



Contractor Assignment Tree View for Administrators

Version: 1.1

Date: 10.05.21



Contractor Assignment Tree View in LCPtracker for Administrators

Introduction

As LCPtracker continues to update and make design changes to the software, we want to ensure that we provide training documents that our users can access to clearly walk-through new design features with no issues.

LCPtracker has made updates to our Contractor Assignment page and all new databases will now see the new view. For previous users we want to provide information on the changes you may see once the new functionality has been turned on. Currently, as of this publication date, this new contractor assignment tree view is not available to be turned on if utilizing the B2Gnow interface. Our Account Management team is working individually with older databases to switch our users over to the new view.

Table of Contents

Contractor Assignment Tree View in LCPtracker for Administrators.....	1
New Contractor Assignment Tree View.....	1
How to Turn on the New Contractor Assignment Tree View	1
Steps with Using the New Contractor Tree View	3
Viewing Contractor Assignments by Contractor.....	6
Support Resources	7

New Contractor Assignment Tree View

How to Turn on the New Contractor Assignment Tree View

Before the new contractor assignment page will be visible, an LCPtracker Project Manager or Account Manager will need to first turn on a back-end APP setting.

Once turned on, the new page will also be visible to your subcontractors if the Admin has set their database to allow Contractors to set up Subcontractors.

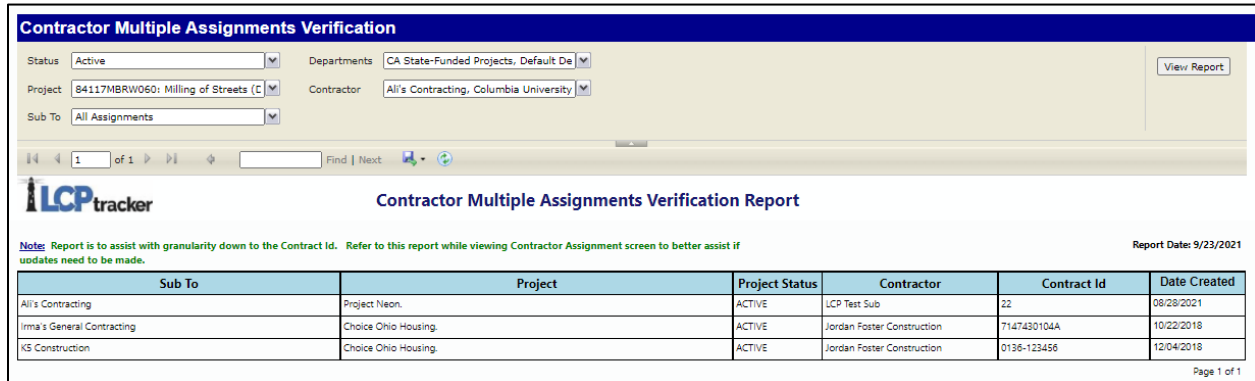
Once the new feature is turned on, it is important to conduct the following two steps:

1. Run the new report available in your database “Contractor Multiple Assignments Verification” to double check that all the assignments are showing correctly.
2. Open and view each project to ensure you have only one Prime listed (some situations may vary on this) and the subcontractor assignments are showing correctly.

Accessing the Contractor Multiple Assignments Verification report:

- Login to www.LCPtracker.net
- Select the Reports tab
- Click the “Management Reports” section
- Select the “Contractor Multiple Assignments Verification” report and enter the parameters accordingly

Here is an example showing a few assignments that should be double checked for accuracy:



Sub To	Project	Project Status	Contractor	Contract Id	Date Created
All's Contracting	Project Neon.	ACTIVE	LCP Test Sub	22	08/28/2021
Irma's General Contracting	Choice Ohio Housing.	ACTIVE	Jordan Foster Construction	7147430104A	10/22/2018
KS Construction	Choice Ohio Housing.	ACTIVE	Jordan Foster Construction	0136-123456	12/04/2018

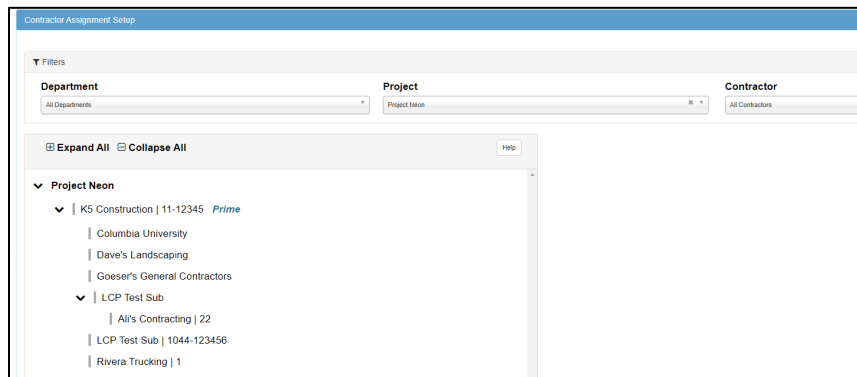
Report Date: 9/23/2021

Next you will want to move to step two and access the contractor assignment for each of your projects. It is important to view the assignments to determine if any changes need to be made.

Accessing the Contractor Assignments Page

To access the Contractor Assignment page is the same process as done previously however the filtering to the project or contractor looks a bit different:

- Login to www.LCPtracker.net
- Select the Set Up tab
- Click “Contractor Setup”
- Select “Contractor Assignment”
- Select Project you want to review
- Review the assignments to ensure they are under the correct parent/sub

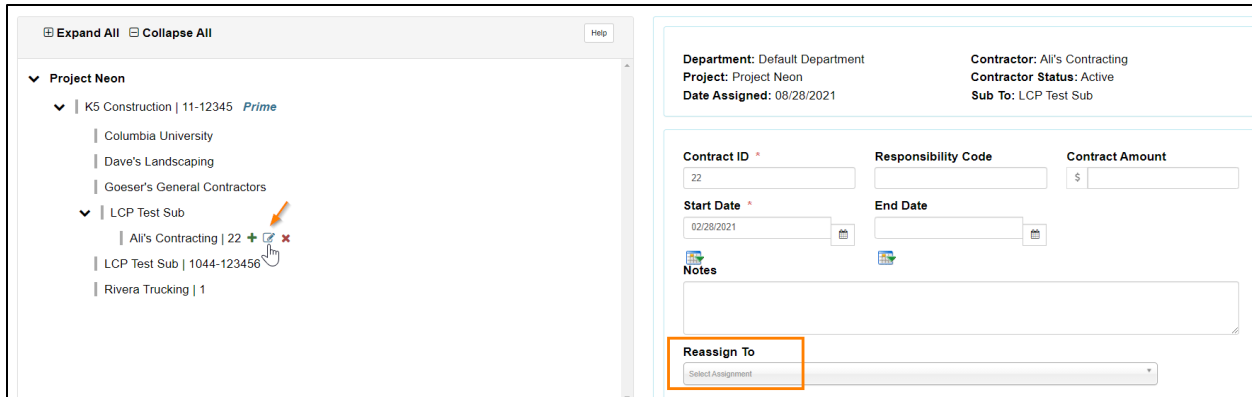


Department	Project	Contractor
All Departments	Project Neon	All Contractors

Expand All Collapse All Help

- Project Neon
 - KS Construction | 11-12345 Prime
 - Columbia University
 - Dave's Landscaping
 - Goesser's General Contractors
 - LCP Test Sub
 - All's Contracting | 22
 - LCP Test Sub | 1044-123456
 - Rivera Trucking | 1

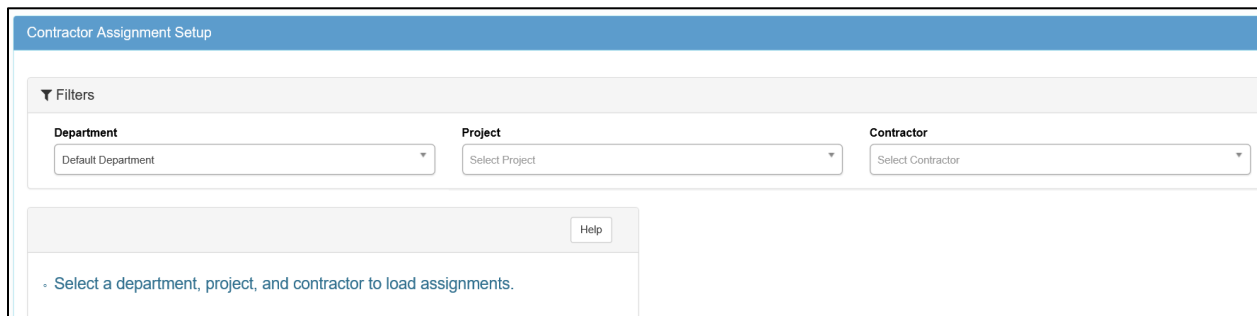
If a reassignment is required, you will simply click on the “edit” icon between the + and x sign next to the assignment you want to modify.



If the assignment is correct as listed, no further change is required.

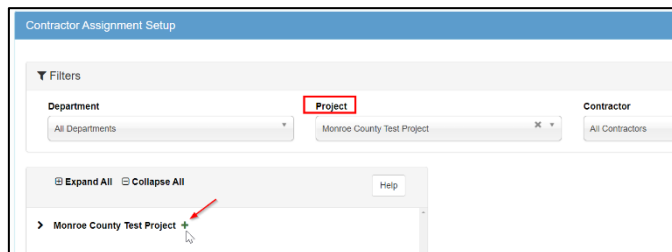
Steps with Using the New Contractor Tree View

- Login to www.LCPtracker.net
- Select the Set Up tab
- Click “Contractor Setup”
- First make sure that you perform step one of the Contractor Assignment process as the Contractor must first be setup before moving to the assignment step
- Select “Contractor Assignment”



First, you must set up the Prime for the project. To do this, select the project under the Project drop-down which will then show the project on the left side of the page.

Click on the + to enter the Prime information for the project. Once you have clicked the +, an additional page on the right will open. This is where you will enter the Contract ID and any other fields that have a * listed.



Complete the entry of information as required and click save. Once the Prime has been saved, you will see the Prime listed under the Project.

You as the Admin can continue to enter subcontractors to the project or your Prime can log in and enter their subcontractors to the project (only if database has been setup to allow this).



Following is a description for each of the fields that may be shown within the contractor assignment screen.

Contractor (to be assigned) – Choose the Contractor/Subcontractor you need to assign to the Project. This is usually the Contractor/Subcontractor you just set up in the system. Some however are already in the system under this Admin’s account, and you just need to assign them to the Project as your Subcontractor.

Contract ID – This is a required field. The Contract ID is the identifier for the contract between you and the subcontractor. You can use the same contract id for each assignment if it is not a duplicate. If the same subcontractor is assigned to the project for multiple contracts, each assignment must have a unique Contract ID entered.

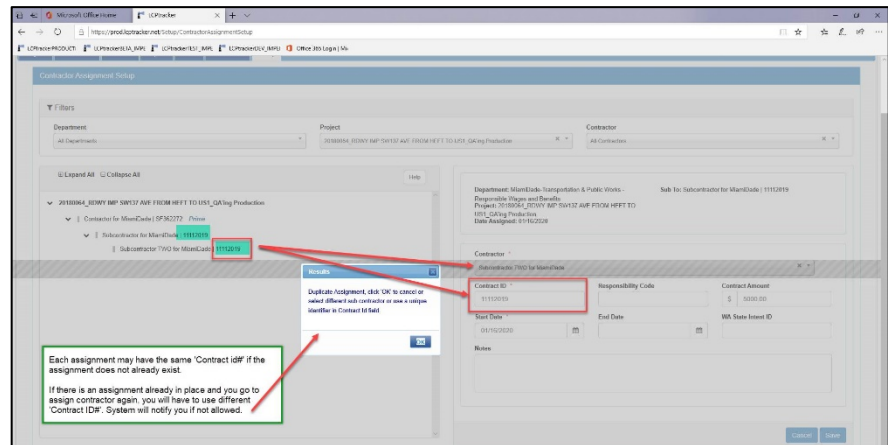
Example:

ABC Company has contract id# 123 as Prime

XYZ, LLC is sub to ABC and has contract id# 123

ORG, Inc is sub to ABC and has contract id# 123

ORG, Inc is sub to ABC (yes again) this contract ID must be different that the one noted in 1st assignment



Responsibility Code – *Optional field*, some agencies may request this information. Typically used with USACE.

Contract Amount – *Optional field*, some agencies may request this information. This is the amount of the contract between you and the subcontractor.

Start Date – Required by many agencies. This is the date that your subcontractor is to/or has started work on the project. This can be modified later if needed. This date drives the “Late CPR Summary Report”.

End Date – *Optional field*, some agencies may request this information.

Notes – *Optional field*, some agencies may request this information, or you may choose to add your own notes.

WA State Intent ID – Only projects within the state of Washington may see this field if turned on by the agency.

Department: NY State Prevailing
 Wage Projects
 Project: Monroe County Federal & State
 Date Assigned: 10/04/2021

Contractor *

Select Contractor

Contract ID * Responsibility Code Contract Amount

Start Date * End Date

Notes

Cancel Save

Page with WA State Intent ID showing required.

Contractor *


Select Contractor

Contract ID * Responsibility Code Contract Amount *

Start Date * End Date WA State Intent ID *

Notes

After you have entered all required information, be sure to Save. Once you have saved your entry, the sub will be sent an email informing them they've been assigned to a project.

You will now see the contractor assignment listed in the Contractor Assignment Screen. You can see/edit the assignment details by selecting the  icon. To view the icon hover over the subcontractor's name, once visible, select it to open the assignment details.

The Date Assigned is a system generated Date Stamp. This is the date that the Contractor was assigned to the project.



Contractor Assignment Setup

Filters

Department: All Departments Project: Monroe County Test Project Contractor: All Contractors

Expand All Collapse All Help

Monroe County Test Project

- K5 Construction | 1 Prime
 - LCP Test Sub | 2  

Department: NY State Prevailing Wage Projects Contractor: LCP Test Sub
 Project: Monroe County Test Project Contractor Status: Active
 Date Assigned: 10/17/2018 Sub To: K5 Construction | 1

Contract ID * Responsibility Code Contract Amount

Start Date * End Date

Notes

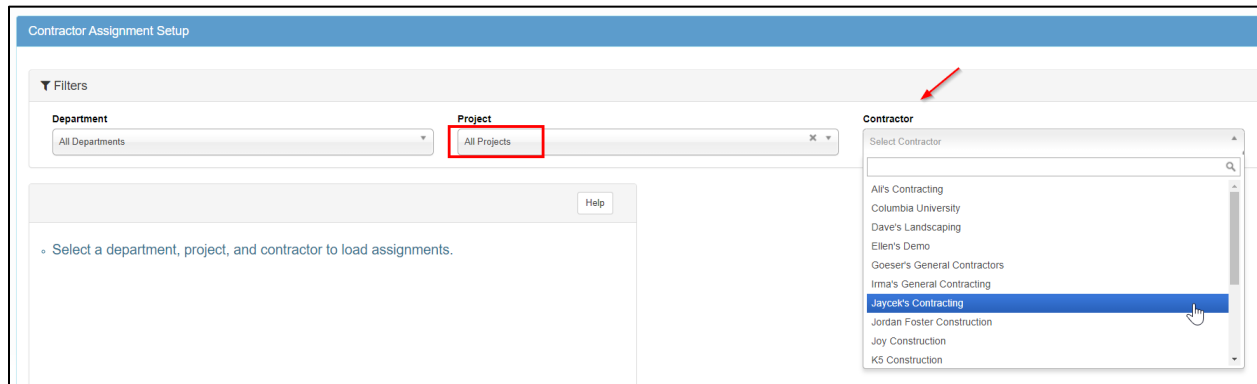
Reassign To

Select Assignment

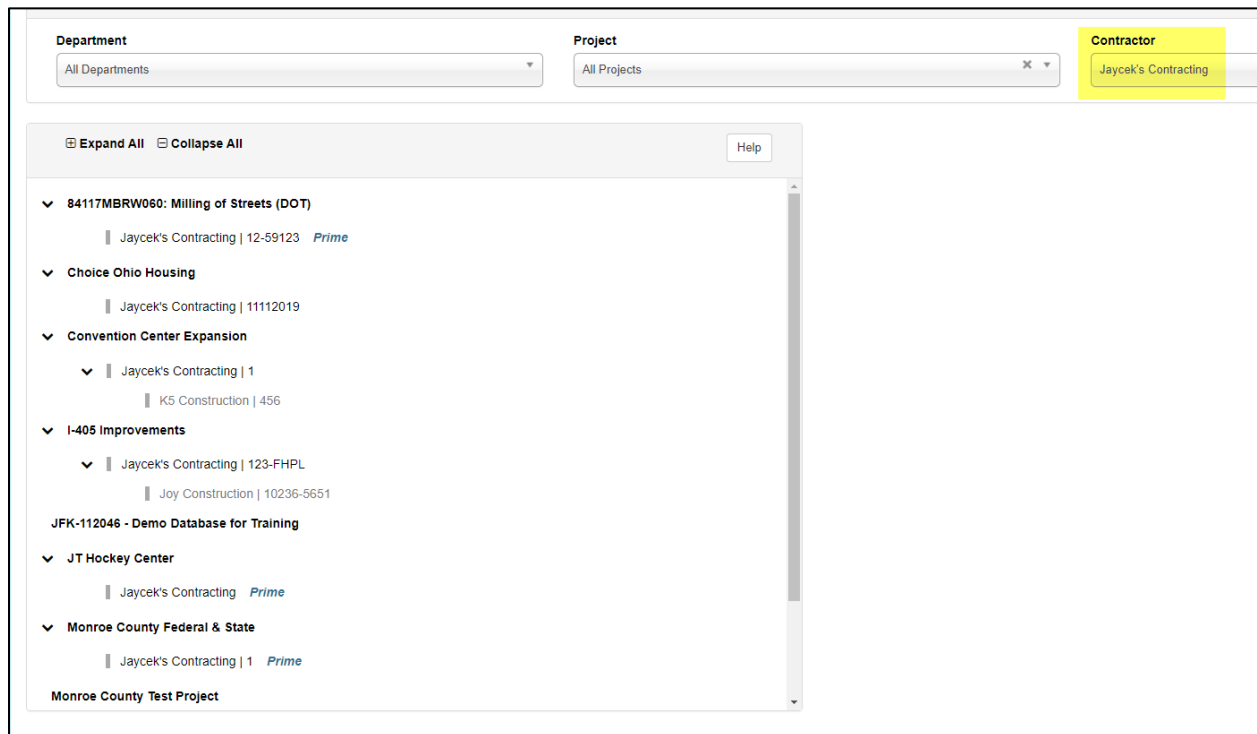
Cancel Save

Viewing Contractor Assignments by Contractor

An Admin may want to see assignments by Contractor. To do so, you must first select “All Projects” within the Project drop down and then select the Contractor you want to view.



Once selecting the Contractor, the assignments for that particular Contractor will show.



Support Resources

Training documents for the new Contractor Assignment Tree View are available under the Training Materials button on the top of the page. We have created a training resource for both Contractors/Subcontractors and Administrators.

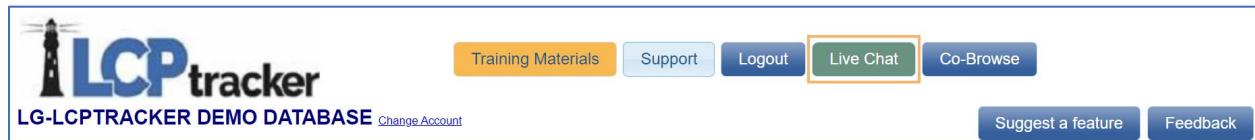


If more support is needed, LCPtracker has a fully staffed support team with a combined 166 years of customer service experience; going above and beyond to ensure your satisfaction is their core objective. We take pride in offering fanatical support through email, phone and live chat for Administrators and Contractors. All incoming support inquiries are tracked and logged with an advanced case management system.

The support team is available 5:00am PST – 5:30pm PST Monday - Friday (excluding Holidays).

To contact the Support team, please choose an option below:

1. Email: support@lcptracker.com
2. Phone: (714) 669-0052 Option 4
3. Live Chat: Click the green “Live Chat” button at the top of your LCPtracker screen.



4. Co-Browse: This button can only be utilized when working directly with a support technician. This will allow support to share screens with you if needed.

Note: to assist our support technicians with getting back to you as quickly and efficiently as possible, please include your User ID, a direct call-back number, your contact information, and a brief description of the issue you are having.