

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
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Table of Contents

Overview:	2
ProjectTeam Introductory Instructions:.....	2
Navigating to and within a Project.....	12
Project Setup in ProjectTeam & Elements to Consider	27
Adding an end user: External	28
Share Groups	29
Scopes of Work within Technology	29
Share Groups and Personnel	30
Forms	32
Workflows.....	32
ProjectTeam Forms: Function and Purpose	33
Functionality of Action Items, Comments, and Formal Responses:	35
Photos	39
Request for Information (RFI)	41
Drawings	43
Design Review Comments	54
How To: Add Response Comments to Design Review Comments	62
Spec/SOW/CEP Template Request	68
Specifications	70
Submittals	75
Transmittals.....	81
Engineering Studies	84
Completion Certificates - Contractor	91
Incidents.....	96
Non-Conformance Report (NCR).....	101
Safety Audit.....	104
Engineering Management Form	106

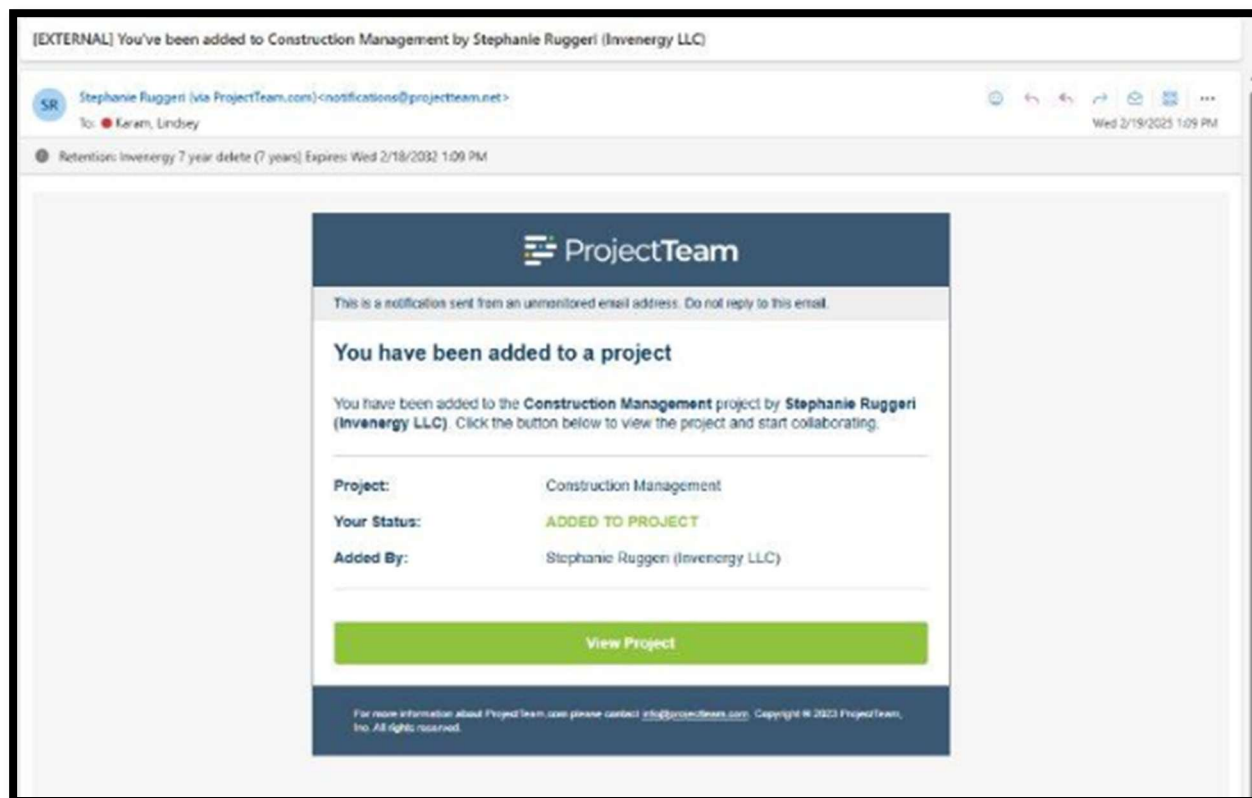
FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Overview:

ProjectTeam serves as Invenergy's Project Management Software allowing for communication, collaboration, formal review / approval processes, and document retention. The following section will provide all external on-site end users with the fundamental knowledge to navigate ProjectTeam and perform introductory level tasks within the platform.

ProjectTeam Introductory Instructions:

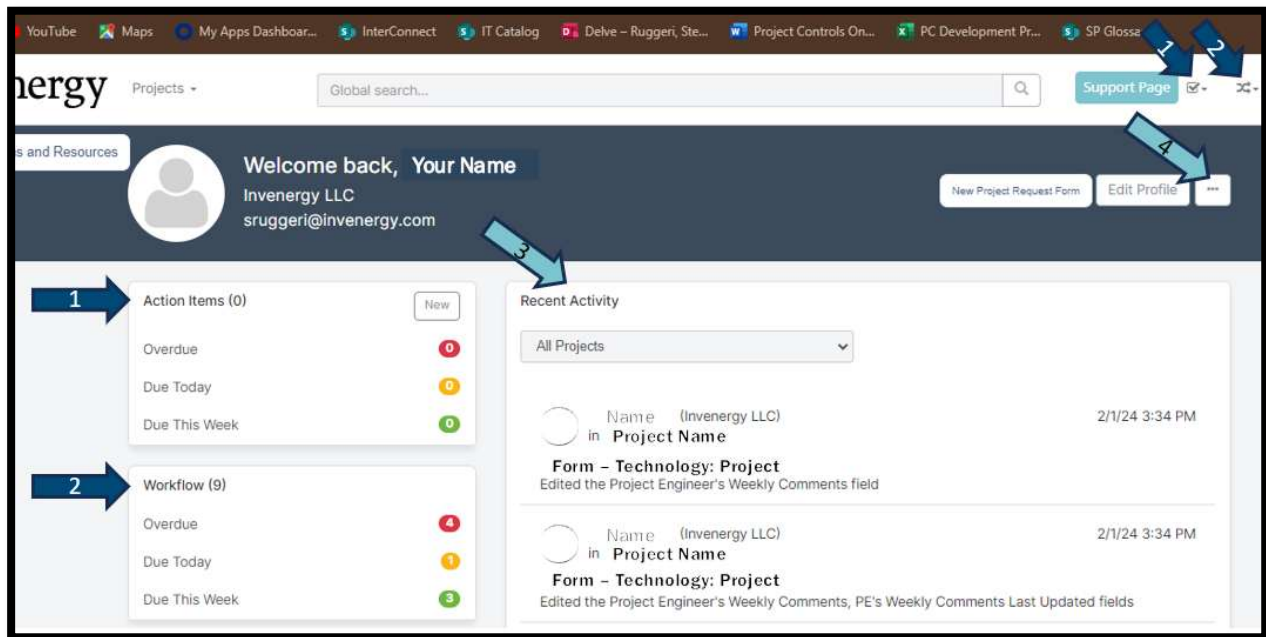
1. If using ProjectTeam for the first time, accept the invitation sent via email, when invited to a project. Please note – the link expires after 24 hours. If it does, select “Forgot Password” to set your password for the account.



2. ProjectTeam will open to your “My Page,” which is an organized space showing any Action Items or Workflows in your court, all forms shared to you organized by most current, various ProjectTeam resources, and profile preferences and settings. Highlighted below, we will focus on Action Items (1), Workflows (2), Recent Activity (3), and the ellipses (4) where you can update / identify the notifications you would like to receive:

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FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



3. Focusing on “1,” **Action Items** are used as a nudge or to-do list to notify individual(s) of a specific task, including a Subject, Due Date, Assignee(s), & Action Item Notes. There are two ways from your “My Page” to navigate to your action items log:
 - a. Lefthand side of the page within your summarized Action Items count by status,
 - b. Or by the checkbox at the top righthand side of the page near your name.*(Please note: the checkbox is accessible anywhere within ProjectTeam and not exclusively in your “My Page” location)*



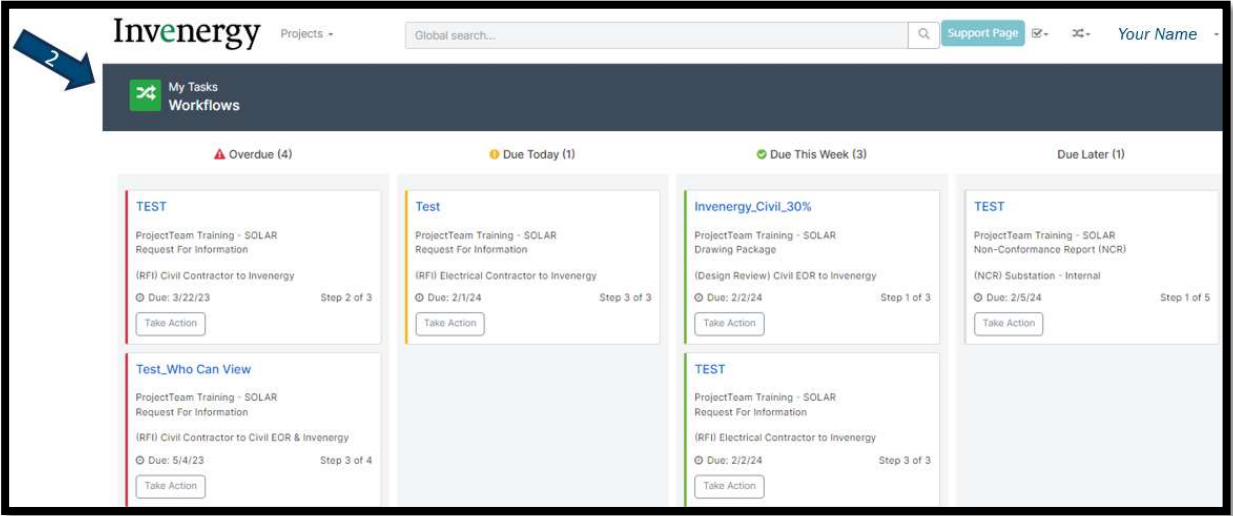
FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

4. Your Action Items log organizes all your assigned items that require your attention by due date. Additionally, you're able to view which action items have been assigned by you to someone else, and a log of total action items.

5. Next, let's focus on "2," which addresses Workflows. Workflows are the formally facilitated review process that takes place in a form or file. These workflows are created by Project Controls support administrators and serve as formal communication to pass between one or more share groups to capture relevant feedback & approvals. Like Action Items, there are two ways to navigate to your Workflow tasks from your "My Page." There will be additional information regarding workflows throughout this guide.

6. Workflows in your court will be organized into 4 categories: Overdue, Due Today, Due This Week, and Due Later. You can either select the hyperlinked subject of the workflow, which will bring you to that specific form, or "Take Action" from your Workflow dashboard by selecting "Take Action."

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



7. **Recent Activity** on your “My Page” displays the most recent updates to all items to which you have visibility. If you are on multiple projects and would like to narrow down your view, you can filter by project.

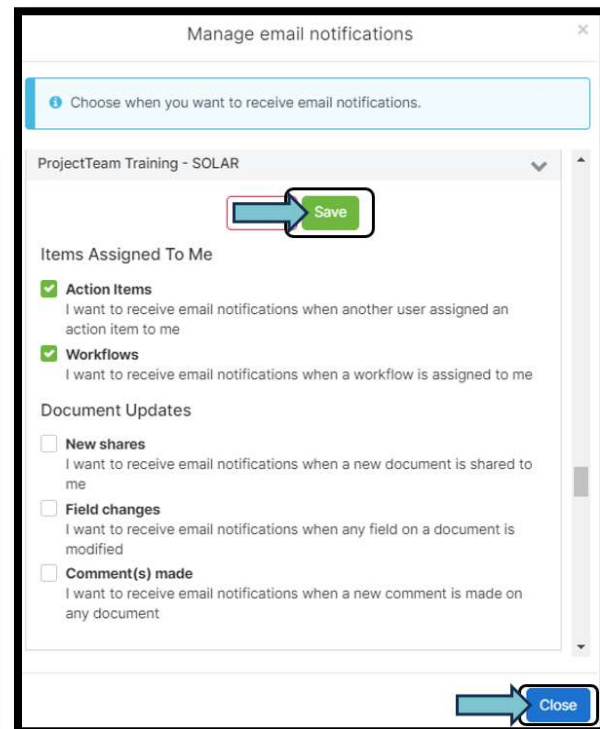
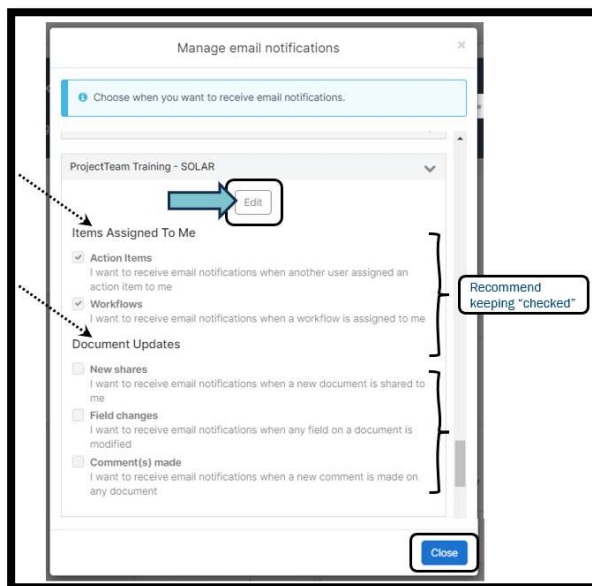


8. When you select the ellipses, you can update your email notifications from this location.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



9. These notifications are broken out into two categories: “Items Assigned to Me” and “Document Updates.”
10. Selecting any option while managing your email notifications means that you are turning on automated emails that send when any of the selected items occur / are assigned to you. On the contrary, unselecting an option means you will no longer receive notifications for that item. This can be updated at any time. Each project can have its own customized email notification preferences. If you make changes, make sure you click “Save” before closing out of the notification preferences tab. (*Please note: it’s strongly encouraged that you keep “Action Items” and “Workflows” selected on your active projects*).



FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

11. Next, you can access various reference materials and edit your profile within your My Page.



FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

12. When you select “Edit Profile,” you can update / add your personal information.

Edit profile [X]

Profile Picture
Your profile picture should clearly show your face so other users know it's you. [Need help?](#)

[Placeholder Image]

[Add new photo](#)

e-Signature
Upload an image of your signature that can be used for merge templates and reports. [Need help?](#)

[Add new signature](#)

Prefix
[Dropdown Menu]

First Name
[Text Field: Your First Name]

Last Name
[Text Field: Your Last Name]

Job Title
[Text Field]

Work Email Address
[Text Field: Your Email Address]

Work Phone Number
[Text Field: Work Phone Number]

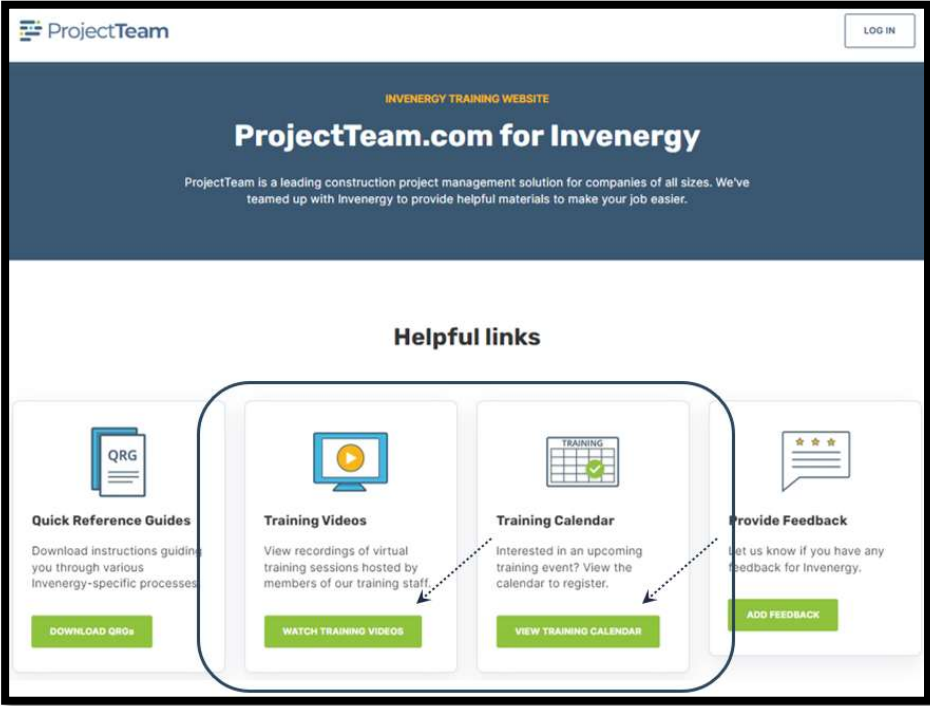
Cell Phone Number
[Text Field: Cell Phone Number]

Fax Number
[Text Field: Fax Number]

[Cancel](#) [Save](#)

13. The “Support Page” button brings you to the Invenergy Training Website. Each link is helpful, but the Training Videos and Training Calendar are most often used.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

14. Within the training videos section, Project Controls provides end users with our high-level introductory training along with specific form functionality training.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Training Videos

Introduction to ProjectTeam



Requests for Information (RFIs)



Drawings



Photos



Submittals



Transmittals



Incidents



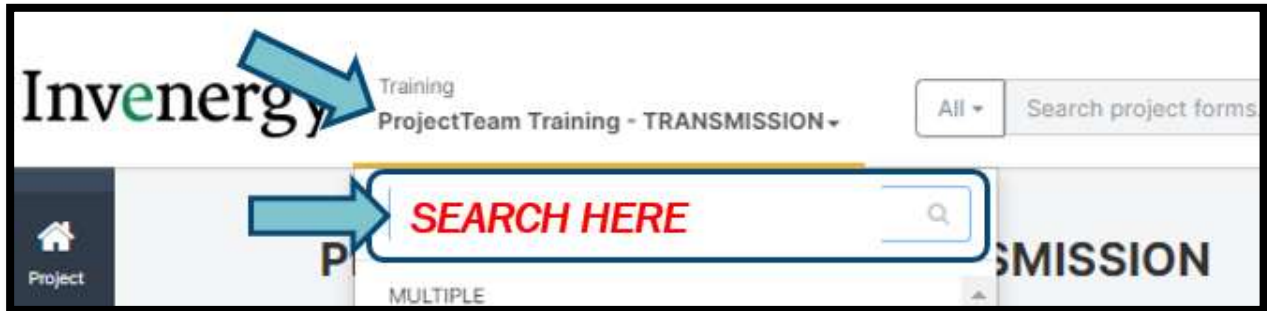
Daily Observations



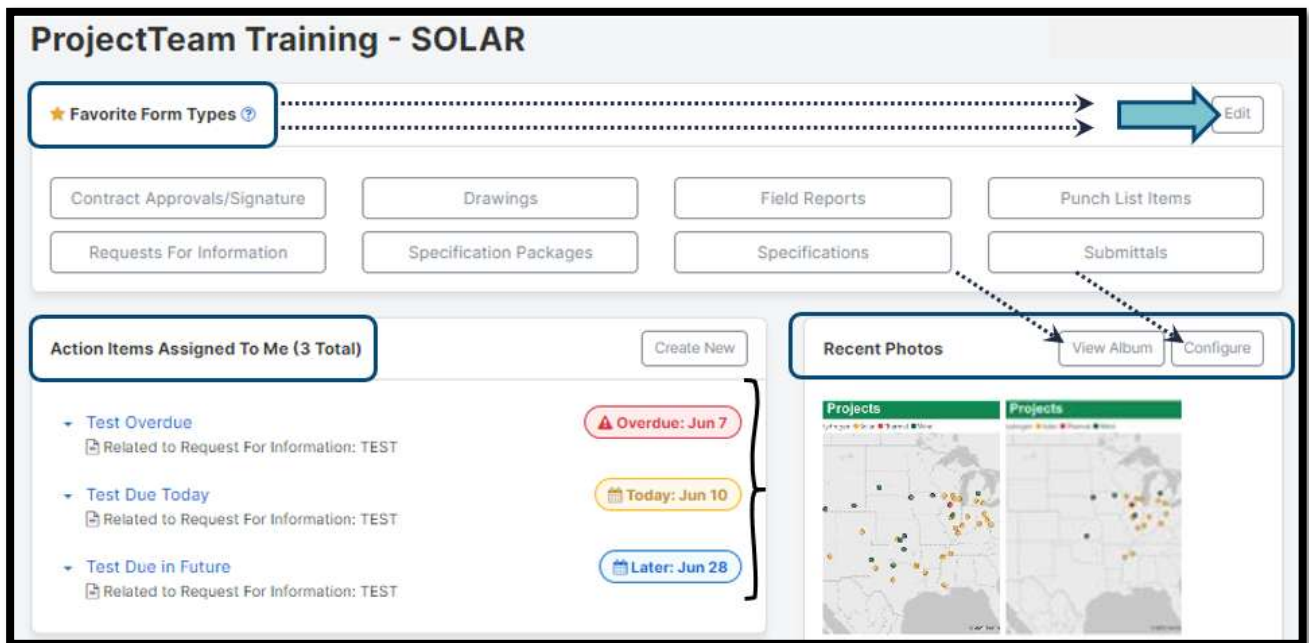
FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Navigating to and within a Project

1. Search using the project dropdown and entering project name:



2. You will then be brought to the Project Home Page for that project. This page shows at a high level several functions / details in one place.



3. At the top, your “Favorite Form Types” are displayed which you can designate at a project level by selecting “Edit”, choosing forms you prefer to be on your Project’s main page, & clicking “Save.” This is recommended to avoid searching by form type every time you log in.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Edit Favorite Form Types

Choose form types that you use most often to show as your "Favorites".

Form Type	Created By
☐ Budget Amendments	System
☐ Budget Items	System
☐ CBS Change Requests	Alex Golden (Invenergy LLC)
☐ Change Orders	System
☐ Completion Certs: Contractor	Alex Golden (Invenergy LLC)
☒ Contract Approvals/Signature	Alex Golden (Invenergy LLC)
☐ Contract Exhibits	System
☐ Contractor Pay App Requests	Stephanie Ruggeri (Invenergy LLC)
☒ Contracts	System
☐ Cost Proposals	System

Cancel Save

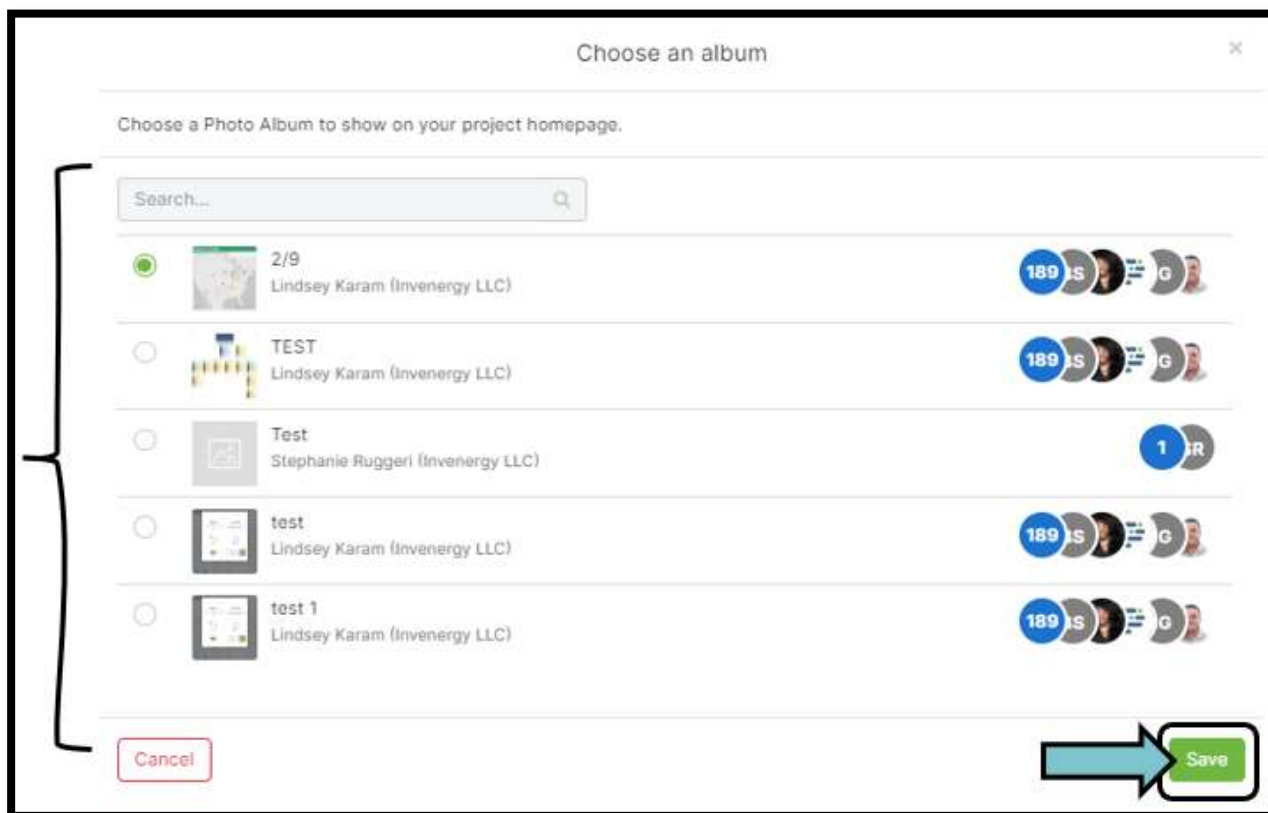
- Under Favorite Form Types, you will see any **project-specific** Action Items assigned to you. These items are also color-coded to identify which are overdue (Red), due today (Yellow), and due at a later date (Blue). From the project home page, you can select any action item and it will bring you directly to the detail of that item.
- Within an action item, you can address the "Notes" left by the individual assigning the item to you, include clarifying questions within the comments, and "Mark Complete" the action item when it has been addressed.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

The screenshot shows the 'Action Items' interface for an item titled 'Test Overdue'. The interface includes a 'Mark Complete' button at the top right, a 'Share' button, and an 'Edit' button. The 'DETAILS' section on the left lists the subject, document reference, assigned to, assigned by, and due date (6/7/24, marked as 'Overdue'). A note at the bottom states 'This is a test the show overdue.' The 'ACTIVITY' section on the right shows a comment input field and a 'Post' button. Annotations include a blue arrow pointing to the 'Mark Complete' button, a blue arrow pointing to the 'Edit' button, and a dashed line pointing to the 'Overdue' status.

- Next, you have a preview of your “Recent Photos.” Here, you have the ability to configure your view by selecting which albums will appear on your Project page. Select Configure à Select Album(s) à Save.

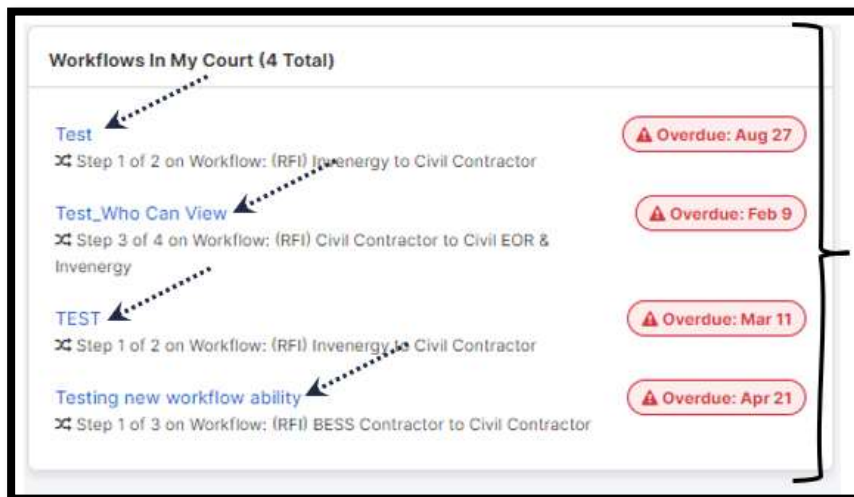
FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



- Next, you have a view of all workflows assigned to you for this specific project. Similar to the action items, it identifies the due date for each workflow and color-codes to

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

simplify. Additionally, you can select any workflow's blue text (hyperlink), and it will bring you to that particular workflow where you can take next steps.



8. In the form's workflow, you are able to "Take Action." If you are the first step, you can either "Pass" the workflow onto the next step including relevant, pertinent notes within the workflow (a means for formal documentation), or "Cancel" (sends back to the initiator) and include notes supporting your reasoning (typically needing further clarification or detail within the form itself).

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

(RFI) Invenergy to Civil Contractor

⚠ You are taking action on **Step 1 (Question Submitted (Contractor))** for Request For Information: Test.

Please review the form submitted by Invenergy and provide appropriate review.

Your action

- ☐ **Pass**
Mark as "Passed" and move forward to the next step (Step 2 - Invenergy Acknowledgement).
- ☐ **Cancel**
Mark as "Cancelled" and stop the workflow

Notes

Notes

Days for next step to take action: ? N/A

Due date for next step: ? N/A

Cancel

Take Action

- If you're past the first step, your choices will be slightly different with "Take Action:" "Pass" is handled in the same way, but you now have "Fail" as your second choice. Failing a workflow allows you to gain clarification from a previous step, continuing the conversation; to "Fail" allows you to route the workflow backwards to any previous step:

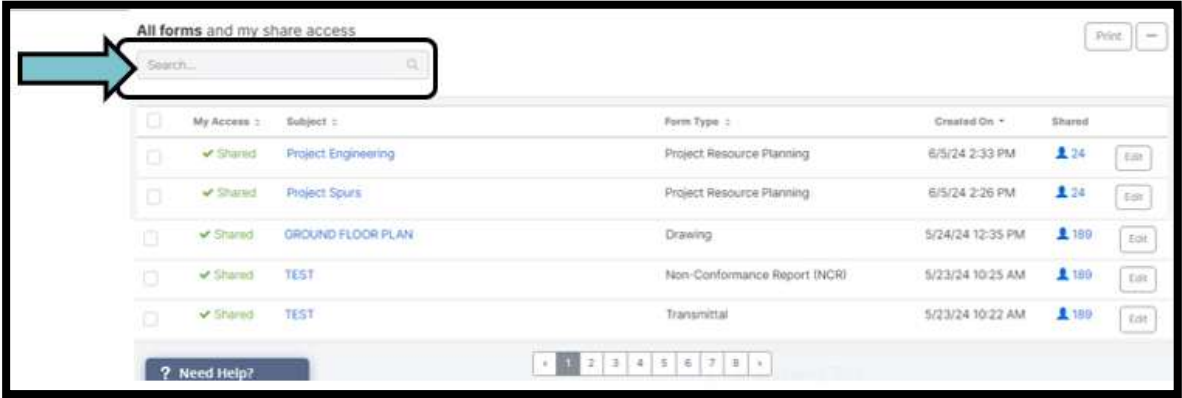
FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

10. Below “Workflows In My Court,” you’re able to view “Recently Created Forms” that are shared to you. You’re also able to “View All” forms for which you have access. At this view, you can also navigate to specific forms via its hyperlink.

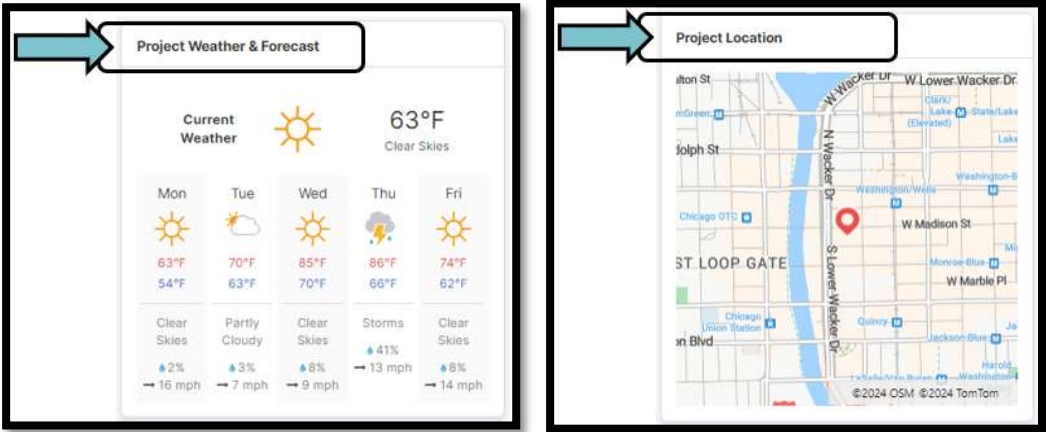
My Access	Subject	Form Type	Created On	Shared
✓ Shared	Project Engineering	Project Resource Planning	6/5/24 2:33 PM	24 Edit
✓ Shared	Project Spurs	Project Resource Planning	6/5/24 2:26 PM	24 Edit
✓ Shared	Project Lakers	Project Resource Planning	6/5/24 2:24 PM	24 Edit
✓ Shared	Project Bulls	Project Resource Planning	6/5/24 2:19 PM	24 Edit

11. You are able to “Search” within all forms on the project:

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

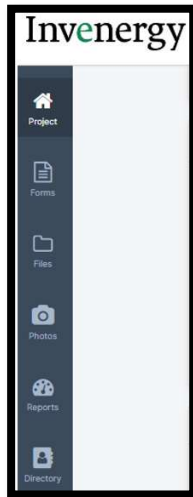


12. When a project is being set up by the Project Controls ProjectTeam support group, one piece of information gathered is the address of the project (or county, coordinates, etc.) which then provides a map of the project location as well as daily weather at the site:

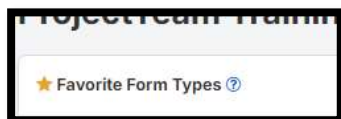
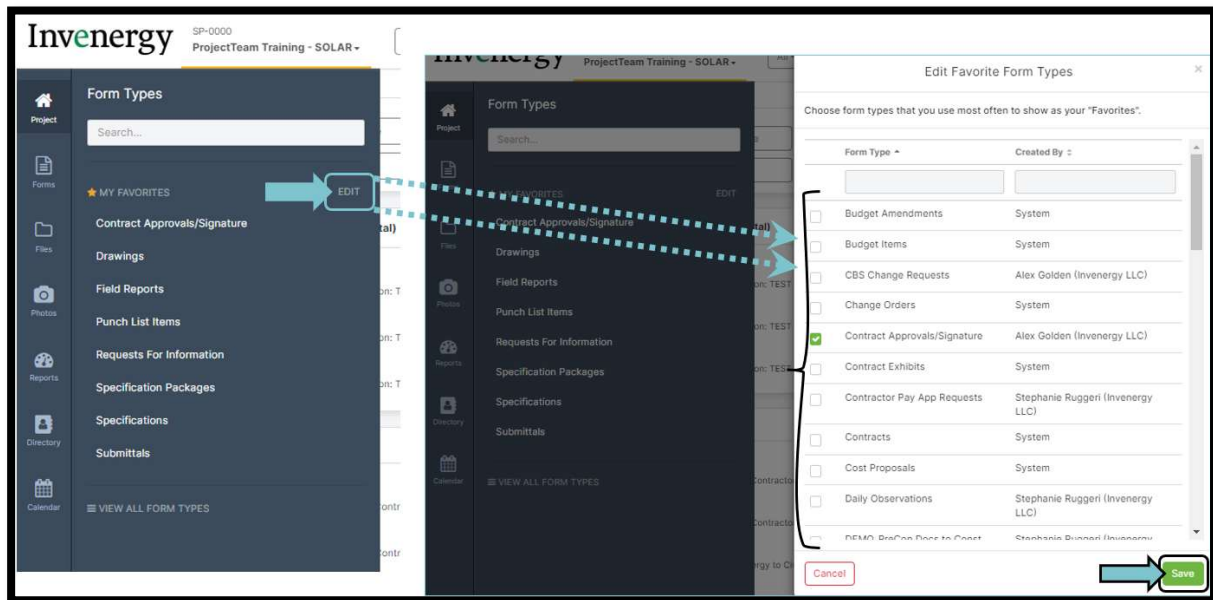


13. Within the blue ribbon on the left-hand side of the screen, you are also able to navigate to various locations / functions within your project:

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

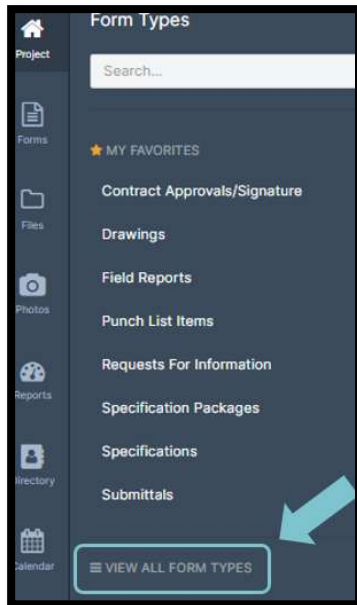


14. After the “Project Home” page, you can view all “Forms.” As you were able to select “My Favorites” on the Project page, you can also do so within “Forms” by selecting Edit. Selection at either location within your project functions the same, as those will appear on your project’s home page for easier navigation.



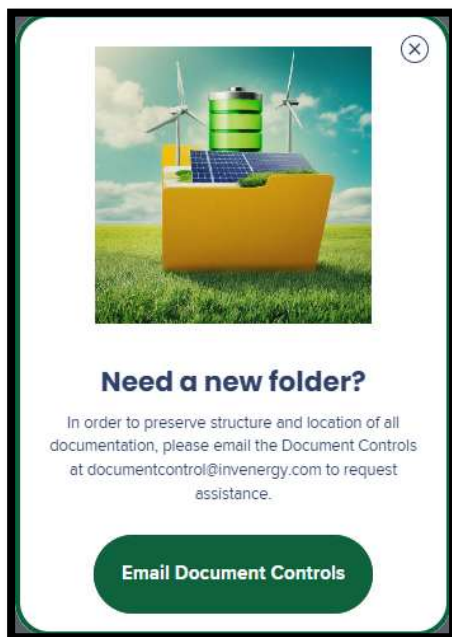
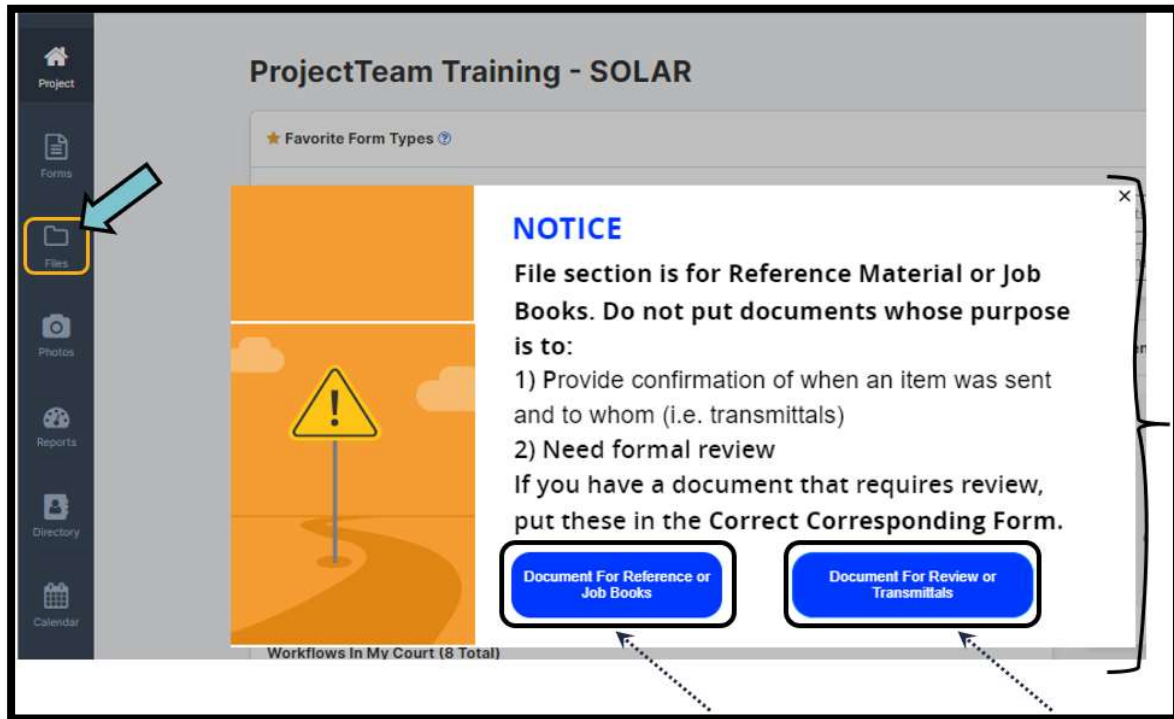
FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

15. You can use the search bar to find a form type. To see a full list of forms available on the project, you can select “View All Form Types:”



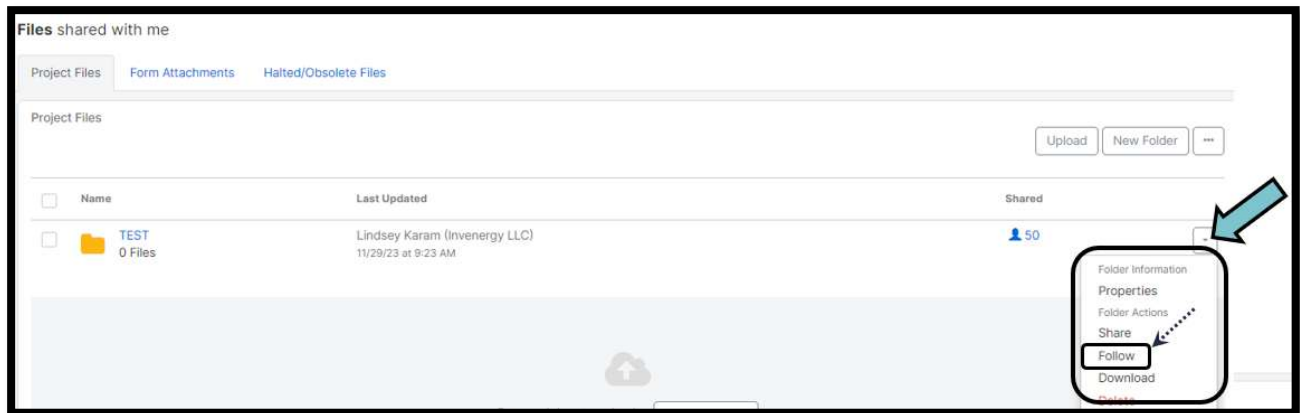
16. Next, is the Files section. It will display a notice to confirm if what you need is within the files section or if a particular document should live within a form. *****PLEASE NOTE: To share documentation within the Files' structure, you will need to work with the Project Controls Document Controls group for them to make any adjustments on share access.***

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

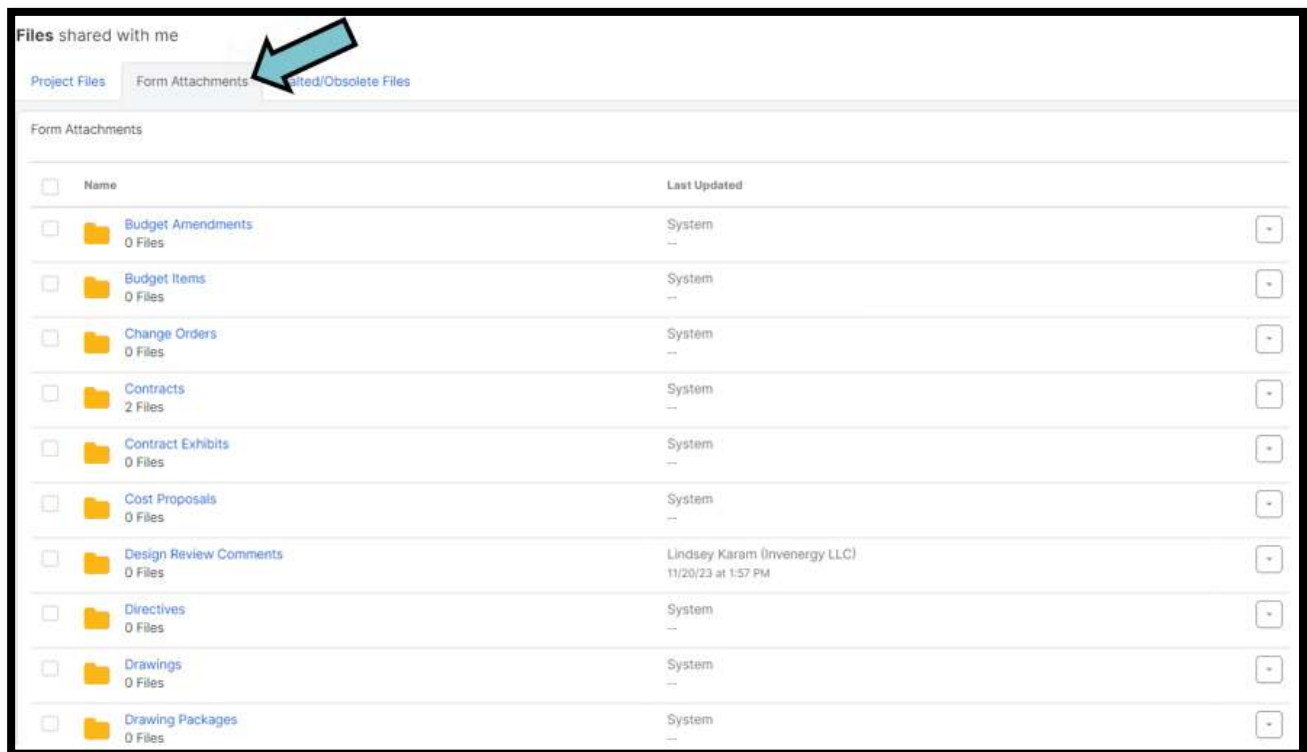


FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

17. There is now an option within the Files section that allows you to “Follow” a folder. If any new documents are uploaded into that specific location, you will receive a notification indicating a new document was uploaded to that location.

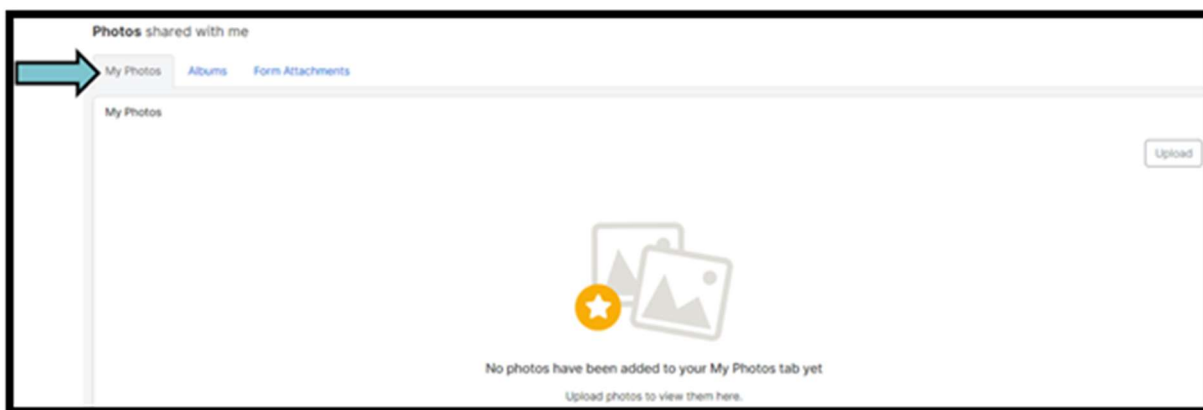


18. In the Files section, documents are also organized within the “Form Attachments” tab and show any document attached to a form organized by form type:

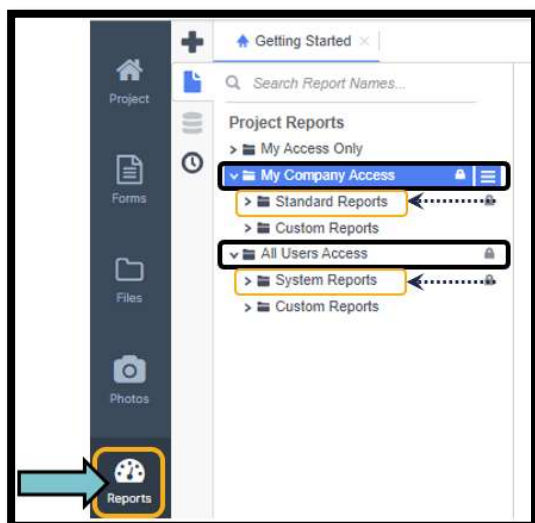


FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

19. The next option on the blue ribbon is “My Photos.”



20. Next, you can generate project-level reporting. If the “Standard” or “System” reports do not address your needs, please reach out to ProjectTeam support, and we will create a unique report for your project. Reports can be run ad hoc or on a need-basis. Reports can also be scheduled to automatically generate on a regular cadence and sent to anyone you designate if they have access to the project.



21. Next, you have your project Directory. You can see who is on the project and to which share group(s) an individual belongs:

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Invenergy LLC

Name of Person	Email	Work Phone	Cell Phone	Email Address
Connected				
Name of Person	Email	Work Phone	Cell Phone	Email Address

Buttons: Edit, View Share Group Membership, Remove

Share Group Membership

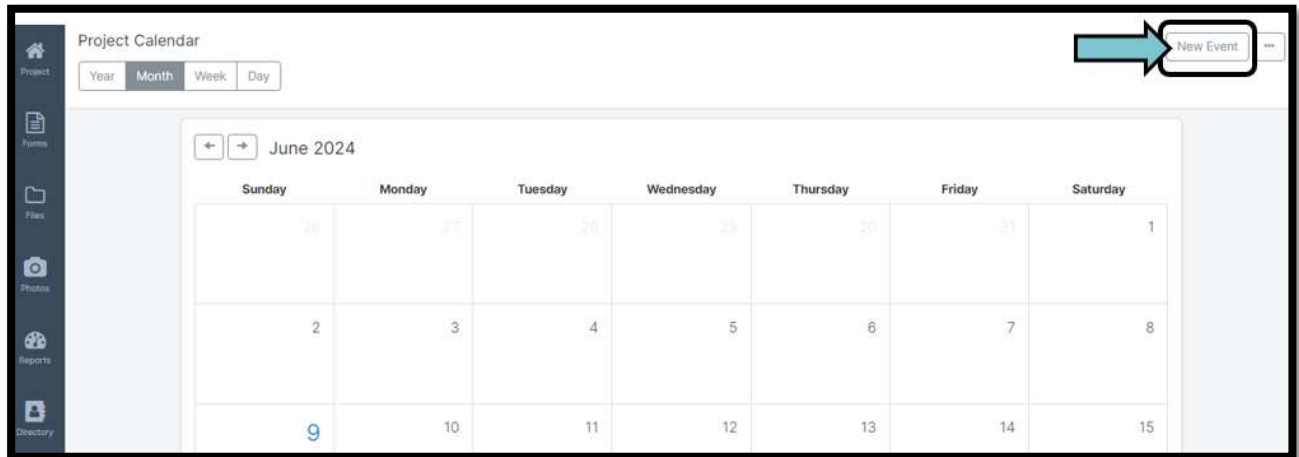
This is a read-only view of the Share Groups this user is part of. To update, contact your project administrator.

Group Name	Description
Invenergy Engineer	This share group provides internal users with the necessary field level security (S) for their role. It should be used in conjunction with the proper workflow (WF) share group(s) if appropriate.
Transmission Invenergy Engineer	This share group provides internal users with the necessary field level security (S) for their role. It should be used in conjunction with the proper workflow (WF) share group(s) if appropriate.

Buttons: Close

22. If you need adjustments to an individual's share group(s) or need to add / remove end users from your project, work with your Invenergy Project Manager, Document Controls and ProjectTeam support groups.
23. Last within the ribbon is the Calendar. Although not often used by Invenergy, you can create events and manage your calendar by month, week, or day:

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



24. Enter the details of the event and save. If you would like to add multiple events at one time, instead of selecting “Save,” select “Save & New” to continue adding more events.

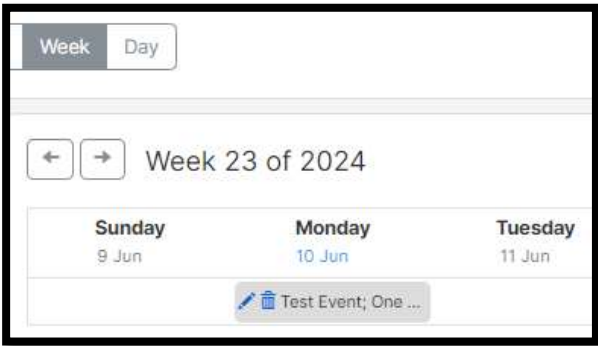
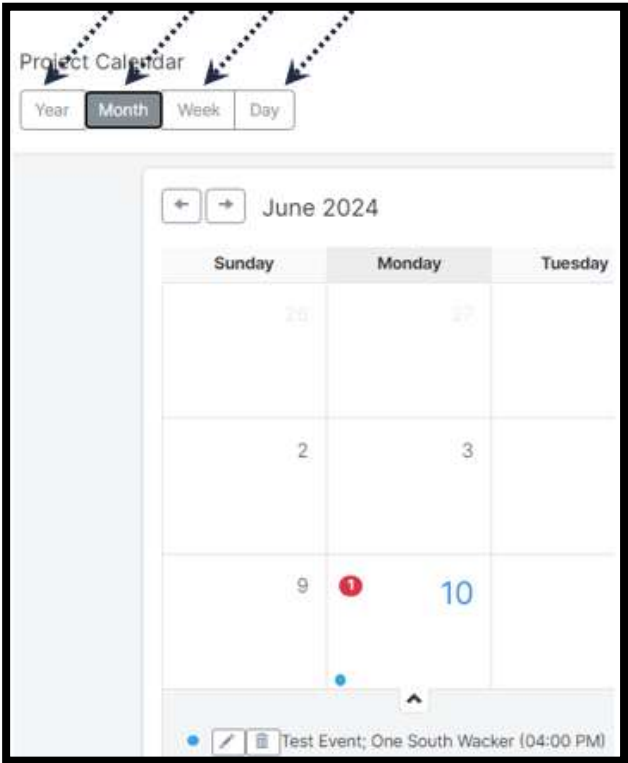
The screenshot shows the 'New event' form. It has the following fields:

- Subject:** Test Event
- Starts At:** 06/10/2024 04:00 PM
- Ends At:** 06/10/2024 05:00 PM
- Location:** One South Wacker
- Notes:** Test event at One South Wacker.

 At the bottom, there are three buttons: 'Cancel' (red), 'Save & New' (blue, highlighted with a blue arrow), and 'Save' (green).

25. You can then view your event within the calendar by month, week, or day:

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



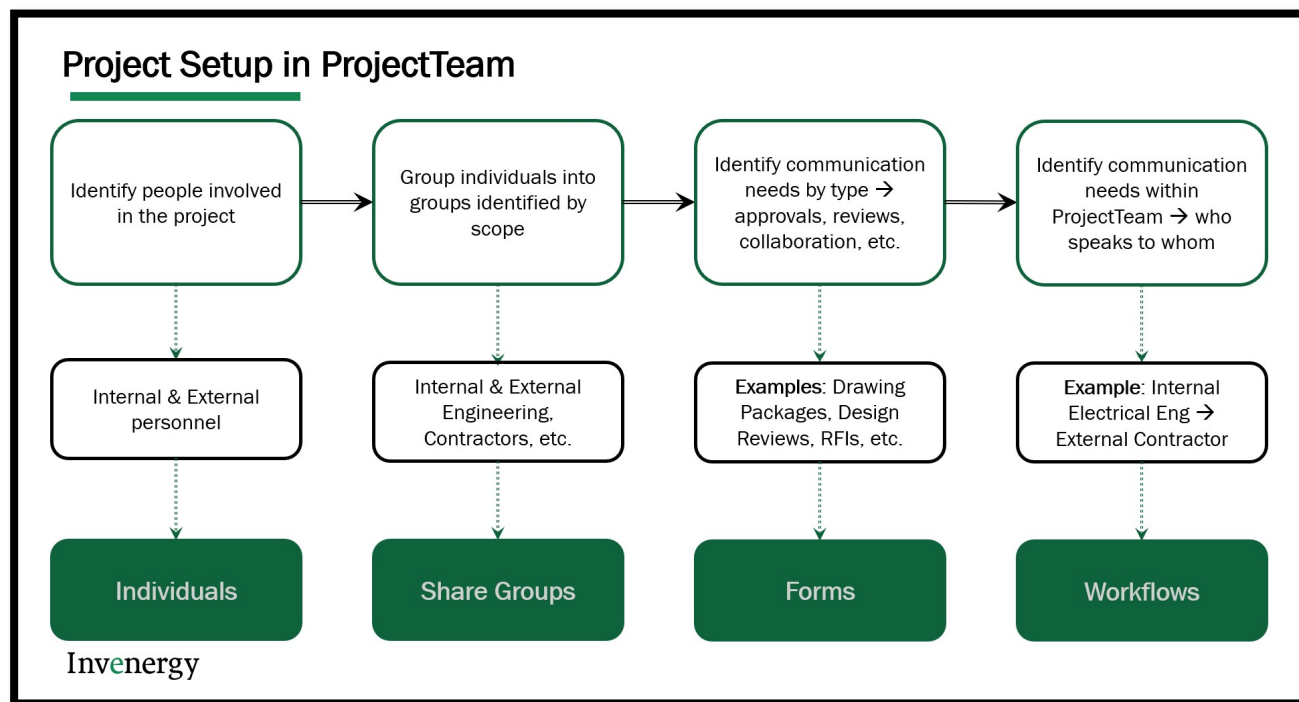
Project Setup in ProjectTeam & Elements to Consider

ProjectTeam Support and Document Controls collaborate to support each project at a granular level within the system. Working with the project's internal leads, we establish who is involved in the project, how they're involved, to what their involvement pertains, and the kind of communication necessary. In ProjectTeam terminology, this is identified as the

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FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

individuals (end users and to which company they belong), Share Groups, Forms, and Workflows.



Adding an end user: External

When adding external parties / personnel to ProjectTeam, ProjectTeam support always needs the following pieces of information:

1. Full Name, Company, & External Company Email Address
2. Project(s) to which they'll need visibility
3. What their role is within a project(s) to properly assign each person to a Share Group
4. **Considerations:** If a 3rd party is performing multiple scopes of work (for example: civil, electrical, and structural engineering), it is best to identify which individuals within the external company corresponds to each scope as those could differ. This ensures the appropriate people oversee the correct documentation and participate in the correct workflows.

Work with your Invenenergy Project Manager to request new users.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Share Groups

Share groups are defined in two ways:

By Scope: When multiple parties/Counterparties need visibility on an item based on SCOPE (Via Forms)

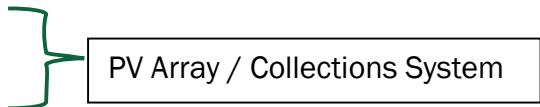
(Please note: Not applicable to share Folders in Folder Structure as Folder Sharing Access is governed by PC – Document Controls)

By Company: All employees or project representatives under that specific company
Applicable to Share Folders in Folder Structure – within their Company File Structure
Folder Sharing Access – Governed by PC – Document Controls

Share Groups by Scope – are exclusively used to activate workflows only, there could be some exceptions to share folders via Share Groups, but that would be determined by Document Controls upon user request.

Scopes of Work within Technology

Solar

- Civil
 - Electrical
 - Structural
 - Substation
 - Transmission (Gen-Tie, specifically)
 - SCADA (Supervisory Control and Data Acquisition)
 - O&M (Operations & Maintenance)
- 

Wind

- Civil
 - Collections
 - Foundations
 - Mech/Erection
 - Substation
 - Transmission (Gen-Tie, specifically)
 - SCADA
 - O&M
- 

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

BESS

- Civil
- Electrical
- Substation
- Transmission (Gen-Tie, specifically)
- O&M
- POI (Point of Interconnection)
- SCADA

Share Groups and Personnel

Please note: this list is not all encompassing and is included for reference. You will be included within the appropriate share group(s) – determined by scope & role – to access necessary documentation, and if applicable, participate in formal reviews.

Invenergy Internal Share Groups:

- **Admin**
 - Project Controls
- **Environmental: INT (ECS)**
 - Environmental Compliance & Strategy (ECS) Team
- **Invenergy O&M**
 - O&M team (Typically added during later stages of construction)
- **Operations Support**
 - Ops Team
- **Procurement**
 - Procurement
- **Project Manager**
 - Project Manager
 - Assistant Project Manager
- **Read Only: All**
 - Personnel who need access to project but are not involved in reviews
- **Invenergy BESS Engineer**
 - BESS Project Engineer
- **Invenergy Civil Engineer**
 - Solar/Wind Project Engineer
- **Invenergy Electrical Engineer/Invenergy Collection Engineer**

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

- Electrical Engineer
- **Invenergy Mech/Erection Engineer**
 - Wind Project Engineer
- **Invenergy SCADA Engineer**
 - SCADA Engineer
- **Invenergy Structural Engineer/Invenergy Foundation Engineer**
 - Solar/Wind Project Engineer
- **Invenergy Substation Engineer**
 - Electrical Engineer
- **Invenergy Transmission Engineer**
 - Electrical Engineer
 - Transmission (Gen-tie) Engineer
- **Vegetation Management**
 - ECS Sub-team for Vegetation Management
- **Contract Management**
 - Project Control's Contract Management
- **Cost Estimating**
 - Estimating
- **Invenergy EHS: INT**
 - Invenergy Construction EHS
- **Project Management Leadership**
 - Project Management leadership assigned to project

Examples of External Share Groups:

- **Civil Contractor**
 - EPC Contractor involved in Civil Work
- **Electrical Contractor**
 - EPC Contractor involved in Collection Electrical Work
- **O&M: EXT**
 - O&M Contractor
- **(EQUIPMENT TYPE) Supplier: EXT**

Please note: There are many Share Groups additional share groups which identify Scope & Role: For example – **Civil Contractor: EXT** vs **Civil EOR: EXT**.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Forms

Each form has a specific purpose, unique functionality, and houses relevant documentation and content within a project. System forms are pre-established and exist on all projects. Custom forms are built by ProjectTeam Support (Invenergy) in collaboration with Document Controls to capture a particular function that is not already addressed within the system. Both system and custom forms are customizable upon request and review of need.

Workflows

As defined earlier, workflows are the formally facilitated review process that takes place in a form or file. Workflows are established by determining who needs to communicate with whom. Standardized project workflows have been established with valuable input from our various end users. Although customization of workflows exists, approximately 80% of the workflows for any technology's communication needs are included within all projects. Typically, the final step of the workflow ends with Invenergy verification. Having Invenergy as a last step ensures we are thoroughly reviewing responses & direction, and/or end deliverables have been satisfactorily provided.

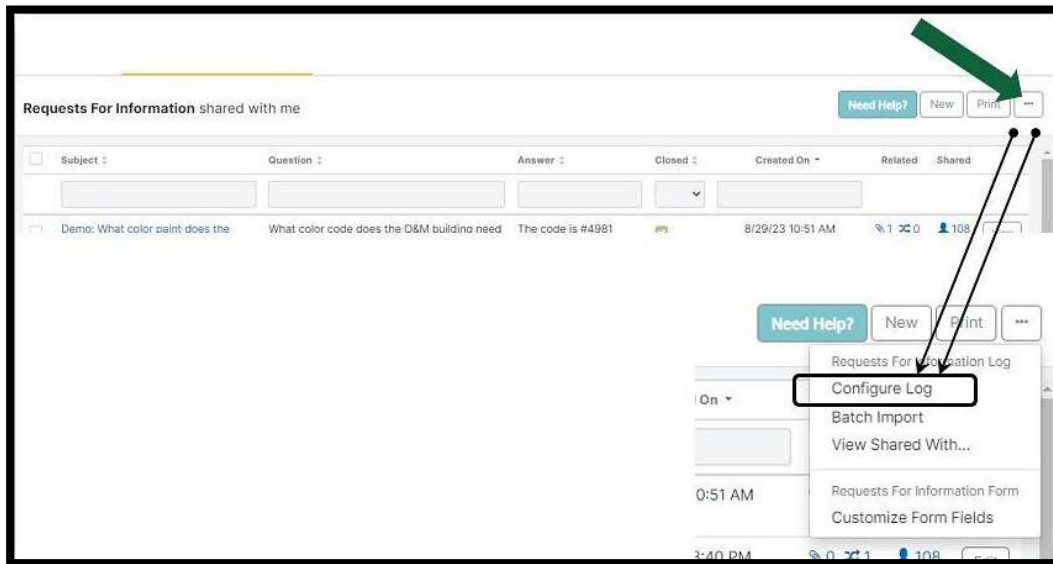
FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

ProjectTeam Forms: Function and Purpose

Log View Configuration:

You can configure your log view within any form on your project. This allows high-level visibility across multiple entries of a form type within a project.

1. Go to a form where you'd like to organize and review content in the log view:



2. Select fields to view in your form's log views:

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Configure Requests For Information Log

Your Request For Information log will show the "Subject", "Created On" and "Shared With" columns by default. Add or remove columns by checking or unchecking the boxes below.

Field Label	Created By
☐ Date Created	Stephanie Ruggeri (Invenergy LLC)
☐ Number *	Stephanie Ruggeri (Invenergy LLC)
☐ Requested By (Company)	Stephanie Ruggeri (Invenergy LLC)
☐ Requested By (Contact)	Stephanie Ruggeri (Invenergy LLC)
☐ Target Resolution Date	Stephanie Ruggeri (Invenergy LLC)
☒ Question	System
☐ Proposed Solution	Stephanie Ruggeri (Invenergy LLC)
☐ Cost Impact	Stephanie Ruggeri (Invenergy LLC)
☐ Cost Impact Comments	Stephanie Ruggeri (Invenergy LLC)
☐ Schedule Impact	Stephanie Ruggeri (Invenergy LLC)
☐ Schedule Impact Comments	Stephanie Ruggeri (Invenergy LLC)

Cancel Save

- Once you save your log view options, you can review the specified content you selected across multiple form entries of any form type.

Requests For Information shared with me

Need Help? New Print ...

Subject	Question	Answer	Closed	Closed Date	Created On	Related	Shared
☐ Demo: What color paint does the O&M Building need?	What color code does the O&M building need for paint?	The code is #4981	☒	8/29/23	8/29/23 10:51 AM	1 0	108 View
☐ Test	TEST	TEST	☒	8/22/23	8/22/23 3:40 PM	0 1	108 Edit
☐ TEST	TEST	TEST	☒	8/17/23	8/17/23 2:40 PM	0 1	108 Edit
☐ TEST	TEST	TEST	☐		8/15/23 10:51 AM	0 0	108 Edit
☐ TEST	TEST	TEST	☒	8/15/23	8/15/23 9:28 AM	0 1	108 Edit

- To update content in the log view, double click on the field you would like to change; you can then edit and save. This will save you time from going into each entry individually and updating details.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Requests For Information shared with me Need Help? New Pr

Subject	Question	Answer	Closed	Closed Date	Created On	Related	Shared
Demo: What color paint does the O&M Building need?	What color code does the O&M building need for paint?	The code #4981	☒	8/29/23	8/29/23 10:51 AM	1 0	108
Test	TEST	TEST	☒	08/22/2023	8/22/23 3:40 PM	0 1	108

? Need Help? Save

Functionality of Action Items, Comments, and Formal Responses:

A form houses documentation, and which form to use is dependent on the content of the document. The following pages will discuss the most used various form types, each form’s purposes, usage expectations, and general user functionality.

Prior to getting into specific form types, having a fundamental understanding of a form’s features is necessary. There are various ways to leave clarification questions, feedback, etc., but each method has its own purpose. Action Items and Workflows were covered at a high level in the introductory section of this document. The following will further explain the purpose of those and the Comments in the “Activity” section within a form.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Request For Information: ProjectTeam Example
Created By Stephanie Ruggeri (Invenergy LLC) on 11/29/23 at 12:03 PM

Quick Navigation: Details Workflows Attachments Action Items Activity Reference Links

SHARED WITH (162) View All

DETAILS

Date Created 11/29/23

Subject ProjectTeam Example

Number * Collection-Civil-012

Requested By (Company) Invenergy LLC

Requested By (Contact) Stephanie Ruggeri

Target Resolution Date 12/1/23

Question Will it snow this weekend?

Proposed Solution Watch the weather channel.

Cost Impact No

Cost Impact Comments N/A

Schedule Impact Yes

Schedule Impact Comments if weather is bad, delays will occur.

Answer Yes, it will snow 4-6 inches with wind gusts up to 60 mph.

Responded By (Company) Invenergy

Responded By (Contact) Stephanie Ruggeri

Closed

Closed Date 11/29/23

WORKFLOWS

(RFI) Electrical Engineer to Project Manager is Done

1 ACTION ITEMS

2 ACTIVITY

3

Differentiating Action Items, Comments, and Formal Responses

Action Items are a type of notification used for reminders. These can be assigned to others or yourself. The details of Action Items include the subject of the particular item, which document it's referencing, to whom the item is assigned, from whom the item was assigned, a due date for the item to be addressed, and any relevant notes the end user would like to include.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

The screenshot shows a 'Create Action Item' form with the following fields: Subject (with a red border and '* Required' label), Document Reference (containing 'Request For Information : ProjectTeam Example'), Assigned To (with a red border and '* Required' label), a checkbox for 'Assign to me', Assigned By (containing 'Stephanie Ruggeri (Invenergy LLC)'), Due Date (with a red border), and Notes (with a placeholder 'Type the Notes'). At the bottom are 'Cancel' and 'Save' buttons. A dashed arrow points from a circled '1' in the background to the 'Subject' field. A callout box states: 'Action Items are utilized as a nudge or reminder when you need an action or info from someone and want to assign a due date.'

Comments are used for casual collaboration within the specific form entry. As the end user of a comment, you can delete / edit your own comments. You can tag project users in comments, which will send the tagged user an email notification. The purpose of this collaborative space is to allow for further clarification and looping in others within the same project / share group for additional review. *Please note: The comments section is **NOT** the location formal decisions are documented. As explained above, comments can be edited or deleted by the owner of each comment, which does not then hold the integrity of the conversations being captured.*

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

The comments section is for casual collaboration within a record. Users can only delete/edit their own comments. The purpose of the comments section is to make suggestions to other people or track issues for follow-up. This area is not meant to document final decisions.

Comments

2

Add @ to force a notification to users

☐ Make Private

Stephanie Ruggeri
 11/29/23 12:23 PM

Both were considered to provide my response.

Stephanie Ruggeri
 11/29/23 12:22 PM

@Stephanie Ruggeri Did you look at Accuweather or the Weather Channel?

Any formal responses or outcomes should be recorded in the detail section of the form and a workflow's notes when taking action. For RFIs, The Invenergy PM will be the last step within the workflow. It is their responsibility to confirm the answer field is correct, reflecting the final decision identified in the workflow's notes.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Target Resolution Date
12/1/23

Question
Will it snow this weekend?

Proposed Solution
Watch the weather channel.

Cost Impact
No

Cost Impact Comments
N/A

Schedule Impact
Yes

Schedule Impact Comments
If weather is bad, delays will occur.

Answer
Yes, it will snow 4-8 inches with wind gusts up to 60 mph.

Responded By (Company)
Invenergy

Responded By (Contact)
Stephanie Ruggeri

Closed
☒

Closed Date
11/29/23

WORKFLOWS

(RFI) Electrical Engineer to Project Manager is Done

Started 11/29/23

REVIEW (PROJECT MA... Passed 11/29/23 ✓ STEP 1

REVIEW (ELECTRICAL ... Passed 11/29/23 ✓ STEP 2

CLOSE OUT (PM) Passed 11/29/23 ✓ STEP 3

Step # Step Label Due Date

0

Action Name Date Completed Notes

Started Stephanie Ruggeri Invenergy LLC 11/29/23

Step # Step Label Due Date

1 Review (Project Manager) 12/1/23

Action Name Date Completed Notes

Passed Stephanie Ruggeri Invenergy LLC 11/29/23 The weather states poor weather conditions - snow, wind 100% probability.

Step # Step Label Due Date

2 Review (Electrical Engineer) 12/1/23

Action Name Date Completed Notes

Passed Stephanie Ruggeri Invenergy LLC 11/29/23 Agreed with response. No further action required.

Step # Step Label Due Date

3 Close Out (PM) 11/30/23

Action Name Date Completed Notes

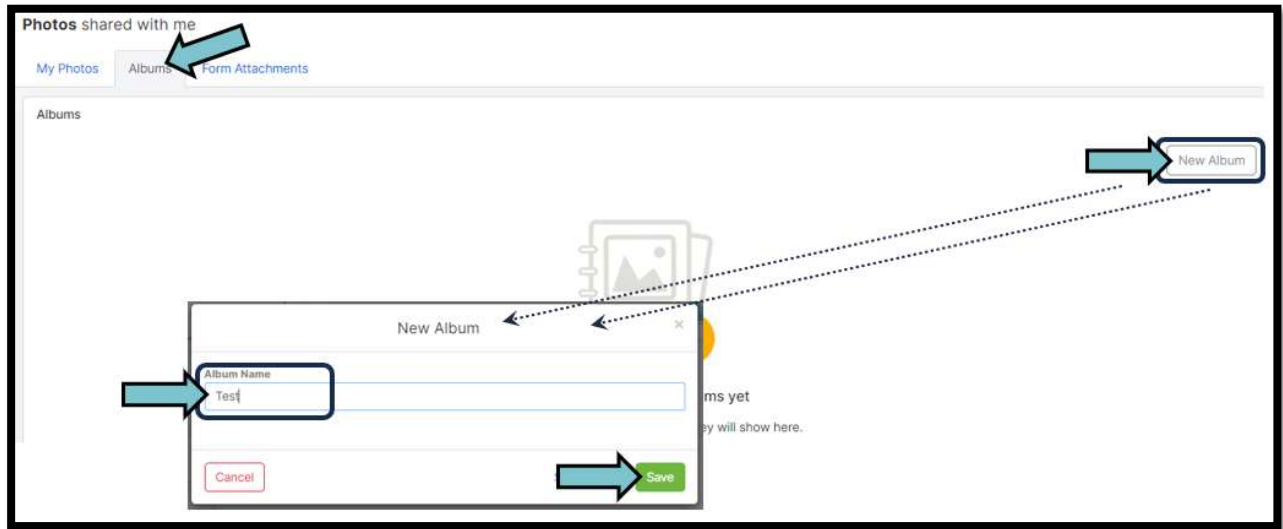
Passed Stephanie Ruggeri Invenergy LLC 11/29/23

Photos

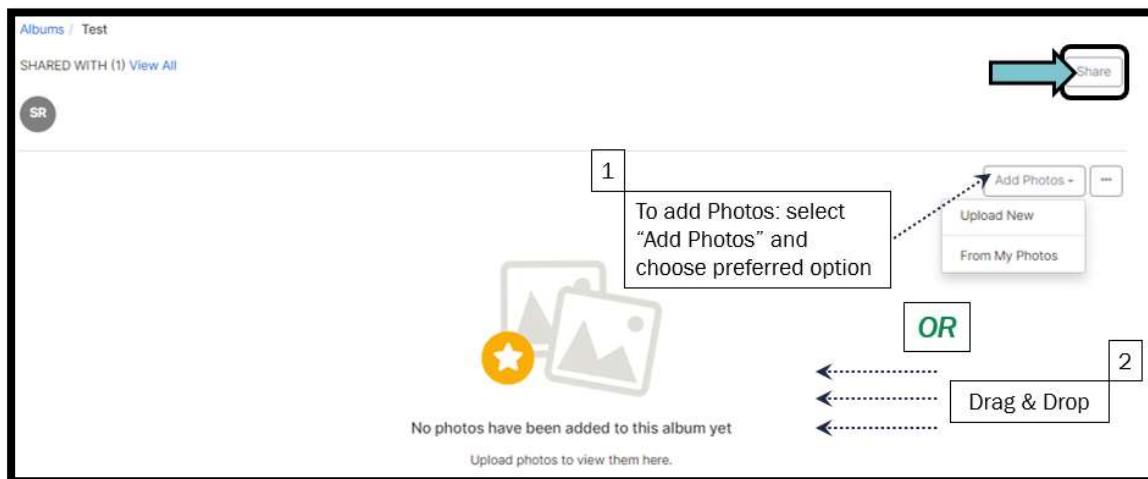
Purpose: Upload any photos of onsite quality inspections, documentation of progress, etc.

1. In a project, select the "Photos" tab in the blue ribbon.
2. Project Controls recommends uploading and organizing photos into "Albums." To add new photos to a new album, select the "Albums" tab à Provide an "Album Name" à Save.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



- To add photos to this album, you have two options: Select “Add Photos” or Drag and Drop:



- If an album already exists, in the “Albums” tab within the Photos, you can select whichever album to which you need to add photos:
- Make sure to share the album with your company and Invenergy. Select the album, click “Share,” and select “Invenergy LLC.”

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



Request for Information (RFI)

Purpose: Form used to house any information within a project that needs to be reviewed, clarified and addressed by Invenergy or a 3rd Party.

Contractors will need to both submit and respond to RFIs.

To submit an RFI to Invenergy / other parties:

1. Navigate to the “Requests for Information” form from your project homepage.
2. Click “New” in the top right corner.
3. Fill out the necessary fields. Make sure to enter your question. If you have a proposed solution in mind, you can enter it here, and if not, leave the field blank. Do not fill out any fields beyond “Proposed Solution”.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

New Request For Information

DETAILS

Date Created *

Subject *

Number *

Requested By (Company)

Requested By (Contact)

Target Resolution Date

Question

Proposed Solution

Answer

? Need Help?

4. Click “Save & Start Workflow” in the top right corner. Select your workflow accordingly.
5. You will receive an email when your question has been answered.

To respond to an RFI:

1. You will receive an email informing you that an RFI awaits your response. Click the link which will lead you to the specific RFI.
2. Review the question.
3. If you require clarification on the question, take action on the workflow and fail it back with comments.
4. If the question does not require clarification, click “Edit.” Fill out the fields “Answer,” “Responded by (Company)” and “Responded by (Contact).” Save your work.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Requests For Information

Request For Information: Test

Created By Ali Syed (Invenergy LLC) on 3/4/25 at 12:03 PM

Quick Navigation: Details Workflows Attachments Action Items Activity Reference Links

Non-Invenergy Users: To ensure all users from your company have access

SHARED WITH (221) View All

IG MB BS LP EM RW TE JB JC RT JC JN AH MR MW LF DH MM SC

DETAILS

Date Created 3/4/25

Subject Test

Number *

Edit

5. Take action on the workflow, passing it to the next step.

(RFI) Invenergy to Electrical Contractor requires your action

Step #: 1 of 2 (Question Submitted (Contractor))

Due Date: 3/14/25

Step Instructions: Please review the form submitted by Invenergy and provide appropriate review.

Take Action View Workflow

Requests For Information

Request For Information: Test

Created By Ali Syed (Invenergy LLC) on 3/4/25 at 12:03 PM

Quick Navigation: Details Workflows Attachments Action Items Activity Reference Links

Non-Invenergy Users: To ensure all users from your company have access

SHARED WITH (221) View All

IG MB BS LP EM RW TE JB JC RT JC JN AH MR MW LF

Drawings

Purpose: Form where Contractors submit FEED, IFC (30%, 60%, 90%), As-Built for: Engineering/Design Packages for Invenergy Review and/or Approval.

Please note: These Packages are tied to Design Review Comments

Initiators: Contractors, Consultants, Invenergy (Internal Review).

Confidential & Proprietary

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Below are high-level visuals addressing what's processed in the Drawings form, where the drawing packages are stored, and how these documents are named. Following are step-by-step instructions clarifying how to use this form.

Drawing Packages – Processed in Form:

Document Type:

- IFC Permit Drawings and Specifications
- Civil Design
- Structural Design Drawings
- Collection Design Drawings
- Civil Design Drawings
- Approved and Permitted Construction Plans and Specifications
- As-Builts

Package Type:

DES = Design

Document Classification:

IFC = Issued for Construction

As-B = As Builts

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Document Storage - All Drawing Packages - that have been reviewed in DRC - will be stored:

Files shared with me

Project Files Form Attachments Halted/Obsolete Files

Project Files / 03 CONSTRUCTION / 02 ENG

☐	Name	Last Updated
☐	2.00 ENG ONBOARD 0 Files	Jeff Bialorucki (Invenergy LLC) 3/11/24 at 11:07 AM
☐	2.01 FEED or Schematic Design 0 Files	Jeff Bialorucki (Invenergy LLC) 3/11/24 at 11:07 AM
☐	2.02 IFC 0 Files	Jeff Bialorucki (Invenergy LLC) 3/11/24 at 11:07 AM
☐	2.03 As Builts 0 Files	Jeff Bialorucki (Invenergy LLC) 3/11/24 at 11:07 AM
☐	2.04 Eng Studies 0 Files	Jeff Bialorucki (Invenergy LLC) 3/11/24 at 11:07 AM
☐	2.05 Specifications 0 Files	Annette Camacho (Invenergy LLC) 7/23/24 at 11:27 AM

Drawings Storage Location

Drag and drop to upload or [browse computer](#)
(if dragging folders, the folder structure will be created without the files)

Naming Convention

Once Drawing Packages have been reviewed and commented - will be stored accordingly within file structure.

Project_Contractor_Design Package - SCOPE_Description_Version Control

Ex. Training Project_XYZ Company_DES-Structural_Civil & Steel Foundations_RevA

Version Control:

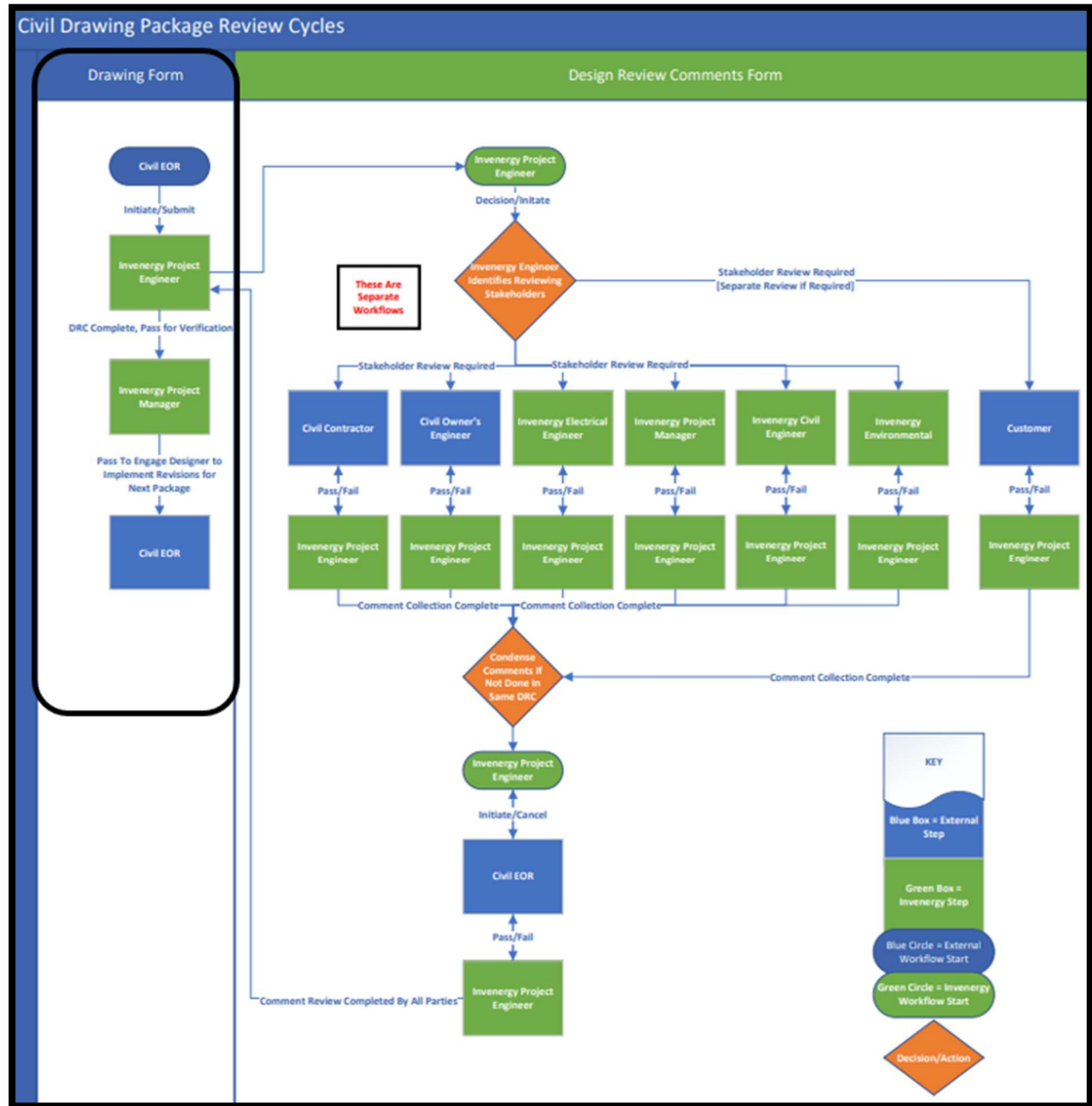
ENG Documents Only:

Engineering Document	Abbreviation	Version Control in File Name
Issue for Review/Front End Engineering Design	IFR / FEED	Rev A, Rev B, Rev C, Rev D
Issue for Construction	IFC	Rev 00, Rev 01, Rev 02
As Built	As-Built	As Built_

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

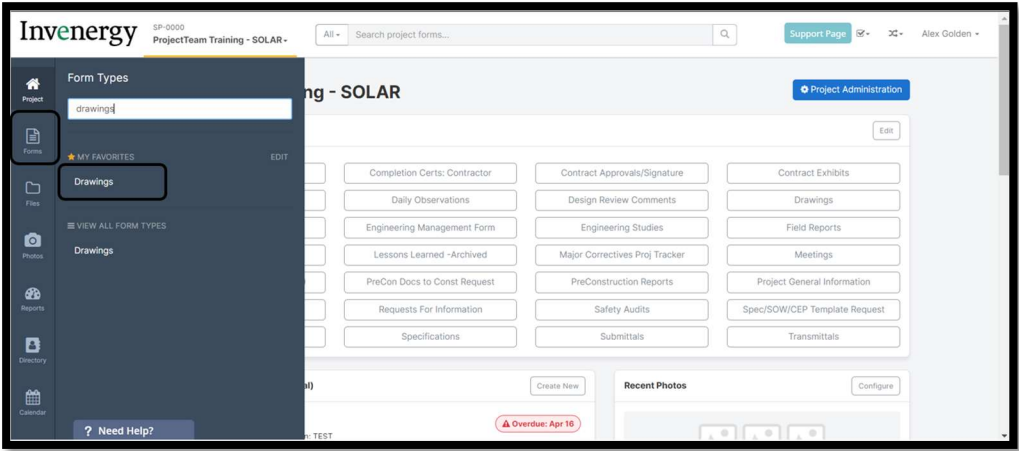
Drawing Process – High-Level Overview

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

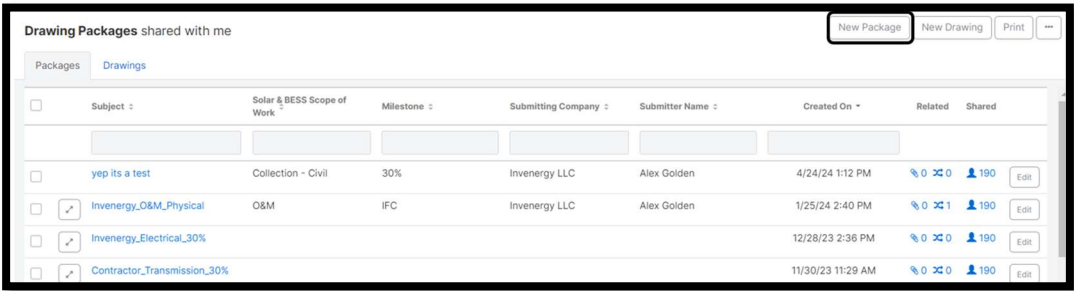


FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

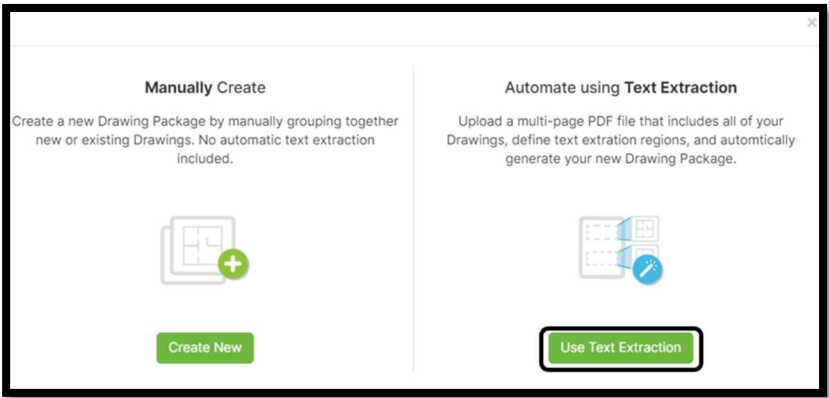
1. To uploading a Drawing Package, go to Forms and select “Drawings.”



2. Select “New Package.”



3. Select “Use Text Extraction” to upload drawing package using text extraction tool.



FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

4. Fill out: Subject, Scope of Work, Milestone, Submitting Company, and Submitter Name. Then press “Save.”

The screenshot shows a web form titled "Create Drawing Package". It has a close button (X) in the top right corner. The form contains the following fields:

- Subject:** A text input field containing "DEMO". An arrow points to this field.
- General Notes:** A large text area with the placeholder text "Type the General Notes".
- Solar & BESS Scope of Work:** A dropdown menu showing "Collection - Structural". An arrow points to this field.
- Milestone:** A dropdown menu showing "10%". An arrow points to this field.
- Submitting Company:** A text input field containing "Invenergy LLC". An arrow points to this field.
- Submitter Name:** A text input field containing "Alex Golden". An arrow points to this field.

At the bottom of the form are two buttons: "Cancel" (outlined in red) and "Save" (solid green).

5. Before uploading the files, make sure all these requirements are followed to allow ProjectTeam’s text extractor to properly identify your text:
 - All drawing pages must have the same dimension.
 - All drawing pages must be in a vector-based format.
 - Drawing text must be un-flattened while everything else in the drawing must be flattened.
 - Text to be extracted cannot have any shapes or words layered on top.
6. Next, either “drag and drop” files from your file explorer into the attachments or browse computer for files. Allow time to upload and then select “Next.”

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Drawings / Text Extraction

New Drawing Package: DEMO

Step 1 of 3. Upload Drawings Next >

Drag and drop or browse your computer to upload drawings (must be PDF with text). [Learn how to make extraction most accurate.](#)



Drag and drop to upload or

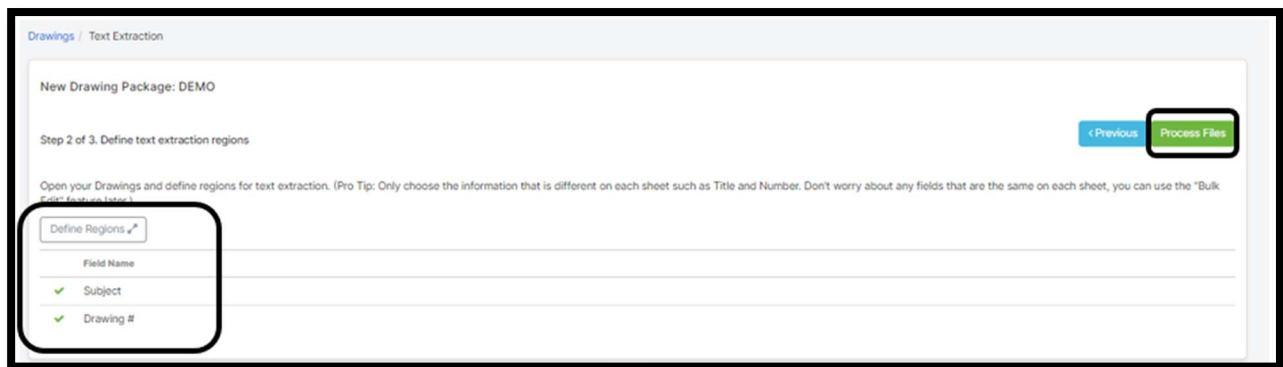
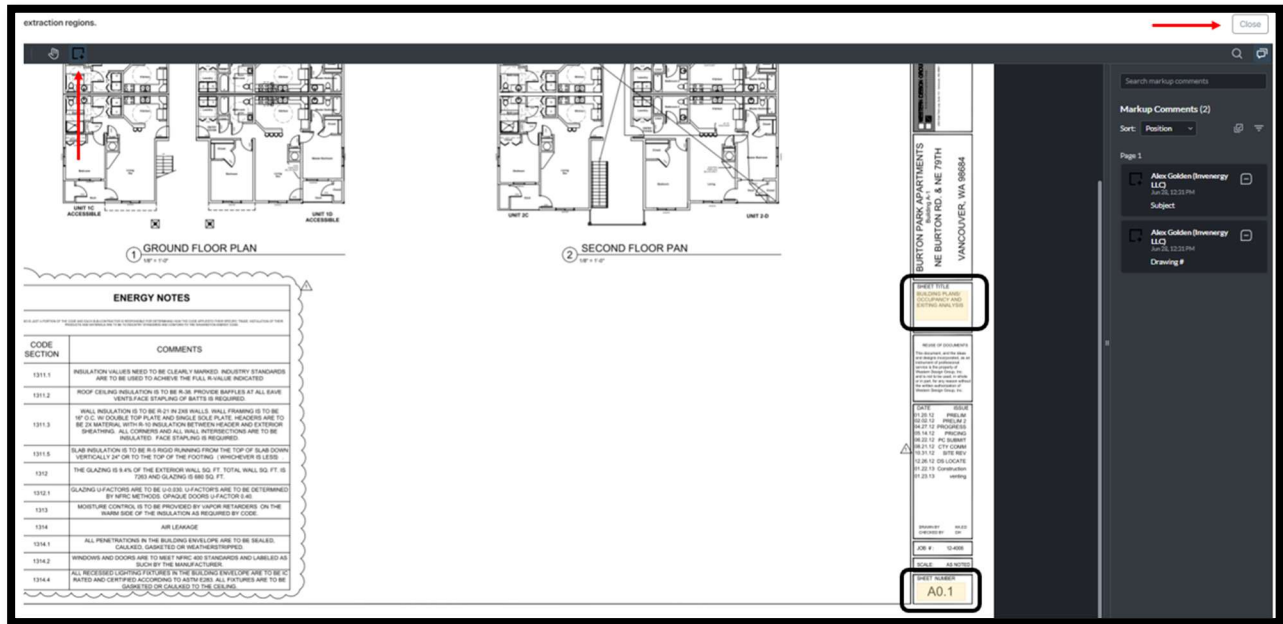
Name	Remove
 A01_BUILDING PLANS OCCUPANCY AND EXITING ANALYSIS_Rev 1.pdf 573 KB	Remove
 A1.3_UNIT PLAN - ACCESSIBLE_Rev 0.pdf 238 KB	Remove
 A2.0_EXTERIOR ELEVATIONS_Rev 0.pdf 389 KB	Remove
 A1.0_GROUND FLOOR PLAN_Rev 0.pdf 334 KB	Remove
 A1.4_UNIT PLAN - ADAPTABLE_Rev 0.pdf 251 KB	Remove
 A1.2_ROOF PLAN_Rev 0.pdf 152 KB	Remove
 C1.0_COVER SHEET_Rev 1.pdf 458 KB	Remove
 A1.1_SECOND FLOOR PLAN_Rev 0.pdf 289 KB	Remove

7. Using the text extraction tool, select “Define Region:”

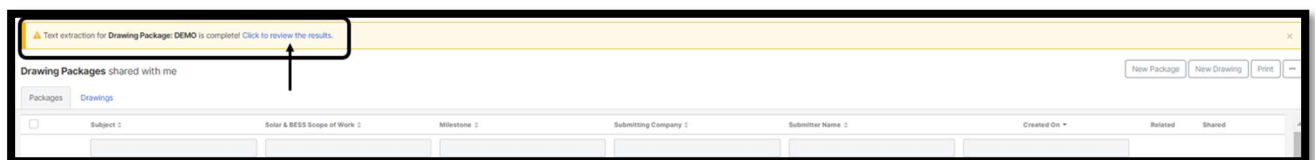
- **Subject:** Select Black Square with + (Region). Right click and create a box in the area where the text extractor will find the subject for your drawings, making sure to give extra space for longer titles on pages. Then select “Subject” and “Add.”
- **Drawing Number:** Select Black Square with + (Region). Right click and create a box in the area where the text extractor will find the Drawing Number for your drawings, making sure to give extra space for longer Drawing Numbers on pages. Then select “Drawing #” and “Add.”
- **Revision:** Select Black Square with + (Region). Right click and create a box in the area where the text extractor will find the Revision for your drawings, making sure to give extra space for longer Drawing Numbers on pages. Then select “Revision” and “Add.”

8. Once Subject, Drawing Number, and Revision are defined on your pages with the text extractor, select “Close” in the top right. Then select “Process Files.”

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



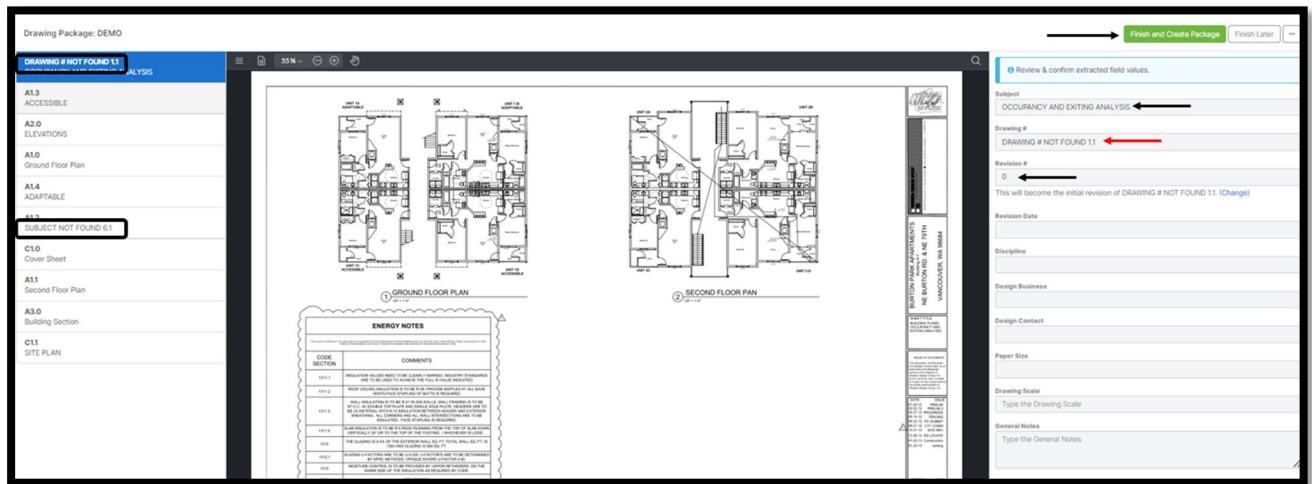
9. Select "View Drawing Log," and then the text at the top should say "Text Extraction for Drawing Package: X is complete! Click to review the results". Select the blue text to review the text extraction of your drawings. Note: Large packages may take more time, you will receive an email when the tool is done extracting the text from the drawing package.



FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

10. Review your Drawings and confirm the Subject, Drawing Number, and Revision # are found for all drawings. If text says “DRAWINGS # NOT FOUND,” then the text extractor was not able to extract the text. Depending on the number of drawing(s) details not captured properly, you have two options:

- You can fill in the text manually if minimal not captured
- If many drawings were not extracted properly, we recommend deleting the package and trying to use the extraction tool again.



11. Once All drawings have Subject, Drawing Number, and Revision input correctly for each drawing, press “Finish and Create Package.”

12. Go to workflows and initiate the workflow for the associated scope of work. Next, select “Share” at the top and share to your company to access the drawing package.



FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Design Review Comments

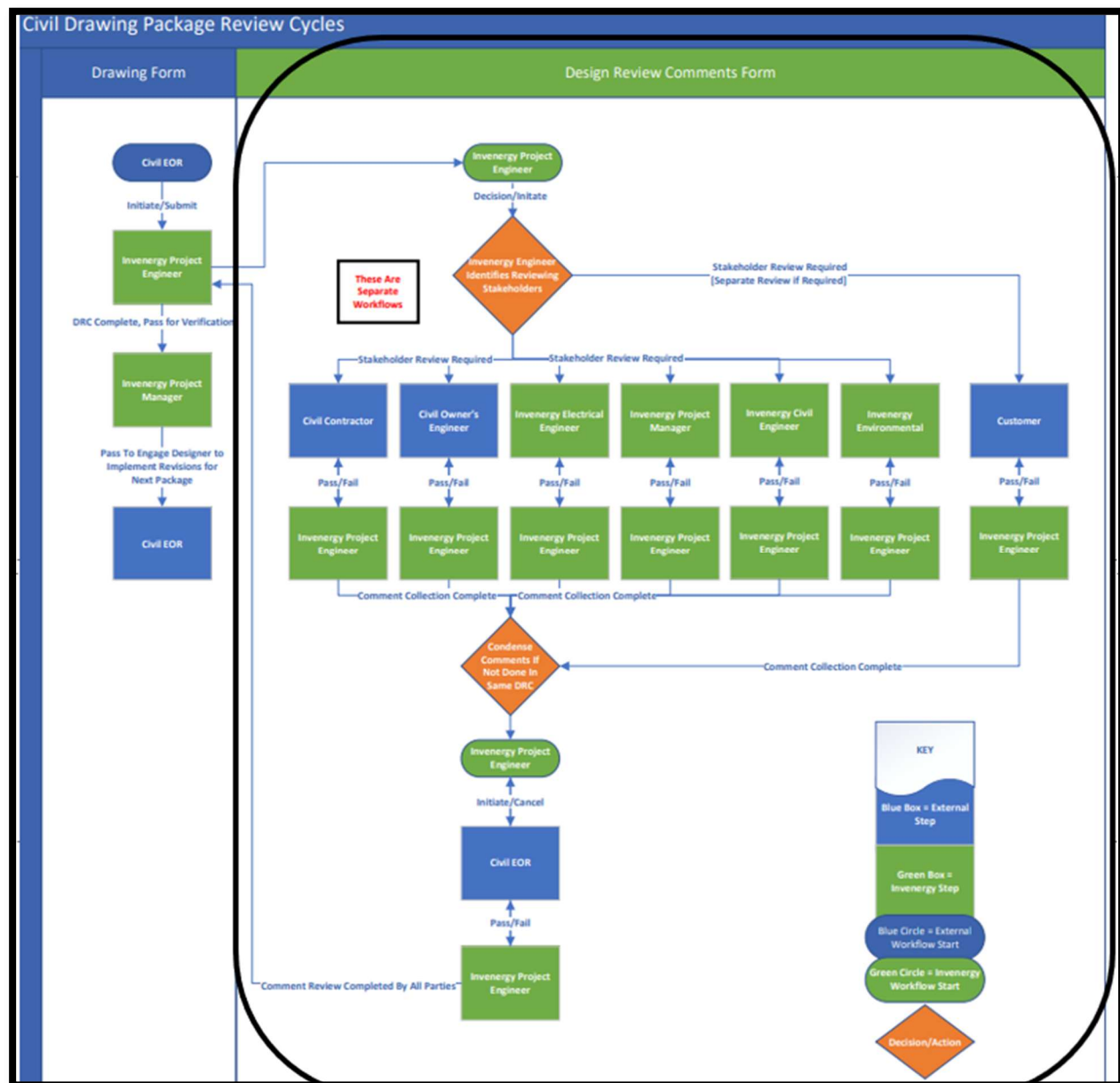
Purpose: Form used by Invenergy to track comments from responsible parties for drawing revisions. This form is directly connected through “Reference Links” to the Drawings form for drawing revision review.

Please note: *If your project requires significant review of a specification/submittal, this form can also be a tool to facilitate those reviews.*

Initiators: Invenergy Engineering, and/or Owner's Engineers.

Drawing Process – Design Review Comments Form Section

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



1. After receiving a Drawing Package or Specification, the Invenergy stakeholder who owns this process will create a Design Review Comment form to link to the original document's form.
2. First, open "Forms" and select "Design Review Comments."

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

The screenshot shows the Invenenergy ProjectTeam Training - SOLAR interface. On the left, a sidebar titled 'Form Types' is open, displaying a search bar with 'design review comments' and a list of 'MY FAVORITES' including 'Design Review Comments'. The main content area shows a grid of form type buttons: Completion Certs: Contractor, Daily Observations, Engineering Management Form, Lessons Learned - Archived, PreCon Docs to Const Request, Requests For Information, and Specifications.

3. Select “New” in the top right

The screenshot shows a close-up of the top right corner of the interface. A 'New' button is highlighted with a red box. Below it are three tabs: 'Created On', 'Related', and 'Shared'.

4. Fill out Subject (Name of Reviewing Document(s)), Reviewer Company, Status of the Review, and Status Updated By fields.
5. Select “Add Existing” in either the Drawing Package Reviewed or Specification Package Reviewed area, depending on the item being reviewed.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

New Design Review Comments Cancel Save & Start Workflow

DETAILS

Subject
Demo

Reviewer Company:
Invenergy LLC

Drawing Package Reviewed Add Existing Create New

☐	Subject	Details
☐	DEMO	

Specification Package Reviewed Add Existing Create New

☐	Subject	General Notes
☐		

Status of Review ?
Gathering Comments

Status Updated By
Alex Golden

Design Comments Create New

☐	#	Page Label	File Name	Author's Company	Author	Comments	Responder (Company)	Responder (Contact)	Response	Closed	Conclusion
☐											

[? Need Help?](#)

6. There are 2 ways to fill out the Design Review Comments Section:

- Option 1: In ProjectTeam
 - Select "Create New" and insert information into Page Label, File Name, Author's Company, Author, and Comments.
 - Select "Add & New" to add additional comment rows or "Add" to complete the list.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Add Design Comments

Page Label

A0.1

File Name

Building Plans/Occupancy and Exiting Analysis

Author's Company

Invenergy LLC

Author

Alex Golden

Comments

Confirm Markup on Drawing.

Responder (Company)

Cancel

Add & New

Add

- Option 2: Batch Import information fields using Excel.
 - Select Ellipse and then "Import Rows."

Design Comments

#

Page Label

File Name

Author's Company

Author

Comments

Responder (Company)

Responder (Contact)

Response

Close

Create New

Import Rows

- Select "Download" under Download template to receive an excel template.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Import Design Comments

- 1 Download template**
Download the template CSV file we've built which is ready for you to fill in.
Download
- 2 Prepare your data**
Use the template to fill in all the rows of the collection.
- 3 Import rows**
Upload the CSV file into ProjectTeam.com.
Upload

Cancel

- Fill out the Excel template with your rows of data and save the document.

Page Label	File Name	Author's Company	Author	Comments	Responder (Company)	Responder (Contact)	Response	Closed	Conclusion
A0.1	BUILDING PLANS/ OCCUPANCY AND EXITING ANALYSIS	Invernergy	Alex Golden	Confirm Markup on Drawing.					
A0.1	BUILDING PLANS/ OCCUPANCY AND EXITING ANALYSIS	Invernergy	Alex Golden	Misspelling on "Plan"					
A1.0	GROUND FLOOR PLAN	Invernergy	Alex Golden	Require an extra emergency exit on the west wall. Need Walls in center hall to be 3' further apart					
A1.1	SECOND FLOOR PLAN	Invernergy	Alex Golden	Looks asymmetrical on western roof apex.					
A1.2	ROOF PLAN	Invernergy	Alex Golden	What are the Lines in the markupid section.					

- Go back to ProjectTeam and select "Upload" under "Import rows." If the data fields are input correctly, the system will import the data into the Design Comments column.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Import Design Comments

1

Download template

Download the template CSV file we've built which is ready for you to fill in.

Download

2

Prepare your data

Use the template to fill in all the rows of the collection.

3

Import rows

Upload the CSV file into ProjectTeam.com.

Upload

Cancel

New Design Review Comments

Cancel Save & Start Work

Status Updated By

Alex Golden

Design Comments

Create New

	#	Page Label	File Name	Author's Company	Author	Comments	Responder (Company)	Responder (Contact)	Reponse	Closed	Conclusion
☐	1	A0.1	BUILDING PLA	Invenery	Alex Golden	Confirm Markup on Drawing.			Type the Reponse	☐	Type the Conclusion
☐	2	A0.1	BUILDING PLA	Invenery	Alex Golden	Misspelling on "Plan"			Type the Reponse	☐	Type the Conclusion
☐	3	A1.0	GROUND FLOC	Invenery	Alex Golden	Require an extra emergenc			Type the Reponse	☐	Type the Conclusion
☐	4	A1.1	SECOND FLOC	Invenery	Alex Golden	Need Walls in center			Type the Reponse	☐	Type the Conclusion
☐	5	A1.2	ROOF PLAN	Invenery	Alex Golden	Looks asymetric al on			Type the Reponse	☐	Type the Conclusion
☐	6	A1.2	ROOF PLAN	Invenery	Alex Golden	What are the Lines in the			Type the Reponse	☐	Type the Conclusion

7. Select "Save & Start Workflow."

8. Initiate workflows to reviewers who need to input their comments for revisions of the document(s).

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

☐	(Design Review Comments) Electrical Engineer to Electrical Owner Engineer Utilize this workflow to send a Design Review Comment to the Electrical Owner Engineer	Review (Owner Engineer) → Review (Electrical Engineer)	3	Monday, July 1, 2024
☐	(Design Review Comments) Electrical Engineer to Project Engineer Utilize this workflow to send a Design Review Comment to the Project Engineer	Review (Project Engineer) → Review (Electrical Engineer)	3	Monday, July 1, 2024
☐	(Design Review Comments) Electrical Engineer to Project Manager Utilize this workflow to send a Design Review Comment to the Project Manager	Review (Project Manager) → Review (Electrical Engineer)	3	Monday, July 1, 2024
☐	(Design Review Comments) Electrical Engineer to SCADA Engineer Utilize this workflow to send a Design Review Comment to the SCADA Engineer	Review (SCADA Engineer) → Review (Electrical Engineer)	7	Friday, July 5, 2024
☐	Electrical Engineer to Transmission Engineer Utilize this workflow to send documents to Invenery Transmission Engineer.	Electrical Engineer to Transmission Engineer → Transmission Engineer to Electrical Engineer	5	Wednesday, July 3, 2024

Cancel Start Workflow

9. Once all comments are collected from the necessary stakeholders via workflows, initiate a workflow to the original submitter of the specifications/drawings.

Start new workflow

electrical engineer to electrical eor

Workflow Name & Description	Workflow Steps	Days for First Step to Take Action ?	Due Date for First Step ?
☒ (Design Review Comments) Electrical Engineer to Electrical EOR Utilize this workflow to send comments to the Electrical Contractor and Electrical EOR	Review (Electrical Contractor/EOR) → Review (Invenery)	7	Friday, July 5, 2024

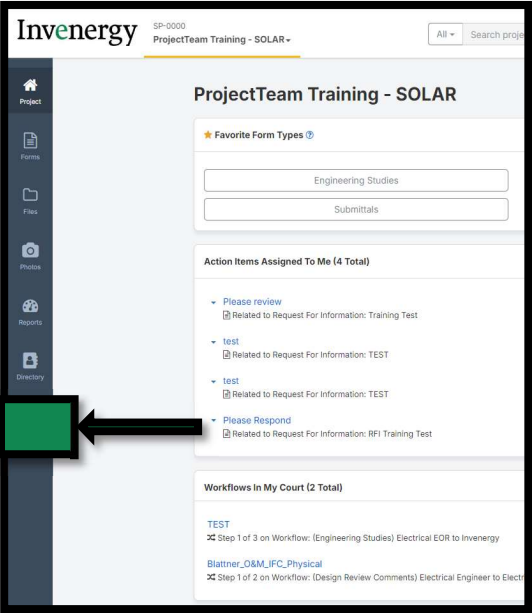
Cancel Start Workflow

10. Complete review with them and reengage with relevant stakeholders, as needed. Ensure stakeholders upload their markup copies of the drawing package in the attachment section.
11. Once reviews are complete and the Specification(s) or Drawing Package are ready for revisions, go back to the actual drawing package, and pass the workflow to the Invenery Project Manager for verification.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

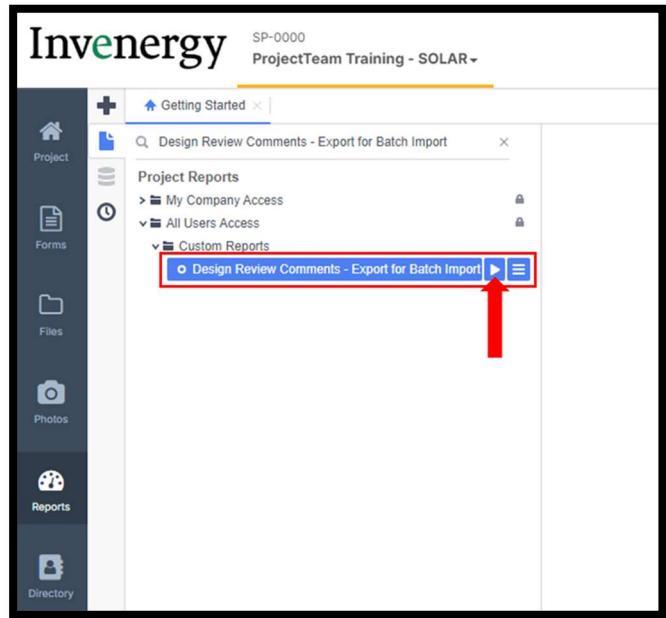
How To: Add Response Comments to Design Review Comments

Step 1: In your project, click on the “Reports” tab on the left.



Step 2: Find the report titled “Design Review Comments – Export for Batch Import” by either (1) using the search bar at the top OR (2) Opening the sections All User Access → Custom Reports.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



Step 3: Click on the report & select the play icon to run the report. Use the dropdown to select the Design Review Comments you would like to export & click “Okay”.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

ch project forms... Support Page

Filters

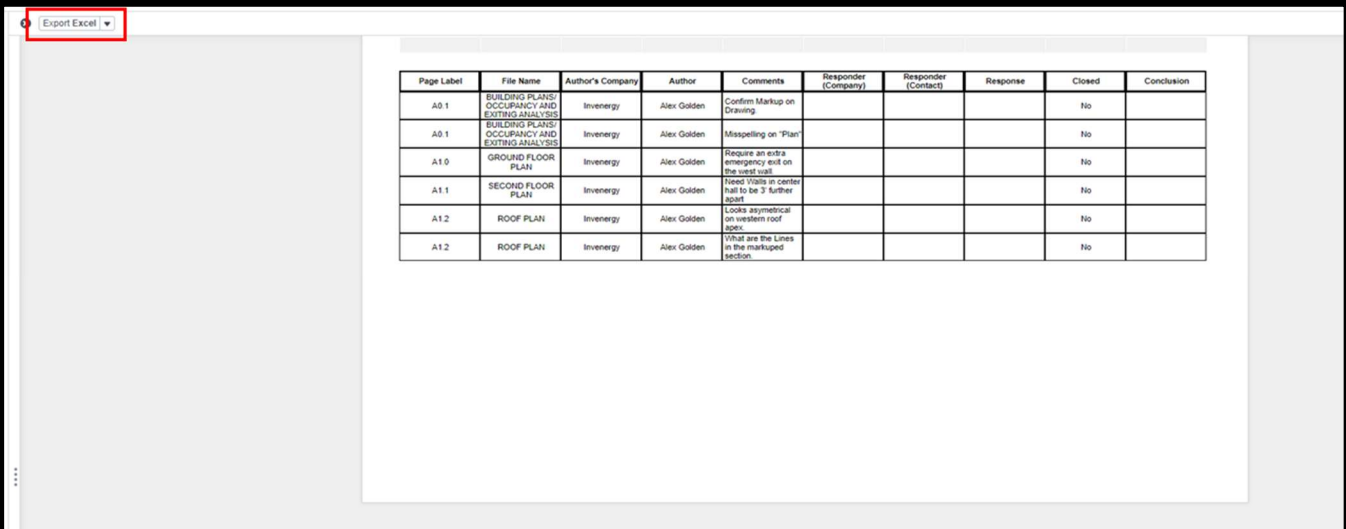
Filter By	Condition	Value
Design Review Comments Subject	Is One Of	Select One ☐ Test ☐ TEST ☐ Invenenergy_O&M_Physical ☐ Electrical_30%_Stakeholder X ☐ test ☐ testing ☐ Blatiner_O&M_IFC_Physical

Okay

Cancel

Step 4: Once the report is run, click “Export Excel” in the top left to export the report as an Excel Spreadsheet.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



Page Label	File Name	Author's Company	Author	Comments	Responder (Company)	Responder (Contact)	Response	Closed	Conclusion
A0.1	BUILDING PLANS/ OCCUPANCY AND EXITING ANALYSIS	Invenergy	Alex Golden	Confirm Markup on Drawing				No	
A0.1	BUILDING PLANS/ OCCUPANCY AND EXITING ANALYSIS	Invenergy	Alex Golden	Misspelling on "Plan"				No	
A1.0	GROUND FLOOR PLAN	Invenergy	Alex Golden	Require an extra emergency exit on the west wall				No	
A1.1	SECOND FLOOR PLAN	Invenergy	Alex Golden	Head Vents in center hall to be 3' further apart				No	
A1.2	ROOF PLAN	Invenergy	Alex Golden	Looks asymmetrical on western roof slope				No	
A1.2	ROOF PLAN	Invenergy	Alex Golden	What are the Lines in the marked-up section				No	

Note: If cannot find the report or are receiving an error message when running it, please reach out to ProjectTeam@invenergy.com for support.

Step 5: In the exported spreadsheet, fill in columns F-H.

Step 6: In your project, open the design review comments form you are adding comments to and click "Edit".

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

file. Copy & paste the content from your report spreadsheet into the corresponding columns of the CSV spreadsheet, then save the file. Upload the CSV file to import the rows.

Design Comments

#

Page Label

File Name

Author's Company

Author

Comments

Responder (Company)

Responder (Contact)

Response

Closed

Create New

Import Rows

Import Design Comments

1

Download template

Download the template CSV file we've built which is ready for you to fill in.

Download

2

Prepare your data

Use the template to fill in all the rows of the collection.

3

Import rows

Upload the CSV file into ProjectTeam.com.

Upload

Cancel

Step 9: Save the form & pass the workflow back to Invenergy.



FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Edit Design Review Comments
 Cancel
Save

☐
☐

Subject

Blattner_O&M_IFC_Physical

Details

Specification Package Reviewed

☐
☐

Subject

General Notes

↗
Add Existing
Create New

Status of Review

EOR Reviewing

✕

Status Updated By

Alex Golden

Design Comments

↗
Create New
...

☐	#	Page Label	File Name	Author's Company	Author	Comments	Responder (Company)	Responder (Contact)	Response	Closed	Conclusion
☐	1	A0.1	BUILDING PLANS/ OCCU	Invenergy	Alex Golden	Confirm Markup on Drawing.	Invenergy	Lindsey Karam	Response 1	☐	Type the Conclusion
☐	2	A0.1	BUILDING PLANS/ OCCU	Invenergy	Alex Golden	Misspelling on "Plan"	Invenergy	Lindsey Karam	Response 2	☐	Type the Conclusion
☐	3	A1.0	GROUND FLOOR PLAN	Invenergy	Alex Golden	Require an extra	Invenergy	Lindsey Karam	Response 3	☐	Type the Conclusion

Note: If you have any questions or would like support walking through this process, please reach out to ProjectTeam@invenergy.com.

Spec/SOW/CEP Template Request

This form is used to request Invenergy equipment specifications. A contractor can use this form to request specifications from Invenergy.

How to request specs:

- 1. Go to Forms and then find "Spec/SOW/CEP Template Request."

Form Types

Project Administration

Forms

MY FAVORITES

Spec/SOW/CEP Template Request

VIEW ALL FORM TYPES

Spec/SOW/CEP Template Request

Need Help?

TEMPLATE

Contract Approvals/Signature

Design Review Comments

Engineering Studies

Punch List Items

Specification Packages

Contract Exhibits

Drawings

Incidents

Requests For Information

Specifications

Contracts

Emails

Meetings

Safety Audits

Submittals

Recent Photos

No photos yet

Choose your favorite album and keep track of new photos added to that album by viewing them here.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

2. Select the form and then select “New” in the top right corner.
3. Type in a short title description in the subject line.
4. Scroll through the form and select the “Create New” section for any Equipment Specification where you are requesting Invenergy’s template(s).

Collection Equipment Specifications [?](#)

☐ Innerduct Medium Voltage Cable Pad Mounted BESS Aux Transformer Trench Fiber Trench Ground

Substation Equipment Specifications [?](#)

☐ Capacitor Bank (Open-Air) Control Enclosure Enclosed Capacitor Bank HV Circuit Breaker HV Current & Voltage Transformer HV Current Transformer HV Switch HV Voltage Transformer MV Circuit Breaker (Solar) MV Hook Switch MV Switch MV Voltage Transformer Neutral Grounding Reactor Relay Control Panels Standard Shape Steel Substation Transformer Tapered Tube Steel Static Wire

Transmission Equipment Specifications [?](#)

☐ OPGW Overhead Conductor Static Wire

Project Engineering SOWs & Specs

☐ Civil Design SOW & Attachment 1: Basis of Design Structural Design SOW Solar Operational MET Station Spec Commissioning Functional Test Commissioning Capacity Test

BESS Engineering SOWs & Specs

☐ BESS Equipment Specification Transformer Specification BESS Inverters Specification BESS Safety Scope of Work Safety Studies and Hazard Mitigation Analysis Emergency Response Planning and Training

5. Write a short description in the field “Description of Need for Specification Request” to ensure the engineer is clear regarding what is being requested.

Project Engineering SOWs & Specs

☐ Civil Design SOW & Attachment 1: Basis of Design Structural Design SOW Solar Operational MET Station Spec Commissioning Functional Test Commissioning Capacity Test

BESS Engineering SOWs & Specs

☐ BESS Equipment Specification Transformer Specification BESS Inverters Specification BESS Safety Scope of Work Safety Studies and Hazard Mitigation Analysis Emergency Response Planning and Training

Description of Need for Specification Request [?](#)

Type the Description of Need for Specification Request

6. Once all information has been entered, click “Save & Start Workflow” in the top right corner. Select the workflow for Invenergy’s Engineers.
7. The engineer(s) will receive the workflow and respond by uploading the requested Equipment Specs to the Attachments section.
8. Once Equipment Specs are revised make sure to upload the revised specs into the correct section in the Specification Form.

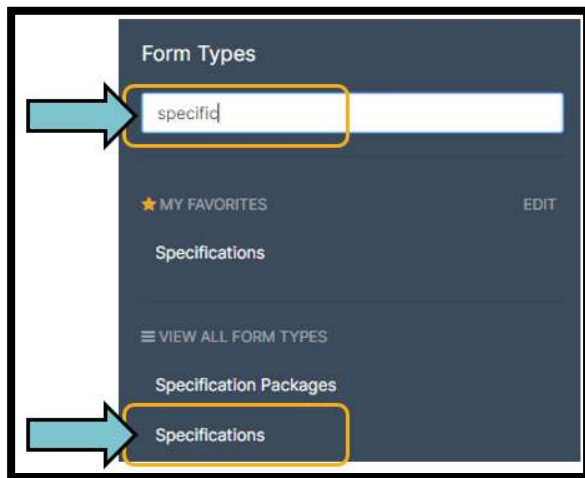
FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Specifications

Purpose: Form used for documents prepared prior to construction, which detail how the execution of construction must be performed. A Specification often refers to a set of documented requirements to be satisfied by a material, design, product or service.

Initiators: Contractors, Consultants, Invenergy (Internal Review).

1. Navigate to the Specifications form.



2. Notice in the log view, the specifications are organized by Division.
3. We have the option to select: "Show Latest Revision I have access to," which updates the view to the most recent revision of each specification.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Specifications shared with me

☐ Show Latest revision I have access to

☐	Subject	Version #	Revision #	Revision Date	Created On	Related	Shared	
No Division defined								
☐	Test	1	0		3/24/23 2:27 PM	0 0 0	189	Edit
Division Collection Equipment								
☐	TEST	V1	0		5/16/24 10:32 AM	0 0 0	189	Edit
☐	TEST	V1	1	5/16/24	5/16/24 10:32 AM	0 0 0	189	Edit
Division Substation Equipment								
☐	HV Circuit Breaker	A	0		11/9/23 9:40 AM	1 0 0	189	Edit
Division Z- Submittal Organization								

- To create a new specification, click “New,” then enter details. The “Status” and “Status Updated By” fields will be filled out by Invenergy.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

New Specification

Save & Start Workflow

DETAILS

Subject * Required
Type the Subject

Division

Version # * Required
Type the Version #

Revision #
0

Revision Date

Discipline

Design Business

Design Contact

General Notes
Type the General Notes

Status

Status Updated By

- On the Specification form's entry page, the number of revisions made to the specification is visible. Additionally, attachments can be added to the Attachments section.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

REVISION HISTORY

Subject	Number	Revision #	Revision Date
HV Circuit Breaker	A	0	

ATTACHMENTS

Name	Last Updated
Wind Project Drawing Review.pdf 118 KB	Alex Golden (Invenergy LLC) 11/9/23 at 9:40 AM

- If you would like to create a revision for a specification, navigate to that specification in the log view, click the title to view form details, then select the blue "create revision" button.

Create Revision

Share

ACTION ITEMS

☐ Show complete/obsolete items

- The revision number automatically updates to the next revision number in the sequence. Update all fields that need to be changed, then hit save & add any attachments to the Attachments section.
- Using the "Specification Package" form, you can aggregate specifications into a single package.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

9. To do so, select "New" and fill in the fields.
10. To add specifications to the package, look under the "Specifications" header, and select "Add existing." Here, you will select all the specifications you want to include in the package.
11. If a specification item is not in ProjectTeam, you can "create new" and fill in the appropriate fields, then save and share.

New Specification Package

DETAILS

Subject
HV Circuit Breaker

General Notes
Type the General Notes

Specifications

	Subject	Version #	Revision #	Revision Date	Discipline
☐					

Add Existing Specifications

☐	Subject	Version #	Revision #	Revision Date	Discipline
☐	TEST	V1	1	5/16/24	PV Electrical
☐	TEST	V1	0		PV Electrical
☒	HV Circuit Breaker	A	0		
☐	SCADA	SCADA	0		
☐	Transmission	Transmission	0		
☐	Substation	Substation	0		
☐	Collection	Collection-Electrical	0		
☐	Collection	Collection-Structural	0		

12. Below is an example of how specifications processed in the form are stored within the folder structure.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Specifications – Processed in Form & Document Storage:

(A) Specifications Processed in Form:

Division

Public Roads

- Civil
- Collection
- Substation
- Transmission
- SCADA
- Testing & Commissioning
- Engineering SOW
- Studies SOW
- O&M Building
- Pile & Racking
- Module Install
- MET Tower
- Construction SOW
- Submittal Organization

Invenenergy

(A) Specifications Classification – will be included in naming convention once stored upon Status Update is Approved with Comments OR Final and Approved.

(B) Naming Convention:
Project Name_Contractor_Specification Type_Aproved Status_Aproved Date

(B) Document Storage:

Project Files / 03 CONSTRUCTION / 02 ENG

- 2.00 ENG ONBOARD
0 Files
- 2.01 FEED or Schematic Design
0 Files
- 2.02 IFC
0 Files
- 2.03 As Built
0 Files
- 2.04 Eng Studies
0 Files
- 2.05 Specifications
0 Files**

Submittals

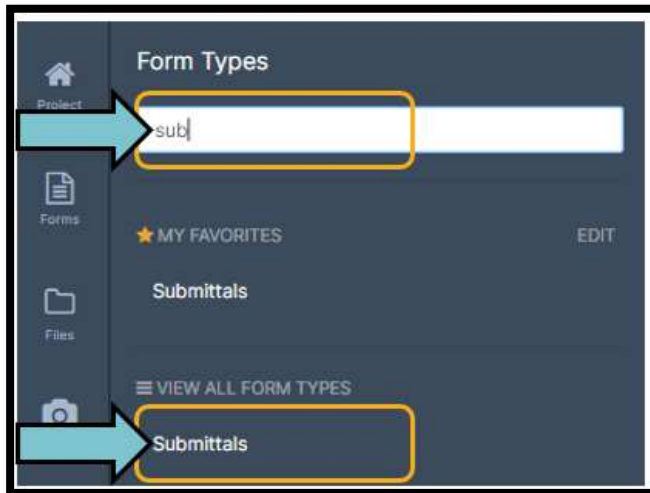
Purpose: The Submittals form holds submission and review processes for submittal documents including but not limited to:

- Vendor Packages, Installation Packages, Fabrication Packages, Plans and Procedures, Testing and Reports, O&M Packages, others.
- Any submittal required per contract that requires Invenenergy (or third party) approval before they are fabricated or used on project site.
- In addition: This can include tests, procedures or information that a customer requests based on issues arising on site.

Contractors will need to submit & revise Submittals.

1. Navigate to the “Submittals” form.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



- The log view is divided into Items and Packages. Multiple submittal items can be assembled into a package. The submittals here are organized by the Specification Section.

Submittal Items shared with me

Items

Packages

Show Latest revision I have access to

☐	Item #	Subject	Submittal Category	Submitting Company	Submitting Contact	Revision	Revision Date	Status	Status Updated By	Created On	Related	Shared
Specification Section Collection-Civil												
☐	Collection-Civil-01.A01	Geotech Study, Grunlof, STU_102923_A01		Invernergy LLC	Alex Golden	A01	10/18/23			12/6/23 1:54 PM	1 0 0	190 Edit
Specification Section SAFETY												
☐	SAFETY-01.0	Civil Contractors Safety Plan		Invernergy LLC	Alex Golden	0				3/20/23 11:06 AM	0 0 0	190 Edit
☐	SAFETY-04.0	Site Name ERP Plan		Invernergy LLC	Michelle Peton	0				5/24/23 10:21 AM	0 0 0	190 Edit
Specification Section Substation												
☐	Substation-01.1	Substation Calculations	Calculations	Invernergy LLC	Lindsey Karam	1		Approved with Comments	Ali Syed	4/18/24 10:24 AM	0 0 0	190 Edit
☐	Substation-02.1	MV Circuit Breaker	Installation Package	Invernergy LLC	Ali Syed	1	4/23/24			4/23/24 2:34 PM	0 0 0	190 Edit

- Below are the fields to complete when creating a new Submittal entry:

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

DETAILS

Subject 

Type the Subject

Submittal Category

Description

Type the Description

Submitting Company

Submitting Contact

Specification Section 

Number 

Type the Number

Revision

0

Revision Date

Requested Approval By

Status 

Status Updated By

Use For Revision Requests

☐

Use For Revision Requests

Revision/Review Requested By Company

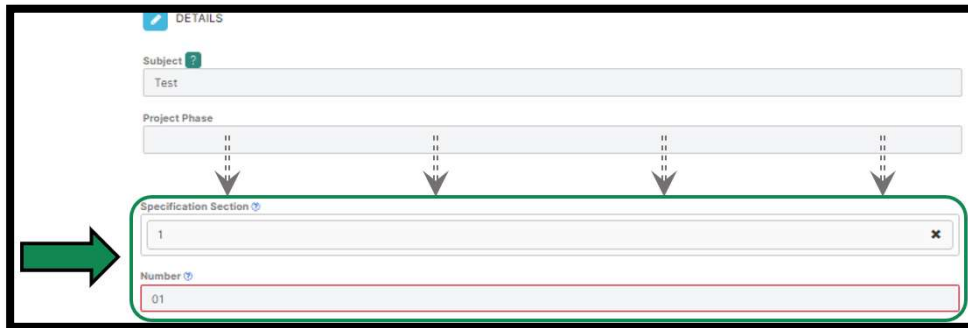
Action Notes

Type the Action Notes

Revision Reviewer

4. The "Number" field will auto-populate according to the specification section selected.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



DETAILS

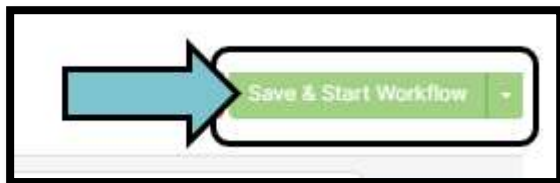
Subject [2]
Test

Project Phase

Specification Section [1] x

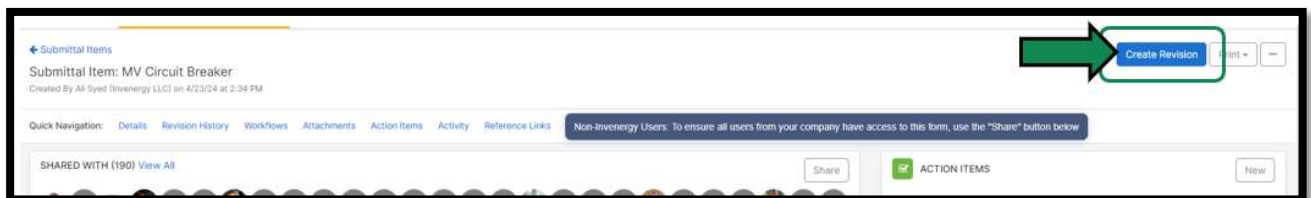
Number [01]

- Please note, if the submittal is the original version, the revision number of the submittal will be "0."
- Once finished with this information, start the appropriate workflow.



Save & Start Workflow

- On the specific submittal form's page, you can add any relevant attachments such as PDFs of material and drawings.
- If there is a modification that you must make, at the top right side of the page, select the blue "Create Revision" button. This will create a new revision, reflected with the updated revision number.



Submittal Items

Submittal Item: MV Circuit Breaker
Created By All Syed (Invenenergy LLC) on 4/23/24 at 2:34 PM

Quick Navigation: Details Revision History Workflows Attachments Action Items Activity Reference Links

Non-Invenenergy Users: To ensure all users from your company have access to this form, use the "Share" button below

SHARED WITH (190) View All

Share ACTION ITEMS New

Create Revision

- Update the necessary information.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

New Submittal Item Revision

DETAILS

Subject
MV Circuit Breaker

Submittal Category
Installation Package

Description
Type the Description

Submitting Company
Invenergy LLC

Submitting Contact
Ali Syed

Specification Section
Substation

Number
02

Revision
2

Save & Start Workflow

10. You can assemble submittal items into packages. To do so, go back to the log view by selecting "Submittals" in the forms section, and select "New Package." Input the subject, specification section (the number will auto update), keep revision at "0," and a description of the revisions. To add Submittal Items into the package, select "Add Existing," then select the submittal items you'd like to add to the package. If you want to create a submittal item for the package, you can also do so here by selecting "Create New."

Please note: Document Controls relies heavily on the status field of these forms and the completion of the workflows to act as indicators that these documents are ready to be migrated to the designated folder location. Reference the example below for further information.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Submittals Form - Contractor/Consultant/EOR submits:

CLASSIFICATION Package Type – Highlighted in Yellow:

Vendor Package (Ex. Below)

- System Description
- Bill of Materials
- Equipment Details, Description and cut sheets including certification for compliance applicable codes and standards
- Mill Certificates

Fabrication Package (Ex. Below)

- Fabrication Shop Drawings
- Selection and Specifications of Key Equipment
- Final shop Drawings incorporating comments from review.

Installation Package (Ex. Below)

- Layout Installation
- Schematic and Preliminary Designs
- Equipment and wiring layout general arrangement drawings issued for construction
- Controls, monitors, protections, and instrumentation drawings

Plans and Procedures (QA/QC) (Ex. Below)

- Onsite welding certificates and procedures
- Any site-specific remediation plans
- Installation, start-up, commissioning, monitoring, and test plans and documents.
- Quality Assurance plans and inspection records
- Performance monitoring plan to ensure compliance with mutually agreed upon performance criteria
- Energization Plan

Testing and Reports (Ex. Below)

- Geotechnical investigation report
- Noise Report
- Corrosion study report for racking and module frames
- Performance of equipment components and subsystems
- Material Test Report including, but not limited to soil compaction and concrete cylinder tests.
- Results of audits and other surveys that may be performed by Contractor

Training & Personnel Certification (Ex. Below)

- Training documentation and certificates for onsite personnel

O&M Package (Ex. Below)

- Recommended spare parts list
- Recommended special tools For maintenance list
- Solar PV System maintenance, schedule, troubleshooting guidelines, and contact information for technical assistance and special tools, spare parts ordering
- O&M Manuals
- Supply Agreement & Warranty

Calculations (Ex. Below)

- Engineering design calculations

Date DocumentType Comments PackageType Version

> If initial submission:

Ex. 2023-10-20 Access Panel Grunloh VEN A1

> If Revision Submission

Ex. 2023-10-20 Access Panel Grunloh VEN R1

Package Type Abbreviations:

VEN = Vendor Package

FAB = Fabrication Package

INST = Installation Package

PLANS = Plans and Procedures

TEST = Testing and Reports

TRAIN = Training & Personnel Cert

O&M = O&M Package

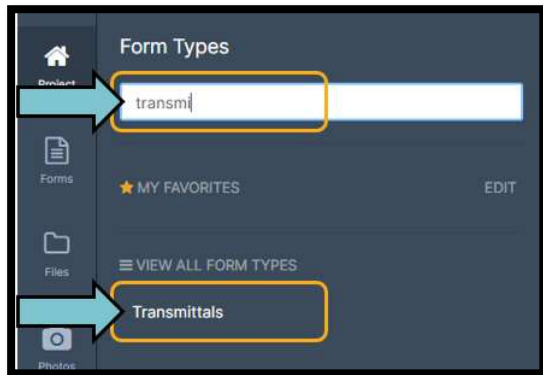
CALC = Calculations

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Transmittals

Purpose: Submit a transmittal if any project documents being provided do not fall into the submittal or drawing categories. This can encompass items that need to be documented for record.

1. Navigate to the Transmittal form log within your project.



2. Fill out the form.

3. There are two types of transmittals available, which are Contractor Transmittals (for complementary information to a submittal) and Letter of Transmittals (formal distribution of any document/communication relevant to a project).

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Type of Transmittal ?

====>

Contractor Transmittal

====>

Letter of Transmittal

4. For course of action, list the action desired by adding a new row. Please note, you can attach documents or reference links.

New Transmittal

DETAILS

Type the Subject

Date Created

Number

Get Next

Type of Transmittal ?

Transmittal Item

Submitting Company

Submitting Contact

Receiving Company

Source of Action

As Requested

For Approval

For Project Records

For Reference

For Review/Comments

For Signature

Further Processing

Submit

Cancel

Add & Review

Add

Course of Action

#	As Requested	For Approval	For Project Records	For Reference	For Review/Comments	For Signature	Further Processing	Submit	Resubmitted	Copies for Approval	Copies for Distribution	Corrected Prints	Related
1	☒	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	

Course of Action Attachments

New +

Upload New

From Files

Drag and drop to upload or

browse computer

Close

5. Save and start a workflow to the applicable party. After saving, you may upload relevant attachments to the Attachments section, if necessary.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Engineering Studies

Purpose: Form that holds review process for engineering tests and study results to confirm that the current design of the project meets certain performance criteria.

Initiators: Contractors, Consultants, Invenergy (Internal Review).

Engineering Studies – processed in Form:

13 STUDIES			SUBMIT Via Project Team - ENG STUDIES FORM
13.1 Electrical Studies	x	x	The "contractor" listed in this section will vary depending on task, listed as contractor since they are normally not created in-house
13.11 Arc Flash AC & DC	x	x	
13.12 Relay Coordination	x	x	
13.13 Grounding	x	x	
13.14 Harmonics	x	x	
13.15 Insulation Coordination	x	x	
13.16 Losses	x	x	
13.17 Fault studies	x	x	May be called short circuit analysis
13.18 PowerLoad Flow	x	x	
13.19 Short Circuit Study	x	x	
13.110 TDOV Analysis	x	x	
13.111 Ampacity Study	x	x	
13.112 Conduit Fill Calculations	x	x	
13.113 Station Service Transformer Sizing Calcs	x	x	
13.114 Switching and Lightning Over Voltage	x	x	
13.115 Other	x	x	
13.2 Mechanical Calculations	x	x	
13.21 Structural EDR Calculations	x	x	
13.211 Structure Design Calculations	x	x	For structural steel
13.212 Wind Speed Study	x	x	
13.213 Corrosion Analysis	x	x	
13.3 Other Studies	x	x	
13.31 Noise Study	x	x	from noise consultant, if applicable
13.32 Stray Voltage Study	x	x	contractor may be local utility, if applicable
13.4 Other	x	x	

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Document Storage:

All Engineering Studies will be stored:

Project Files / 03 CONSTRUCTION / 02 ENG

☐	Name
☐	2.00 ENG ONBOARD 0 Files
☐	2.01 FEED or Schematic Design 0 Files
☐	2.02 IFC 0 Files
☐	2.03 As Bults 0 Files
☐	2.04 Eng Studies 0 Files

1. Select Form and then type in “Engineering Studies.”

Project

Forms

Files

Photos

Reports

Directory

Form Types

engineering studies

MY FAVORITES

Engineering Studies

VIEW ALL FORM TYPES

Engineering Studies

PROJECT TEMPLATE

Types

Change Orders

Daily Observations

Engineering Management Form

Non-Conformance Report (NCR)

Spec/SOW/CEP Template Request

Transmittals

Contract Approvals/Signature

Design Review Comments

Engineering Studies

Punch List Items

Specification Packages

igned To Me

2. Select the form and then select “New” in the top right corner.

engineering Studies shared with me

You have no Engineering Studies yet
Once you have access to Engineering Studies, they will show here.
[Create New Engineering Studies](#)

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

- Fill out the following fields: Subject, Revision, Submitter Company, Submitting Company Contact, Scope of Work, Status, and Status Updated By.
- If the engineering study relates back to a drawing package in ProjectTeam, select “Add Existing” on the Studies Associated to Drawing Package section. Then select the drawing package that the study references.

- Select “Save & Start Workflow” in the top right corner. Select the workflow that addresses this study’s Scope of Work best. Selecting Electrical scopes will go to Invenergy Electrical Engineers while selecting civil, foundations, or structural scopes will go to the Invenergy Project Engineer.
- If the Engineering study doesn’t require review and is for reference, Invenergy will pass the workflow back with acknowledgement the study was received. The submitter can then pass the workflow to complete the submission of the document.
- If the Engineering Study requires review from any party, use the “Review Comments” section at the bottom of the page to track comments for revision.
 - Option 1: In ProjectTeam
 - Select Create New and insert information into Page Label, File Name, Author’s Company, Author, and Comments.
 - Select “Add & New” to add additional comment rows or “Add” to complete the list.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Add Design Comments

Page Label

A0.1

File Name

Building Plans/Occupancy and Exiting Analysis

Author's Company

Invernergy LLC

Author

Alex Golden

Comments

Confirm Markup on Drawing.

Responder (Company)

Cancel

Add & New

Add

- Option 2: Batch Import information fields using Excel.
 - Select Ellipse and then "Import Rows."

Design Comments

#

Page Label

File Name

Author's Company

Author

Comments

Responder (Company)

Responder (Contact)

Reponse

Clo...

Import Rows

- Then select "Download" under "Download template" to receive an excel template.

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87

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Import Design Comments

- 1 Download template**
Download the template CSV file we've built which is ready for you to fill in.
Download
- 2 Prepare your data**
Use the template to fill in all the rows of the collection.
- 3 Import rows**
Upload the CSV file into ProjectTeam.com.
Upload

Cancel

- Fill out the Excel template with your rows of data and save the document.

Page Label	File Name	Author's Company	Author	Comments	Responder (Company)	Responder (Contact)	Reponse	Closed	Conclusion
A0.1	BUILDING PLANS/ OCCUPANCY AND EXITING ANALYSIS	Invenergy	Alex Golden	Confirm Markup on Drawing.					
A0.1	BUILDING PLANS/ OCCUPANCY AND EXITING ANALYSIS	Invenergy	Alex Golden	Misspelling on "Plan"					
A1.0	GROUND FLOOR PLAN	Invenergy	Alex Golden	Require an extra emergency exit on the west wall. Need Walls in center hall to be 3' further					
A1.1	SECOND FLOOR PLAN	Invenergy	Alex Golden	apart					
A1.2	ROOF PLAN	Invenergy	Alex Golden	Looks asymmetrical on western roof apex.					
A1.2	ROOF PLAN	Invenergy	Alex Golden	What are the Lines in the markuded section.					

- Go back to ProjectTeam and select "Upload" under Import rows. If the data fields are input correctly, the system will import the data into the corresponding Design Comments column.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Import Design Comments

1

Download template

Download the template CSV file we've built which is ready for you to fill in.

Download

2

Prepare your data

Use the template to fill in all the rows of the collection.

3

Import rows

Upload the CSV file into ProjectTeam.com.

Upload

Cancel

New Design Review Comments

Cancel Save & Start Workflow

Status Updated By
Alex Golden

Design Comments

Create New

		#	Page Label	File Name	Author's Company	Author	Comments	Responder (Company)	Responder (Contact)	Response	Closed	Conclusion
☐	☐	1	A0.1	BUILDING PLA	Invenergy	Alex Golden	Confirm Markup on Drawing.			Type the Reponse	☐	Type the Conclusion
☐	☐	2	A0.1	BUILDING PLA	Invenergy	Alex Golden	Misspelling on "Plan"			Type the Reponse	☐	Type the Conclusion
☐	☐	3	A1.0	GROUND FLOC	Invenergy	Alex Golden	Require an extra emergenc			Type the Reponse	☐	Type the Conclusion
☐	☐	4	A1.1	SECOND FLOC	Invenergy	Alex Golden	Need Walls in center			Type the Reponse	☐	Type the Conclusion
☐	☐	5	A1.2	ROOF PLAN	Invenergy	Alex Golden	Looks asymetric al on			Type the Reponse	☐	Type the Conclusion
☐	☐	6	A1.2	ROOF PLAN	Invenergy	Alex Golden	What are the Lines in the			Type the Reponse	☐	Type the Conclusion

8. Select “Save & Start Workflow.”
9. Initiate workflow to associated party who needs to input comments pertaining to revisions for the document(s).

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

SELECT ONLY 1

Workflow Name & Description

Workflow Steps

Days for First Step to Take Action

Due Date for First Step

☐ (Engineering Studies) Civil EOR to Invenery
Utilize this workflow to provide Engineering Studies to Invenery

☐ (Engineering Studies) Electrical EOR to Invenery
Utilize this workflow to provide Engineering Studies to Invenery

☐ (Engineering Studies) Structural EOR to Invenery
Utilize this workflow to provide Engineering Studies to Invenery

☐ (Engineering Studies) Substation EOR to Invenery
Utilize this workflow to provide Engineering Studies to Invenery

☐ (Engineering Studies) Transmission EOR to Invenery
Utilize this workflow to provide Engineering Studies to Invenery

Engineering Studies Review Comments (Invenery) → Review Engineering Studies Comments → Review Conclusions

Engineering Studies Review Comments (Invenery) → Review Engineering Studies Comments → Review Conclusions

Engineering Studies Review Comments (Invenery) → Review Engineering Studies Comments → Review Conclusions

Review Engineering Studies → Review Engineering Studies Comments → Review Conclusion

Review Engineering Studies → Review Engineering Studies Comments → Review Conclusion

3

Thursday, July 4, 2024

3

Thursday, July 4, 2024

3

Thursday, July 4, 2024

3

Thursday, July 4, 2024

3

Thursday, July 4, 2024

Cancel

Start Workflow

10.Once all comments are collected through workflows with the necessary stakeholders, initiate a workflow to the original submitter of the Engineering Study. (Picture shows going to Electrical EOR, but could be a Contractor, as well)

Start new workflow

electrical engineer to electrical eor

Workflow Name & Description

Workflow Steps

Days for First Step to Take Action

Due Date for First Step

☒ (Design Review Comments) Electrical Engineer to Electrical EOR
Utilize this workflow to send comments to the Electrical Contractor and Electrical EOR

Review (Electrical Contractor/EOR) → Review (Invenery)

7

Friday, July 5, 2024

Cancel

Start Workflow

11.Collaborate to complete review and circle back with other stakeholders, as needed. Make sure stakeholders upload their markup copies of the Engineering Study in the Attachments section.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Completion Certificates - Contractor

A Contractor's Completion Certification is a document that states the construction of a specific scope of work item has been completed in accordance with the established specifications and standards. These certificates are to be submitted with proof of completion to Invenergy from the on-site contractor and signed by Invenergy when sufficient proof of completion is delivered and verified by the Invenergy on-site team.

Initiators: Contractors only

Document Storage:

All CLIENT – Approved Completion Certificates will be stored (Implementation in Progress):

Project Files / 01 Offtake / 01 Executed Offtake

- 01 EXECUTED - Ext 0 Files
- 02 EXHIBITS - Ext 0 Files
- 03 CHANGE ORDERS - Ext 0 Files
- 04 NTP & LNTP 0 Files
- 05 COI 0 Files
- 06 PAYAPP 0 Files
- 07 NOTICES 0 Files
- 08 COMP CERT - Ext 0 Files
- 09 MISC 0 Files
- INT - Draft & Redlines 0 Files

All CONTRACTOR – Approved Completion Certificates will be stored:

Project Files / 03 CONSTRUCTION / 06 CONTRACTS / Invener Energy, LLC

- 01 EXECUTED - Ext 2 Files
- 02 EXHIBITS - Ext 0 Files
- 03 CHANGE ORDERS - Ext 2 Files
- 04 NTP & LNTP 4 Files
- 05 COI 0 Files
- 06 PAYAPP 0 Files
- 07 NOTICES 0 Files
- 08 COMP CERT - Ext 0 Files
- 09 MISC 0 Files
- INT - Draft & Redlines 0 Files

Completion Certificate: Contractor

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

CONTRACTOR - Completion Certificates – processed in Form:

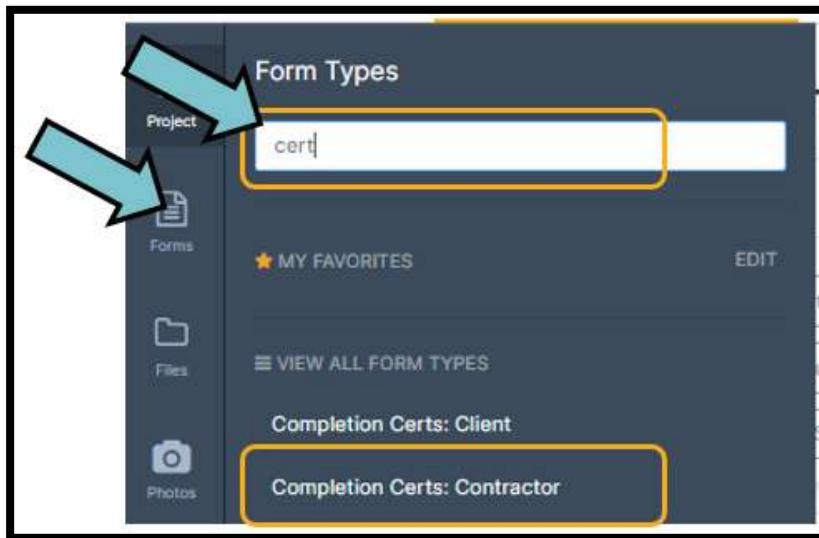
Wind

COMPLETION CERTIFICATE TYPE (DROP-DOWN)
Foundation Completion Certificate
Collection System Completion Certificate
Infrastructure Completion Certificate
WTG Mechanical Completion Certificate
Substantial Completion Certificate
Final Completion Certificate
Substation Completion Certificate
Transmission Line Completion Certificate

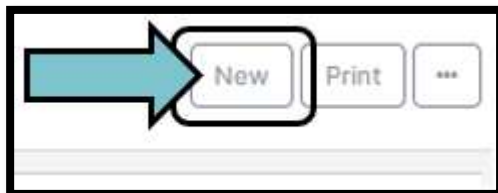
Solar

COMPLETION CERTIFICATE TYPE (DROP-DOWN)
Rack Installation Completion Certificate
Collection System Completion Certificate
Block Mechanical Completion Certificate
Placed in Service Completion Certificate
Substantial Completion Certificate
Final Completion Certificate
Substation Completion Certificate
Transmission Line Completion Certificate

1. Select Forms & search Completion Certs: Contractor.



2. Select "New."



3. Fill out Form Fields:

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FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

- Subject
- Submitting Company
- Submitted By
- Scope
- Completion Certificate Type
- (**SOLAR Projects**) Block #, Circuit(s), or N/A; (**WIND Projects**) Foundation #(s), WTG(s), Circuit(s) #, N/A
- Description

The screenshot shows a web-based form titled "DETAILS" with a pencil icon. The form contains several input fields, each with a light blue arrow pointing to it from the right. The fields and their values are:

- Subject ***: Milestone Completion Certificate, Company Circuit 8, 9, 10
- Submitting Company**: Company Name
- Submitted By**: Employee Name
- Scope**: Balance of System (BOS)
- Completion Certificate Type**: Block Mechanical Completion Certificate
- Block #(s), Circuit(s), or N/A**: Circuit - 8, 9, 10
- Description**: (This field is highlighted with a rounded rectangle and a blue arrow pointing to it from the right)
- Status**: Accepted with Punchlist
- Invernergy PM Remarks**: (Empty text area)
- Contractor's Remarks**: (Empty text area)

4. "Save and Start Workflow."

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FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

New Completion Cert: Contractor

Save & Start Workflow

5. There will be two workflows per each scope of work:

- Completion Certificates: This workflow is for the Invenergy project manager or construction manager to review and approve for completion. These should be individual verified items.
- Substantial/Final Completion Certificates: This workflow is for Invenergy project managers and construction managers to verify completion and then pass to Invenergy Leadership for signature.

Start new workflow

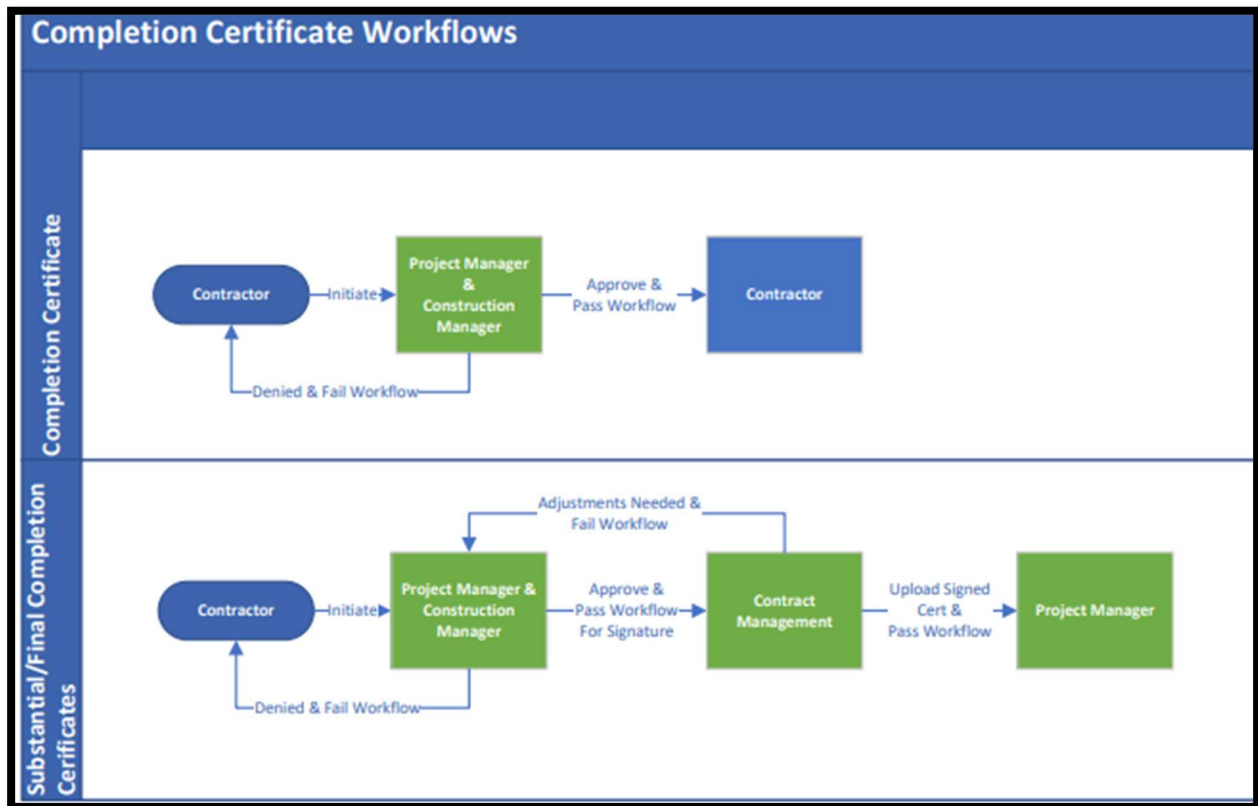
elect

	Workflow Name & Description	Workflow Steps	Days for First Step to Take Action	Due Date for First Step
☐	(Completion Certificate) Electrical Contractor to Invenergy Utilize this workflow to submit a regular Completion Certificate	Review (Invenergy) → Review (Electrical Contractor)	5	Saturday, August 3, 2024
☐	(Substantial/Final Completion Certificate) Electrical Contractor to Invenergy Utilize this workflow to submit a SUBSTANTIAL OR FINAL COMPLETION CERTIFICATE	Review (Invenergy) → DocuSign (Contract Management) → Review (Project Manager)	5	Saturday, August 3, 2024

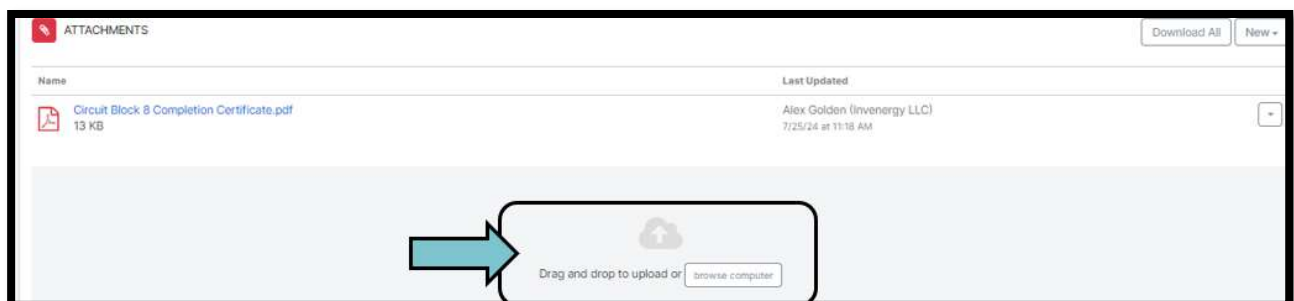
Cancel

Start Workflow

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025



- Once the workflow is started, upload the completion certificate signature form to the attachment section.



- Once the EPC contractor has initiated this workflow to the Invenergy Project Manager and Construction Manager, the length of time to accept/reject the completion certificate set for this workflow aligns to the timeline outlined within the contract.
- The Project Manager and Construction Manager will review the documentation for completion, and have the onsite team verify quality of designs and specifications.

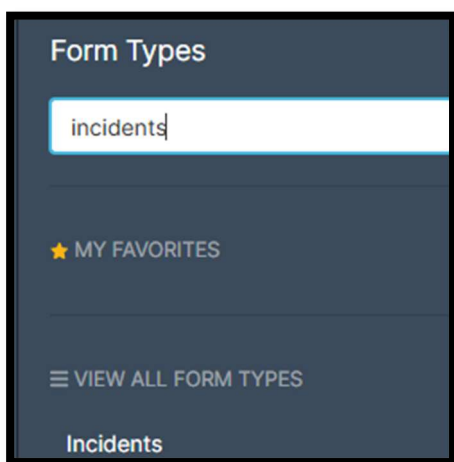
FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

9. If the workflow is failed back to you, the completion certificate has been rejected. The PM/CM will include comments identifying requirements for completion certificate to qualify for signature.

Incidents

Purpose: Form that houses documentation of events that occur on a project's site that cause harm or damage to a person(s), equipment, and/or environment. Use this form if you would like to send an incident report to Invenergy's Environmental Health and Safety team.

1. Select Forms & search "Incidents"



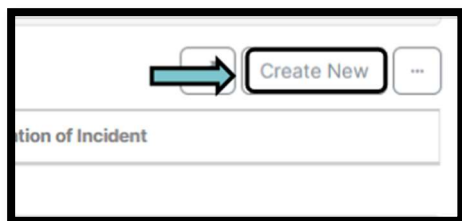
2. Select "New"



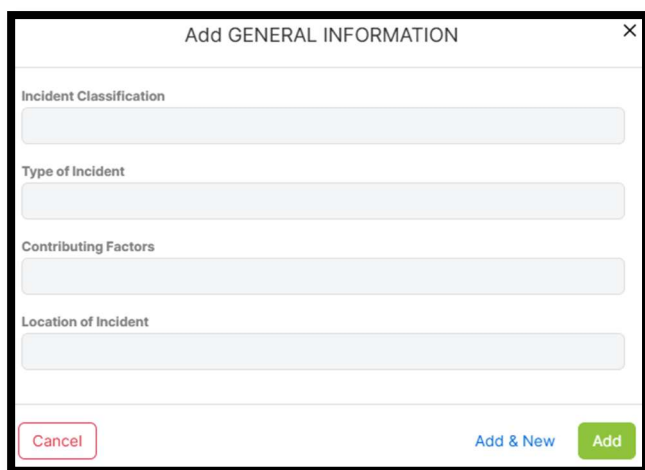
3. Input your:
 - a. Subject
 - b. Brief Description
 - c. Date Created (day that form was created)
 - d. Incident Report Number (select "Get Next")
 - e. Report Submitted By: Input your name
 - f. Submitting Company: input your company
 - g. Incident Date: Date of the occurrence
 - h. Incident Time
 - i. Identified during

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

- j. Final Report Due Date (usually a week from the incident)
- 4. Input the General Information
 - a. Select “Create New”



- b. Put in Incident Classification from the list
- c. Select Type of Incident: Safety, Environmental, or Material issue
- d. Select the top contributing factor for the incident
- e. Type the location of the incident, as accurate as possible
- f. If there are more classifications to put in for this report, select “Add & New;” otherwise, select “Add.”



- 5. Enter the Contributing Factor details. Elaborate and provide as much detail as possible. Feel free to add a numbered list that would add context to the contributing factor.
- 6. Input the contractor information
 - a. Select Contractor from the list
 - b. Select a main contact for the contractor, to obtain more information, if needed
 - c. If there is a subcontractor, put that into the last field.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Add CONTRACTOR INFORMATION

Contractor

Contractor Main Contact

Subcontractor (If applicable)

Cancel
Add & New
Add

7. Create an Incident Involvement row:

- Identify if employee is a contractor, subcontractor, Invenergy Employee, or if there was damage to equipment. If "Other," provide detail.
- Select the length of time employee was on the project.
- If there are any witnesses, input the witness information. Capture witnesses' name(s), company information, and general information.

Add INCIDENT INVOLVEMENT

Contractor Employee

Subcontractor Employee

Invenergy Employee

Equipment

Other:

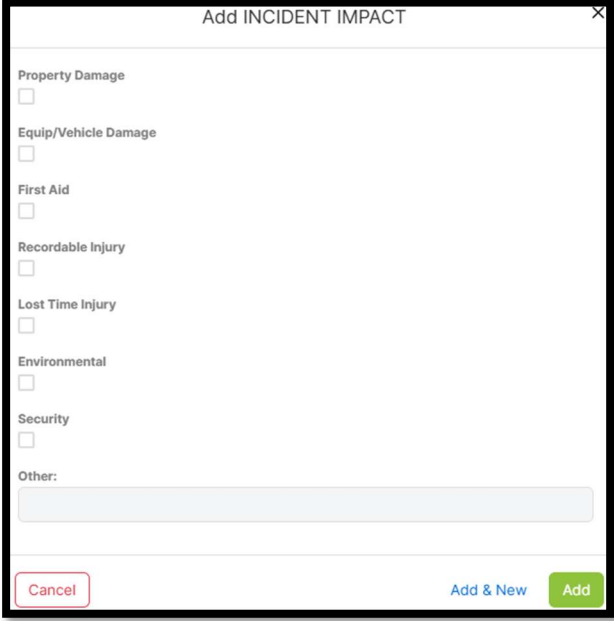
Length of Time on Job/Project

Witness(es) Information ⓘ

Cancel
Add & New
Add

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

8. Create an Incident Impact row:
 - a. Include the Contractor Employee
9. Include the Incident Impact
 - a. Select the relevant impact; you can select multiple. Property, Equip, First Aid, Recordable Injury, etc.



Add INCIDENT IMPACT

Property Damage ☐

Equip/Vehicle Damage ☐

First Aid ☐

Recordable Injury ☐

Lost Time Injury ☐

Environmental ☐

Security ☐

Other:

Cancel Add & New Add

10. List the equipment that has been impacted
11. Nature of Injury and Illness – select if there is a sprain/fracture/cut etc. Once again, feel free to select multiple options.
12. If there is an injury location, select from the picklist.
13. Write a description of the illness, and which body part is injured, if applicable
14. If an immediate action was taken, select the type of action that was pursued.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Add IMMEDIATE ACTIONS

☐ Invenergy Notified

☐ Emergency Medical Services Provided

☐ Emergency Medical Services Refused

☐ Shutdown operation

☐ Investigation

☐ Reporting

☐ Temporary Mitigation

☐ Wildlife Protection and Removal

☐ Vegetation Protection and Removal

Cancel

Add & New

Add

15. Input a comprehensive description of the incident and any investigation details. If corrective details are needed, please input them here. Also, input any corrective action and preventative action.
- 16.Once finished, hit “Save and Start Workflow” and select the appropriate workflow.

Save & Start Workflow

Create New

Start New Workflow

Search...

	Workflow Name & Description	Workflow Steps	Days for First Step to Take Action	Due Date for First Step
☐	(Civil Contractor) Incidents Workflow Contractor utilize this workflow to report incidents	Incident Report Submitted → Incident Report Review (EHS Manager) → Incident Final Report Submission (Contractor) → Review Final Report (Invenergy) → Final Report Communication (Contractor) → Final Report Review (EHS)	1	Friday, February 28, 2025
☐	(Electrical Contractor) Incidents Workflow Contractor utilize this workflow to report incidents	Incident Report Submitted → Incident Report Review (EHS Manager) → Incident Final Report Submission (Contractor) → Review Final Report (Invenergy) → Final Report Communication (Contractor) → Final Report Review (EHS)	1	Friday, February 28, 2025
☐	(Structural Contractor) Incidents Workflow Contractor utilize this workflow to report incidents	Incident Report Submitted → Incident Report Review (EHS Manager) → Incident Final Report Submission (Contractor) → Review Final Report (Invenergy) → Final Report Communication (Contractor) → Final Report Review (EHS)	1	Friday, February 28, 2025

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

17. The EHS manager will review the report, ask for more information if necessary, and go back and forth to finalize the information. Utilize the merge template if necessary, and attach any necessary documentation into the “Attachments” section.

Non-Conformance Report (NCR)

Purpose: Form that houses documentation of events that occur on a project’s site that cause harm or damage to a person(s), equipment, and/or environment. Use this form to send an incident report to Invenergy’s Environmental Health and Safety team.

1. An Invenergy team member (Project Manager, Invenergy Engineer, etc.) can initiate a Non-Conformance (NCR) form. If a form is created, Contractors will receive the following information within the form upon notification:

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

New Non-Conformance Report (NCR)

DETAILS

Subject * ⓘ
This field is required

Get Next

Solar Scope of Work

Nonconformance Notification

	Date Issued	Type	Location	Target Due Date
☐				

Company Responsible for SOW

Date Identified

Status

Support Document or Process of Reference ⓘ

Description of NCR

Proposed Corrective Action Details ⓘ

Add Nonconformance Notification ×

Date Issued

Type

Location

Target Due Date ⓘ

Cancel Add & New Add

2. As the Contractor, you will update the following section.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

The screenshot displays a web form interface with two main sections: Contractor Section and Invenergy Section. The Contractor Section includes fields for Date Acknowledged, Personnel Who Acknowledged, Contractor's Notes, and Contractor Remedial Measures to Prevent Recurrence. The Invenergy Section includes a Declaration of Conformity field. A large diagonal label "Contractor Content" points to the Contractor's Notes and Remedial Measures fields. A large bracket on the left groups the Contractor Section fields. A table at the bottom shows columns for Date, Approved By, Comments, and NCR CLOSED.

3. Input the date acknowledged.
4. Select the acknowledging personnel from the directory list.
5. Input the contractor notes, which would be a justification for the non-conformance.
6. For the "Contractor Remedial Measures to Prevent Recurrence" field, specify action items if completed or to be completed, include date(s) and attach inspection documents. This typically is the actionable steps to address and correct the issue.
7. Pass the workflow to the Invenergy team, who will set a declaration of conformity, and list any comments. Once Invenergy has updated these fields, Invenergy will pass the workflow to complete. This will indicate the NCR is resolved.

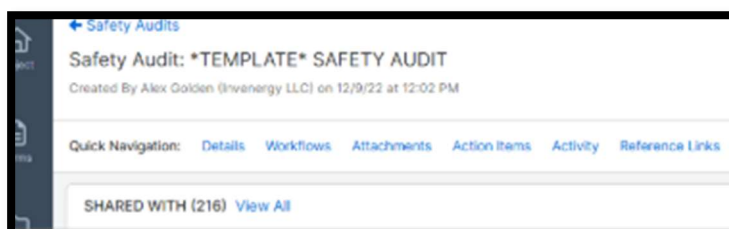
FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Invenergy Declaration of Conformity				
Date	Approved By	Comments	NCR CLOSED	Related
3/29/24		has redone blocks 1-5's cord securement and block 6 is also starting to be secured with metal bands and bolts.	✓	0 0 0 0

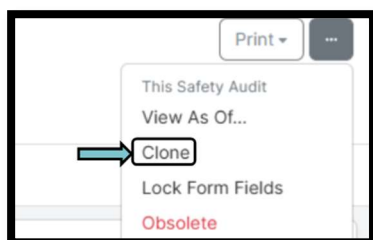
Safety Audit

Purpose: This is a form that is completed weekly to assess the safety regulations of the site, typically by the Invenergy Construction EHS department.

1. Go to Forms and select “Safety Audits”
2. Locate the “Template” Safety Audit. This can be at the very end of the project.



3. Select the entry, then locate the three dots on the upper right, Select the “Clone” option.



4. Input a subject. This can be the date of the audit entry.
5. Generate the next Safety Audit number by selecting “Get Next.”

 A screenshot of a form field for "Safety Audit #:". It has a text input area and a "Get Next" button.

6. Input the date of the safety audit
7. Add your name in the “Completed By” section
8. Set a status: “Open with Action Items” signifies a review needs to be made, “Completed” signifies no review is needed.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Status

|

Open with Action Items

Completed

STOP Work Required

9. The “Corrected Immediately” checkbox is for establishing if the item has already been addressed.
10. “STOP work required” is for suspending work, perhaps if there is a dangerous situation.
11. For “Safety Observations,” attach an itemized audit in the attachments later, if possible, and provide a note in this box
12. The “Safety Audit Items” field has checkboxes for Job Information, Employee Interview, Safety Engagement, Personal Protection Equipment, Housekeeping, sanitation, lighting, etc. This is a very comprehensive form – make sure to select all the boxes. Select either “Yes,” “No,” or “N/A.” Input any relevant comments as well.

SAFETY AUDIT ITEMS						Create New	...
☐	Category	Items Description	YES	NO	N/A	Comments	
☐	JOB INFORMATION	Project signs posted at the entrance?	☐	☐	☐		
☐		OSHA posters prominently posted in a conspicuous place where employees can see?	☐	☐	☐		
☐		Emergency response phone numbers and information posted regarding hospital and clinic	☐	☐	☐		
☐		First aid supplies readily accessible?	☐	☐	☐		
☐		All visitors and workers attend Project Safety Orientation?	☐	☐	☐		
☐		Site map available for use and included in the visitor/contractor orientation materials?	☐	☐	☐		

13. Select “Save and Start Workflow.” The Construction Manager should start the “Safety Audit - Invenergy (CM)” workflow.

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Workflow Name & Description	
☒	Safety Audit - Invenergy (CM) Utilize this Workflow to distribute a Safety Audit performed by Site Construction Manager

14. Attach any relevant documentation
15. If there is a hazard, Invenergy EHS will start the appropriate workflow when reviewing the form, and will send to the relevant contractor, who will apply corrective actions.

Engineering Management Form

Purpose: This form is utilized to communicate any design criteria for the project. This is to streamline document control to the contractor and EOR prior to/at design kickoff. The Project Engineers are the primary users of the form, and the Invenergy Project Manager will communicate the contractually obligated documentation to other parties.

1. Within your project's "Forms," select the "Engineering Management" form.

The screenshot shows a dark-themed interface titled "Form Types". At the top is a search bar containing the text "engineering mana". Below the search bar is a section labeled "MY FAVORITES" with an "EDIT" button. Further down is a link that says "VIEW ALL FORM TYPES". At the bottom of the visible list is the "Engineering Management Form".

2. In the log view, there will be entries for each scope/requirement

FOR CONTRACTOR USE	ProjectTeam Process Guide: Forms, Functions, Purpose	Revision	00
		Approval Date	04/01/2025
		Implementation Date	04/01/2025

Engineering Management Form shared with me					New	Print
☐ Document	Created On	Related	Shared			
☐ Inverter/ MVT Cutsheet	1/8/25 10:24 AM	7 0	160	Edit		
☐ Basis of Design	12/18/24 3:26 PM	0 1	174	Edit		
☐ Constraints Map	12/18/24 3:26 PM	1 0	179	Edit		
☐ ALTA Survey	12/18/24 3:26 PM	2 0	174	Edit		
☐ Crossing Requirements	12/18/24 3:26 PM	0 0	174	Edit		
☐ Special Leases/Corridors/Exclusion Areas	12/18/24 3:26 PM	2 0	174	Edit		
☐ MET Files	12/18/24 3:26 PM	1 0	174	Edit		
☐ State/County Permits	12/18/24 3:26 PM	3 0	174	Edit		

3. Select the item to view or share.
4. The status field will determine if the document is established
 - a. Drafting
 - b. Final – Subject to Change
 - c. Final
 - d. Revision
5. If there is a change in a form entry, a workflow will be started internally so Invenenergy receives the new documentation. If you are sent a workflow, simply pass it to acknowledge the new document.
6. Utilize the Attachments section for information. New documentation will have a New Version, denoted for example by a “V2” black box next to the file name. Please note: the numbering following “V” is automatically sequential and updated when uploading a new version.