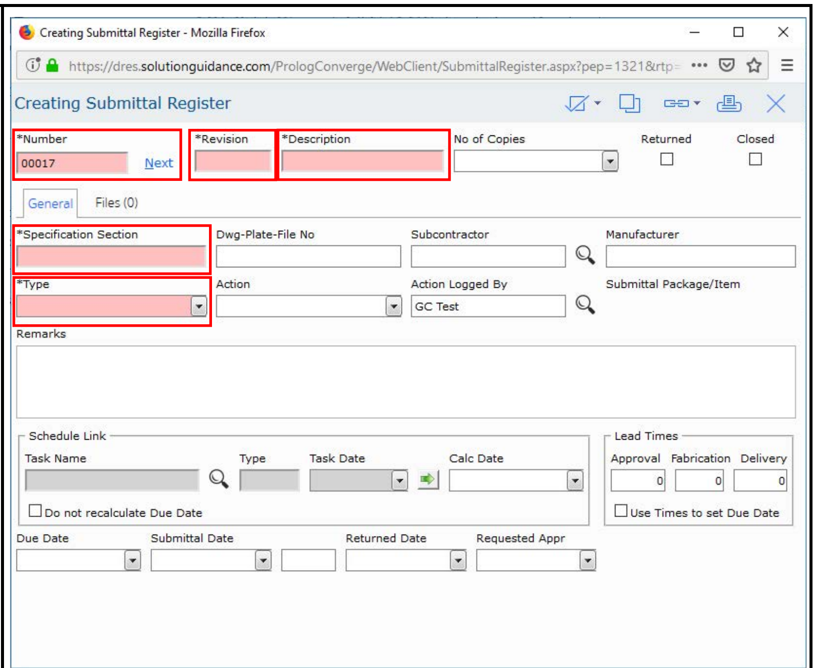


Figure 3

Step 4 - Fill in the **Due Date** for all submittals (the date the contractor plans to submit this Register). This field is not marked as mandatory, but is still important information to provide. Similarly, the **Submittal Date** is not essential but helpful to a more complete Register. This date entry accounts for when the Register is to be submitted to the A/E.

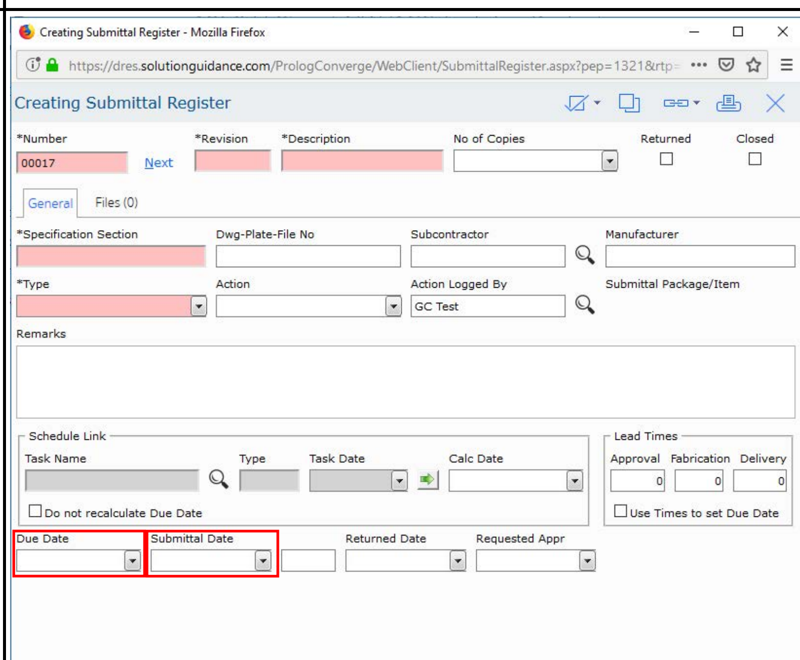


Figure 4

Step 5 - When done with the Submittal Register Item, click the applicable save option in the top right-hand corner. If adding more items click **Save and New**. If done click **Save and Exit**.

Repeat steps 1-3 as many times as necessary. To complete the Submittal Register Log.

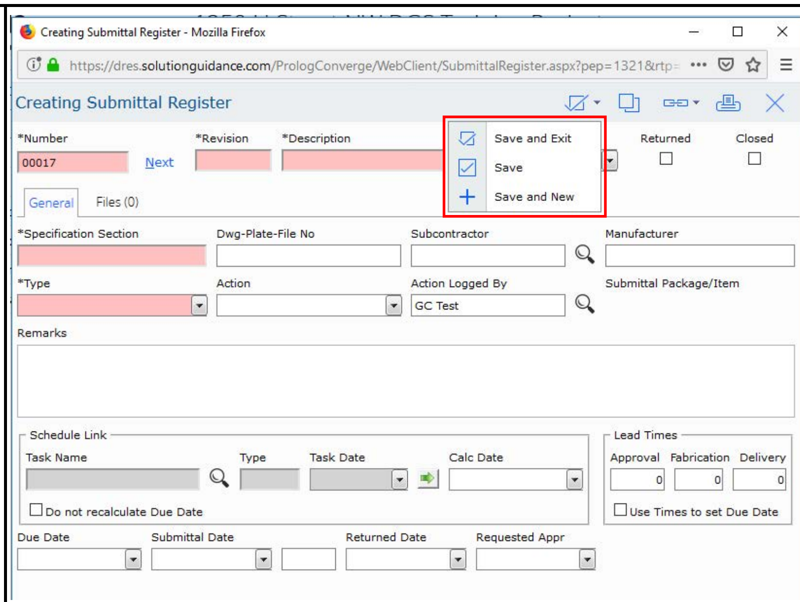


Figure 5

When the necessary information from the A/E has been provided, updates with the **Action** and **Returned Date** can be added. Again, these are not mandatory but go towards a more complete record. Then click the appropriate Save option.

Figure 6

Step 1 - Following completion of the Submittal Register it must be sent to DGS and AE for approval before being used in the submittal package process.

To do this head to the **Reports** section from the drop down menu at the center top of the window.

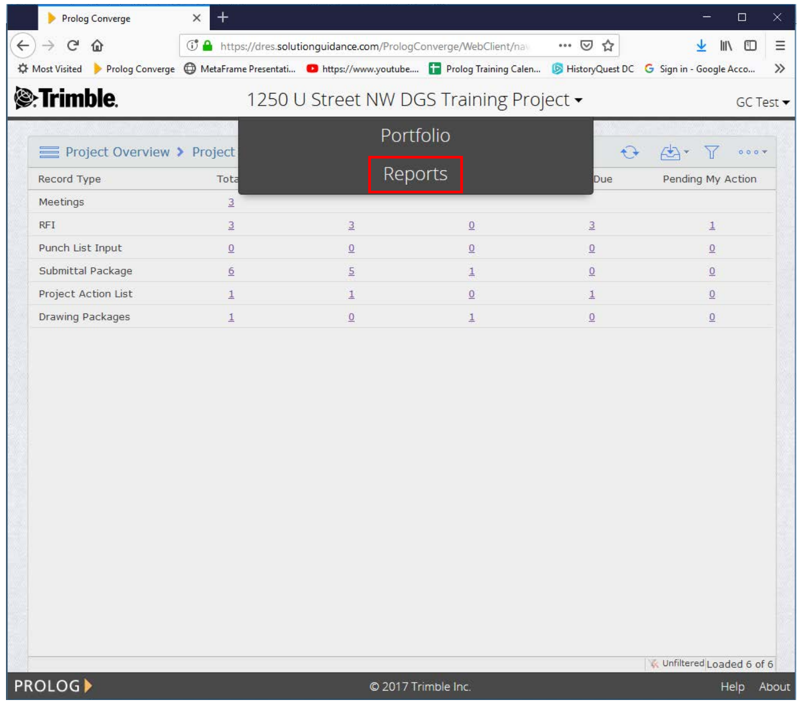


Figure 1

Step 2 - Click on:

Select A Report > System > Doc Control > Submittal Register > Submittal Register [Tracking Log]

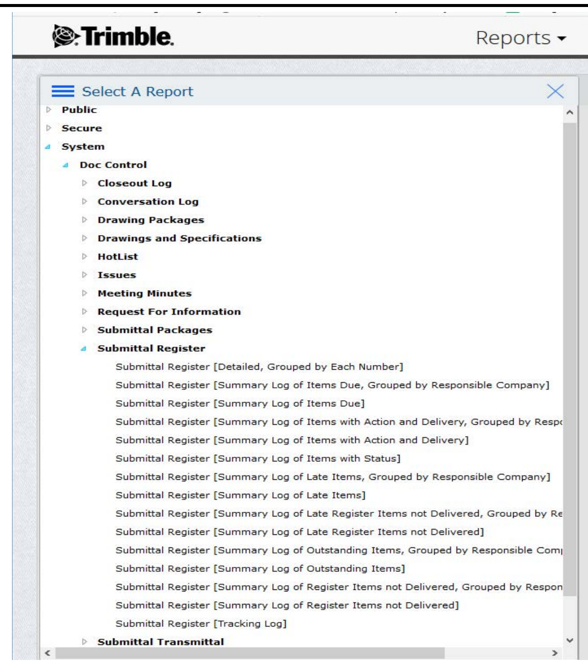


Figure 2

Step 3 - To review the report or print it out, click on the **Printer** icon in the top right of the window. Then choose the desired report format (PDF being the best option) and click **View**. This will allow you to review, save or print the PDF.

To send the report to someone for review click on **EMail** and see steps below.

NOTE: It is strongly recommended that rather than emailing directly from Prolog, that the report be downloaded as a PDF, saved to a preferred location, and then emailed using standard email. This preserves a record of the email sent.

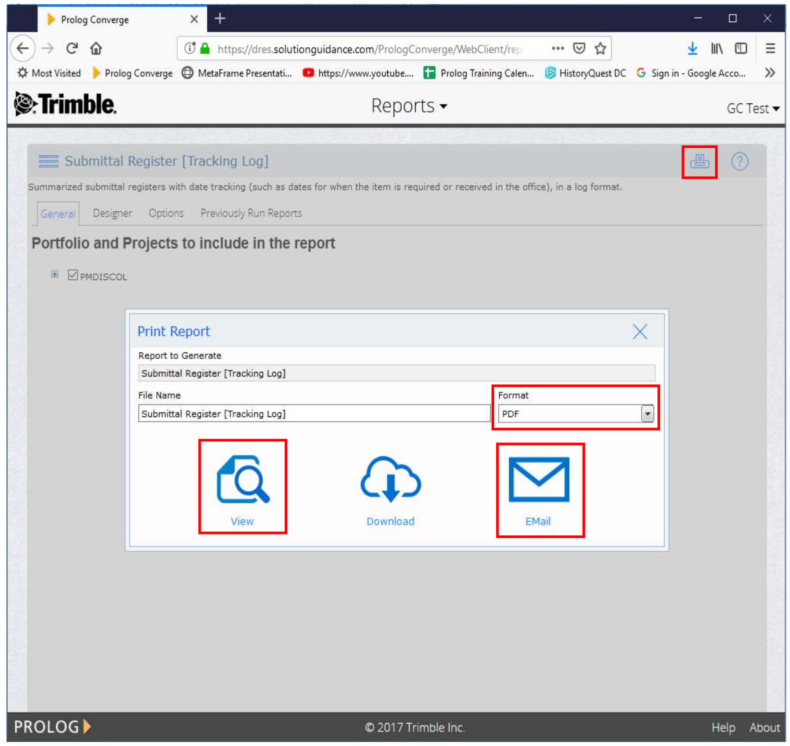


Figure 3

Step 4 - A blank email form will open for the use.

Fill in the **Subject** and **Body** as seen fit. Click on **Add Multiple Email To…** to begin adding people to the email.

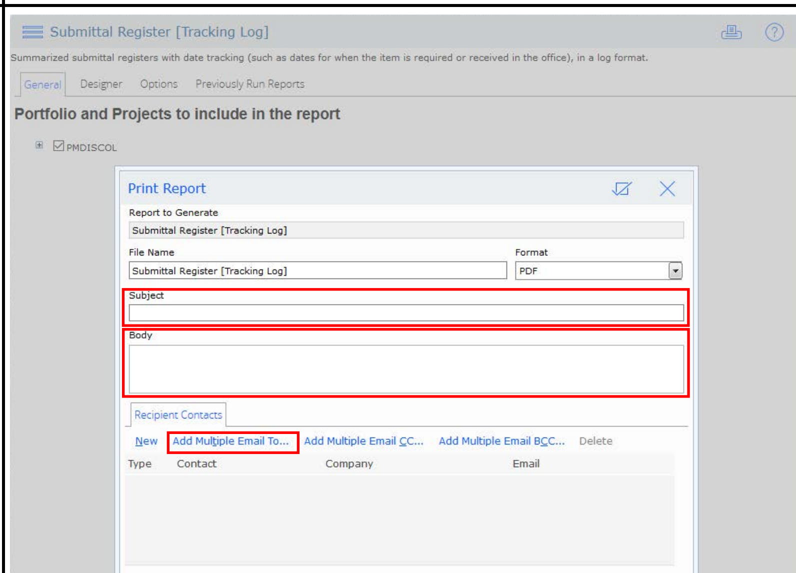


Figure 4

Step 5 - This opens up the Contact Search Box.

After finding and checking the box for the correct reviewer(s) click on the **Check Box** icon at the top of the page.

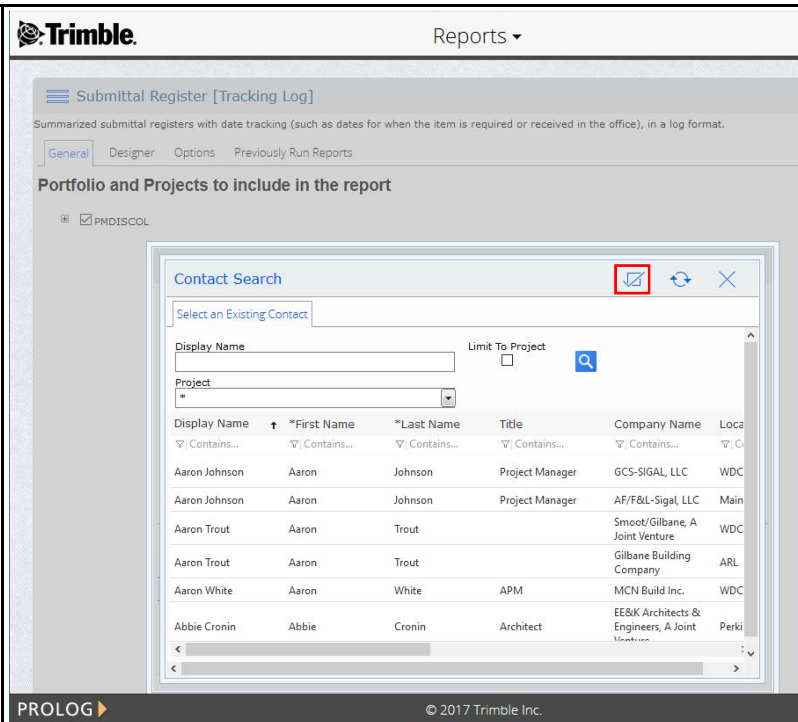


Figure 5

Step 6 - If the person is not in Prolog Converge, click on **New** and type in the person's email address in the box under Email.

Repeat Steps 4-5 as necessary.

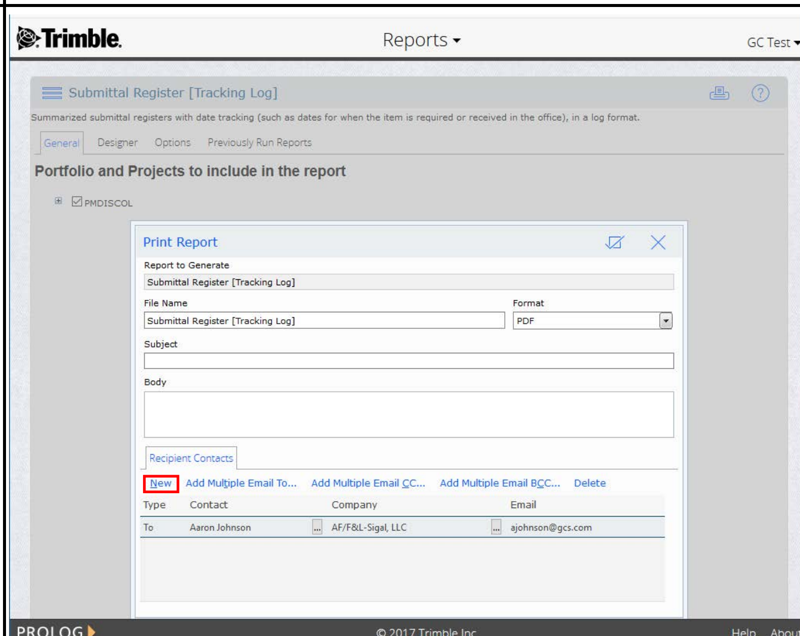


Figure 6

Step 7 - When done click on the **Check Box** icon at the top right of the window. An email with the attached report will be sent to the proper contacts for review.

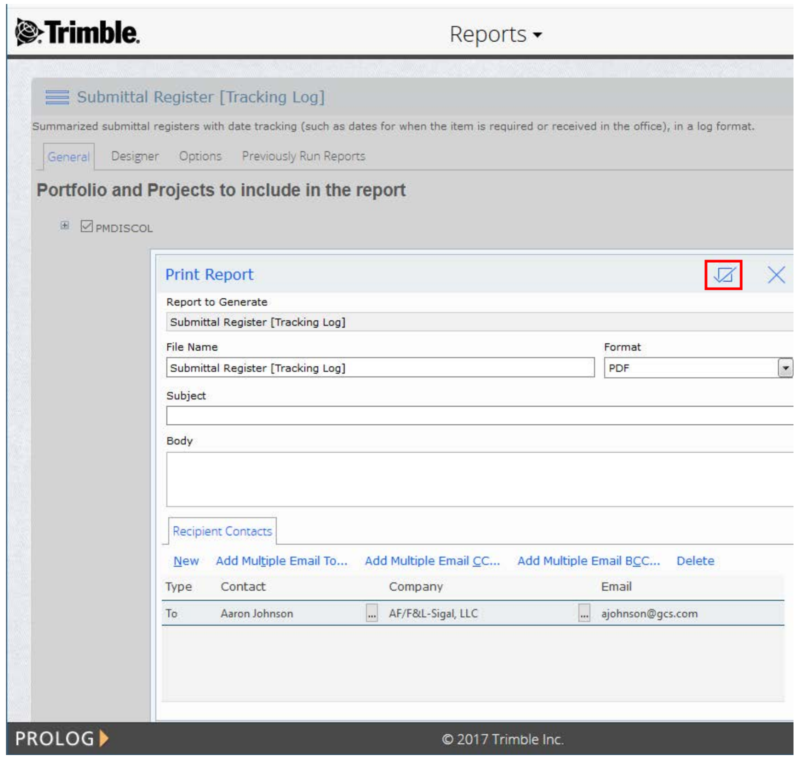


Figure 7

Step 1 - The next step is to create the submittal package and route it for review and approval. Select **Create** from under the Submittal Packages module.

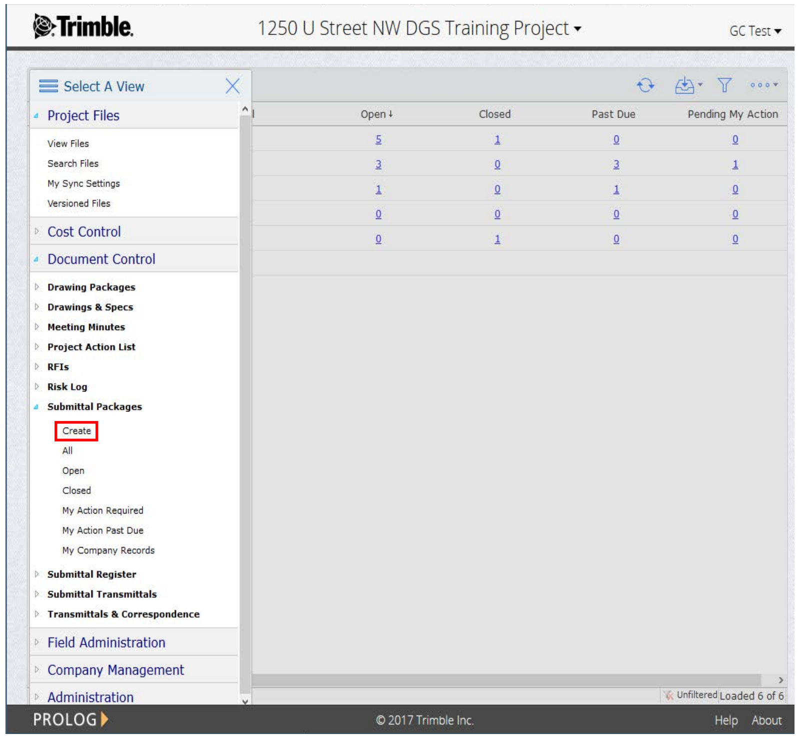


Figure 1

Step 2 - This will open a blank submittal package. All pink fields are required fields; astrisked pink fields are manditory in order to save the record.

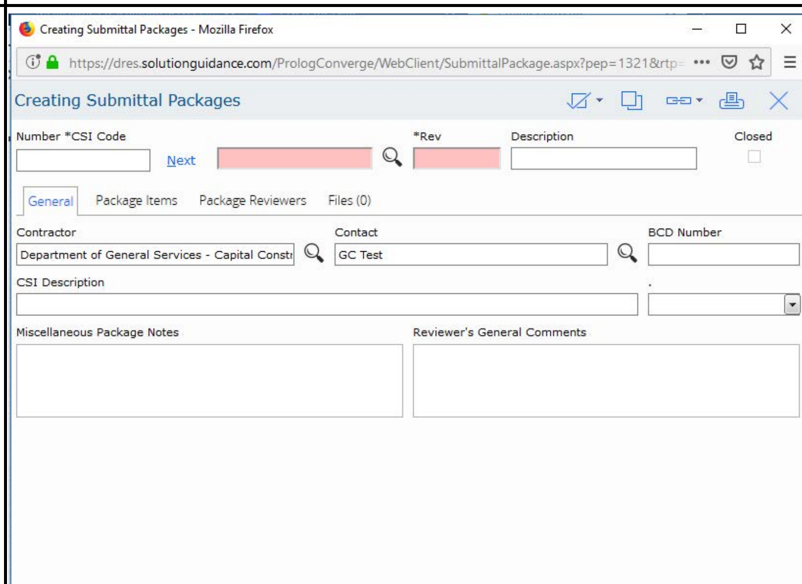


Figure 2

Step 3 - Provide a **Description** of the package. This is normally the specification section being submitted.

The Submittal package number comprises of two parts: Number*CSI Code. For example for CSI code 08 11 13, the first submittal package number would be 0001-08 11 13.

To select the CSI code click on the Search (or magnifying glass) icon to find the proper CSI Code.

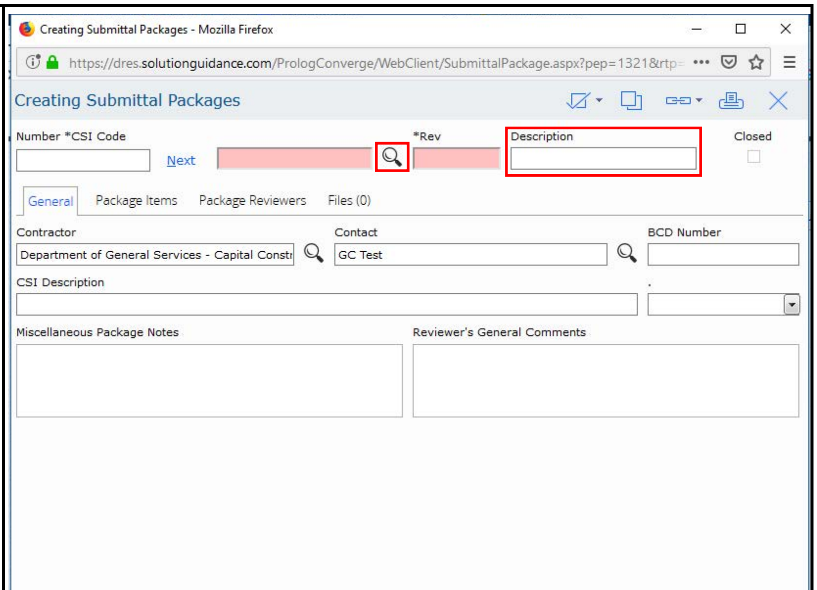


Figure 3

Step 4 - This will open the CSI Search. CSI code or description can be used as the search method. If you search with both fields blank, this will provide the complete CSI code listing.

Find the proper CSI Code. Click on the **Check Box** icon at the top right of the window to bring it into the package.

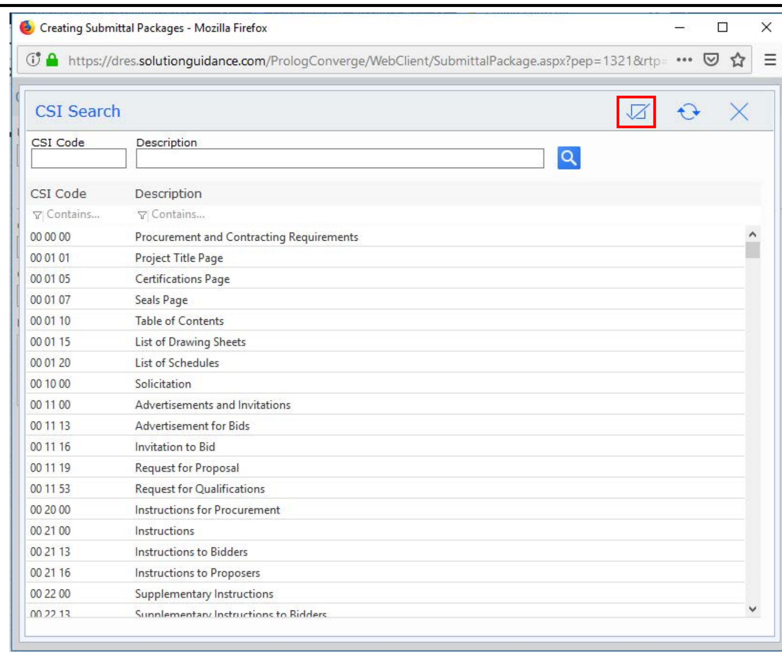


Figure 4

Step 5 - NOTE: **Number** & **CSI Description** will fill in automatically after selecting a CSI Code.

Under the Revision (***Rev**) section make sure to place ZERO (0) if this is an original package. Use the appropriate revision number for revised packages.

When done, proceed to the **Package Items** tabs.

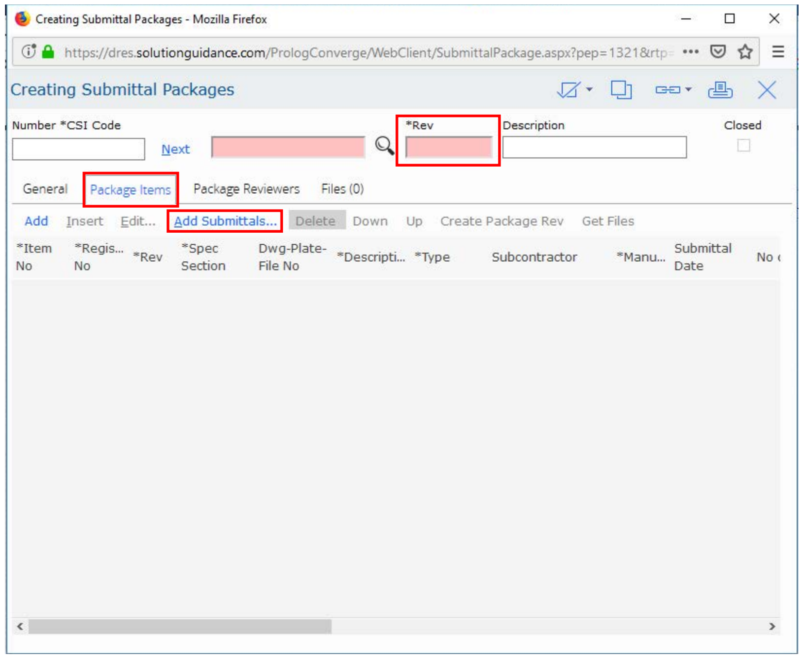


Figure 5

Step 6 - Click on **Add Submittals**. All submittal register items that have been assigned will appear in the submittal items section. All the ones selected will get attached to the package. When done, click on the **Check Box** icon.

Repeat this step until all required submittals within that package have been included.

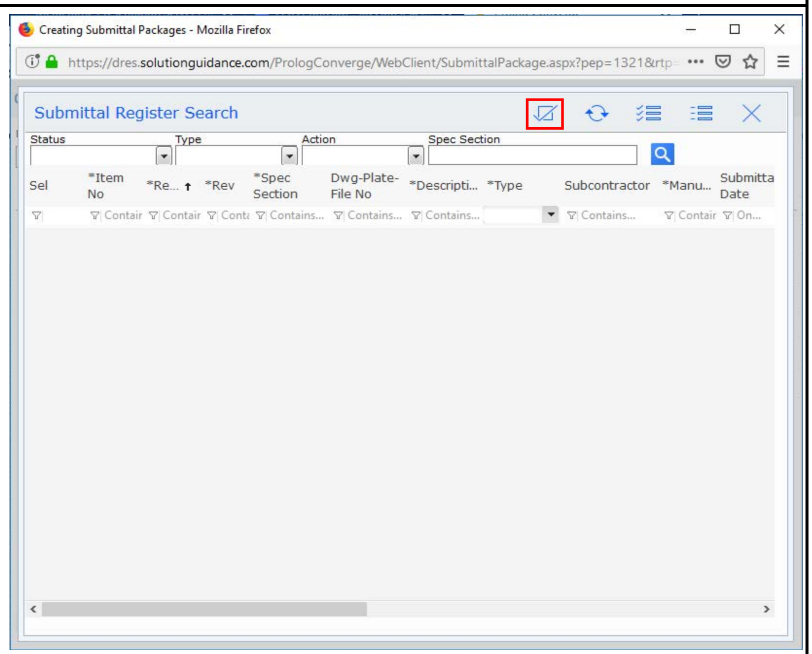
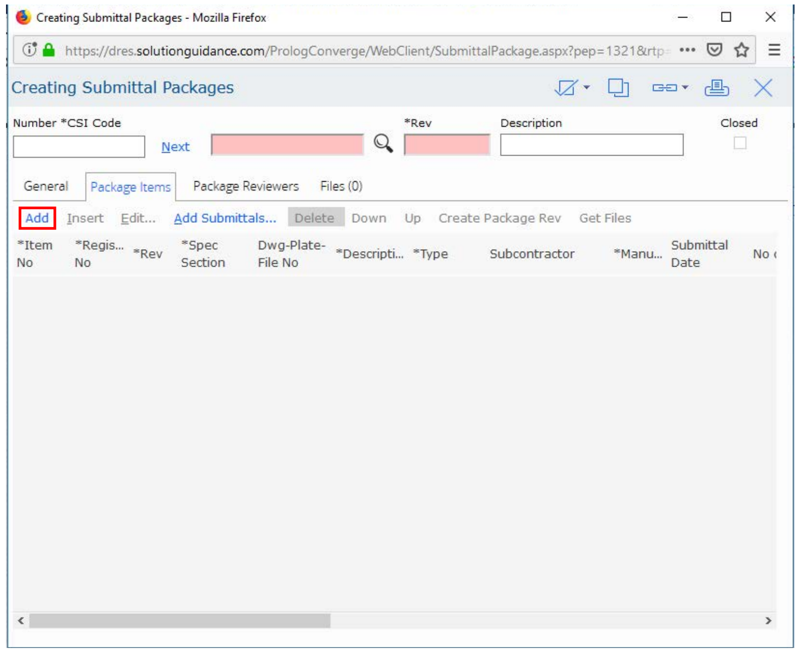
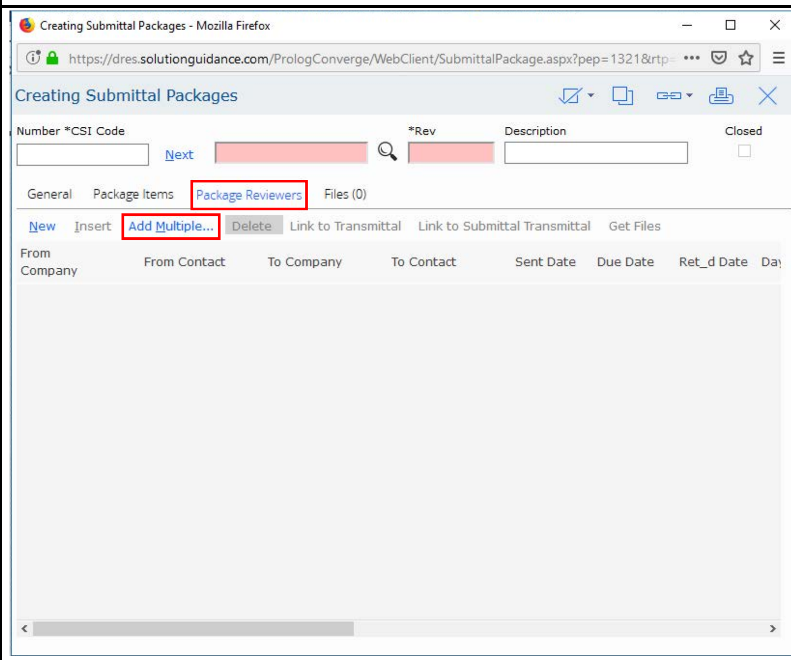


Figure 6

Step 7 - In case the package needs to include a submittal that was missed in the submittal register; click on **Add** to add the submittal item directly. Please note, adding the item here will automatically also add this to the submittal register.	 Figure 7
Step 8 - Click on the **Package Reviewers** tab. Add the DGS PM and the AE as reviewers for the package. Click on the **Add Multiple** button to begin adding reviewers to the package.	 Figure 8

Step 9 - This opens up the Contact Search window. People can be found by searching first or last name.

After finding and selecting the correct reviewer(s) check the **Check Box** icon.

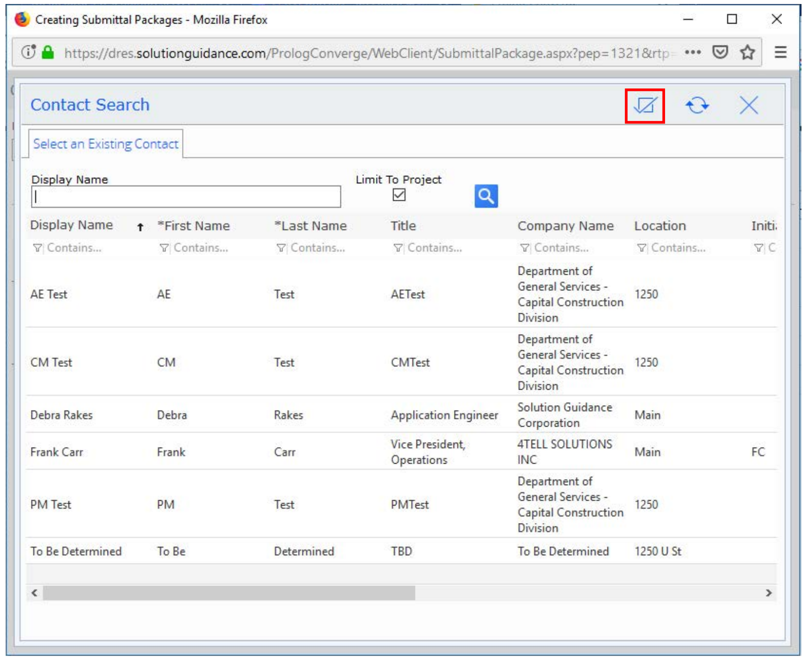


Figure 9

Step 10 - It is very important that for each reviewers added, the **Action** box is checked so they receive a notification and have the access rights to review and edit this submittal package

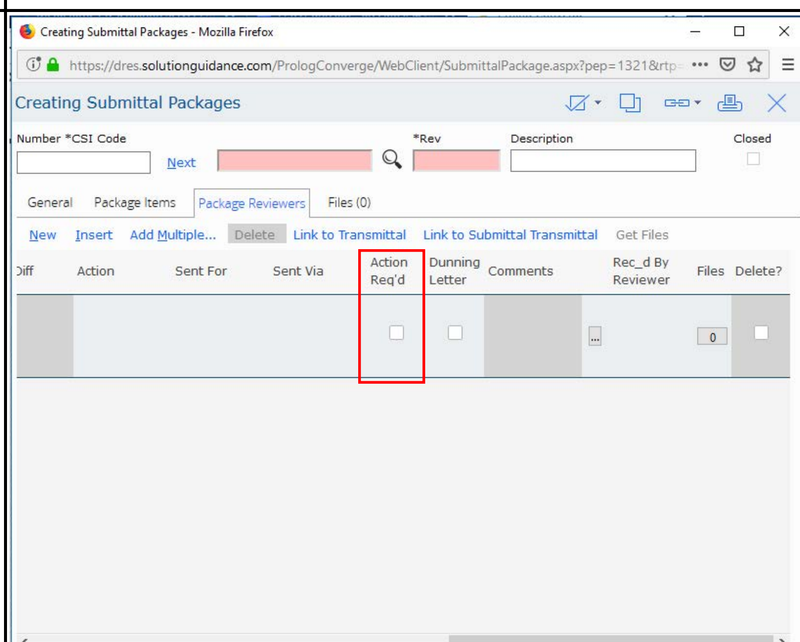


Figure 10

Step 11 - Attachments should be added to each individual respective submittal item. To do this, go back to the **Package Item** tab. For said register item, highlight the item and click the "Edit" button.

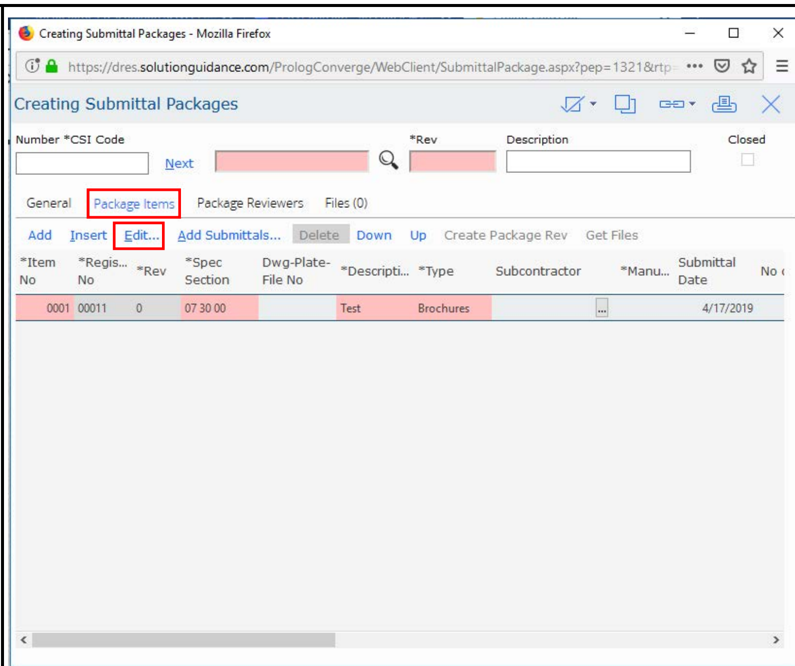


Figure 11

Step 12 - Select "Files" tab in the **Editing Submittal** Register window.

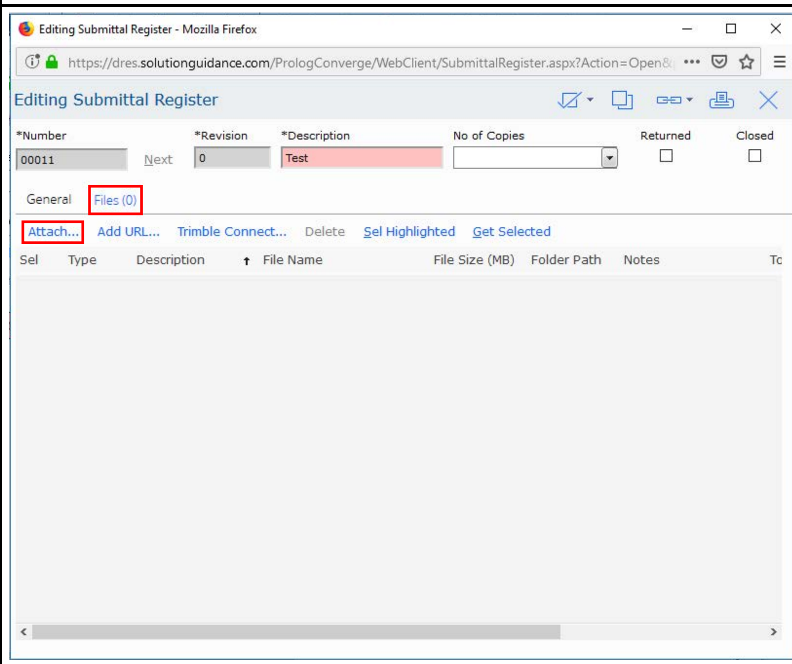


Figure 12

Step 13 - The Prolog Converge document management system will appear below. If the files have already been uploaded in Converge then navigate to them and select any documents to be Submitted.

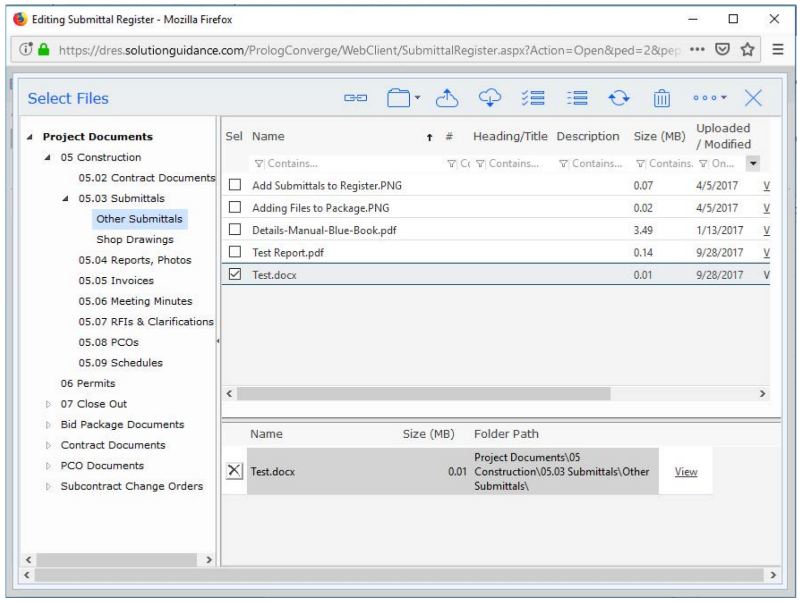


Figure 13

Step 14 - If the file to be uploaded has not yet been placed into the system, they can be added by selected **Submittals** folder. Then click on the **Upload** icon.

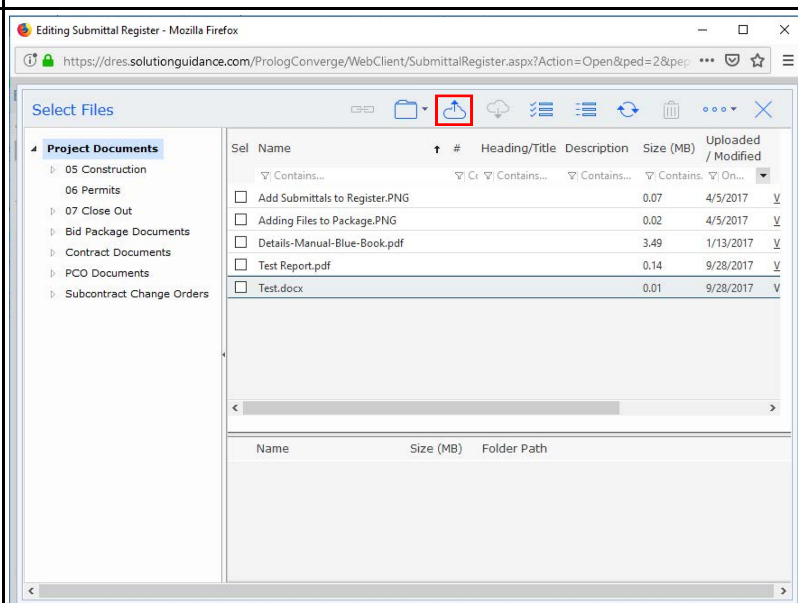


Figure 14

Step 15 - The file upload box will open. Select the "+" icon, which will produce a new window to select the file(s) to upload. Find the file(s) to be uploaded and select them by clicking **Open**.

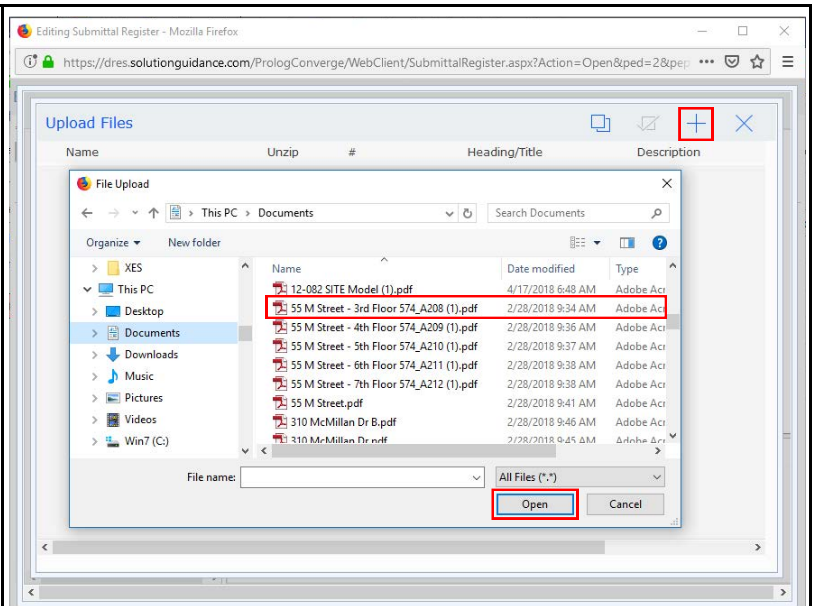


Figure 15

Step 16 -When done selecting as many files as desired, click on the **Upload** icon button. Return to Step 11 to attach documents.

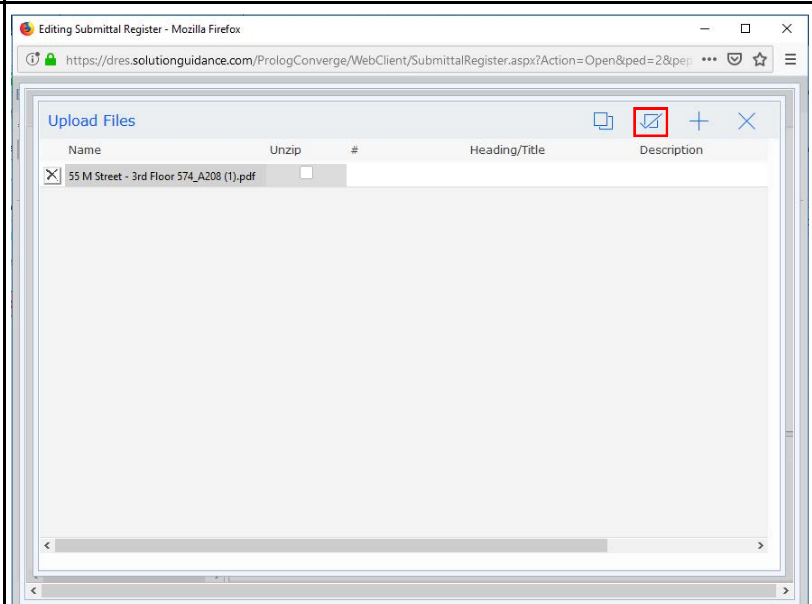


Figure 16

Step 17 - It is also important to attach those same files that were just uploaded to the entire package. To do this click on the **File** Tab. Then click on the **Attach…** button. From there repeat Step 11 to upload any necessary files. Please make sure to attach all the submittal attachments that belong to all the submittal items included in the package.

NOTE: The contractor is responsible for clearly identifying the applicable item on the submitted documents (product data, shop drawing, samples and/or warranties) by circling the items

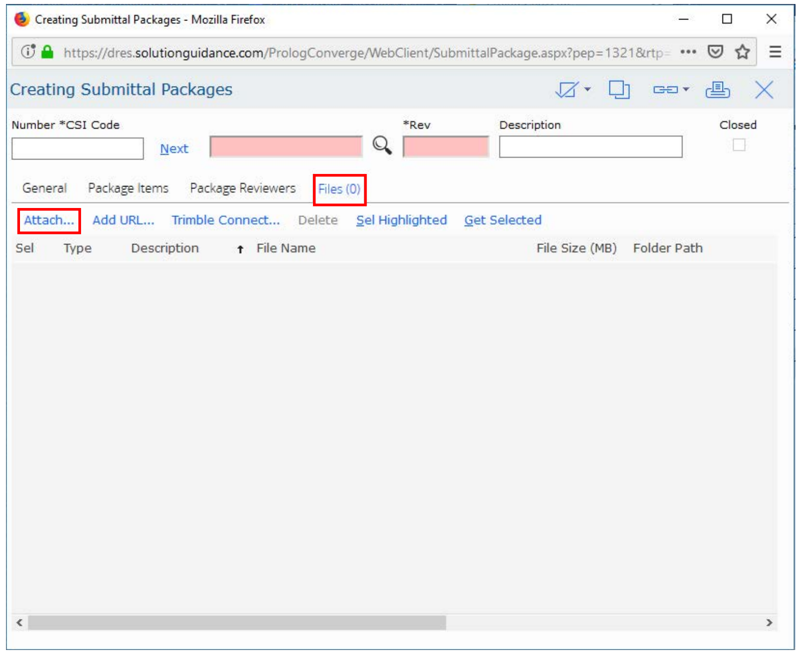


Figure 17

Step 18 -When done click "Save and Exit" or select the drop down arrow and click "Save". This will trigger the automatic notifications to be sent to the selected reviewers.

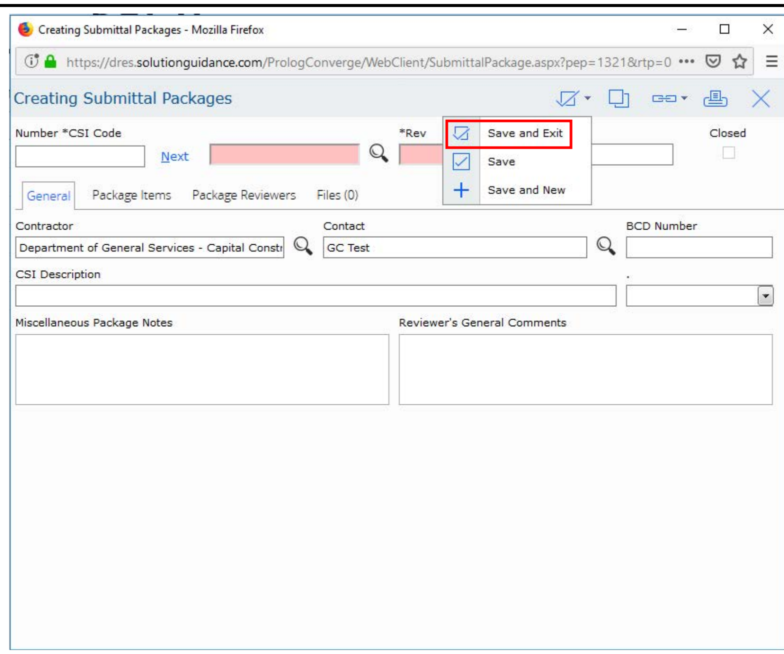


Figure 18

Step 19 - Select the Package that requires revision by either selecting **All** or **My Action Required** and then clicking **Edit**.

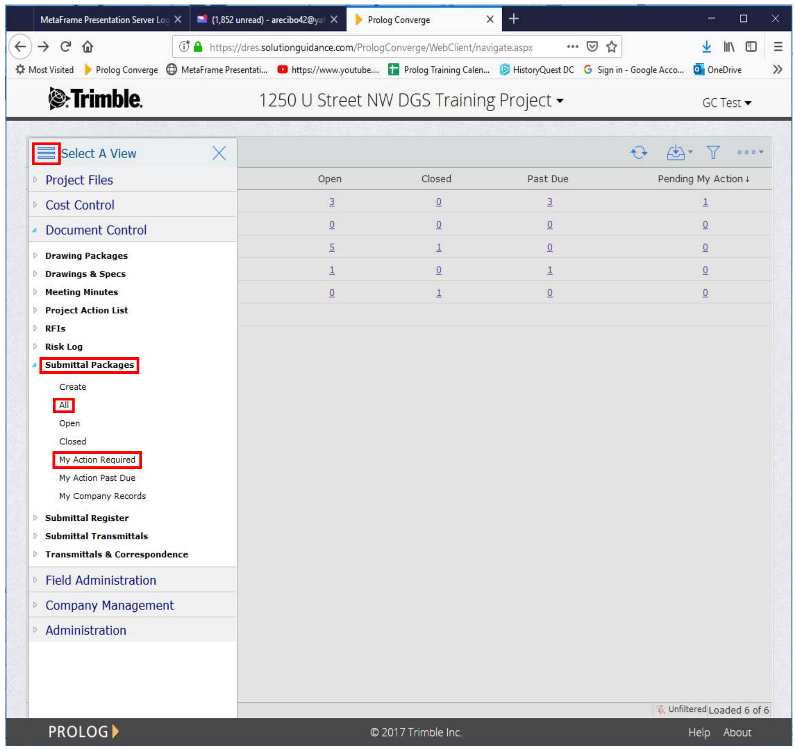


Figure 19

Step 20 - Click on the **Package Items** tab then click on the **Create Package Rev** button.

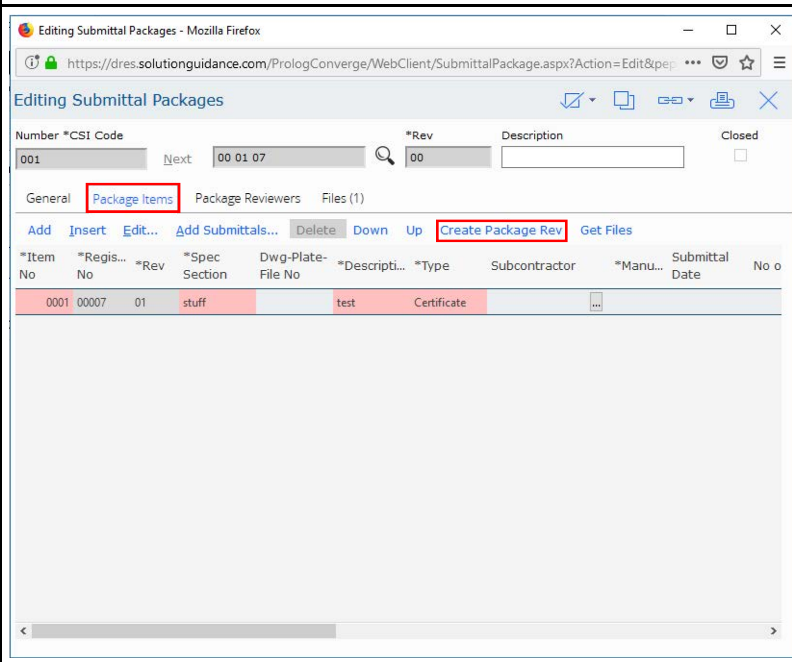


Figure 20

Step 21 - A dialog box will appear prompting the user about creating the revision. Click **OK**.

By doing this, Prolog will do three things:

- It will create a new submittal package with the same number, but using the next available revision number.
- It will create a new items with the same submittal number, but the next available revision number.
- It will close the originally submitted and rejected submittal items, since the new ones have now been opened.

Once the new revision package has been created, the contractor can repeat steps 11-19 to add reviewers, add appropriately revised attachements and submit the package.

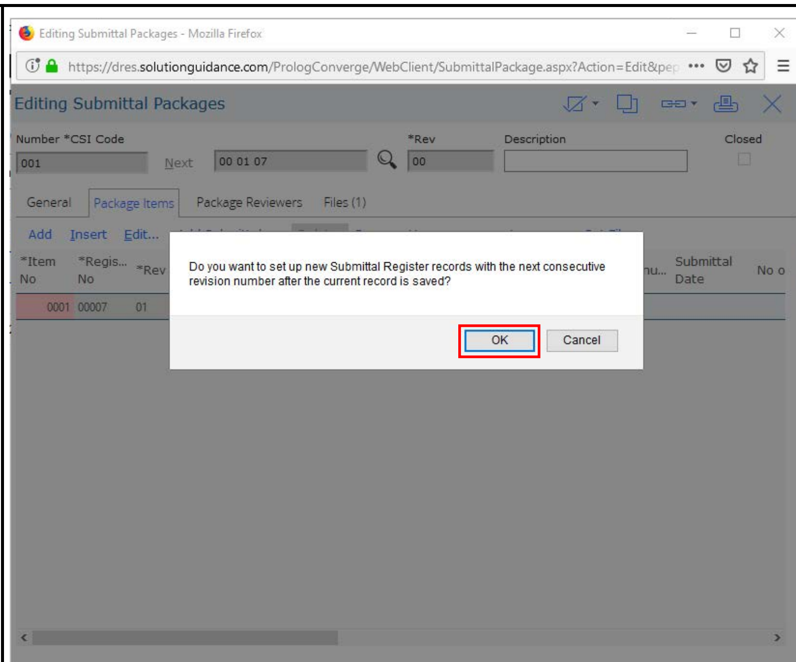


Figure 21

Step 22 - When done, click **Save and Exit**. This will trigger all automatic notifications to be sent.

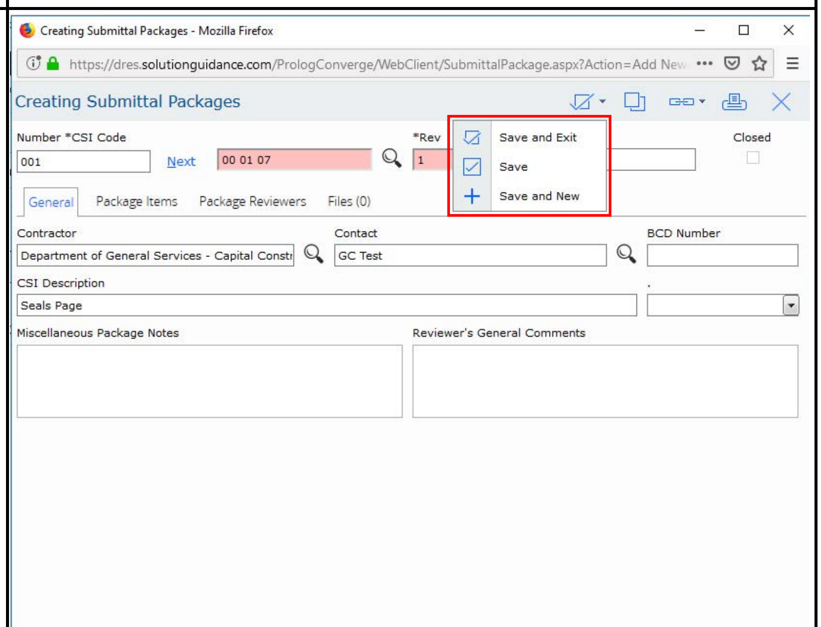


Figure 22