

Job Book Setup

This guide will walk the team through their respective steps to submit a Job Book for review and approval. Click on the bookmarks below to jump to that section.

[Invenergy Project Manager Submits Request](#)

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[Invenergy Project Manager to Assign Reviewers](#)

[Reviewers Provide Comments](#)

[Invenergy PM to Resolve Contractor Comments](#)

[Invenergy Project Manager to Submit Job Book to Customer/Owner](#)

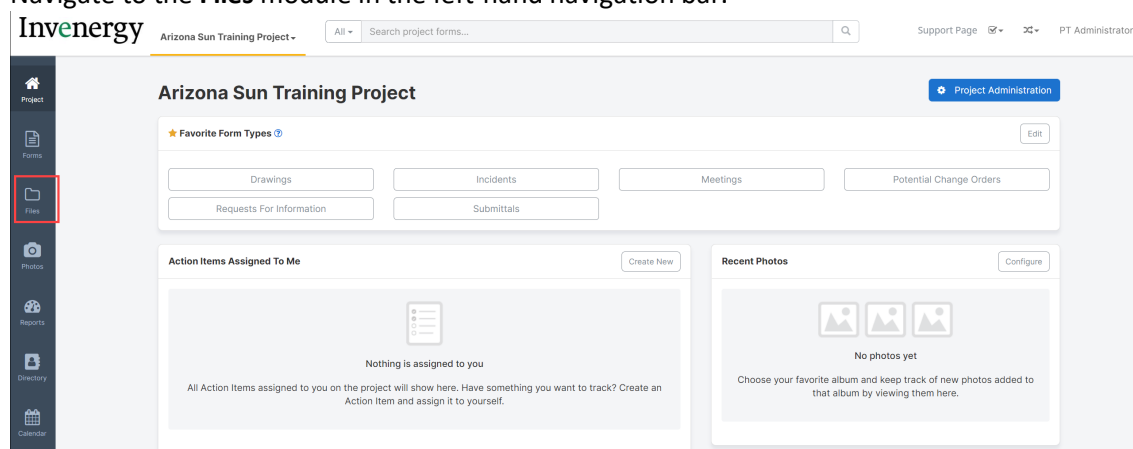
[Customer/Owner Review and Approve](#)

Invenergy Project Manager Submits Request

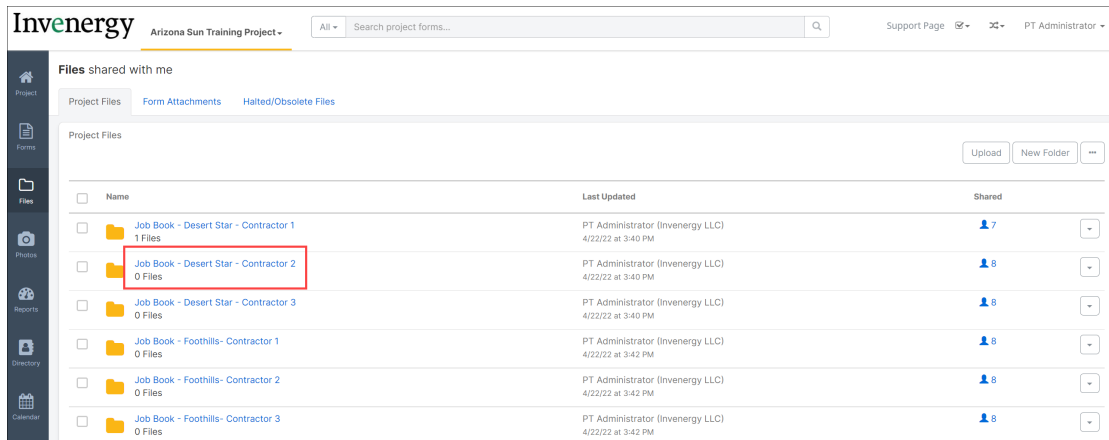
1. Project Manager (PM) will submit an email request to [Project Controls \(PC\) group](#). The following items will need to be included in the request:
 - a. Table of Contents (ToC): email the contractor's ToC list
 - b. Project Contractor Name(s)
 - c. Project Site Name(s)
 - d. Supply Client/Owner Company Name, Primary Contact Name, and Email
2. PC will create a folder for each Site Name + Contractor.
3. PC will upload the ToC placeholder folder structure and **Share** with PM, Customer Share Group, and Contractor Share Group.
4. PC to add contractor company to the workflow(s).
5. PC to add Client/Owner to the Project Directory and Invite them to the project.
6. Once complete, PC will email PM stating their request is complete.
7. Alternative step: if there are revisions to the ToC, email PC to implement those changes.

Contractor Actions: Upload Documents

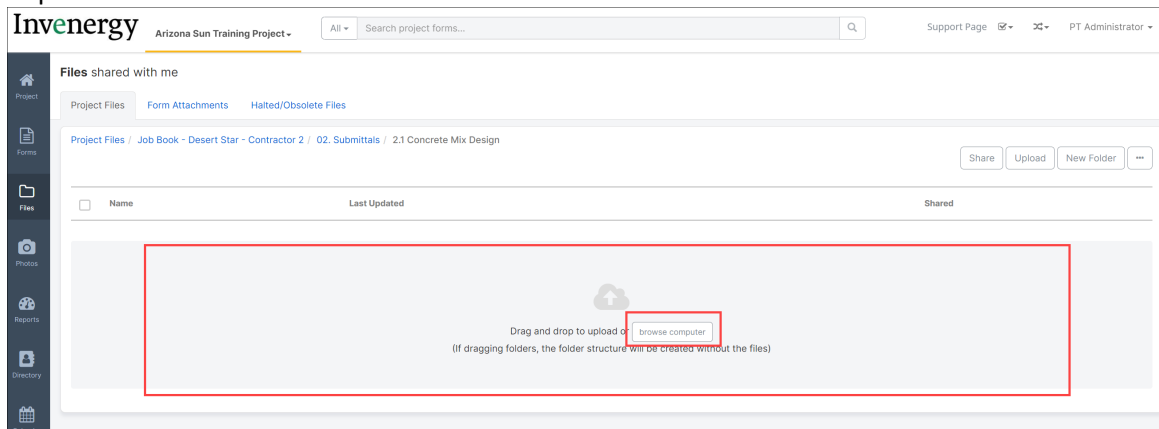
1. Navigate to the **Files** module in the left-hand navigation bar.



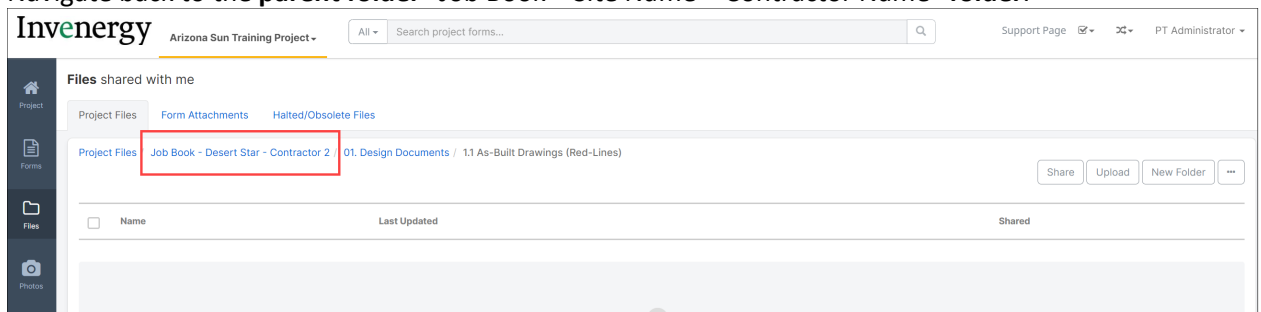
- Locate and click on the desired **Job Book folder**.



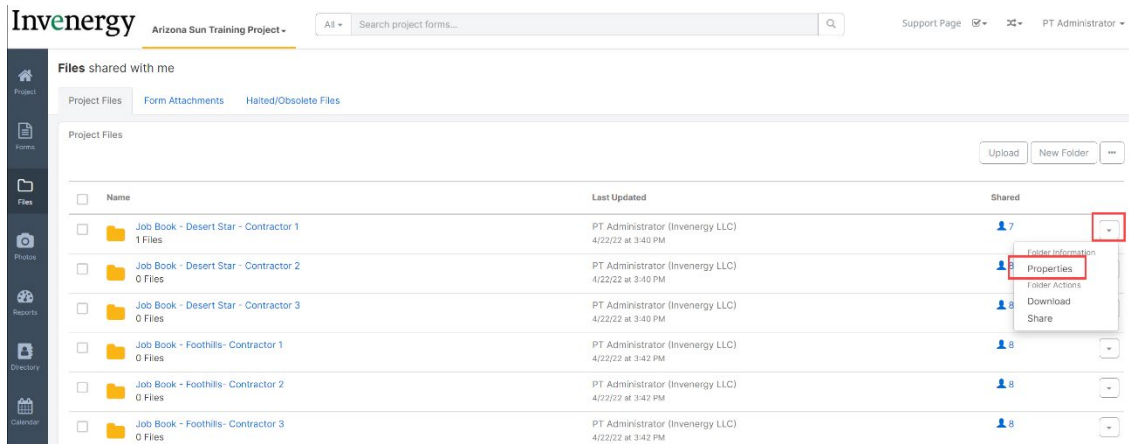
- Here you will find a folder for each required item from the ToC.
- Click the Subject of the folder. Use the drag and drop feature to **upload the document(s)**. Repeat for all folders.



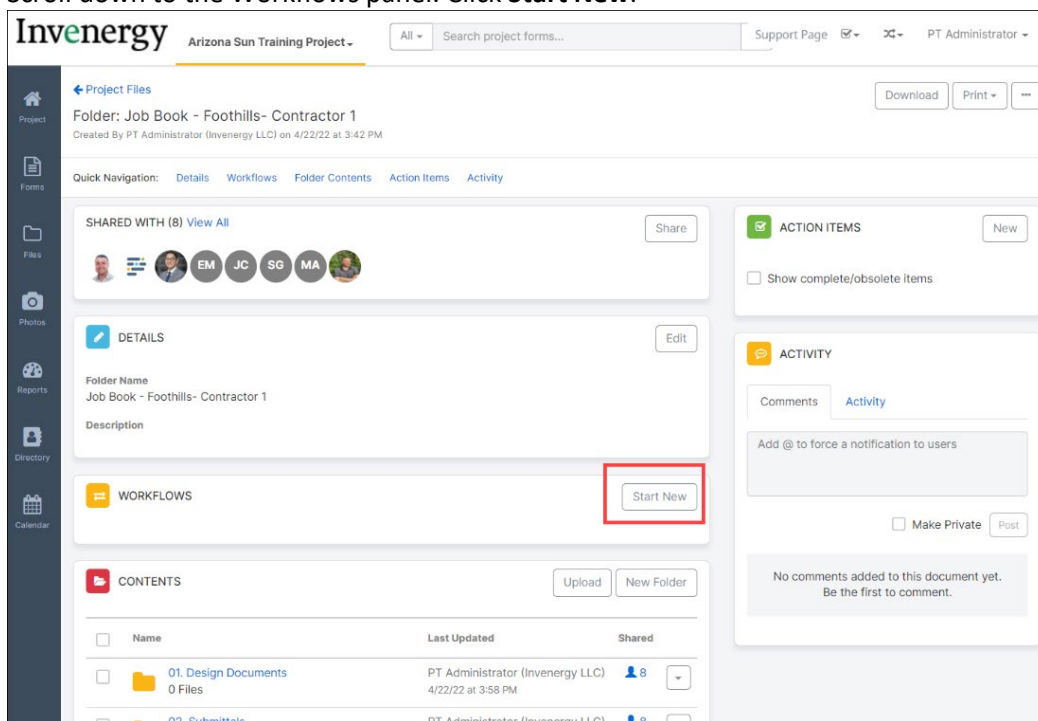
- Once all documents have been uploaded to the corresponding folders and the Job Book is complete, you need to inform the Invenenergy PM by **Starting a Workflow**. To do so, continue onto Step 6.
- Navigate back to the **parent folder** "Job Book – Site Name – Contractor Name" folder.



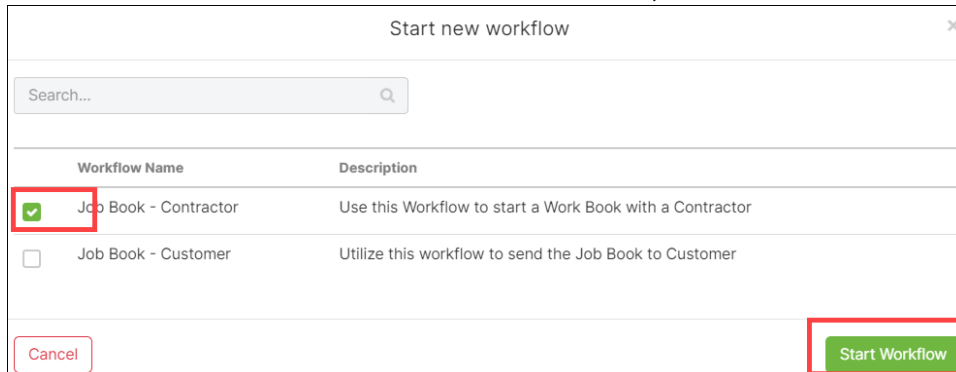
- Click the **ellipses**. Next, click **Properties**.



8. Scroll down to the Workflows panel. Click **Start New**.



9. Check the box for the Job Book – Contractor workflow, then click **Start Workflow**.



10. Invenenergy will review the documents and make comments indicating needed updates or corrections. You will receive a workflow notification instructing the contractor to make any changes annotated by Invenenergy and then pass the workflow.

Customer to Invenergy Workflow:

Workflow Name
Job Book - Powin

Description
Use this Workflow to start a Job Book with Invenergy

Available For
Folders

Who Can Start
(S) Administrator: INT (Invenergy LLC)
Powin (Powin)

Workflow Steps Reorder

Step #	Step Label	Days to Approve	Who Must Approve
1	Review (Invenergy)	5	Any
Send To (For Action) (S) Project Manager: INT (Invenergy LLC)			
Step Instructions Please confirm: contractor has supplied all correct documentation for each folder.			
Also Copy (For Information)			
2	Reviewing Comments (Contractor)	2	Any
Send To (For Action) Powin (Powin)			
Step Instructions Make any changes annotated by Invenergy and then pass the workflow.			
Also Copy (For Information)			
3	Final Review (Project Manager)	2	Any
Send To (For Action) (S) Project Manager: INT (Invenergy LLC)			
Step Instructions Review the changes the Contractor has made. If good pass the workflow, if adjustments are needed fail the workflow back to the contractor with notes on changes.			
Also Copy (For Information)			

Invenergy PM to Assign Reviewers

The contents of all the required Job Book submissions have been created by the contractor, submitted to the Invenergy Project Manager, and now the Invenergy PM needs to assign each folder to the appropriate review party. This will be accomplished by assigning an Action Item. Here are the steps.

1. Navigate to project **Files** > and click on the **Job Book-Site Name-Contractor Name** folder.
2. For each folder, click on the **dropdown arrow** on the far right of the row for that folder.

Invenergy Arizona Sun Training Project All Search project forms... Support Page PT Administrator

Files shared with me

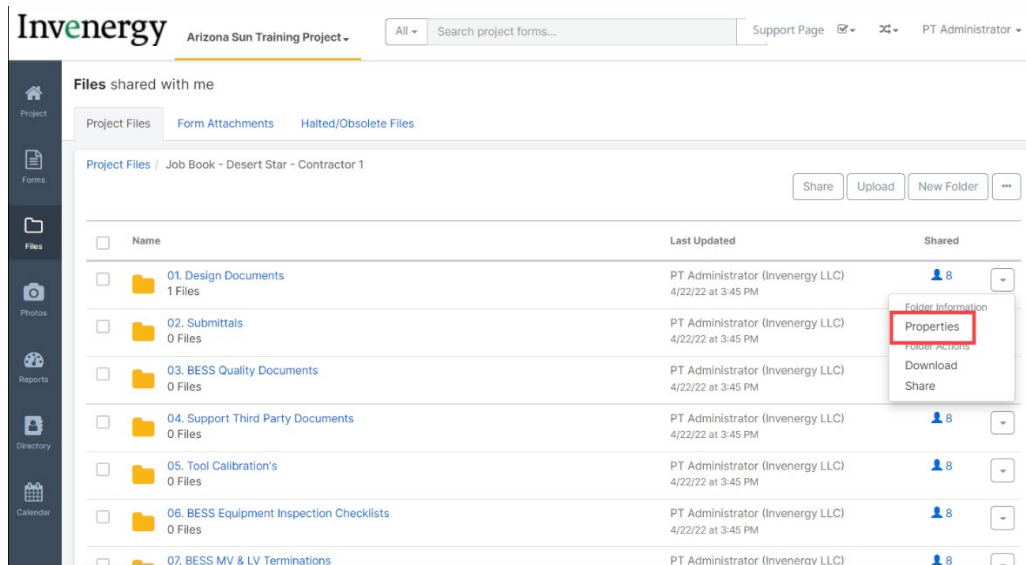
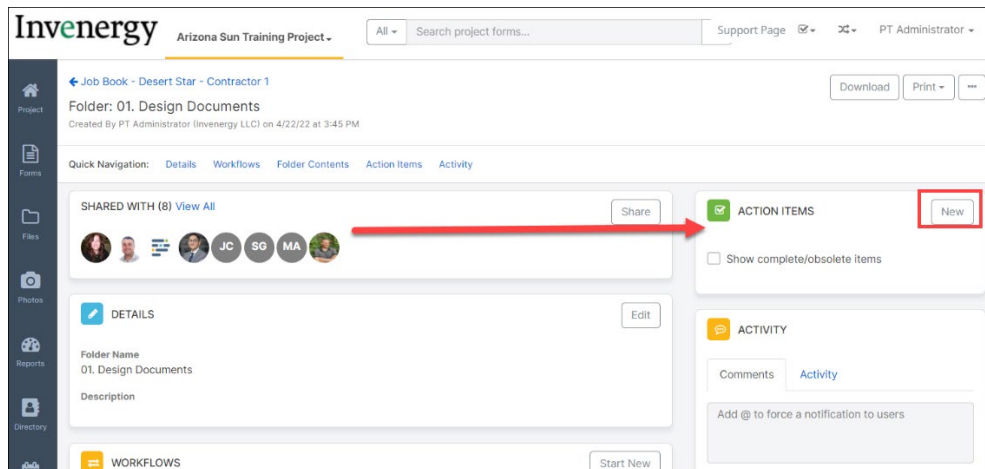
Project Files Form Attachments Halted/Obsolete Files

Project Files / Job Book - Desert Star - Contractor 1

Share Upload New Folder

Name	Last Updated	Shared
01. Design Documents 1 Files	PT Administrator (Invenergy LLC) 4/22/22 at 3:45 PM	8
02. Submittals 0 Files	PT Administrator (Invenergy LLC) 4/22/22 at 3:45 PM	8
03. BESS Quality Documents 0 Files	PT Administrator (Invenergy LLC) 4/22/22 at 3:45 PM	8
04. Support Third Party Documents 0 Files	PT Administrator (Invenergy LLC) 4/22/22 at 3:45 PM	8
05. Tool Calibration's 0 Files	PT Administrator (Invenergy LLC) 4/22/22 at 3:45 PM	8
06. BESS Equipment Inspection Checklists 0 Files	PT Administrator (Invenergy LLC) 4/22/22 at 3:45 PM	8
07. BESS MV & LV Terminations	PT Administrator (Invenergy LLC)	8

Folder Information
Properties
Folder Actions
Download
Share

3. Click **Properties**.4. In the **Action Items** panel, click **New**.5. Fill out the **Subject**, **Assigned To** (this is the reviewer you are assigning this folder to), **Due Date** (is always **5 days**), and any Notes.

Create Action Item

Subject
Design Doc Review for Job Book Submission-Site Name-Contractor

Document Reference
Folder : 01. Design Documents

Assigned To
Steven Gordon (Invenery LLC) [Remove]

☐ Assign to me

Assigned By
PT Administrator (Invenery LLC)

Due Date
05/24/2022

Notes
Type the Notes

[Cancel] [Save]

6. Click **Save**.
7. The **Assigned To** person will receive an email and have 5 days to provide feedback.
8. Use the **Activity panel > Comments** section to send comments and respond back to comments with the team.

Invenery Arizona Sun Training Project

SHARED WITH (8) [View All] [Share]

DETAILS [Edit]

Folder Name: 01. Design Documents

Description:

WORKFLOWS [Start New]

CONTENTS [Upload] [New Folder]

ACTION ITEMS [New]

☐ Show complete/obsolete items

ACTIVITY

Comments Activity

@Arjun Wadnerkar everything looks good

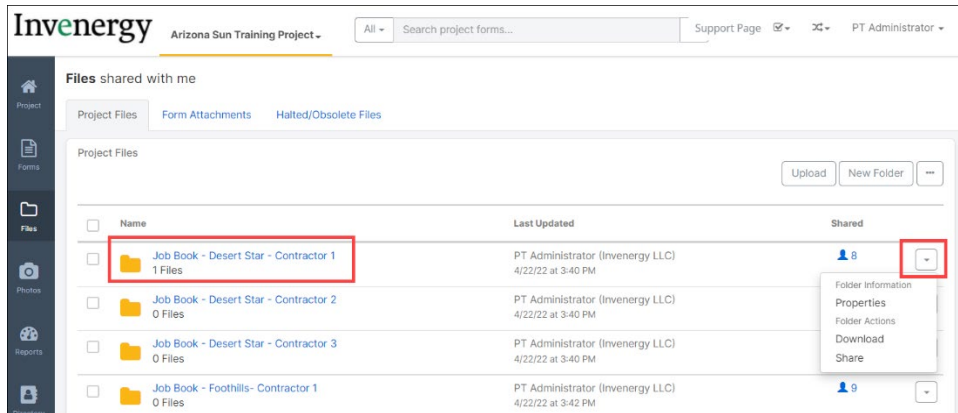
☐ Make Private [Post]

No comments added to this document yet.
Be the first to comment.

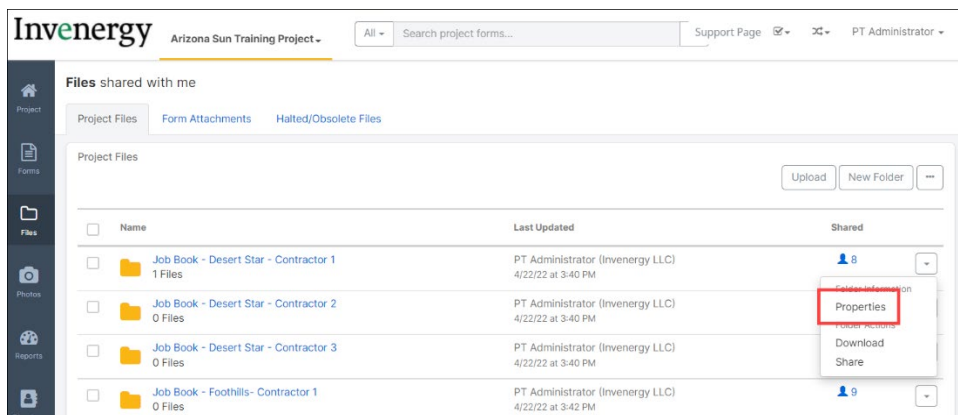
Reviewers Respond and Provide Comments

Assigned Reviewers receive email notifications stating they have been assigned part(s) of the Job Book to review and provide comments. Reviewers will input their comments into the Invenery and Contractor Comments table. Here are instructions:

1. You can use the link in the email notification you received. Or navigate to **Files > Job Book – Site Name – Customer Name** folder.



2. Click the **dropdown arrow**, then click **Properties**.



3. Find the **Invenenergy and Contractor Comments** table. Click **Edit**.

DETAILS Edit

Folder Name
Job Book - Desert Star - RES

Site Name

Description


Invenenergy and Contractor Comments Edit

#	Commenter Company	Commenter Name	Comment Description	Comment Date	Contractor Name	Contractor Response
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Invenenergy and Customer Comments Edit

#	Commenter Company	Commenter Name	Comment Description	Comment Date	Status	Invenenergy Name	Invenenergy Response
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4. Click **Create New**.

 DETAILS



Folder Name
Job Book - Desert Star - RES

Site Name

Description
Type the Description


Invenergy and Contractor Comments   Create New 

<input type="checkbox"/>	#	Commenter Company	Commenter Name	Comment Description	Comment Date	Contractor Name	Contractor Response

Invenergy and Customer Comments  Create New 

<input type="checkbox"/>	#	Commenter Company	Commenter Name	Comment Description	Comment Date	Status	Invenergy Name	Invenergy Response

5. Populate the following information:
- Commenter Company (pick from list)
 - Commenter Name (pick from list)
 - Comment Description
 - Comment Date
 - Status (select Open if response required)

Add Invenergy and Customer Comments 

Commenter Company

Commenter Name




Comment Description
Type the Comment Description

Comment Date

Status

Invenergy Name

Invenergy Response
Type the Invenergy Response

6. Click **Add & New** to add additional comments. Or click **Add** to complete the comments.

Add Invenergy and Customer Comments

Commenter Company

Commenter Name

Comment Description
Type the Comment Description

Comment Date

Status

Invenergy Name

Invenergy Response
Type the Invenergy Response

Cancel Add & New Add

7. Once complete with your review comments, you will need to mark your Action Item complete.
8. Navigate to the **Action Item** on the project **home page**.

Invenergy Arizona Sun Training Project

Search project forms... Support Page PT Administrator

Project Administration

★ Favorite Form Types

Drawings Incidents Meetings Potential Change Orders

Requests For Information Submittals

Action Items Assigned To Me (1 Total) Create New

Job Book is ready for contractor to upload Overdue: May 31

Related to Folder: Job Book - Desert Star - Contractor 1

Workflows In My Court (2 Total)

Job Book - Desert Star - Contractor 2 Overdue: May 11

Step 1 of 2 on Workflow: Job Book - Customer

Job Book - Foothills- Contractor 1 Overdue: May 16

Step 1 of 2 on Workflow: Job Book - Contractor

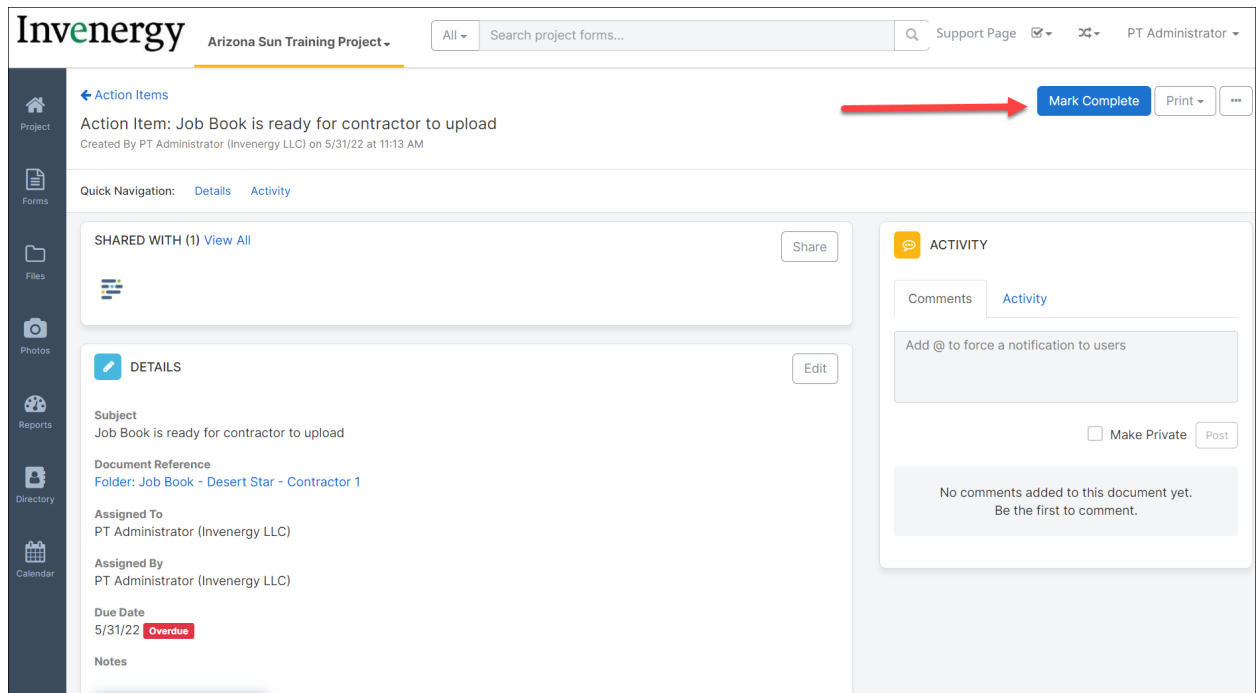
Recently Created Forms View All

Recent Photos Configure

Project Weather & Forecast

Phoenix 78°F

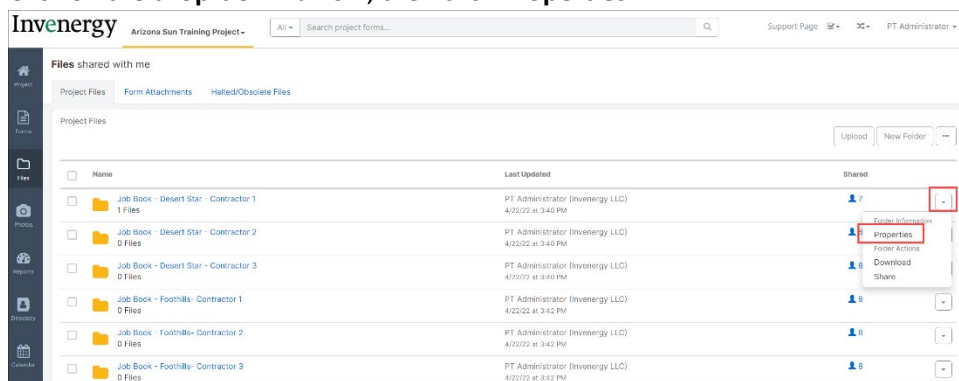
9. Click on the action item, then click **Mark Complete**.



Resolve Comments between Invenery and Contractor

Once comments are resolved between the Contractor and Invenery, the Invenery PM will complete the workflow back to the contractor.

1. Navigate to the **Files** module and locate the Job Book. Click on the Job Book title.
2. Click on the **drop-down** arrow, then click **Properties**.



3. Click **Take Action** on the Contractor workflow to close it out.

Invenenergy Arizona Sun Training Project - All Search project forms... Support Page PT Administrator

Job Book - Contractor requires your action
 Step #: 2 (Final Review (Project Manager))
 Due Date: 5/8/22
 Step instructions: Please confirm RES has supplied all correct documentation for each folder.
 Take Action New Workflow

Project Files
 Folder: Job Book - Desert Star - Contractor 1
 Created By PT Administrator (Invenenergy LLC) on 4/22/22 at 3:40 PM

Quick Navigation: Details Workflows Folder Contents Action Items Activity

SHARED WITH (7) View All Share

ACTION ITEMS New
☐ Show complete/obsolete items

4. Click **Pass**, then **Take Action**.

Job Book - Contractor

⚠ You are taking action on **Step 2 (Final Review (Project Manager))**.
 Please confirm RES has supplied all correct documentation for each folder.

Your action
☒ **Pass**
 Mark as "Passed" and move forward to the next step
☐ **Fail**
 Mark as "Failed" and move back to step:

Notes
 Notes

Cancel Take Action

Invenenergy PM to Submit Job Book to Client / Owner – via ProjectTeam

The Invenenergy PM sends the Job Book to the Customer/Owner. *It is required to send ALL Job Books to the customer at the same time.*

1. Scroll down to the Workflow panel. Click **Start New**.

Invenenergy Arizona Sun Training Project - All Search project forms... Support Page PT Administrator

Project Files
 Folder: Job Book - Desert Star - Contractor 2
 Created By PT Administrator (Invenenergy LLC) on 4/22/22 at 3:40 PM

Quick Navigation: Details Workflows Folder Contents Action Items Activity

SHARED WITH (8) View All Share

DETAILS Edit
 Folder Name: Job Book - Desert Star - Contractor 2
 Description:

WORKFLOWS Start New

CONTENTS Upload New Folder

Name	Last Updated	Shared
01. Design Documents 0 Files	PT Administrator (Invenenergy LLC) 4/22/22 at 3:45 PM	8
02. Submittals	PT Administrator (Invenenergy LLC)	8


ACTION ITEMS New
☐ Show complete/obsolete items

ACTIVITY
 Comments Activity
 Add @ to force a notification to users
☐ Make Private Post
 No comments added to this document yet.
 Be the first to comment.

2. Check the Job Book – Customer workflow and click **Start Workflow**.

Start new workflow

Search...

Workflow Name	Description
 Job Book - Customer	Utilize this workflow to send the Job Book to Customer

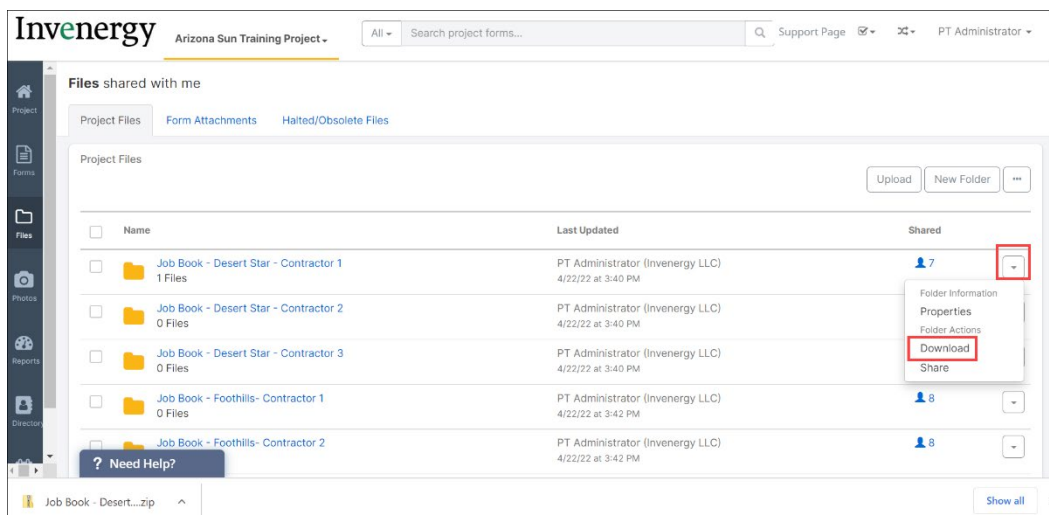
Cancel Start Workflow

- The Customer/Owner will receive an email notification to review the Job Book.

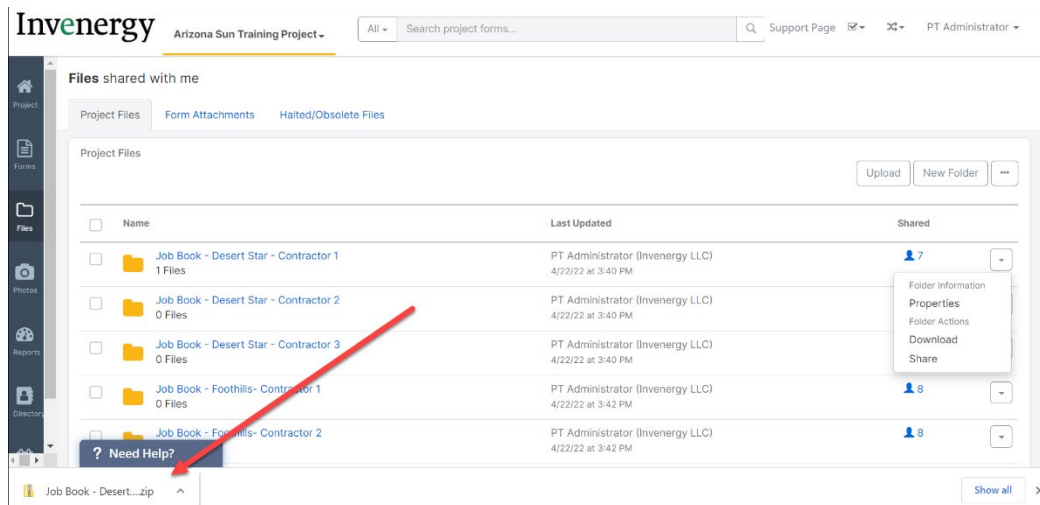
NOTE: If the Customer/Owner performing the review on Owner's behalf is NOT in ProjectTeam you have the choice to download the book and send it via email or another route. Here are the instructions:

Invenergy PM to Submit Job Book to Client / Owner – Outside of ProjectTeam

- Click on the **drop-down** arrow of each Job Book, then click **Download**.



- A zip file will be in your Download tray.



3. Next, email or upload to a shared drive to send to the Customer/Owner.

Customer/Owner to Review and Comment Job Book in ProjectTeam

Invenenergy has completed a project Job Book for your review and approval. Your task is to log into ProjectTeam.com, review the Job Book(s), communicate any required updates, then approve the workflow showing acceptance. Here are the steps.

1. You will receive an email notification stating there is a Job Book for your review. You may use the link in the email to navigate to the Job Book. Or you may log into [ProjectTeam](#).
2. Once logged into [ProjectTeam](#) navigate to the **project**. On the Homepage you will see the **Workflows panel**. Click on the Job Book title.

Arizona Sun Training Project

★ Favorite Form Types

Drawings Incidents Meetings Potential Change Orders

Requests For Information Submittals

Action Items Assigned To Me

Nothing is assigned to you

All Action Items assigned to you on the project will show here. Have something you want to track? Create an Action Item and assign it to yourself.

Workflows in My Court (1 Total)

Job Book - Desert Star - Contractor 2

Step 2 of 2 on Workflow: Job Book - Contractor

Recently Created Forms

My Access	Subject	Form Type	Created On	Shared
Shared	Footfills Job Book - RES	Submittal Package	4/22/22 11:52 AM	1
Shared	Paloma Job Book	Submittal Package	4/22/22 11:52 AM	1
Shared	Hyder Job Book	Submittal Package	4/22/22 11:52 AM	1
Shared	Gila Bend Job Book	Submittal Package	4/22/22 11:51 AM	1
Shared	Desert Star Job Book	Submittal Package	4/22/22 11:50 AM	1

Project Weather & Forecast

Phoenix Current 82°F Clear Skies

Fri	Sat	Sun	Mon	Tue
98°F 78°F	99°F 77°F	92°F 74°F	89°F 70°F	93°F 71°F
Cloudy	Cloudy	Clear Skies	Clear Skies	Clear Skies
→ 11 mph	→ 22 mph	→ 19 mph	→ 18 mph	→ 15 mph

Project Location

3. At the bottom of the screen, you will see a **Contents** panel. Click into each one of the folders and review all documents.

Folder: Job Book - Desert Star - Contractor 2

Created By PT Administrator (Invenenergy LLC) on 4/22/22 at 3:40 PM

Quick Navigation: Details Workflows Folder Contents Action Items Activity

SHARED WITH (8) View All

DETAILS

Folder Name: Job Book - Desert Star - Contractor 2

Description

WORKFLOWS

Job Book - Contractor is in Progress (Step 2 of 2)

CONTENTS

Name	Last Updated	Shared
01. Design Documents 0 Files	PT Administrator (Invenenergy LLC) 4/22/22 at 3:45 PM	8
02. Submittals 0 Files	PT Administrator (Invenenergy LLC) 4/22/22 at 3:45 PM	8
03. BESS Quality Documents 0 Files	PT Administrator (Invenenergy LLC) 4/22/22 at 3:45 PM	8
04. Support Third Party Documents 0 Files	PT Administrator (Invenenergy LLC) 4/22/22 at 3:45 PM	8
05. Tool Calibration's 0 Files	PT Administrator (Invenenergy LLC) 4/22/22 at 3:45 PM	8
06. BESS Equipment Inspection Checklists 0 Files	PT Administrator (Invenenergy LLC) 4/22/22 at 3:45 PM	8
07. BESS MV & LV Terminations 0 Files	PT Administrator (Invenenergy LLC) 4/22/22 at 3:45 PM	8

4. If you have questions or comments, use the **Invenergy to Customer** table. Click **Edit** to add comments.

 DETAILS Edit


Folder Name
Job Book - Desert Star - RES

Site Name

Description


Invenergy and Contractor Comments 

#	Commenter Company	Commenter Name	Comment Description	Comment Date	Contractor Name	Contractor Response

Invenergy and Customer Comments 

#	Commenter Company	Commenter Name	Comment Description	Comment Date	Status	Invenergy Name	Invenergy Response



5. Click the **Create New** button.

 DETAILS



Folder Name
Job Book - Desert Star - RES

Site Name

Description
Type the Description

Invenergy and Contractor Comments  Create New 

<input type="checkbox"/>	#	Commenter Company	Commenter Name	Comment Description	Comment Date	Contractor Name	Contractor Response

Invenergy and Customer Comments  Create New 

<input type="checkbox"/>	#	Commenter Company	Commenter Name	Comment Description	Comment Date	Status	Invenergy Name	Invenergy Response

6. Populate the following items:
- Commenter Company (pick from list)
 - Commenter Name (pick from list)
 - Comment Description
 - Comment Date
 - Status (select Open if response required)

Add Invenergy and Customer Comments

Commenter Company

Commenter Name

Comment Description
Type the Comment Description

Comment Date

Status

Invenergy Name

Invenergy Response
Type the Invenergy Response

Cancel Add & New Add

7. Click **Add & New** to add additional comments. Or click **Add** to complete the comments.

Add Invenergy and Customer Comments

Commenter Company

Commenter Name

Comment Description
Type the Comment Description

Comment Date

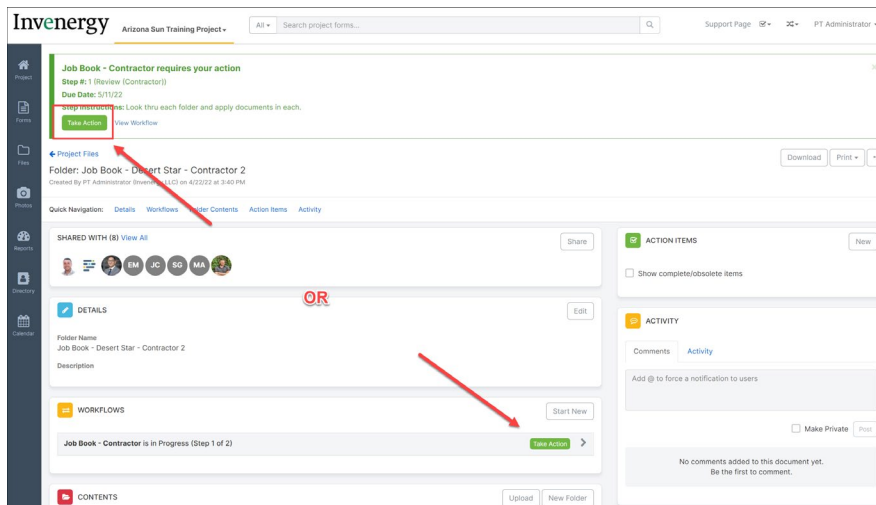
Status

Invenergy Name

Invenergy Response
Type the Invenergy Response

Cancel Add & New Add

8. When you have completed your comments, the Customer will pass the workflow back to Invenergy. To do so, click on **Take Action**.



9. Check the **Pass** option, then click **Take Action**. Invenenergy will be notified.

The screenshot shows the "Job Book - Customer" dialog box. It contains a warning message: "You are taking action on Step 1 (Review (Customer)). Please review all Job Book Documentation and comment to Project Manager with any issues. Then pass the workflow to the Project Manager for their final review." Below this, the "Your action" section has two radio buttons: "Pass" (selected and highlighted with a red box) and "Cancel". The "Pass" option is described as "Mark as 'Passed' and move forward to the next step". The "Cancel" option is described as "Mark as 'Cancelled' and stop the workflow". At the bottom, there is a "Notes" text area and two buttons: "Cancel" and "Take Action" (highlighted with a red box).

Invenenergy to Customer Workflow:

Workflow Details

Edit

Workflow Name

Job Book - Customer

Description

Utilize this workflow to send the Job Book to Customer

Available For

Folders

Who Can Start

(S) Administrator: INT (Invenergy LLC)
(S) Project Manager: INT (Invenergy LLC)

Workflow Steps

Reorder

Step #

Step Label

Days to Approve

Who Must Approve

1

Review (APS)

5

Any

Send To (For Action)

(S) Customer: EXT (Invenergy LLC)

Step Instructions

Please review all Job Book Documentation and comment to Project Manager with any issues. Then pass the workflow to the Invenergy Project Manager

Also Copy (For Information)

Step #

Step Label

Days to Approve

Who Must Approve

2

Review Comments (Invenergy)

2

Any

Send To (For Action)

(S) Project Manager: INT (Invenergy LLC)

Step Instructions

Please review Job Book Document change requests and once complete pass the workflow

Also Copy (For Information)

Step #

Step Label

Days to Approve

Who Must Approve

3

Final Review (Customer)

2

Any

Send To (For Action)

(S) Customer: EXT (Invenergy LLC)

Step Instructions

Please review the changes by Invenergy. Pass the workflow if complete or fail the workflow back to Invenergy for more revisions.

Also Copy (For Information)