



Professional Construction Management

GETTING STARTED WITH THE CONSOLIDATED PROJECT MANAGEMENT (CPM) SYSTEM

Introduction

Welcome to the Consolidated Project Management (CPM) System. The CPM system was created in 1995 and has since been updated and expanded many times as we continue to keep up-to-date with technology and users' needs. Today the CPM system represents a versatile straightforward system for the management and oversight of construction projects. The system is intuitive, making it easy-to-use. New users should have no problems learning to access and modify supportive project-related data.

First Steps

If you are reading this memo, it is likely you are a new user and if so here are some things to note before you begin to use the system.

- 1) The system will require a copy of Adobe Acrobat on your computer to display some of the documents. (Other PDF viewing software will work, but not all features may be available. Adobe Acrobat is optimal.)
- 2) The system stores images and PDF documents. These documents will, on most systems, appear on the computer screen as a pop-up. While a user may download documents for viewing purposes, in order to view these documents online, the pop-up blocker must be turned off, or set to not block the Consolidated CM website. The pop-up blocker and its setting are typically found on the internet browser under Tools.

Logging In

The log in procedure is straight forward. The log in page is called the CPM Portal. The login page URL is: <http://cpm.consolidatedcm.com/private/login.cfm> However, if you downloaded this document, you just need to look further down your current webpage to find the login fields.

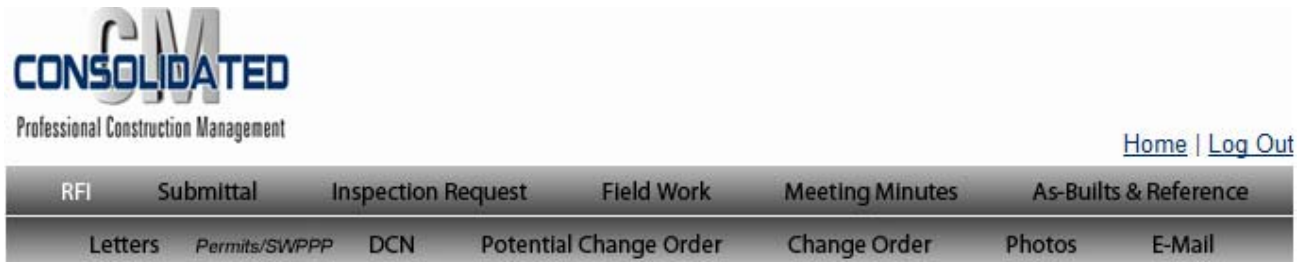
Once you are on the log in page: 1) enter your user name, 2) enter your password and 3) select the project you are interested in from the pop-up list. The pop-up list will remember the project last visited, so on future site visits that project will appear by default, though you can of course select a different project. If you do not have a user name and password, request one from the CCM project manager. If you are unable to access a project that you have selected, please contact the CCM project manager to allow access privileges.



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Using The System

As noted in the Introduction, the CPM system is intuitive and user friendly. The system stores Submittals, RFIs, Change Orders, Reference Documents, Inspection Reports, As-builts, and more. When you first log in, you will be placed in the RFI section of the project you have logged into. If you are looking for specific documents, take a look at the top of the page (shown below); this navigation bar shows the different sections you may choose from. To change sections, click the title of the section you desire from the navigation bar. Pressing “Home” will put you back on the Consolidated CM main web page, and “Log Out” will log out your current account from the CPM system, placing you back on the CPM Portal page.



CPM System Navigation Bar

Most of the categories on the CPM System tend to adhere to the format shown below; RFI Number, Drawing and Spec References, Reviewer, etc are all information that may be filled in intuitively, corresponding to construction documents. However, there are some aspects that are not so obvious. These areas are circled in the image below, as well as labeled (A, B, C, and D).

The screenshot shows an RFI form with the following fields and annotations:

- Navigation:** << PREV NEXT >> (left) and NEW DELETE UPDATE (right, circled in red and labeled **B**).
- RFI Number:** 219.0
- RFI Date (mm/dd/yyyy):** 04/01/2014 (calendar icon circled in red and labeled **A**)
- Receive Date (mm/dd/yyyy):** 04/01/2014 (calendar icon circled in red and labeled **A**)
- Due Date (mm/dd/yyyy):** 04/15/2014 (calendar icon circled in red and labeled **A**)
- Drawing Reference:** N/A
- Spec Reference:** N/A
- Schedule ID:** N/A
- RFI Subject:** Shielded Rooms Door Openings
- To Reviewer (mm/dd/yyyy):** 04/02/2014 (calendar icon circled in red and labeled **A**)
- From Reviewer (mm/dd/yyyy):** (calendar icon circled in red and labeled **A**)
- Reviewer:** SKA (dropdown menu)
- To Contractor (mm/dd/yyyy):** (calendar icon circled in red and labeled **A**)
- Impact:** Unknown (dropdown menu)
- Status:** Pending (dropdown menu)
- Remark:** (text area)
- Attachments:** Attach a Photograph (circled in red and labeled **C**)
- Related Photographs:** RFI-219 (circled in red and labeled **D**)

- A. The symbol of a calendar denotes the date. A user may type in the date a form was created, received, sent, etc on their own (following the (mm/dd/yyyy) format), or open the calendar by clicking the calendar icon. This will bring up a pop-up calendar in another window, and a user may click whichever date they need.
- B. 1. The UPDATE button – When a user modifies any information fields on a form, he or she must click the update button to save it into the database. Failure to do so will not save the information changed or added otherwise.
2. The NEW button – To create a new record (RFI, Submittal, etc), a user should press the NEW button and fill in pertinent requisite data. In order to create a new form successfully, values must be entered for the Number, To Reviewer, Date,



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Subject, Receive Date, and Due Date, or the system will show an error message and your new form will not be created.

3. The DELETE button – This will delete your current record in its entirety.

C. Attach a Photograph – This button allows a user to upload relevant images or PDF documents to the CPM system. Clicking this will prompt the following:

Upload New Photograph

Section	<input type="text" value="Request For Information"/>
Document Number	<input type="text" value="219.0"/>
File Name	<input type="button" value="Browse_"/> No file selected.
Description <i>(200 Characters Max)</i>	<input type="text" value="[New Photo]"/>
	<input type="button" value="Upload This File"/>

Simply choose the file you wish to upload by clicking the “Browse” button and locating the document you wish to upload from your computer. Once you have chosen a document, the words to the right of the “Browse” button will change to reflect the document name. Once you have done this, fill out the Document Number, and Description (This will be your file name under D. *Make sure that your description does not contain the “#” sign, or it will create a system error and the file will not be accessible.*)



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D. Related Photographs – Files you have uploaded will be listed beneath the “Related Photographs” heading and are accessible with a click. Clicking them will open a pop-up of the file accessed, and will open another webpage (below):

Photograph Document Type Photograph
Library Request For Information Record 219.0 : 08_07_05_2014_04_02_RFI 219.pdf

<< PREV NEXT >> NEW DELETE UPDATE

Description

RFI-219

[08_07_05_2014_04_02_RFI 219.pdf](#)

This page shows all the files uploaded for the entire section (the system notes all files as “photographs”), as well as the Description, and a link to the file itself. Note that the description is just the name of the file. If you change this information, you must save your changes with the “UPDATE” button once your changes are complete.

Additional Features

- **Printing Reports**

On some sections of the website, you may have the option to print reports.

Professional Construction Management [Home](#) | [Log Out](#)

RFI	Submittal	Inspection Request	Field Work	Meeting Minutes	As-Builts & Reference	
Letters	Permits/SWPPP	DCN	Potential Change Order	Change Order	Photos	E-Mail

Alameda County
Berkeley Oaks Seismic & TI
Document : 1 of 1

Function: Inspections (circled in red) **A**
Date: 04/11/2014
Inspector: RS

[Advanced Search](#)

<< PREVIOUS | NEXT >> NEW | DELETE | UPDATE

Inspection Date (mm/dd/yyyy): 04/11/2014
Inspector ID: RS
Project Day Number: 285
Week Day: Friday
Work Hours (h:mm-h:mm): 7:00 3:30
Weather: Fair
Maximum Temperature: 74
Minimum Temperature: 55

Print Report (circled in red) **B**

A. By pressing the Functions tab, you can open a menu containing the different subsections you may access. In the case of the Field Work section, the options would be Inspections, Activities, and As-Built Reports.

B. By pressing the Print Report button, you will open a PDF containing the information found in your current subsection, corresponding to the date. If you are trying to save the PDF file to your computer, you may do so once the PDF opens.

Conclusion

This memo is a brief overview of the CPM system intended to help get you started. As you work with the system, you will rapidly become proficient in its use; however, from time to time you may have questions or require assistance. In either case, please call Consolidated CM Inc., (510) 208-1720 and ask for Matt Scoble or Erica Holt with questions or to discuss issues.