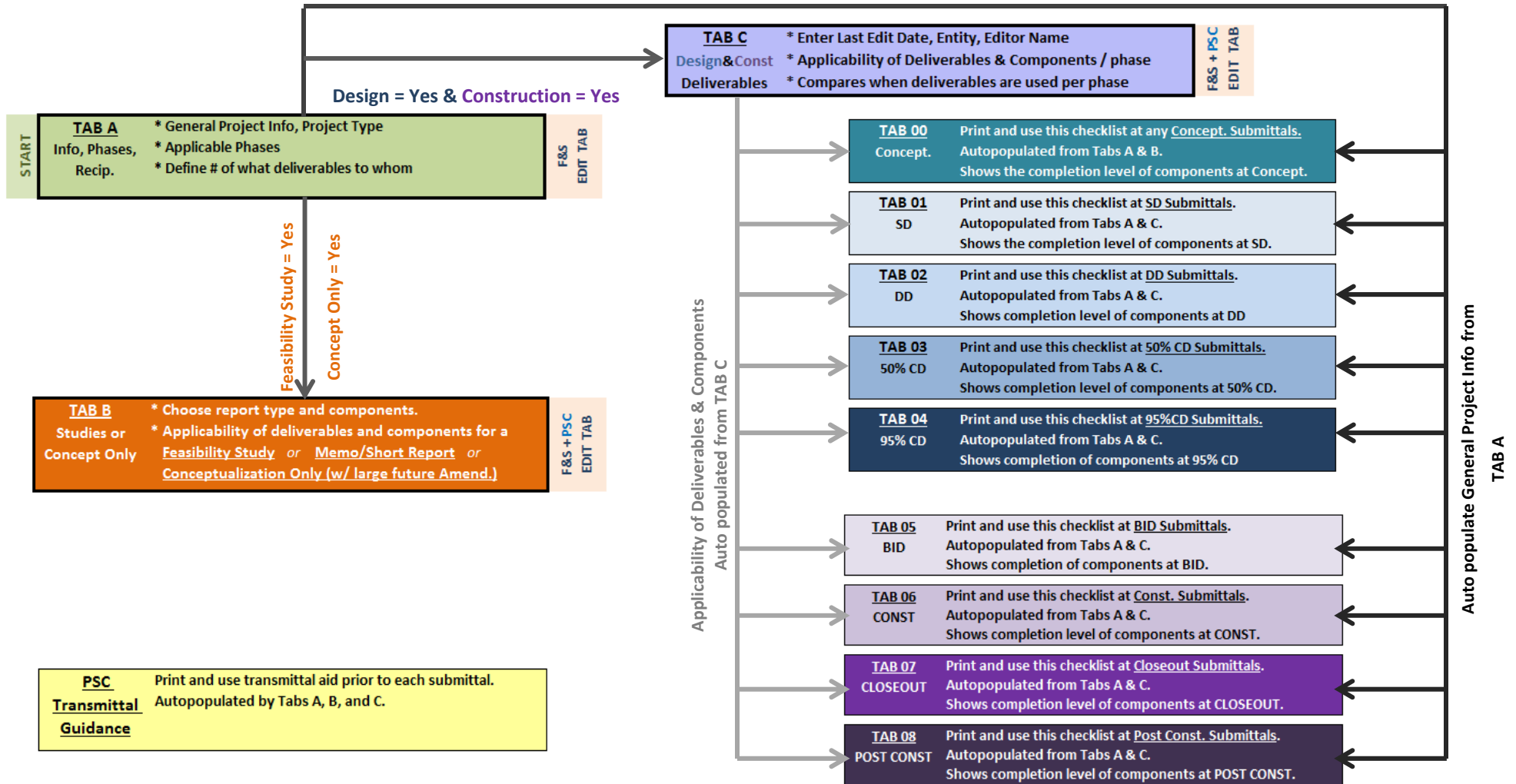


SPREADSHEET FLOWCHART



TIP #1 – PASTE SPECIAL (VALUES) – REQUIRED!

DO NOT USE A DIRECT COPY AND PASTE! Doing so will change the formulas, “smart” features, and conditional formats.

If there are multiple cells to change to the same value, use “paste special – values”.

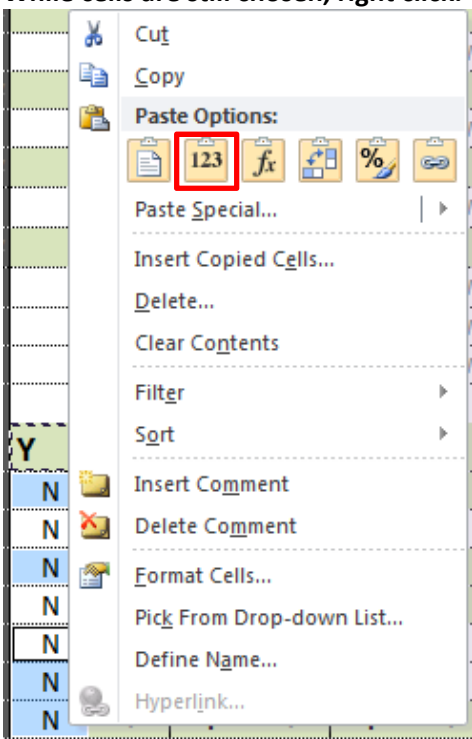
For example – several cells need to be modified from a “N” to a “Y”. Choose an existing cell with a “Y”. Copy (Either “ctrl-c” or right click and select “copy”).

Y	
N	Y
N	Y
N	Y
N	Y

- Choose multiple cells at one time that need the value changed to “Y” by selecting the first cell, then holding down the “Ctrl” button while clicking to select the remaining cells.

Y	Y
N	Y
N	Y
N	Y
N	Y
N	Y
N	Y
N	Y
N	Y
N	N

- While cells are still chosen, right click. → Choose paste special – values “1-2-3”



TIP #2 – DO NOT DELETE ANY ROWS OR COLUMNS. USE TIP #3 INSTEAD

There are multiple references, names, etc. Deleting rows and columns will cause multiple errors.

TIP #3 – HIDE / UNHIDE MULTIPLE ROWS

The PM or Planner may wish to hide some of the non-applicable disciplines in TABS 00-08.

- Select first row to hide by selecting the row number at the left of the sheet.

99	N	PLACEHOLDER ROW – Building Automation Controls Systems – CUSTOM	<---PM/Planner ma
100	Y	Access Controls - General Systems (Updates to)	
101	N	PLACEHOLDER ROW – Access Controls – CUSTOM	<---PM/Planner ma
102	Y	Telecom - General Systems (Updates to)	

- While row # is still selected, press the “Ctrl” button and hold down while selecting the #'s of the other row to hide.

99	N	PLACEHOLDER ROW – Building Automation Controls Systems – CUSTOM	<---PM/Planner may hide PLACE
100	Y	Access Controls - General Systems (Updates to)	
101	N	PLACEHOLDER ROW – Access Controls – CUSTOM	<---PM/Planner may hide PLACE
102	Y	Telecom - General Systems (Updates to)	
103	N	PLACEHOLDER ROW – Telecom – CUSTOM	<---PM/Planner may hide PLACE
104	Y	Audio Visual - General Systems (Updates to)	
105	N	PLACEHOLDER ROW – Audio Visual – CUSTOM	<---PM/Planner may hide PLACE
106	N	PLACEHOLDER ROW – CUSTOM ROW – OPTIONAL CLIENT ITEM	<---PM/Planner may hide PLACE

- While all row #'s to hide are still chosen, continue to hold “Ctrl”, hover over the #'s while simultaneously & right clicking.

- Select “Hide”.

99	N	PLACEHOLDER ROW – Building Automation Controls Systems – CUSTOM	<---PM/Planner may hi
100	Y	Access Controls - General Systems (Updates to)	
101	N	PLACEHOLDER ROW – Access Controls – CUSTOM	<---PM/Planner may hi
102	Y	Telecom - General Systems (Updates to)	
103	N	PLACEHOLDER ROW – Telecom – CUSTOM	<---PM/Planner may hi
104	Y	Audio Visual - General Systems (Updates to)	
105	N	PLACEHOLDER ROW – Audio Visual – CUSTOM	<---PM/Planner may hi
106	N	PLACEHOLDER ROW – CUSTOM ROW – OPTIONAL CLIENT ITEM	<---PM/Planner may hi

o. Project Applicable Information / Calculations - Updated

109		(Complete) Occupancy calculations between existing and proposed; breaking down for FTE
110		(Complete) Soil Borings and Soils Report
111		(Substantially Complete) Stormwater Runoff Rate Calculation/Model Results and Water Detention
112		(Substantially Complete) Asbestos and Lead Survey and Recommendations
113		Results of Hazardous Materials Testing and Hazardous Materials Mediation Plan
114		(Substantially Complete) EPA & State Permits
115		(Substantially Complete) Environmental Checklist
116		(Preliminary) Excel files of all equipment schedules for all disciplines.

Directions for Overall Spreadsheet

Start on TAB : [A-Info, Phases, Recip.] - 

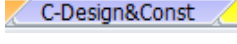
TAB A -- appears in white as shown in the list of tabs below:



For Studies Projects, UIUC PM/Planner will next complete only TAB : [B-Studies or Concept Only] -  - 
 PSC will review and make/recommend modifications to TAB B.

TAB B -- appears in orange as shown in the list of tabs below:



For Design & Const. Projects, UIUC PM/Planner complete TAB: [C-Design&Const] - 
 PSC will review and make/recommend modifications to TAB C.

TAB C -- appears in blueish-purple as shown in the list of tabs below:



Review and adjust print margins for applicable phases after TAB C. (i.e. 00 - Concept, 01 - SD, etc.....)

For all tabs, the default viewing setting is "page break preview". Areas outside of the printable area will appear in gray.

DIRECTIONS: Fill out form for whether or not a reviewer applies and in all boxes with a peach background. (Darker peach are drop downs) 7/31/2017
 TO BE COMPLETED BY PLANNER OR PM. THIS TAB IS THE MASTER FORM. Choosing submittal phases here will control which subsequent tabs are activated.

Directions for each tab will appear at the top of the sheet and be locked in that position.

Required Phases and Delivery Requirements																
Master Template last updated on: 07/31/2017																
Date	Construction Delivery Method	Project Name				Project #										
7/31/2017	BID	Davenport Hall Addition & Remodel - Example				U12345										
0001	Remodeling/Addition	Jane Doe		John Smith		John Smith		John Smith								
Bldg #, Lot or Utility	Construction Type	Planner		BOT approval?		SHPD Involvement?		CDB project?								
0001	Silver - Certified			Yes		Yes		No								
	LEED Goal	Note: Bid & Award includes Addenda Submittals				Ok										
	Submittal Applies? ----->															
Recipient & Applicability		Conceptualization				Design				Construction						
		Concept DRAFT	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Post Const.	Size
Yes	F&S Planner and/or PM: Jane Doe (Planner); John Smith (PM)	PR, e	PR, e	PR, e	PR, e	PR, e	e, D, PBOD	e, PM, D	e, PM, D	e, PM, D	e, PM, D	e, PM, D	-	-	-	half-size
	115 or 141 PPSB (MC-800) [1]	# of each as indicated above				# of each as indicated above				# of each as indicated above						
Yes	Design & Construction Submittal Receiving	2PR, 2PC*, CD	3PR, 3PC*, CD	3PR, 3PC*, CD	3PR, 3PC*, CD	PR, PC*, CD	PBOD*, PC*, D, CD	PBOD*, PC*, FB*, PM, D, CD	PBOD*, PC*, FB*, PM, D, CD	PBOD*, PC*, FB*, PM, D, CD	PBOD*, PC*, FB*, PM, D, CD	PBOD*, PC*, FB*, PM, D, CD	-	-	-	As indicated
	117 PPSB (MC-800) Facilities & Services University of Illinois 1501 S. Oak St. Champaign, IL 61820	# of each as indicated above				Each as indicated above, except: 1 PM/D half-size, 1 PM/D full-size, 1 CD				Each as indicated above, except: 2 PM/2D half-size, 1 PM/D full-size, 1 CD						

PM/Planner complete peach cells (Date, delivery, project name, etc.)
 PM/Planner complete peach cells (Const type, planner, etc.)
 PM/Planner choose applicability of Report/Construction type
 PM/Planner choose applicability of submittals
 in columns G through I choose Feasibility / Memo or Cost
 confirm with PM/Planner on SIZE

Guidance or instructional messages will appear at the right outside of the printable area. Red text is important or special directions.

DIRECTIONS: PSC should print & use at CONCEPT submittals. PM/Planner only should hide non-applicable rows. Choices for applicability are in the tab [C-Design&Const]

U12345 - Davenport Hall Addition & Remodel - Example	
Conceptualization - PSC Minimum List of Deliverables	
Const. Delivery = BID ; Const. Type = Remodeling/Addition; LEED Goal = Silver - Certified; Bldg, lot, or Utility: 0001 Master Template last updated on: 12/01/2016. Struck out text is not required.	
12/1/2016	John Smith
Last Edited	Edited by
Most Recent Editor's Name	
Data Transmitted	Applies?
Item Name	
(Item's with only one *- Updates beyond first listed phase)	
Y	00. * Minimum List of Deliverables
Y	01. Construction Cost Estimate (area; volume; unit costs)

-----ECHOED from Tab [A-Info, Phases, Recip.]
 -----Phase Applicability chosen in Tab [A-Info, Phases, Recip.]
 -----ECHOED from Tab [A-Info, Phases, Recip.]
 -----Enter/Update "EDIT DATE" / "ENTITY" / "EDITOR"
 Guidance

On **TAB A**, cells with peach backgrounds are to be completed, edited, or verified. Light peach is for a manual entry. Darker peach are dropdown options.

Fill in / complete in light peach cells.

Required Phases and Delivery Requirements															
Master Template last updated on: 07/31/2017															
7/31/2017	BID	Davenport Hall Addition & Removel - Example										U12345			
Date	Construction Delivery Method	Project Name										Project #			
0001	Remodeling/Addition	Jane Doe	Yes	Yes	No	John Smith									
Bldg #, Lot or Utility	Construction Type	Planner	BOT approval?	SHPO Involvement?	CDB project?	Project Manager / Coordinator									
	Silver - Certified	Note: Bid & Award includes Addenda Submittals													
	LEED Goal	Conceptualization				Design				Construction				Ok	
	Submittal Applies? ----->	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
Recipient & Applicability		Concept DRAFT				Concept FINAL	SD	DD	50% CD	95% CD	Bid & Award	Const.	Close Out	Post Const.	Size
Yes	F&S Planner and/or PM: Jane Doe (Planner); John Smith (PM)	PR, e	PR, e	PR, e	PR, e	PR, e	e, D, PBOD	e, PM, D	e, PM, D	e, PM, D	e, PM, D	-	-	-	half-size
	115 or 141 PPSB (MC-800) ⁽¹⁾	# of each as indicated above				# of each as indicated above				# of each as indicated above		# of each as indicated above			
Yes	Design & Construction Submittal Receiving	2PR, 2PC*, CD	2PR, 2PC*, CD	2PR, 2PC*, CD	2PR, 2PC*, CD	PR, PC*, CD	PBOD*, PC*, D, CD	PBOD*, PC*, FB*, PM, D, CD	PBOD*, PC*, FB*, PM, D, CD	PBOD*, PC*, FB*, PM, D, CD	PBOD*, PC*, FB*, PM, D, CD	-	PBOD*, PC*, FB*, PM, D, CD	-	
	117 PPSB (MC-800)	Each as indicated above, except:					Each as indicated								

On **TABS A, B, C** cells with peach backgrounds are to be completed, edited, or verified. Darker peach are dropdown options. On all design and construction phase tabs, the only dropdown is for the “Edited by”.

Fill in / complete in dark peach cells.

Required Phases and Delivery Requirements															
Master Template last updated on: 07/31/2017															
7/31/2017	BID	Davenport Hall Addition & Removel - Example										U12345			
Date	Construction Delivery Method	Project Name										Project #			
0001	Remodeling/Addition	Jane Doe	Yes	Yes	No	John Smith									
Bldg #, Lot or Utility	Construction Type	Planner	BOT approval?	SHPO Involvement?	CDB project?	Project Manager / Coordinator									
	Silver - Certified	Note: Bid & Award includes Addenda Submittals													
	Choose from Drop Down	Conceptualization				Design				Construction				Ok	
	None	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
Recipient & Applicability		Concept DRAFT				Concept FINAL	SD	DD	50% CD	95% CD	Bid & Award	Const.	Close Out	Post Const.	Size
Yes	F&S Planner and/or PM: Jane Doe (Planner); John Smith (PM)	PR, e	PR, e	PR, e	PR, e	PR, e	e, D, PBOD	e, PM, D	e, PM, D	e, PM, D	e, PM, D	-	-	-	half-size
	115 or 141 PPSB (MC-800) ⁽¹⁾	# of each as indicated above				# of each as indicated above				# of each as indicated above		# of each as indicated above			
Yes	Design & Construction Submittal Receiving	2PR, 2PC*, CD	2PR, 2PC*, CD	2PR, 2PC*, CD	2PR, 2PC*, CD	PR, PC*, CD	PBOD*, PC*, D, CD	PBOD*, PC*, FB*, PM, D, CD	PBOD*, PC*, FB*, PM, D, CD	PBOD*, PC*, FB*, PM, D, CD	PBOD*, PC*, FB*, PM, D, CD	-	PBOD*, PC*, FB*, PM, D, CD	-	
	117 PPSB (MC-800)	Each as indicated above, except:					Each as indicated								

Directions for Tab [A-Info, Phases, Recip.]

TAB A - A-Info, Phases, Recip.

Purpose : Start of the new process to insert basic project information, verify type of project, select applicable phases, provide a list of who receives how many of what deliverable in which format at which phase, and set the basic information and phase applicability echoed in subsequent tabs.

A-1 : Complete all peach cell information at the top including:

Date, Bldg #/ Lot / Utility, Construction Delivery Method, Construction Type, LEED Goal, Project Name, Project Number, Planner, PM, BOT applicability, IHPA Involvement, and CDB applicability.

Required Phases and Delivery Requirements												
Master Template last updated on: 04/19/2016												
###/##/####	Choose from Drop Down	Insert Project Name										U160##
Date	Construction Delivery Method	Project Name										Project #
####	Choose from Drop Down	TBA	Select	Select	Select	TBA						
Bldg #, Lot or Utility	Construction Type	Planner	BOT project?	IHPA Involvement	CDB project?	Project Manager / Coordinator						
	Choose from Drop Down											
LEED Goal		Conceptualization	Design			Construction				Ok		

A-2 : Use dropdown menus at the top of the table to determine applicability of master phases (Feas, vs Concept. / Design / Const.):

Utility	Conceptualization				Design				Construction				Ok	
Submittal Applies? ---->	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Size
Recipient & Applicability	Concept DRAFT				Concept FINAL	SD	DD	50% CD	95% CD	Bid	Const.	Close Out	Post Const.	

Conceptualization only	Design				Construction			
Investigation/Memo/Short Report	Design				Construction			
Feasibility Study	Design does not apply				Construction does not apply			
Conceptualization only	SD	DD	50% CD	95% CD	Bid & Award	Const.	Close Out	Post Const.
Conceptualization								
Feasibility or Conceptualization do not apply								
No reports or Conceptualization Apply								

Note 2a- If a choice of something not applying is selected, the subsequent cells below will automatically gray out. (see "construction does not apply" below).

Note 2b- If Feasibility Study is selected, Design or Construction should NOT be selected. An error will appear in red at the right.

LEED Goal	Feasibility Study				Design				Construction does not apply				Error	
Submittal Applies? ---->	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
Recipient & Applicability	Feas. DRAFT				Feas. FINAL	SD	DD	50% CD	95% CD	Bid & Award	Const.	Close-Out	Post-Const.	Size
Yes	F&S Planner and/or PM: Jane Doe (Planner); John Doe (PM)	PR, E	PR, E	PR, E	PR, E	PR, E	2D, 2PBOD	E,PM,D	E,PM,D	E,PM,D	E,PM,D	-	-	half-size

A-3 : Use next row of dropdown menus at the top of the table to determine applicability of each phase

(Draft and Final of reports, SD, DD, 50% CD, 95% CD, Bid, Const., Close Out, Post Const.).

LEED Goal	Conceptualization				Design				Construction				Ok	
Submittal Applies? ---->	Yes	No	No	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
Recipient & Applicability	Concept DRAFT				Concept FINAL	SD	DD / 50%	95% CD	Bid & Award	Const.	Closeout	Post Const.	Size	
Yes	F&S Planner and/or PM: Jane Doe (Planner); John Smith (PM)	PR, e	PR, e	PR, e	PR, e	e, D, PBOD	e,PM,D	e,PM,D	e,PM,D	e,PM,D	e,PM,D	-	-	Half Size
	115 or 141 PPSB (MC-800) (1)	# of each as indicated above				# of each as indicated above				# of each as indicated above				
Yes	Design & Construction Submittal Receiving	DD	DD	DD	DD	DD	DD	DD	DD	DD	DD	PM,D,DD	-	
	Univ. of IL Facilities & Services 117 PPSB (MC-800) 1501 S. Oak St. Champaign, IL 61820											1 PM,D full-size, DD		As indicated

Note 3 - Selecting "No" in one or more of the design phases will automatically change the labels to reflect combined submittals. Columns below will gray out.

A-4a : Verify/Complete the names of each recipient in the peach cells on the left.

A-4b : Fill in requested # of each deliverable and deliverable format in the rows to the right of each name.

LEED Goal		Conceptualization				Design				Construction does not apply				Ok	
Submittal Applies? ----->		Yes	No	No	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes		
Recipient & Applicability		Concept DRAFT				Concept FINAL	SD		DD / 50%CD	95% CD	Bid-& Award	Const.	Close-Out	Post-Const.	Size
Yes	Project Department(s): TBA INSERT-Room # and BLDG Name INSERT-Street Address INSERT-City, IL and ZIP CODE INSERT-email address	2 PR, E	1-PR,-E	1-PR,-E	1-PR,-E	2 PR, E	E,D,PM	E,D,PM	E,D,PM	E,D,PM	E,D,PM		E,D,PM		Half Size
Yes	Project College (as applicable): TBA INSERT-Room # and BLDG Name INSERT-Street Address INSERT-City, IL and ZIP CODE INSERT-email address	1 PR, E	1-PR,-E	1-PR,-E		1									Half Size
Yes	Other: TBA INSERT-Room # and BLDG Name INSERT-Street Address INSERT-City, IL and ZIP CODE INSERT-email address	1 PR, E	1-PR,-E	1-PR,-E	1-PR,-E	1 PR, E	E,D,PM	E,D,PM	E,D,PM	E,D,PM	E,D,PM		E,D,PM		Half Size

4b – Example: Project department is receiving 2 hard copies of the report.

4a - Complete recipient information for Project Department, College, and any other applicable recipients.

4a - Choose Yes or No from drop downs. (Cells will automatically gray out if No is chosen.)

Note 4b – The key for the deliverables and formats are at the bottom of the table.

Yes	Other: Campus Historic Preservation Officer Facilities & Services 1501 S. Oak St. Champaign, IL 61820	E	1-PR,-E	1-PR,-E	1-PR,-E	1 PR, E	E,D,PM	E,D,PM	E,D,PM	E,D,PM	E,D,PM	-	-	-	Half Size
Yes	Email electronics only: MA@illinois.edu	E	E	E	E	E	E	E	E	E	E	-	-	-	

Key: DD = link to digital download pdf and all native files (cad, word, excel, etc.) D = paper Drawings, E = emailed pdfs or link to files, e = access to F&S files, PR = paper Report, PBOD = paper Basis of Design, PC = paper Calcs / Info, FB = hard copy Finishes & FF&E Binder/Boards, PM = paper Project Manual * = As Applicable
FOR ITEMS IN SUBMITTALS NOT ADDRESSED IN TABLE OR KEY ABOVE - See PSC Transmittal Guidance from PM/Planner

(1) Address is: Facilities & Services, University of Illinois, 1501 S. Oak St., Champaign, IL 61820
PSC mails or delivers directly to recipients with specific cover sheets. PSC shall use Transmittal Guidance provided by PM/Planner and the "PROJECT SUBMITTAL REQUIREMENTS".

Directions for Tab [B - Studies or Concept only]

TAB B – Studies or Concept Only (For Feasibility Studies, Investigations, Memo/Short Report or for Conceptualization Only contract)

Purpose : After basic project information is completed in previous tab [A-Info, Phases, Recip.], use TAB [B-Studies or Concept Only] choose applicability of deliverables and components for a Feasibility Studies or Memo/Short Reports or Conceptualization only contracts. Select type of report. **Not dependent on TAB C.**

B -1a : Verify in TAB A that the following selections are chosen:

(Memorandum or Short Report) or (Feasibility Study) or (Conceptualization Only) WITH Design & Construction Grayed.

LEED Goal		Memorandum or Short Report					Design				Construction			
Submittal Applies? ---->		Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Recipient & Applicability		Memo DRAFT				Memo FINAL	SD	DD	50%-CD	95%-CD	Bid-& Award	Const.	Close-Out	Post-Const.
Yes	F&S Planner and/or PM: Jane Doe (Planner); John Smith (PM)	PR, E	PR,E	PR,E	PR,E	PR, E	D,-PBOD	E,PM,D	E,PM,D	E,PM,D	E,PM,D	-	-	-
	115 or 141 PPSB (MC-800) ⁽⁴⁾	# of each as indicated above					# of each as indicated above				# of each as indicated above		# of each as indicated above	
Yes	Design & Construction Submittal Receiving	2PR, 2PC*, CD	2PR, 2PC*, CD	2PR, 2PC*, CD	2PR, 2PC*, CD	PR, PC*, CD	PBOD+, PC+,D,CD	PBOD+, PC+,EB+	PBOD+, PC+,EB+	PBOD+, PC+,EB+	PBOD+, PC+,EB+	-	-	-

B -1b : If TAB [B-Studies or Concept only] is grayed out like the image below, "Feasibility Study" or "Memorandum or Short Report" or "Conceptualization Only" was not selected in TAB A.

DIRECTIONS: PM/ Planner only should hide non-applicable rows. Choose applicability from Drop Downs. **DO NOT COMPLETE TABS 00 - 08. DESIGN & CONSTRUCTION DO NOT APPLY.**

Y 1. **EXAMPLE Deliverable/Master ITEM - will be striked out if drop box selection is "N".**

Y Example Sub Item (Deliverable Component) - will be striked out if drop box selection is "N".

Y O Example Subset (Deliverable Subcomponent) Item - will be striked out if drop box selection is "N".

U12345 - Davenport Hall Addition & Remodel - Example

PROJECT IS DESIGN & CONSTRUCTION - NO FEASIBILITY STUDY

Const. Delivery = BID; Const. Type = Remodeling/Addition; LEED Goal = Gold - Not Cert.; Bldg. lot, or Utility=0001
Master Template last updated on: 12/01/2016. Struck out text is not required.

Planner

Last Edited Edited by Most Recent Editor's Name

Date Transmitted	Applies?	Item Name
Y		00, Updated Minimum List of Deliverables
Y		01, Conceptual Construction Cost Estimate for Each Alternate (area; volume; unit costs)
Y		02, Project Schedule (Proposed Durations of Activities)
Y		03, Written Response to Review Comments

B -2a : Note the information echoed from TAB A at the top of the printable area

Date, Bldg #/ lot/ Utility, Construction Delivery Method, Construction Type, Project Name, Project Number, Planner, PM, BOT applicability, and CDB applicability.

B -2b : Complete the DATE, EDITED BY, & EDITOR NAME

U12345 - Davenport Hall Addition & Remodel - Example		
Feasibility Study - PSC Minimum List of Deliverables		
Const. Delivery = BID ; Const. Type = Remodeling/Addition; LEED Goal = Gold - Not Cert.; Bldg, lot, or Utility: 0001 Master Template last updated on: 12/01/2016. Struck out text is not required.		
Planner		
Last Edited	Edited by	Most Recent Editor's Name
Date Transmitted	Applies?	Item Name
Y	✓	00. Updated Minimum List of Deliverables
Y	✓	01. Conceptual Construction Cost Estimate for Each Alternate (area; volume; unit costs)
N	✓	02. Project Schedule Not Used in this Design Phase

2a

2b

NOTE – For TAB [B-Studies or Concept only], applicability of each item is selected within the ACTUAL tab for the Feasibility phase, **not in [C-Design&Const]**. **No** other tabs beyond TAB [B-Studies or Concept only] should be completed.

B-3 : Choose “Y” for only 1 of the 4 types of reports. If more than one report type is selected OR no report types are selected, an ERROR will appear.

Y	✓	03. Written Response to Review Comments
Y		04a. Basis of Design (BOD) / Program Statement (Feasibility Report)
<i>Echo Choose at least 1 No choice made</i>		
N		Report Type 1 – BOD/PS (SIMILAR COMPONENTS AS CONCEPTUALIZATION REPORT) – default

Y		04a. Basis of Design (BOD) / Program Statement (Feasibility Report)
<i>Echo Error - choose only 1 Report Type 1 - BOD/PS (SIMILAR COMPONENTS AS CONCEPTUALIZATION REPORT) - default / Report Type 2 - CONDITION AND/OR CAPACITY ASSESSMENTS (Overall system and general</i>		
	Y	Report Type 1 - BOD/PS (SIMILAR COMPONENTS AS CONCEPTUALIZATION REPORT) - default
	Y	Signed and Sealed Report Cover - (Final Version only)
	Y	Project Description
	Y	Program Needs Assessment

B-4a : Choose applicability of numbered bold deliverable items - Y / N / ?

4b : Choose applicability of sub or component items - Y / N / ?

4c : Choose applicability of subset items of components - Y / N / ?

Y	04a. Basis of Design (BOD) / Program Statement (Feasibility Report)	
Echo	Selection =	Report Type 1 - BOD/PS (SIMILAR COMPONENTS AS CONCEPTUALIZATION REPORT) - default
Y		Report Type 1 - BOD/PS (SIMILAR COMPONENTS AS CONCEPTUALIZATION REPORT) - default
Y		Signed and Sealed Report Cover - (Final Version only)
Y		Project Description
Y		Program Needs Assessment

3b – Y/N / ? of deliverable components.

3a - Y/N / ? of numbered deliverable.

Y	Opinions of Probable Cost for each alternate	
Y	Financial Analysis	
Y	<input type="radio"/>	Client Optional Financial Item 1
Y	<input type="radio"/>	Client Optional Financial Item 2
Y	<input type="radio"/>	Client Optional Financial Item 3
Y	<input type="radio"/>	Client Optional Financial Item 4

3c – Y/N / ? of subset items of components.

3b – Y/N / ? of deliverable components.

B-4 : Selecting "N" will automatically strike out the item and any dependent components or subset items.

Y	Life Safety Analysis	
N	<i>Applicable Permits / Analysis</i>	
Y	Results of itemized Area Analysis Comparing the Net-to-Gross Square Feet - Per Floor; P Assembly Space; and Per Building as applicable	
N	Historic Preservation	
Y	<input type="radio"/>	<i>Review of Campus Heritage Database and Historical Districts</i>
Y	<input type="radio"/>	<i>Review of requirements of building façade / envelope</i>
Y	<input type="radio"/>	<i>Review of requirements of significant interior spaces</i>
Y	<input type="radio"/>	<i>Historical Documentation (HABS)</i>

B-5 : Recommend HIDING rows of non-applicable report types.

Directions for Tab [C – Design & Const.]

TAB C – Design & Const. (For Design & Construction Phases)

Purpose : After basic project information is completed in previous tab [A-Info, Phases, Recip.], choose when to turn on major deliverables and turn off deliverable components and subset items for design & construction phases [TABs 00 – 08]. All design and construction phases are listed side by side to see when each item is applicable. **Inputs in this sheet will echo on the individual tabs for each phase.**

Note – The completion level of line items is indicated is indicated within the individual tabs for each design & construction phase.

C-1a : Insert last edited information – Date, By (Planner, PM, PSC), and Editor Name at the top of the sheet.

C-1b : OPTIONAL & AS SHOWN BELOW. Unhide all columns from column G through column Y.

C-2 : If Cells at the top of the sheet appear with Red Text and a red or pink background, finish completing project information in **TAB A**. This information includes:

Date, Bldg #/ lot/ Utility, Construction Delivery Method, Construction Type, Project Name, Project Number, Planner, PM, BOT applicability, SHPO applicability, and CDB applicability.

Date: 7/31/2017 Last Edit by: PM Last Editor's Name: John Smith

Insert Project Information (Project Name & #) in TAB A

Bldg, Lot, Utility = 0001; Delivery = BID; Type = Remodeling/Addition; LEED Goal = Silver - Certified ; BOT = Select; SHPO = Yes; CDB = No

00	00	01	01	02	02	03	03	04	04	05	05	06	06	07	07	08	08		
Conceptualization-Not Basic Services	Conceptualization-Not Basic Services (DEFAULT)	Schematic Design	Schematic Design (DEFAULT)	Design Development	Design Development (DEFAULT)	50% CD	50% CD (DEFAULT)	95% CD	95% CD (DEFAULT)	Bld & Award	Bld & Award (DEFAULT)	Construction	Construction (DEFAULT)	Close Out	Close Out (DEFAULT)	Post Construction-Not Basic Services	Post Construction-Not Basic Services (DEFAULT)	General Item Name <small>(completeness level would be specific to phase) (Item's with only one * - Updates beyond first listed phase)</small>	Basic Services? <small>(If Supply or Remo.)</small>
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	00.* Minimum List of Deliverables	Y
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	01. Construction Cost Estimate <small>Estimates for all ADA upgrades and deficiency corrections shall be broken out in an additional estimate</small>	Y
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	02.* Project Schedule	Y
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	03. Written Response to Comments	Y

C-3 : Verify applicable phases have been selected (in previous **TAB A**). Non-applicable phases will appear with dark gray background.

Note – Default settings based on project information are shown in the right column for each phase in red text.

2 Note – Default values shown in gray. (Not actual selections – just guidance)

Date: 7/31/2017 Last Edit by: PM Last Editor's Name: John Smith

Comparison between MLD requirements in phases for U12345-Davenport Hall Addition & Removel - Example

Bldg, Lot, Utility = 001; Delivery = BID; Type = Remodeling/Addition; LEED Goal = Silver - Certified ; BOT = Yes; SHPO = Yes; CDB = No


00	00	01	01	02	02	03	03	04	04	05	05	06	06	07	07	08	08		
Conceptualization-Does Not Apply	Conceptualization-Does Not Apply (DEFAULT)	Schematic Design	Schematic Design (DEFAULT)	Design Development	Design Development (DEFAULT)	50% CD	50% CD (DEFAULT)	95% CD	95% CD (DEFAULT)	Bld & Award	Bld & Award (DEFAULT)	Construction	Construction (DEFAULT)	Close Out	Close Out (DEFAULT)	Post Construction-Not Basic Services	Post Construction-Not Basic Services (DEFAULT)	General Item Name <small>(completeness level would be specific to phase) (Item's with only one * - Updates beyond first listed phase)</small>	Basic Services? <small>(If Supply or Remo.)</small>
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	00.* Minimum List of Deliverables	Y
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	01. Construction Cost Estimate <small>Estimates for all ADA upgrades and deficiency corrections shall be broken out in an additional estimate</small>	Y
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	02.* Project Schedule	Y
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	03. Written Response to Comments	Y

2 – Conceptualization does not apply and appears gray.

C-4a : Choose applicability for each item for each phase by choosing from the dropdown choices.

C-4b : Choose applicability of Basic Services for each item for each phase by choosing from the dropdown choices.

4a – Hover over cell, click/select to see and select dropdown choice. (Y / N / ? /)



N	N	N	N	N	N	N	N	N	N	09.	Illinois Historic Preservation Agency (IHPA)	Y
Y	N	N	N	N	N	N	N	N	N		Walk through with IHPA	Y
N	N	N	N	N	N	N	N	N	N		Narrative on building and historical significance	Y
?	N	N	N	N	N	N	N	N	N			

4a – Hover over cell, click/select to see and select dropdown choice. (Y / N / ? /)



N	N	N	N	N	N	N	N	N	N	09.	Illinois Historic Preservation Agency (IHPA)	Y
N	N	N	N	N	N	N	N	N	N		Walk through with IHPA	Y
N	N	N	N	N	N	N	N	N	N		Narrative on building and historical significance	Y
N	N	N	N	N	N	N	N	N	N		Exterior Photographic Documentation	?

C-5: Finish choosing applicability for entire sheet (Item 1 down all the way to Item 42).

Date: 7/31/2017 Last Edit by: PM Last Editor's Name: John Smith																		
Comparison between MLD requirements in phases for U12345-Davenport Hall Addition & Removel - Example																		
Bldg, Lot, Utility = 0001; Delivery = BID; Type = Remodeling/Addition; LEED Goal = Silver - Certified ; BOT = Yes; SHPO = Yes; CDB = No																		
Master Template last updated on: 07/31/2017																		
00	00	01	01	02	02	03	03	04	04	05	05	06	06	07	07	08	08	Basic Services? (Y = Supp. or Remb.)
Conceptualization DOES NOT APPLY	Conceptualization DOES NOT APPLY	Schematic Design (DEFAULT)	Schematic Design (DEFAULT)	Design Development (DEFAULT)	Design Development (DEFAULT)	50% CD	50% CD (DEFAULT)	95% CD	95% CD (DEFAULT)	Bid & Award	Bid & Award (DEFAULT)	Construction (DEFAULT)	Construction (DEFAULT)	Close Out (DEFAULT)	Close Out (DEFAULT)	Post Construction- Not Basic Services	Post Construction (DEFAULT)	General Item Name <i>(completeness level would be specific to phase)</i> <i>(Item's with only one * - Updates beyond first listed phase)</i>
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	00. * Minimum List of Deliverables
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	01. Construction Cost Estimate <i>Estimates for all ADA upgrades and deficiency corrections shall be broken out in an additional estimate</i>
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	02. * Project Schedule
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	03. Written Response to Comments

Date: 7/31/2017 Last Edit by: PM Last Editor's Name: John Smith																		
Comparison between MLD requirements in phases for U12345-Davenport Hall Addition & Removel - Example																		
Bldg, Lot, Utility = 0001; Delivery = BID; Type = Remodeling/Addition; LEED Goal = Silver - Certified ; BOT = Yes; SHPO = Yes; CDB = No																		
Master Template last updated on: 07/31/2017																		
00	00	01	01	02	02	03	03	04	04	05	05	06	06	07	07	08	08	Basic Services? (Y = Supp. or Remb.)
Conceptualization DOES NOT APPLY	Conceptualization DOES NOT APPLY	Schematic Design (DEFAULT)	Schematic Design (DEFAULT)	Design Development (DEFAULT)	Design Development (DEFAULT)	50% CD	50% CD (DEFAULT)	95% CD	95% CD (DEFAULT)	Bid & Award	Bid & Award (DEFAULT)	Construction (DEFAULT)	Construction (DEFAULT)	Close Out (DEFAULT)	Close Out (DEFAULT)	Post Construction- Not Basic Services	Post Construction (DEFAULT)	General Item Name <i>(completeness level would be specific to phase)</i> <i>(Item's with only one * - Updates beyond first listed phase)</i>
										N	N	N	N	Y	Y	N	N	34. Final Approved Contractor Submittals with Log
										N	N	N	N	Y	Y	N	N	35. Contractor As-Built Drawings and As-Built Project Manual
																		POST CONSTRUCTION PHASE SPECIFIC ITEMS
										N	N	N	N	N	N	Y	Y	40. Post Construction Activities Log
										N	N	N	N	N	N	Y	Y	41. Log of Equipment with Settings Different than Manufacturer's Recommendations
										N	N	N	N	N	Y	Y		42. Post Construction Report

C-6: Hide default columns to avoid confusion.

- Select first column to hide by selecting the column letter at the top of the sheet.
- While letter is still selected, press the “Ctrl” button and hold down while selecting the letters of the other columns to hide.

00	00	01	01	02	02	03	03	04	04	05	05	06	06	07	07	08	08
Conceptualization DOES NOT APPLY	Conceptualization DOES NOT APPLY	Schematic Design (DEFAULT)	Schematic Design (DEFAULT)	Design Development (DEFAULT)	Design Development (DEFAULT)	50% CD	50% CD (DEFAULT)	95% CD	95% CD (DEFAULT)	Bid & Award (DEFAULT)	Bid & Award (DEFAULT)	Construction (DEFAULT)	Construction (DEFAULT)	Close Out	Close Out (DEFAULT)	Post Construction- Not Basic Services	Post Construction (DEFAULT)
Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
00. * Minimum List of Deliverables																	
01. Construction Cost Estimate <i>Estimates for all ADA upgrades and deficiency corrections shall be broken out in an additional estimate</i>																	
02. * Project Schedule																	

- While all column letters to hide are still chosen, hover over the column letters while simultaneously & right clicking.
- Select “Hide”.

05	06	06	07
Bid & Award (DEFAULT)	Construction (DEFAULT)	Construction (DEFAULT)	Close Out
Y	Y	Y	Y
00. * Minimum List of Deliverables			

Final View for TAB [C-Design&Const Deliverables] should appear similar to below after hiding default columns:

00	01	02	03	04	05	06	07	08
Conceptualization DOES NOT APPLY	Schematic Design	Design Development	50% CD	95% CD	Bid & Award	Construction	Close Out	Post Construction- Not Basic Services
Y	Y	Y	Y	Y	Y	Y	Y	Y
00. * Minimum List of Deliverables								
01. Construction Cost Estimate <i>Estimates for all ADA upgrades and deficiency corrections shall be broken out in an additional estimate</i>								
02. * Project Schedule								

Directions for Echoed Design Phases - Tabs 00 - 04

00 - Concept.	<p><u>Print and use this checklist at any Conceptualization Submittals.</u> <i>Represents overall project information and <u>conceptualization</u> phase applicability from TAB A. Echoes applicabilities of Deliverables and Components chosen in TAB C. Echoes the level of completion of components.</i></p>
01 - SD	<p><u>Print and use this checklist at any SD Submittals.</u> <i>Represents overall project information and <u>SD</u> phase applicability from TAB A. Echoes applicabilities of Deliverables and Components chosen in TAB C. Echoes the level of completion of components.</i></p>
02 - DD	<p><u>Print and use this checklist at any DD Submittals.</u> <i>Represents overall project information and <u>DD</u> phase applicability from TAB A. Echoes applicabilities of Deliverables and Components chosen in TAB C. Echoes the level of completion of components.</i></p>
03 - 50% CD	<p><u>Print and use this checklist at any 50% CD Submittals.</u> <i>Represents overall project information and <u>50% CD</u> phase applicability from TAB A. Echoes applicabilities of Deliverables and Components chosen in TAB C. Echoes the level of completion of components.</i></p>
04 - 95% CD	<p><u>Print and use this checklist at any 95% CD Submittals.</u> <i>Represents overall project information and <u>95% CD</u> phase applicability from TAB A. Echoes applicabilities of Deliverables and Components chosen in TAB C. Echoes the level of completion of components.</i></p>

00/04-1a : Verify in **TAB A** that following selections are chosen:

[Design]

Conceptualization				Design				Construction				
Yes	No	No	No	Yes	Design				Yes	Yes	Yes	Yes
Concept DRAFT				Concept FINAL	Design does not apply				Bid & Award	Const.	Close Out	Post Const.
					SD	DD	50% CD	95% CD				

00/04-1b : If any of TABS 02-06 is DARK-grayed out like the image below with "NO DESIGN" in red, Design was not selected in **TAB A**. If "DESIGN DEVELOPMENT DOES NOT APPLY", then the individual phase was not selected in **TAB A**.

U12345 - Davenport Hall Addition & Removdel - Example		
NO DESIGN - DESIGN DEVELOPMENT DOES NOT APPLY		
Const. Delivery = BID; Const. Type = Remodeling/Addition; LEED Goal = Silver - Certified; Bldg. Lot, or Utility: 0001 Master Template last updated on: 07/31/2017. Struck-out text is not required.		
7/31/2017	PM	John Smith
Last Edited	Edited by	Most Recent Editor's Name
Date Transmitted	Applies?	Item Name
		(Item's with only one *- Updates beyond first listed phase)
Y		00.* Minimum List of Deliverables – Current
Y		01. Construction Cost Estimate – Quantity Takeoff in CSI Format (Subst. Complete w/ Bid Alts.) <i>Estimates for all ADA upgrades and deficiency corrections shall be broken out in an additional estimate</i>
Y		02.* Project Schedule – Updated
Y		03. Written Response to Comments

00/04-2a : Note the information echo from TAB A at the top of the printable area

Date, Bldg #/ lot/ Utility, Construction Delivery Method, Construction Type, Project Name, Project Number, Planner, PM, BOT applicability, SHPO applicability and CDB applicability.

00/04-2b : Check the accuracy of the DATE, EDITED BY, & EDITOR NAME (if incorrect, edit in TAB C)

U12345 - Davenport Hall Addition & Removdel - Example			2a
Design Development - PSC Minimum List of Deliverables			
Const. Delivery = BID ; Const. Type = Remodeling/Addition; LEED Goal = Silver - Certified; Bldg, lot, or Utility: 0001 <i>Master Template last updated on: 07/31/2017. Struck out text is not required.</i>			
7/31/2017	PM	John Smith	2b
<i>Last Edited</i>	<i>Edited by</i>	<i>Most Recent Editor's Name</i>	
Date Transmitted	Applies?	Item Name <i>(Item's with only one *- Updates beyond first listed phase)</i>	
Y		00. * Minimum List of Deliverables - Current	
Y		01. Construction Cost Estimate - Quantity Takeoff in CSI Format (Subst. Complete w/ Bid Alts.) <i>Estimates for all ADA upgrades and deficiency corrections shall be broken out in an additional estimate</i>	
Y		02. * Project Schedule - Updated	

REMINDER – TAB C controls the applicability of individual items in these phase sheets.

00/04-3a : VIEW applicability of numbered bold deliverable items - Y / N / ?

3b : VIEW applicability of sub or component items - Y / N / ?

3c : VIEW applicability of subset items of components - Y / N / ?

Y		05b. Furnitures, Fixtures, and Equipment Binder
Y		(Approx 50% Complete) Cut Sheets
Y		(Approx 50% Complete) Product Samples
Y		(Draft) "Furniture Information Form" (electronic)
N		<i>PLACEHOLDER ROW - CUSTOM ROW - OPTIONAL CLIENT ITEM</i>

3b – Y/N / ? of deliverable components echoed from TAB C.

3a - Y/N / ? of numbered deliverable echoed from TAB C.

Date Transmitted	Applies?	Item Name <i>(Item's with only one *- Updates beyond first listed phase)</i>
Y		07a. Drawing Set
	Y	<i>Title Sheet (Approx. 50% Complete)</i>
	Y	<i>Code Compliance (Approx. 50% Complete)</i>
	Y	<i>Life Safety (Approx. 50% Complete)</i>
	Y	<i>General Project Info (Approx. 50% Complete)</i>
	Y	Asbestos, Lead Based Paint, & Hazardous Materials Drawings
	N	<i>PLACEHOLDER ROW - CUSTOM - Asbestos</i>
	Y	<i>Asbestos Removal, Remediation, Containment (Approx. 50% Complete)</i>

3c – Y/N / ? of subset items of components echoed from TAB C.

3b – Y/N / ? of deliverable components echoed from TAB C.

00/04-4 : Selecting "N" will automatically strike out the item and any dependent components or subset items.

	N	PLACEHOLDER ROW – Construction Layout/Laydown Plan with tree protection
	Y	Landscape Plan (Approx. 50% Complete)
	N	Architectural Drawings
	N	PLACEHOLDER ROW – CUSTOM – Architectural
	N	PLACEHOLDER ROW – CUSTOM – Architectural
	Y	Renderings (Approx. 50% Complete)
	Y	Floor Plans (Approx. 50% Complete)
	Y	Roof Plan (Approx. 50% Complete)

00/04-5 : OPTIONAL – Hide PLACEHOLDER ROWS.

Directions for Echoed Construction Phases - Tabs 05 - 08

05 - Bid	<u>Print and use this checklist at any BID Submittals.</u> Represents overall project information and <u>BID</u> phase applicability from TAB A . Echoes applicabilities of Deliverables and Components chosen in TAB C . Echoes the level of completion of components.
06 - CONST	<u>Print and use this checklist at any CONST Submittals.</u> Represents overall project information and <u>CONST</u> phase applicability from TAB A . Echoes applicabilities of Deliverables and Components chosen in TAB C . Echoes the level of completion of components.
07 - CLOSE OUT	<u>Print and use this checklist at any CLOSE OUT Submittals.</u> Represents overall project information and <u>CLOSE OUT</u> phase applicability from TAB A . Echoes applicabilities of Deliverables and Components chosen in TAB C . Echoes the level of completion of components.
08 - POST CONST	<u>Print and use this checklist at any POST CONST Submittals.</u> Represents overall project information and <u>Post Const</u> phase applicability from TAB A . Echoes applicabilities of Deliverables and Components chosen in TAB C . Echoes the level of completion of components.

05/08-1a : Verify in TAB A that following selections are chosen:
[Construction]

Conceptualization					Design				Construction			
Yes	No	No	No	Yes	Yes	Yes	Yes	Construction				
Concept DRAFT				Concept FINAL	SD	DD	50% CD	95% CD	Construction does not apply			
									Bid & Award	Const.	Close Out	Post Const.

05/08-1b : If any of TABS 05/08 is DARK grayed out like the image below with “NO CONSTRUCTION” in red, Construction was not selected.

U12345 - Davenport Hall Addition & Removdel - Example		
NO CONSTRUCTION - CONST. DOES NOT APPLY		
Const. Delivery – BID ; Const. Type – Remodeling/Addition; LEED Goal – Silver - Certified; Bldg., lot, or Utility- 0001 Master Template last updated on: 07/31/2017. Struck-out text is not required.		
7/31/2017	PM	John Smith
Last Edited	Edited by	Most Recent Editor's Name
Date Transmitted	Applies?	Item Name
(Item's with only one "*" - Updates beyond first listed phase)		
Y	00.*	Minimum List of Deliverables – Current
N	01.	Construction Cost Estimate Not Used In This Construction Phase
N	02.*	Project Schedule Not Used In This Construction Phase
N	03.	Written Response to Comments Not Used In This Construction Phase

05/08-2a : Note the information echo from TAB A at the top of the printable area

Date, Bldg #/ lot/ Utility, Construction Delivery Method, Construction Type, Project Name, Project Number, Planner, PM, BOT applicability, SHPO applicability, and CDB applicability.

05/08-2b : Check the accuracy of the DATE, EDITED BY, & EDITOR NAME (if incorrect, edit in TAB C)

U12345 - Davenport Hall Addition & Remodel - Example			2a
Construction - PSC Minimum List of Deliverables			
Const. Delivery = BID ; Const. Type = Remodeling/Addition; LEED Goal = Gold - Not Cert.; Bldg, lot, or Utility: 0001 <i>Master Template last updated on: 12/01/2016. Struck out text is not required.</i>			
12/1/2016	PM	John Smith	2b
<small>Last Edited</small>	<small>Edited by</small>	<small>Most Recent Editor's Name</small>	
Date Transmitted	Applies?	Item Name <small>(Item's with only one * - Updates beyond first listed phase)</small>	
Y		00. * Updated Minimum List of Deliverables	
N		01. Cost Estimate Not Used in This Construction Phase	

REMINDER – TAB C controls the applicability of individual items in these phase sheets.

05/08-3a : VIEW applicability of numbered bold deliverable items - Y / N / ?

3b : VIEW applicability of sub or component items - Y / N / ?

3c : VIEW applicability of subset items of components - Y / N / ?

Y	05a. Ext. & Int. Finishes Binder/Finishes Boards - Installed - RECORD SET
Y	(Final Installed) Product Samples of Floor Coverings, Wall Covering, Window Treatment, Ceiling Tile, etc...
Y	(Final Installed) Paint selections and combinations
N	Placeholder Row - Custom Row - Optional Client Item
N	Placeholder Row - Custom Row - Optional Client Item
Y	05b. Furnitures, Fixtures, and Equipment Binder- Installed - RECORD SET
Y	(Final Installed) Cut Sheets
Y	(Final Installed) Product Samples
Y	(Final Installed) Product Samples

3b – Y/N / ? of deliverable components echoed from TAB C.

3a - Y/N / ? of numbered deliverable echoed from TAB C.

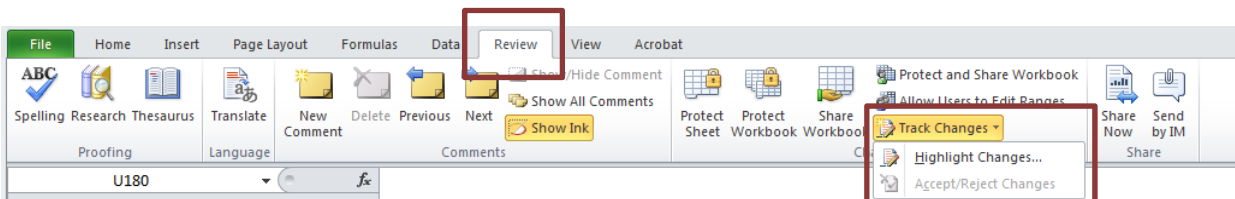
05/08-4 : Selecting "N" (in TAB C) will automatically strike out the item and any dependent components or subset items.

N	PLACEHOLDER ROW - CUSTOM - Hazardous Materials
Y	Other Hazardous Materials Removal, Remediation, Containment (Record)
N	Site, Civil, & Landscape Drawings(Record)
N	PLACEHOLDER ROW - CUSTOM - Site / Civil / Landscape
N	PLACEHOLDER ROW - CUSTOM - Site / Civil / Landscape
Y	Site Clearing, Demolitions, & Abandonments (Record)
Y	Site Plan (show tree protection if not yet shown in layout plan)(Record)

05/08-5 : OPTIONAL – Hide PLACEHOLDER ROWS. Process is similar to hiding columns.

Track the changes by the PSC

- After all inputs and options have been completed in **Tab A & Tab B**
or
Tab A & Tab C
and
subsequent tabs reviewed, → **save the spreadsheet.**
- After saved, then perform a “SAVE AS” with the date at the end of the name.
(i.e. “U12345 RPMLD 2018.10.31.xlsx”)
- Turn on track changes in this dated version prior to sending to the PSC.
 - Go to the Review Menu → Track Changes → Highlight Changes.



- Save as - add "tracked" to the end of the file name.
(i.e. “U12345 RPMLD 2018.10.31.xlsx”)
- Email the tracked excel file to the PSC. Inform them to review and make suggested changes that you can discuss during negotiations or at project phase submittal.