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## **Harkins Contract Estimator Proposal**

### **Database**

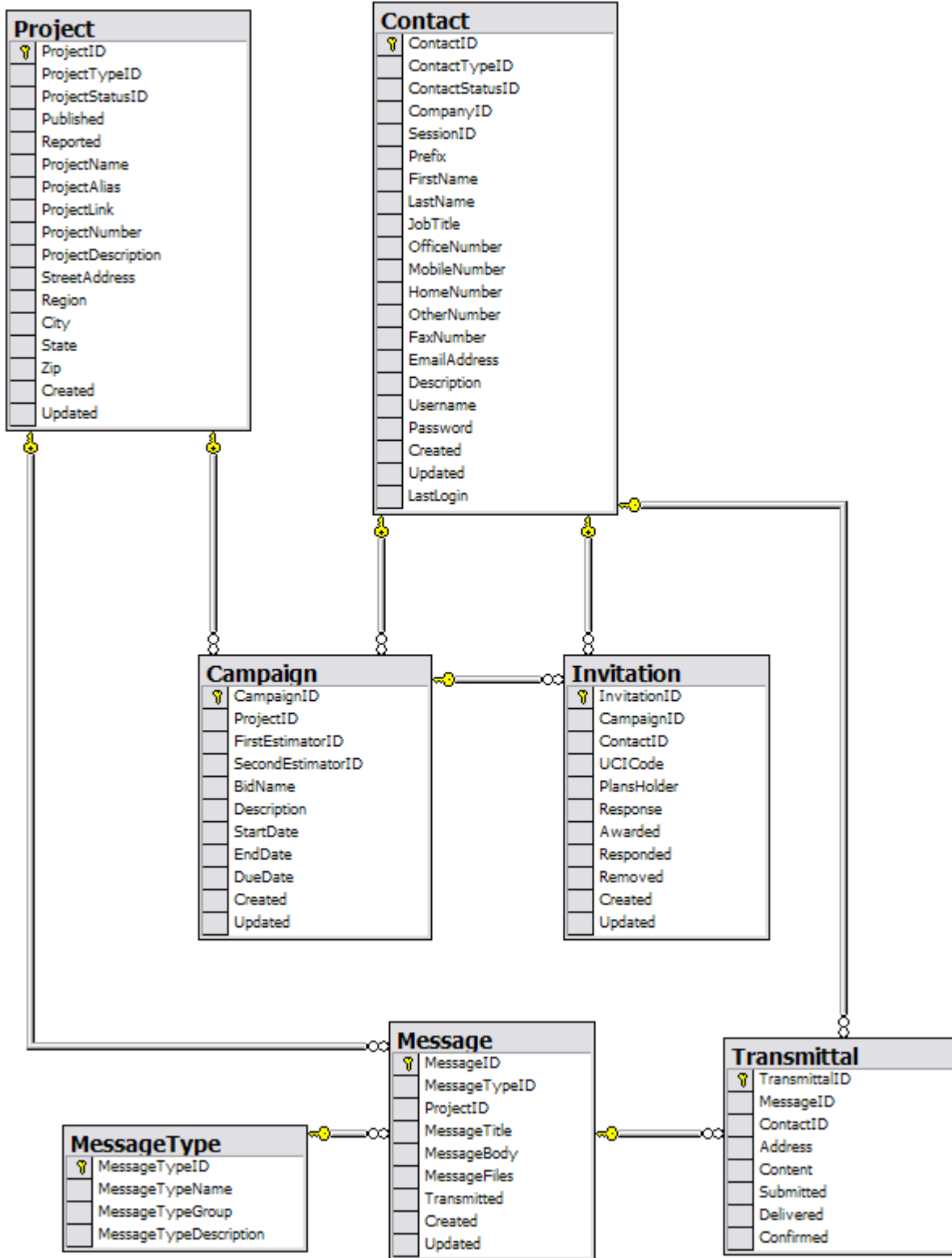
The database has been redesigned and normalized to persist the necessary data in a well structured format that will be easier to maintain and provide faster access for queries and reports. This new database structure will be dependent on two primary tables from the existing Project Directory database. They are the [Project] and [Contact] table and are therefore dependent on their dependencies. A brief description of each new database table is provided below.

The [Campaign] table maintains information pertaining to a phase of a bid. Each campaign belongs to a project and has a primary and secondary estimator user assigned. Additional fields are provided for a user entered name and description. The start, end and due dates are also maintainable. A campaign contains a unique list of subcontractors associated with a project.

The [Invitation] table maintains which subcontractors have been invited to participate in a campaign. Each record contains the trade code for which the subcontractor was invited in and the respective plans holder flag, response status, awarded and responded dates. The removed date allows the record to be disassociated from the current list but retained for historical tracking. The selected [Company] record is linked via the assigned [Contact] record.

The [Message] table maintains a list of messages which have been sent regarding a project. These messages may be used across campaigns within a given project. The message has a title, body and a list of file attachments maintained on the server. Once a message has been transmitted it may not be edited but may be copied and re-sent as a new message. Messages exist as a specific type including internal communications to other employees and single/broadcast messages to subcontractors invited into a project.

The [Transmittal] table maintains a list of sent messages. Each transmittal log item records the original message template and recipient contact. The address field logs the delivery type as efax/email/fax/mail/hand and records specific delivery information. The content column contains a text only version of the delivered content. The submitted timestamp stores the requested delivery date, delivered stores the date of actual delivery and the confirmed date stores the confirmation of delivery if applicable.



## Application

The new Contract Estimator application will consist of a set of web pages used to maintain the information persisted in the new database. Many of the database entities will be reused from the Project Directory module of the Harkins Intranet which will reduce the development effort for this phase of the project. The pages necessary to support the needs of the Contract Estimator are described below. Some of the items describe new pages which do not yet exist whilst others describe necessary changes to existing pages.

- Company Management
  - Company Report
    - Provides a filterable/searchable list of companies in the database
    - Allows user defined filter sets to be created and saved
  - Company Home
    - Displays list of projects for which the company has an active invitation
    - Display list of message transmittals
    - Provide ability to update a project invitation status
  - Company Update
    - Provide ability to add/remove uci codes/regions/minority items separately
    - Provide ability to set the default contact for the subcontractor
  - Company Merge
    - Provides ability to merge two company records into a single record for duplicate resolution, includes all historical campaign and message data
- Contact Management
  - Contact Home
    - Display list of projects for which the contact has an active invitation
    - Display list of message transmittals
    - Ability to update a project invitation status
    - Change selected default communication method (fax/email)
- Project Management
  - Project Home
    - Display detailed project information from project and tracking tables
      - Ability to edit primary project and tracking information
    - Display associated project contacts and harkins team members
      - Link to project role / harkins team management
    - Display campaign bid list for access to campaign home page
      - Ability to create a new or copy an existing campaign
    - Display associated list of recent project/company comments
      - Ability to create a new comment
    - Display selected plans printer for associated project
      - Link to plan distribution management
      - Link to drawings log update
      - Link to plans set creation
      - Link to plans reporting
    - Display associated list of campaign messages
  - Estimator Home
    - Display associated list of recent projects
      - Include campaign and message details

- Include project details and bid status
- Campaign Home
  - Display filter options for subcontractor invitation report
    - Ability to select system defined filter set
    - Ability to select custom project level filter set
    - Ability to save custom project level filter criteria
  - Allow individual and batch update operations
    - Add new uninvited subcontractor contacts
    - Change assigned subcontractor contact
    - Add/remove uci codes from invitation
    - Update invitation status for campaign
    - Remove subcontractor invitation
  - Provide ability to copy current list to new campaign
    - Allow for selection of a different project from list
    - Allow for invitation status to be reset or maintained
  - Provide predefined printer friendly output
- Message Home
  - Create new or copy existing message
  - Send a new message to a single contact
  - Broadcast a message to subcontractors
    - Provide ability to filter subcontractors by invitation status
    - Provide ability to select specific subcontractor contacts
- Transmittal Reporting
  - Display filter options for transmittal message report
    - Ability to filter by project message
    - Ability to filter by message type
    - Ability to filter company name
    - Ability to filter contact name
    - Ability to filter by date range
    - Ability to filter by address
    - Ability to filter by delivery status
    - Ability to resubmit failed message(s)
  - Provide predefined printer friendly output
- Drawing Management
  - Add new drawing plan
    - Enter category, identifier, description
  - Filter list of existing drawing plans
    - Filter by uci code assignment
    - Filter by revision date
    - Filter by category
  - Single and batch update group of drawing plans
    - Add/remove uci code assignment
    - Change date and description
  - Generate transmittal delivery report
    - Create message to mark plan log date set
    - Select previous plan log date set
    - Generate transmittal report for printer delivery