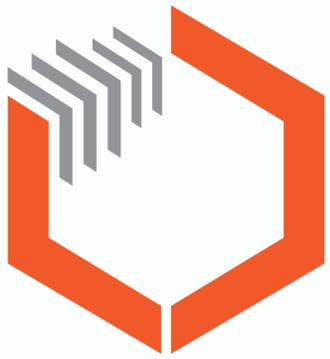




INERTIA

BUILD EFFICIENT

quick start guide



INERTIA

BUILD EFFICIENT

Quick Start Guide

Page 1	Welcome To Inertia
Page 2	Personalized Profile and Notifications
Page 3	Establishing Project IR Types
Page 4	Inspection Requests (Sub Contractor)
Page 6	Inspection Requests (GC/QC)
Page 7	Locating Inspections
Page 9	New Submittals
Page 11	Submittal Workflow
Page 13	RFI's and Inquiries(Sub Contractor)
Page 14	RFI's and Inquiries (Universal guide)
Page 17	WAN
Page 19	Key Terms



welcome to INERTIA

Build Proactive. Predict and prevent setbacks before they happen.

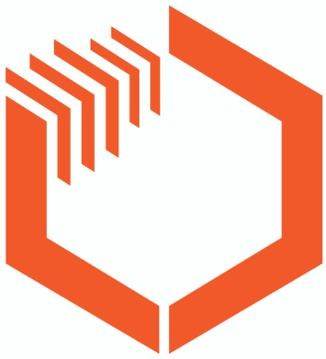
Build Together. Keep your entire team synced on one real-time platform.



Connected and Simple.

From Design to Built. **Build Efficient.**

This guide provides a few simple suggestions for getting started, best practices, and making Inertia yours.



Quick Guide: Personal Settings

Set project and notification settings that will make Inertia more efficient

1

Paul Stefanski
[My Account](#) [Support](#)

Admin Dashboard Comm & Msg Project Photos Submittals RFI's Change L

Widgets Users Projects My Project Settings My Project Files Proliance User A

Click My Account in the top left

2

Basic Information

First Name: [text input]
 Last Name: [text input]
 Username: [text input]
 Password: [text input]

Address: [text input]
 Address: [text input]

City: [text input]
 State: [text input]
 Zip: [text input]

Contacts

Telephone 1: [text input]
 Telephone 2: [text input]
 Email 1: pauls@projectinertia.com
 Email 2: [text input]

Settings

Session Timeout: 1 Hour
 Default: CBRE Property 101

License/Certs

License/C... Issuing Authority License N... Issue Date Expire da...

Add personal information if desired then select your default project from the dropdown list of your active projects

3

Save your selection properly before exiting

Save

Success
 Updated successfully
 OK

4

Admin Dashboard Comm & Msg Project Photos Submittals

Widgets Users Projects My Project Settings My Project Files

Refresh the Dashboard and select My Project Settings

5

Select personal notification bubbles as desired based on type and frequency

Notification Settings

WAN Notification:	<input type="radio"/> Off	<input type="radio"/> Live	<input checked="" type="radio"/> Hourly	<input type="radio"/> Daily
WAN Revision:	<input type="radio"/> Off	<input type="radio"/> Live	<input type="radio"/> Hourly	<input checked="" type="radio"/> Daily
IR - New to QC:	<input checked="" type="radio"/> Off	<input type="radio"/> Live	<input type="radio"/> Hourly	<input type="radio"/> Daily
IR - OPEN:	<input checked="" type="radio"/> Off	<input type="radio"/> Live	<input type="radio"/> Hourly	<input type="radio"/> Daily
IR - Reschedule:	<input type="radio"/> Off	<input type="radio"/> Live	<input checked="" type="radio"/> Hourly	<input type="radio"/> Daily
IR - Reschedule Accepted:	<input checked="" type="radio"/> Off	<input type="radio"/> Live	<input type="radio"/> Hourly	<input type="radio"/> Daily
IR - PASS:	<input checked="" type="radio"/> Off	<input type="radio"/> Live	<input type="radio"/> Hourly	<input type="radio"/> Daily
IR - PENDING:	<input checked="" type="radio"/> Off	<input type="radio"/> Live	<input type="radio"/> Hourly	<input type="radio"/> Daily

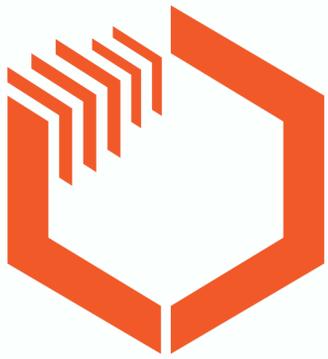
6

Save and you're done!

Save

Success
 Action performed successfully.
 OK

You're done!



Quick Guide: Project IR Types

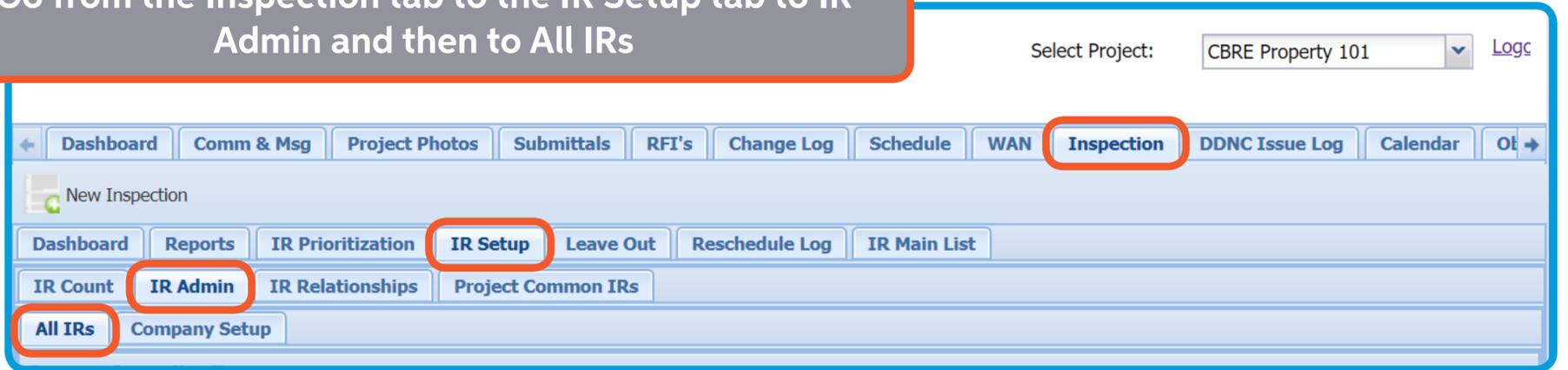
Sort and select the proper Inspection Request Types to use across your project

Types to use across your project

(Doing this right at the start with your whole team makes Inertia really easy to use)

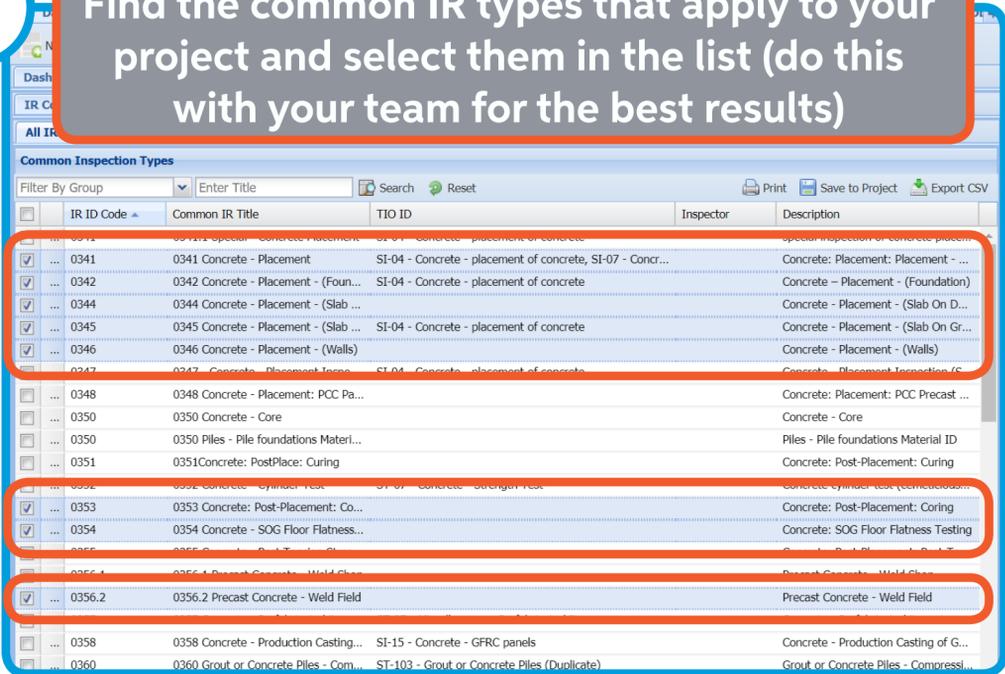
1

Go from the Inspection tab to the IR Setup tab to IR Admin and then to All IRs

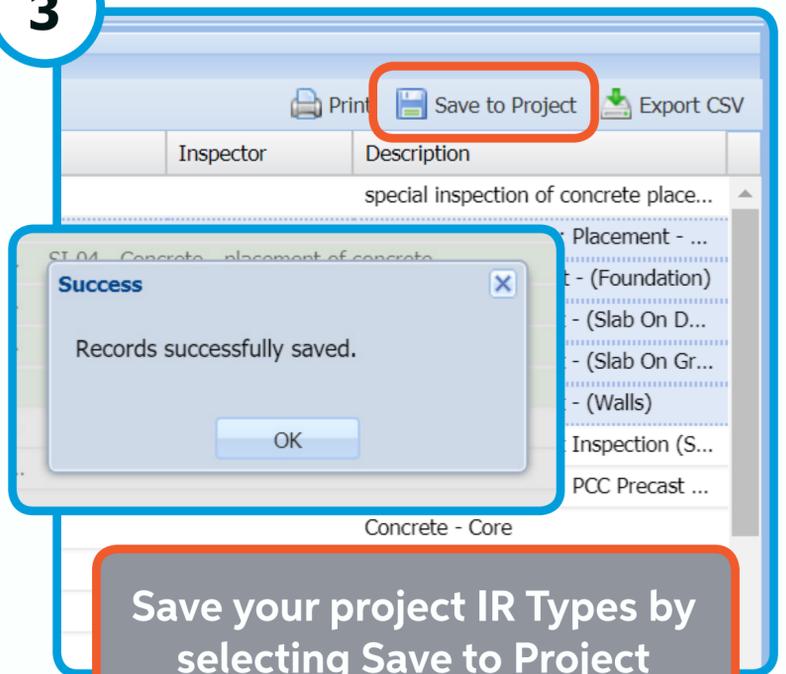


2

Find the common IR types that apply to your project and select them in the list (do this with your team for the best results)



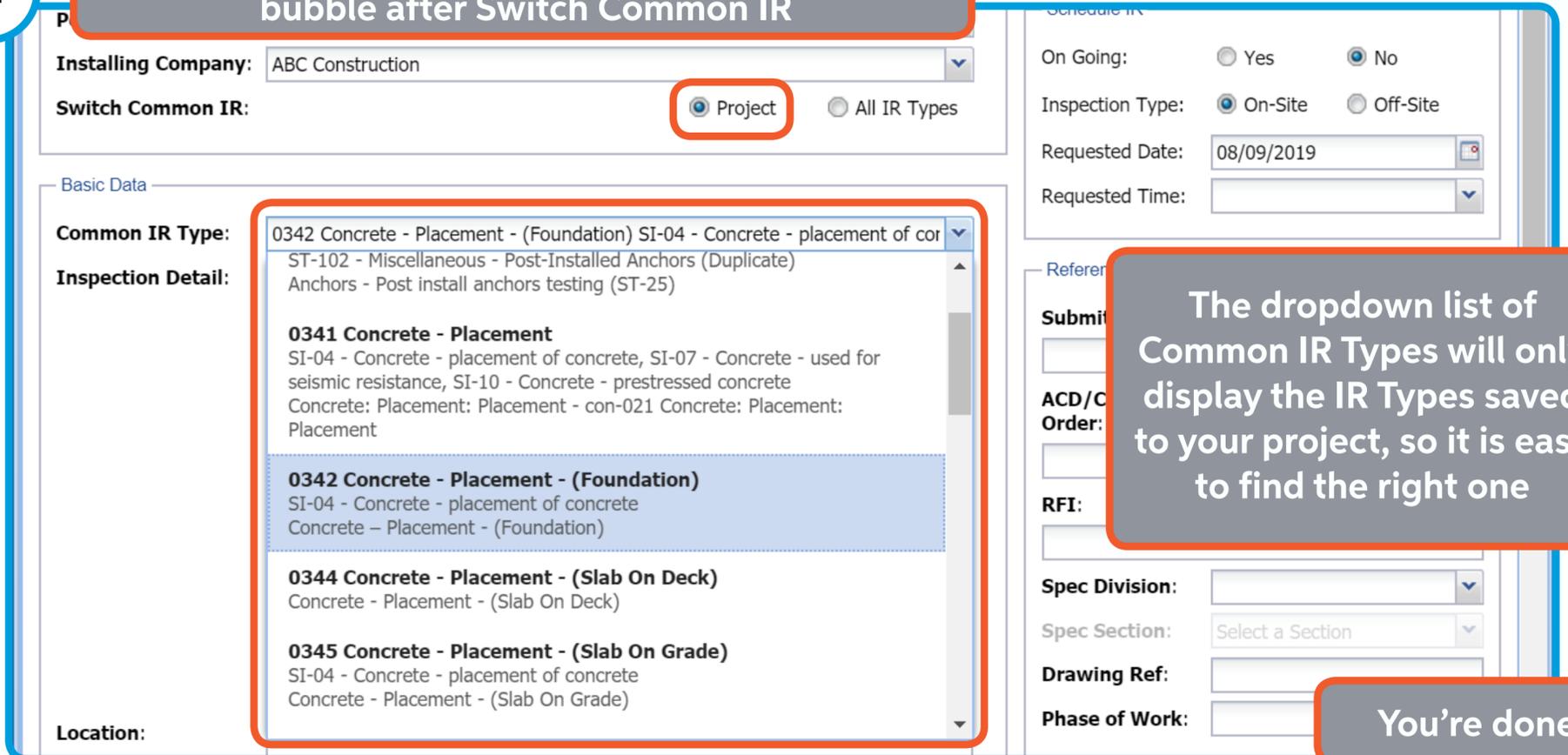
3



Save your project IR Types by selecting Save to Project

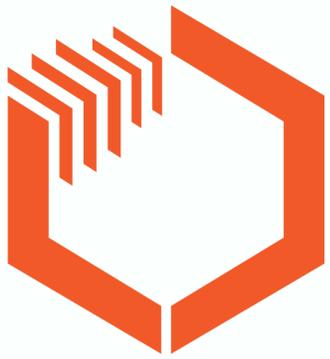
4

Whenever you create a new IR select the Project bubble after Switch Common IR



The dropdown list of Common IR Types will only display the IR Types saved to your project, so it is easy to find the right one

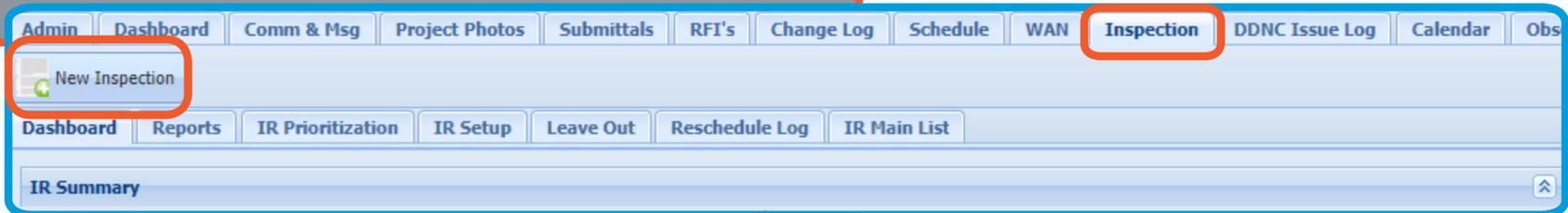
You're done!



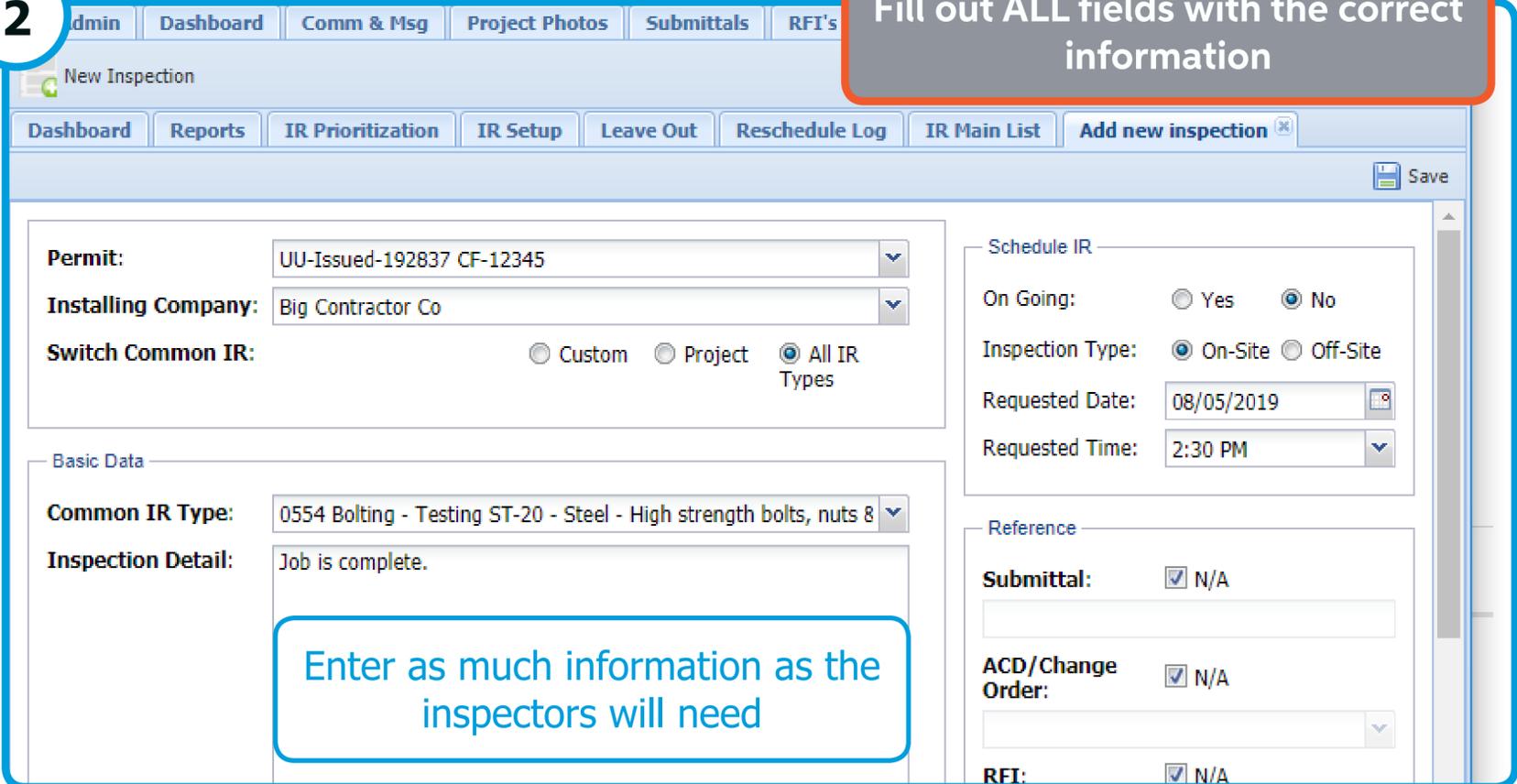
Quick Guide: Inspection Requests

How to create an inspection request and submit it for review
(Sub Contractor Guide)

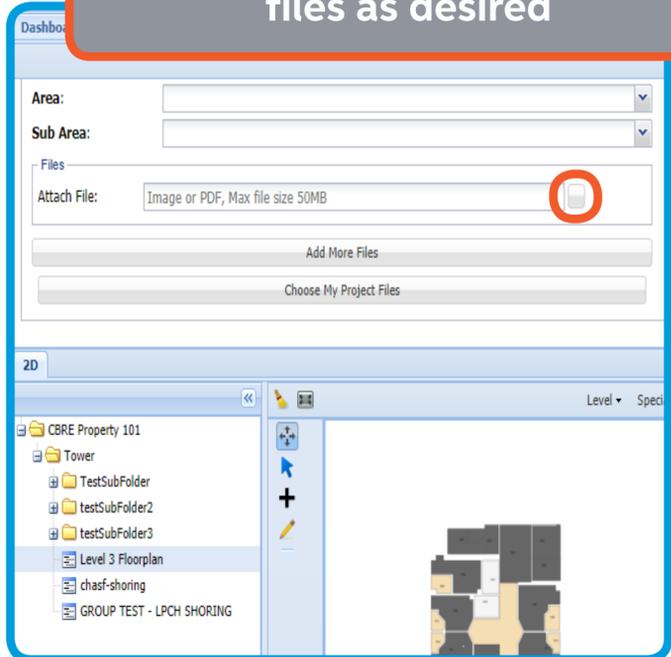
1 Select New Inspection under the Inspection tab



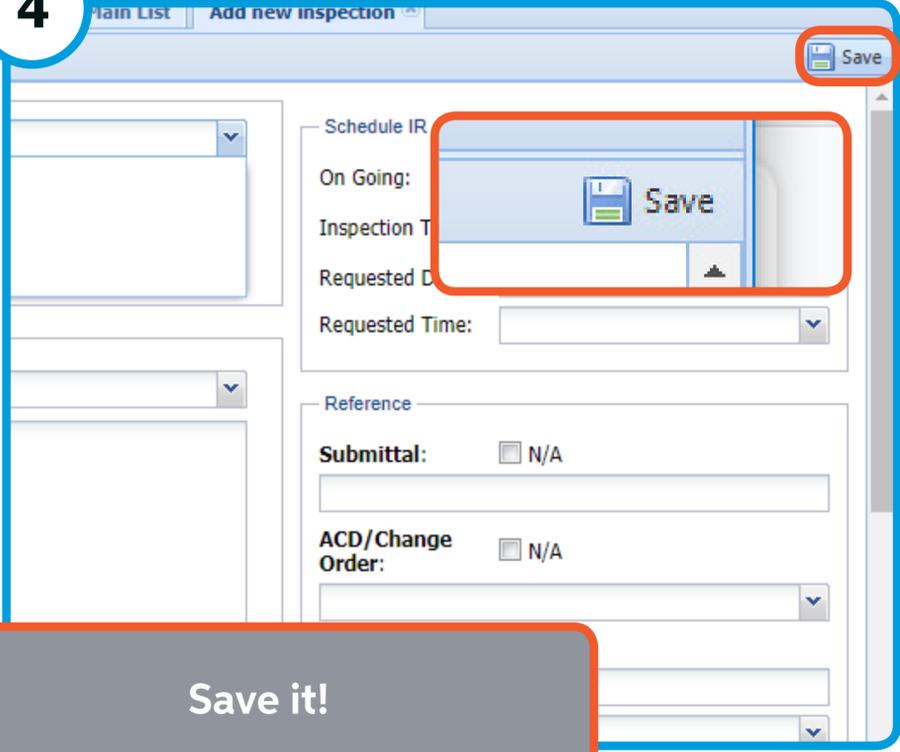
2 Fill out ALL fields with the correct information

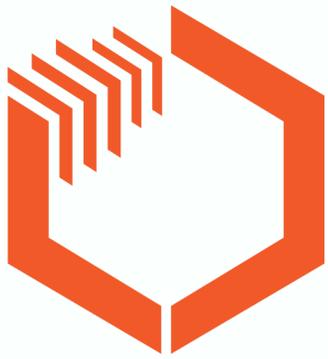


3 Fill the lower fields and attach files as desired



4

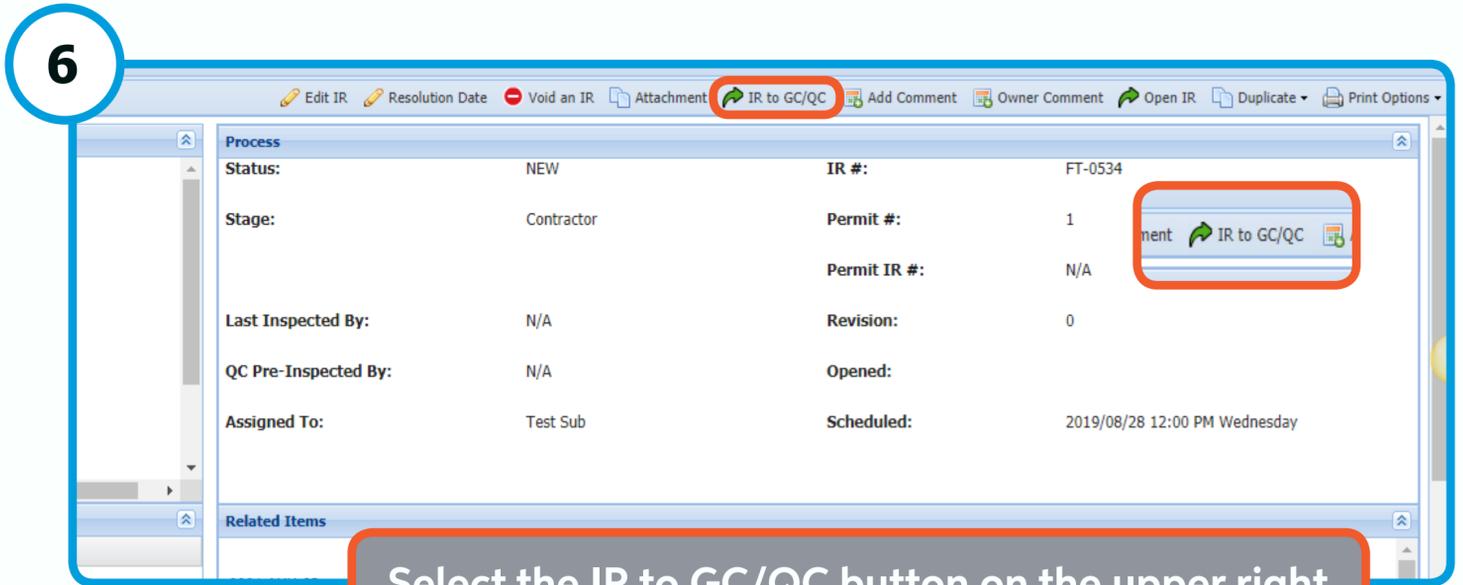
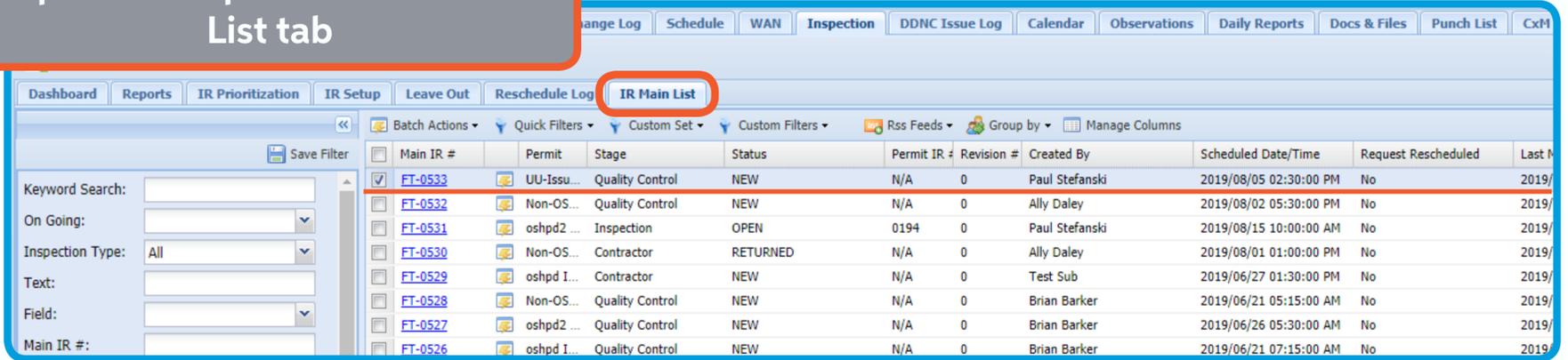




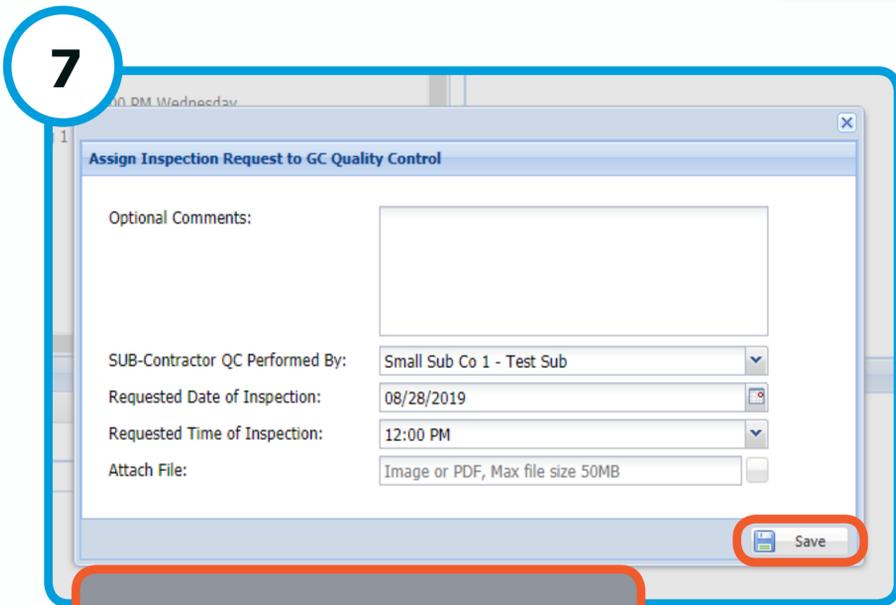
Quick Guide: Inspection Requests

How to create an inspection request and submit it for review
(Sub Contractor Guide)

5 Locate and open your new inspection request in the IR Main List tab

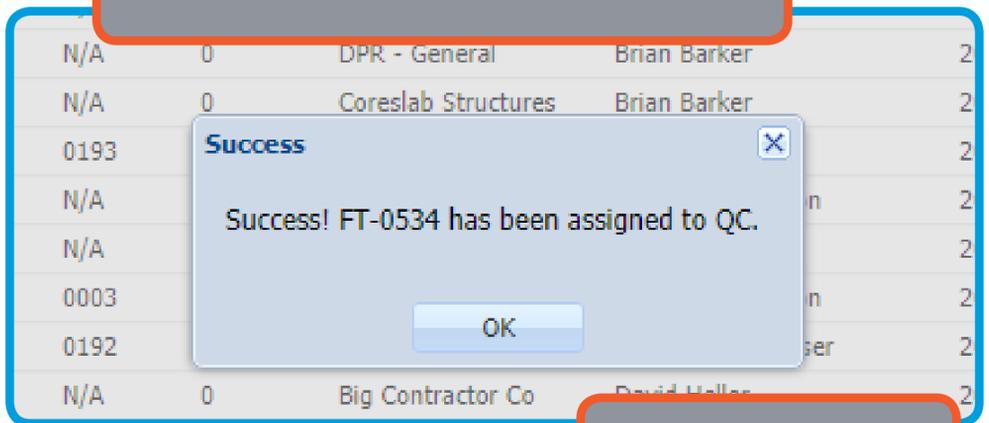


Select the IR to GC/QC button on the upper right

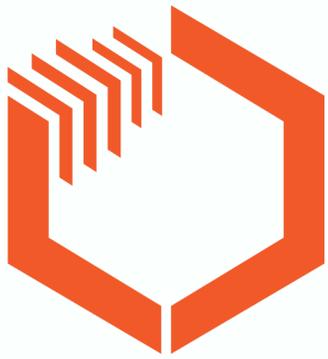


Fill all required fields with the correct information and upload additional files as desired then Save

8 Be sure your request has saved



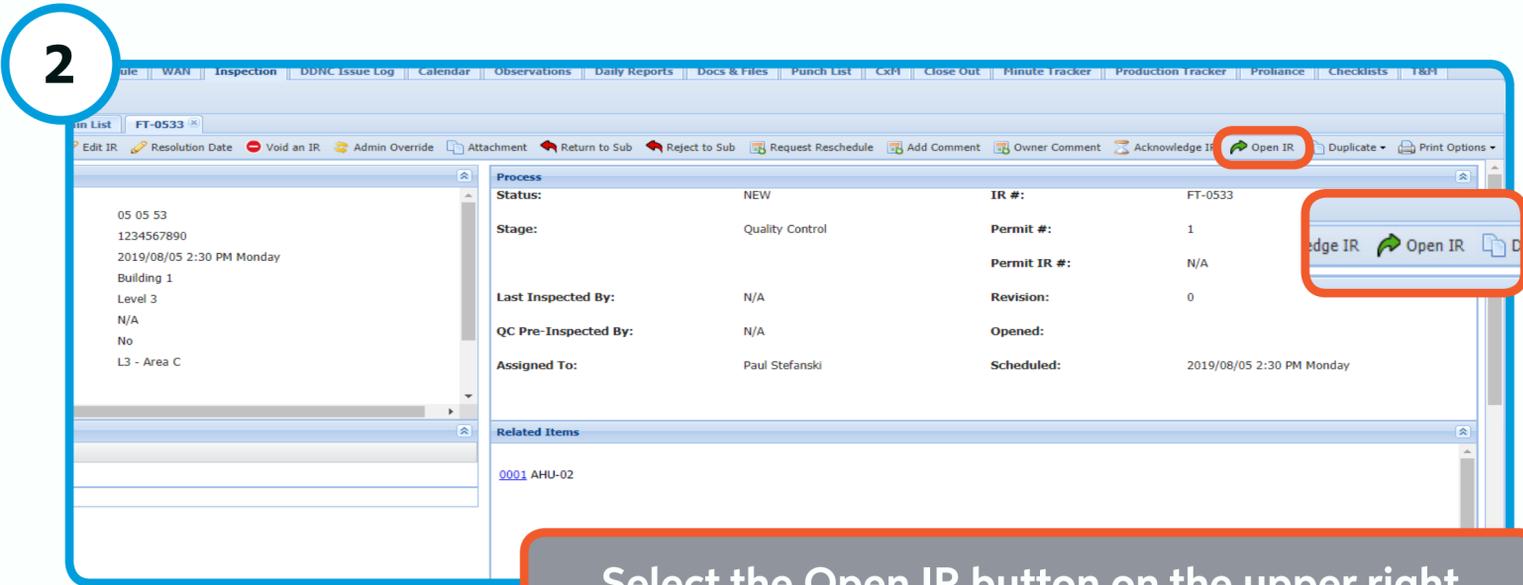
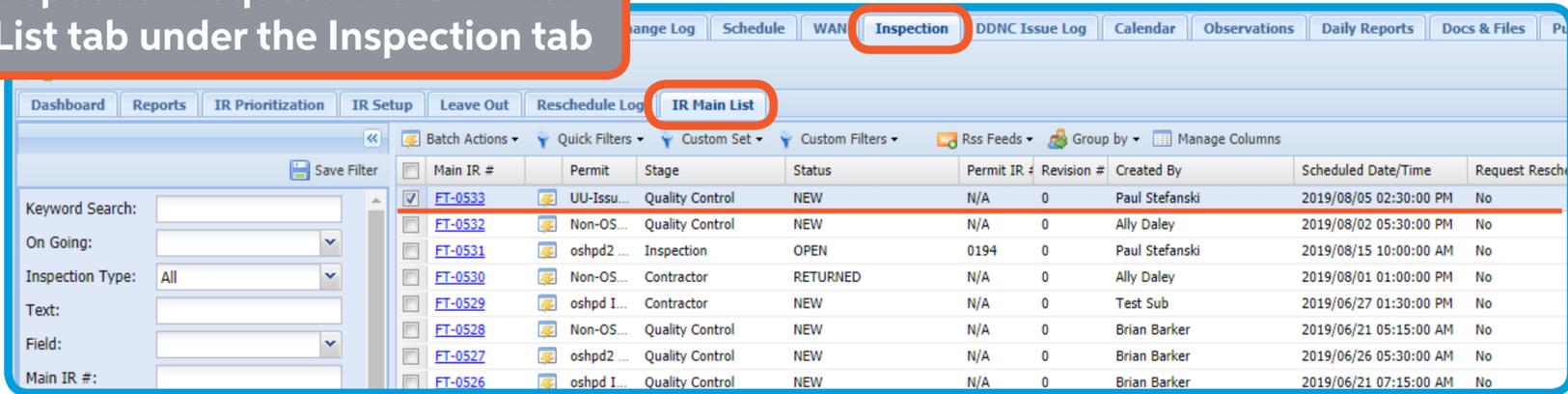
You're done!



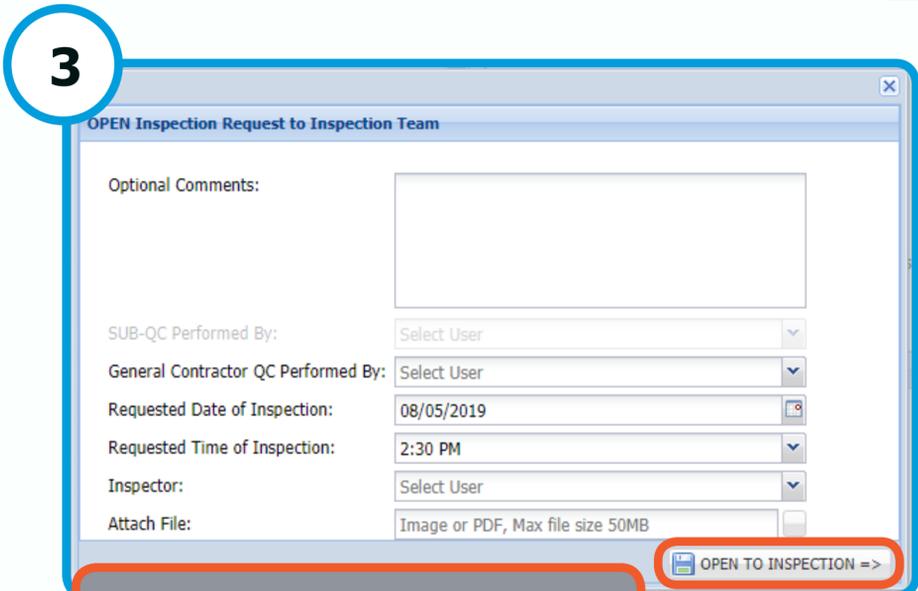
Quick Guide: Inspection Requests

How to locate an inspection request and open it to inspection
(GC/QC Guide)

1 Locate and open the new inspection request in the IR Main List tab under the Inspection tab

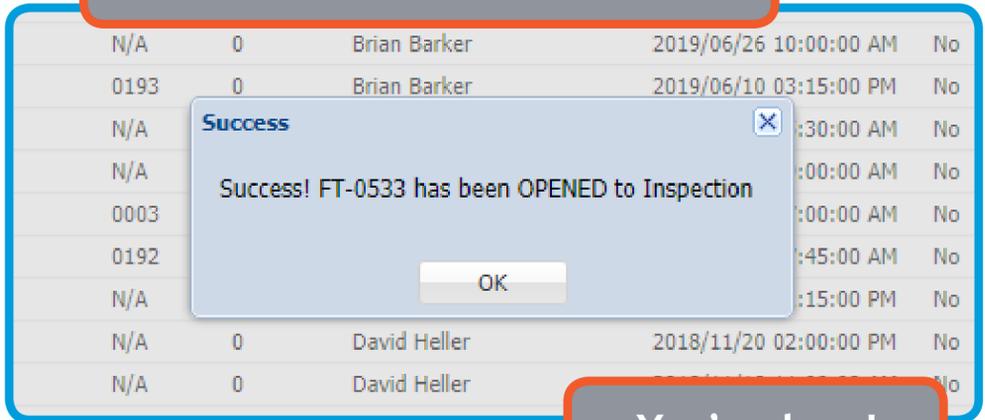


Select the Open IR button on the upper right

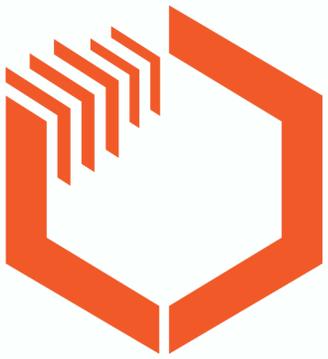


Fill all required fields with the correct information and upload additional files as desired, then select Open To Inspection button

4 Be sure your request has saved



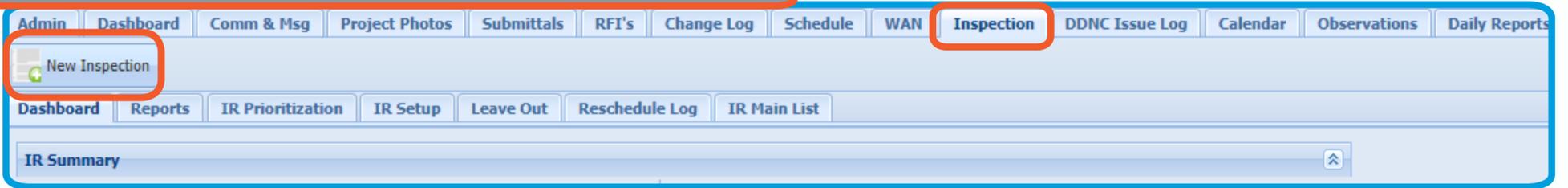
You're done!



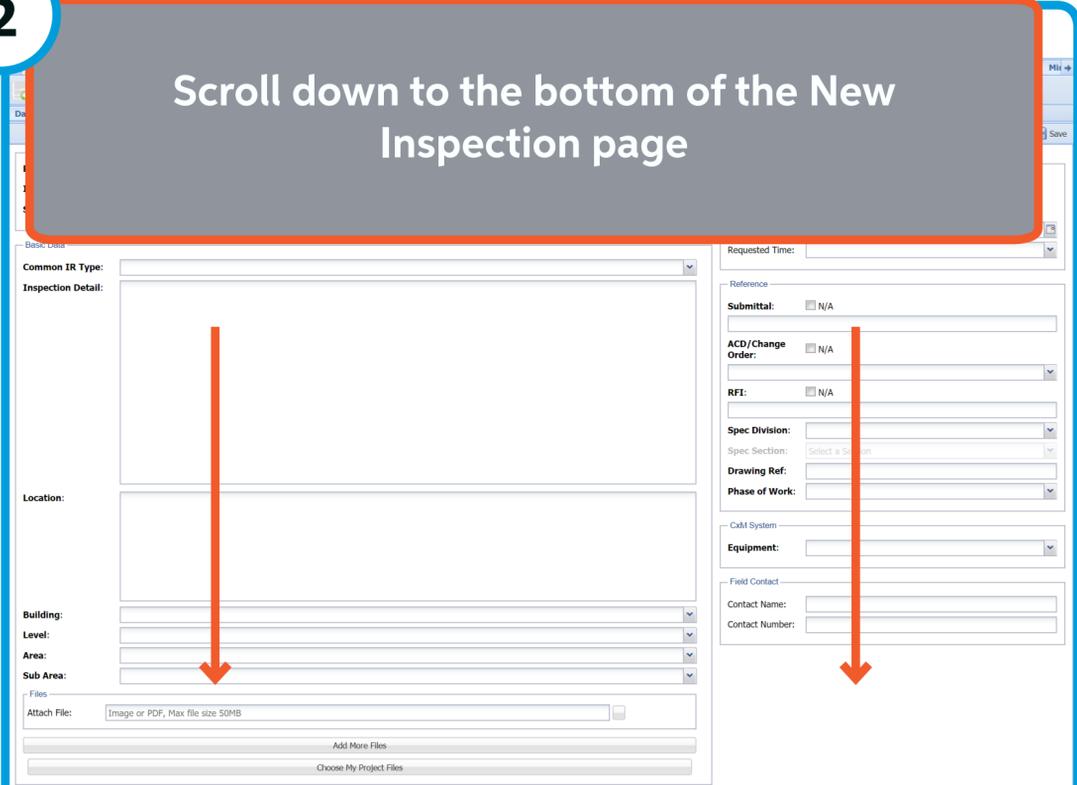
Quick Guide: Locating IRs

How to Identify the Location of an Inspection on the project map

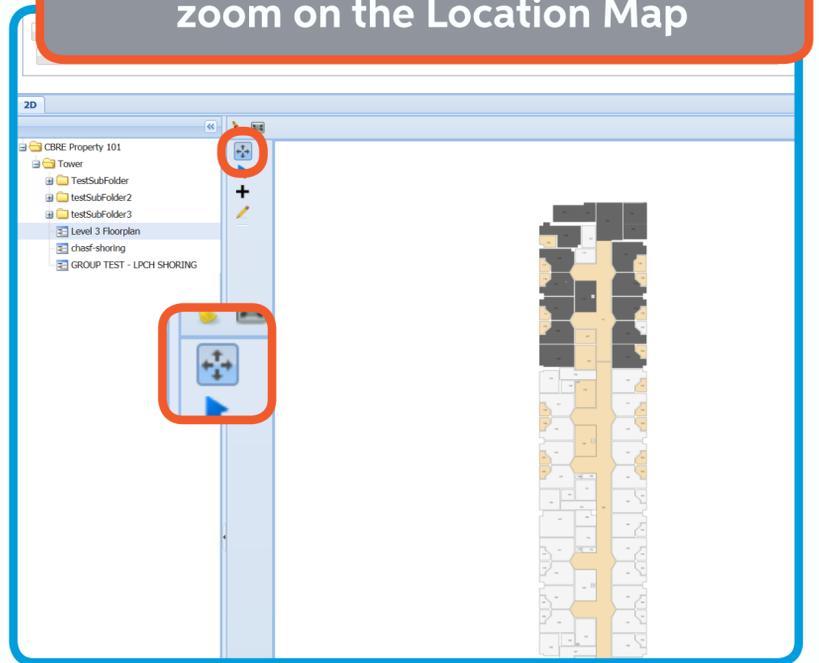
1 Select New Inspection under the Inspection tab



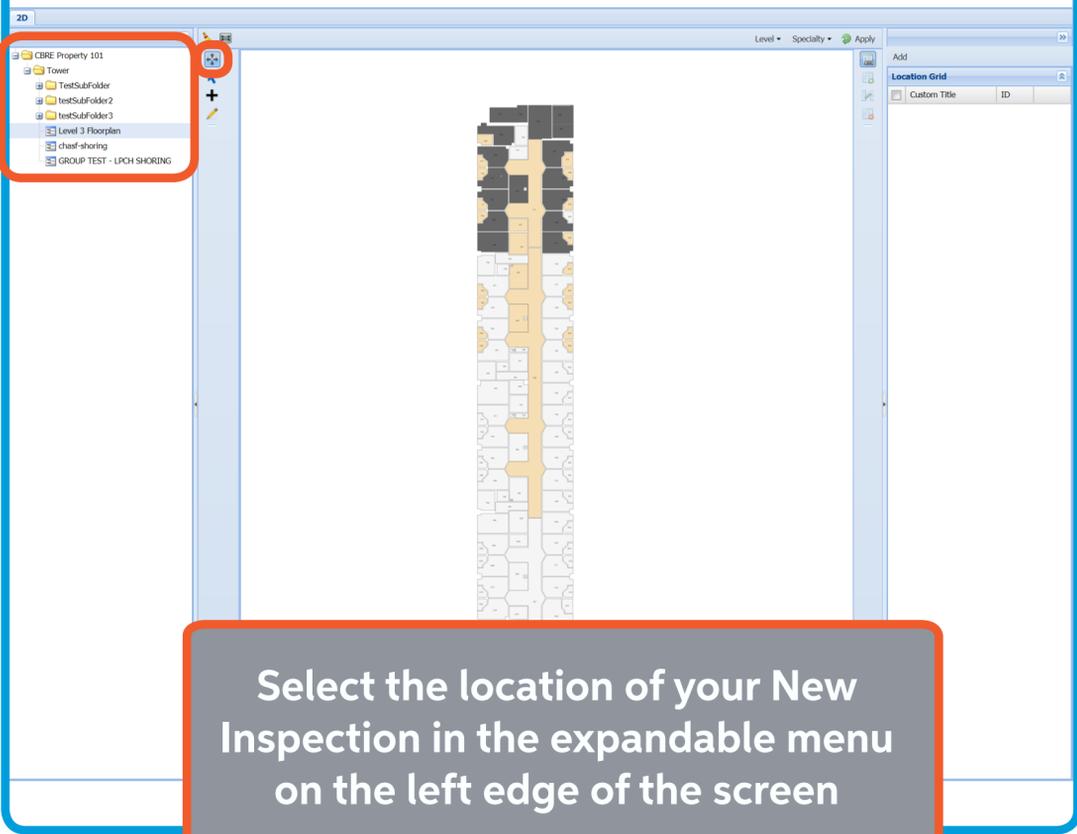
2 Scroll down to the bottom of the New Inspection page



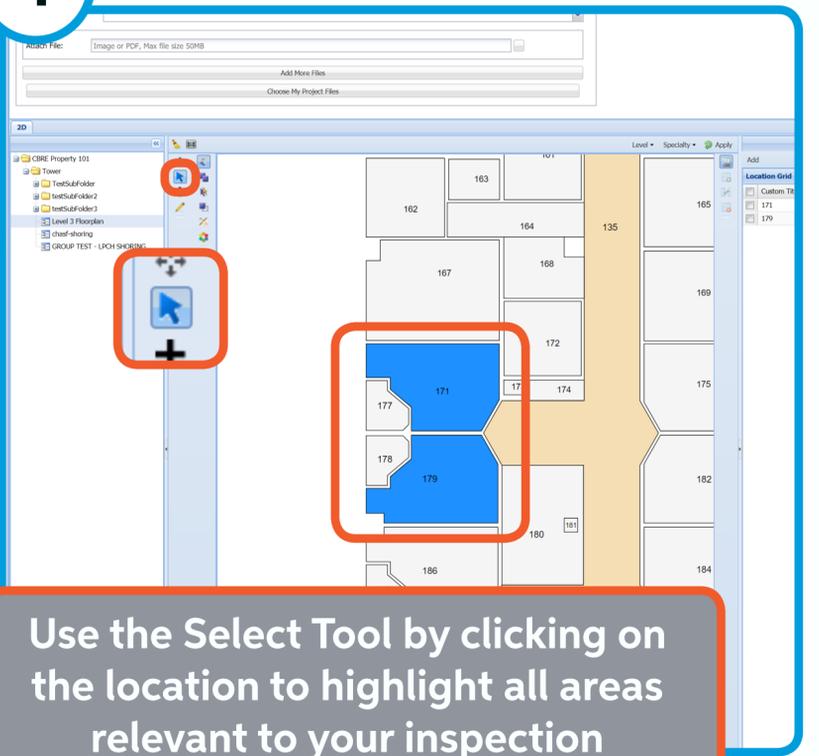
3 Use the Navigation Tool to move and zoom on the Location Map

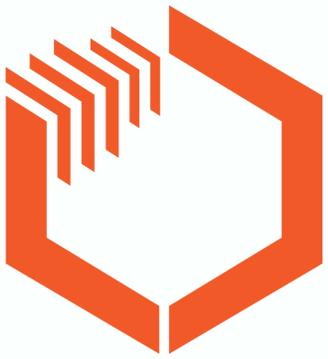


Select the location of your New Inspection in the expandable menu on the left edge of the screen



Use the Select Tool by clicking on the location to highlight all areas relevant to your inspection





Quick Guide: Locating IRs

How to Identify the Location of an Inspection on the project map

5

Save it!

6

Locate and open your new inspection request in the IR Main List tab

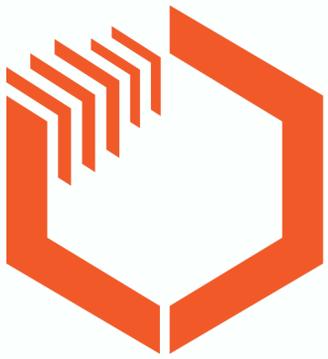
Main IR #	Permit	Stage	Status
FT-0533	UU-Issu...	Quality Control	NEW
FT-0532	Non-OS...	Quality Control	NEW
FT-0531	oshpd2 ...	Inspection	OPEN
FT-0530	Non-OS...	Contractor	RETURN
FT-0529	oshpd I...	Contractor	NEW
FT-0528	Non-OS...	Quality Control	NEW

7

Use the Snapshot Tool to take pictures of your inspection are for future reference by other Inertia users

Save it!

You're done!

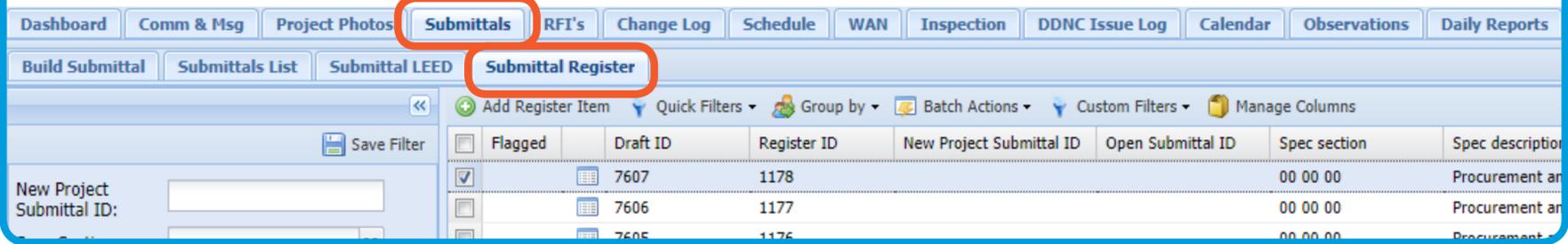


Quick Guide: Submittals

How to create a submittal and send it for review

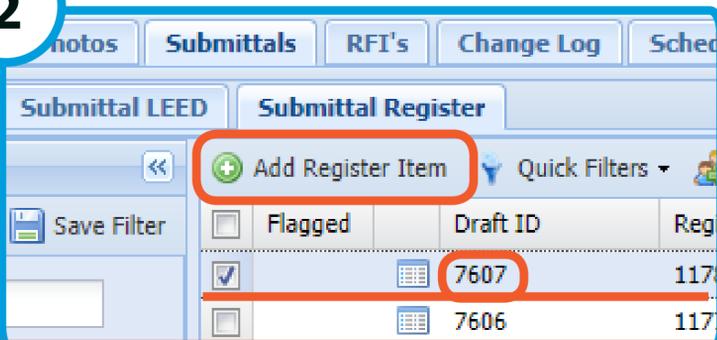
1

Select the Submittals tab and then the Submittal Register tab



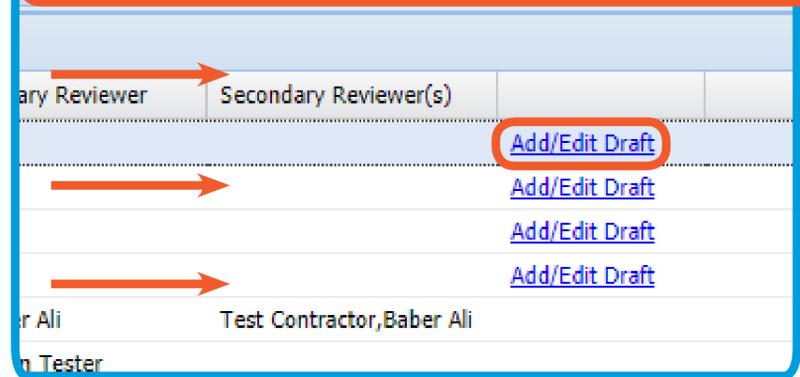
2

Click Add Register Item and a new draft will appear at the top of the list with an Inertia-assigned serial draft ID



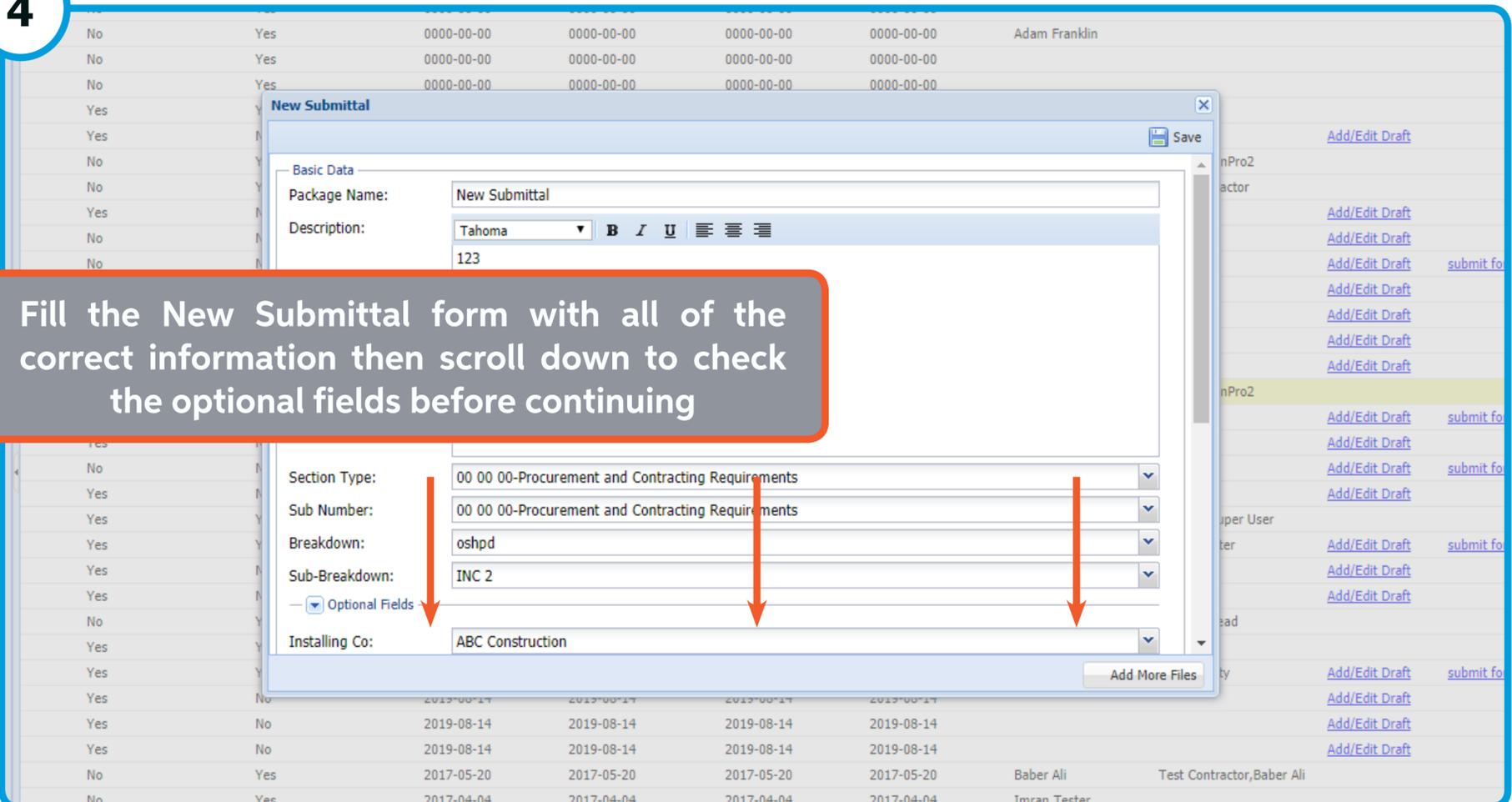
3

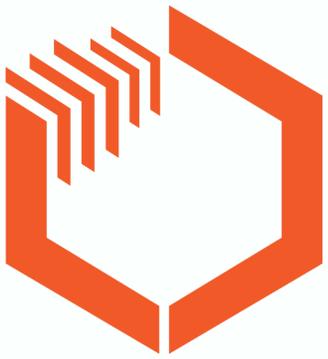
Locate and select Add/Edit Draft



4

Fill the New Submittal form with all of the correct information then scroll down to check the optional fields before continuing





Quick Guide: Submittals

How to create a submittal and send it for review
(with LEED)

5

Fill the optional fields as necessary and attach files at the bottom then click Save

6

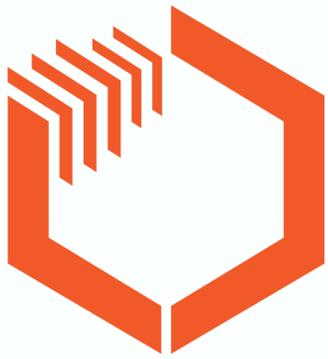
GC Review Date	Primary Reviewer	Secondary Reviewer(s)	
2019-09-04			Add/Edit Draft submit for review Duplicate Register
2019-09-03	Test QC-Lead	Test QC-Lead	Duplicate Register
0000-00-00			Duplicate Register
0000-00-00	Adam Franklin		Duplicate Register
0000-00-00			Duplicate Register

Locate and select Submit for Review

7

Once you have saved the proper reviewers will be notified of the new submittal

You're done!



Quick Guide: Submittal Workflow

How to workflow a submittal in Inertia

1

Select the Submittals tab and then the Submittal List tab

The screenshot shows the top navigation bar with tabs: Dashboard, Comm & Msg, Project Photos, **Submittals**, RFI's, Change Log, Schedule, WAN, Inspection, DDNC Issue Log, Calendar, and Observations. Below this, a sub-menu has tabs: Build Submittal, **Submittal List**, Submittal LEED, and Submittal Register. The main content area shows a table of submittals with columns: New Project Submittal ID, Package ID, Specs, Spec description, Package Title, and Draft ID. Two rows are visible: one for ID 0128 (Concrete) and one for ID 0127 (Maintenance of Met...).

2

The screenshot shows the 'Submittal List' table with columns: New Project Submittal ID, Package ID, Specs, Spec description, Package Title, Draft Id, and Register ID. The row for submittal ID 0128 is highlighted in red. The table contains several other rows with various IDs and descriptions.

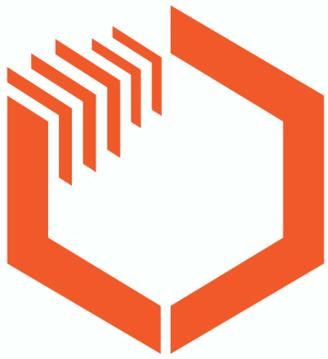
Find and click the submittal you want to open and click the blue number

Submittal details and history can be reviewed here. Use the options on the top right to edit, reassign, or request comment. Accounts with permission can update the status by clicking Status Package

3

The screenshot shows the 'Submittal Details' page for submittal ID 0128. The status is 'Under Review'. The page is divided into two main sections: 'Submittal Details' on the left and 'Related Items' on the right. The 'Submittal Details' section includes fields for Submittal ID, Trade Partner Due Date, Date Submitted, Draft ID, New Project Submittal ID, Group Submittal ID, Spec Section, Breakdown, Company, Date Due, Primary Viewer, Days in Status, Package Title, and Package Detail. The 'Related Items' section shows a list of related items, including '0006 - GP-01'. Below the details is a 'Discussion Board' with a 'Public Comments' section. A text area for comments is visible, with a 'Submit' button at the bottom right.

Leave comments here and click Submit to save them



Quick Guide: Submittal Workflow

How to workflow a submittal in Inertia

4

Select a Package Status that will be submitted and reported to the team. Inertia automatically notifies users of important updates and changes

Associated files appear here

Type comments or notes here

Package: Select Package Status

- Approved as Noted
- Approved as Submitted
- Draft
- Information Only
- Not Approved
- Register Item
- Resubmit Noted Portion Only
- Resubmittal Not Required
- Review Not Required by Contract Documents
- Review Only / No Approval Action Required
- Revise Resubmit
- Under Review
- Void

5

Click Submit on the bottom right to save the status change

Submit

Success
Action has been completed successfully

OK

6

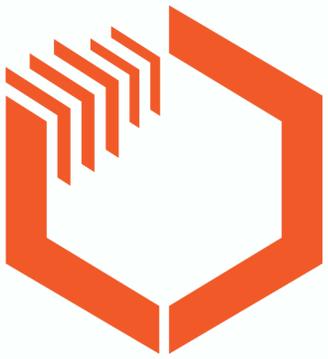
The status change will be displayed in the Submittal Details under Status:. Other users will be notified automatically of the change.

You're done!

Submittal | Submittals List | Submittal LEED | Submittal Register | 0128

Submittal Details		Status: Approved as Submitted		Related Items
Submittal ID:	030000-01-00	Completion Date:	0000-00-00	0006 - GP-01
Trade Partner Due Date:	0000-00-00	Reviewer Due Date:	0000-00-00	
Date Submitted:	2019-08-28 14:52:35	Assigned To:	Test QC	
Draft ID:	7629	Submittal Group Number:	0035	
New Project Submittal ID:	0128	Created By:	Inertia Design	
Group Submittal ID:	0035	Sub-Breakdown:	Increment 2 - Middle Work	
Spec Section:	03 00 00	Date Submitted:	2019-08-28 14:52:35	
Breakdown:	oshpd	Approved Date:	2019-08-28 15:02:13	
Company:	Big Contractor Co	Secondary Reviewer:	Test DesignPro2	
Date Due:	0000-00-00	REV Number:	0	
Primary Viewer:	Test QC			
Days in Status:	0			
Package Title:	How to review a submittal			

Discussion Board
Public Comments
2019-08-28 15:01:15
This looks good

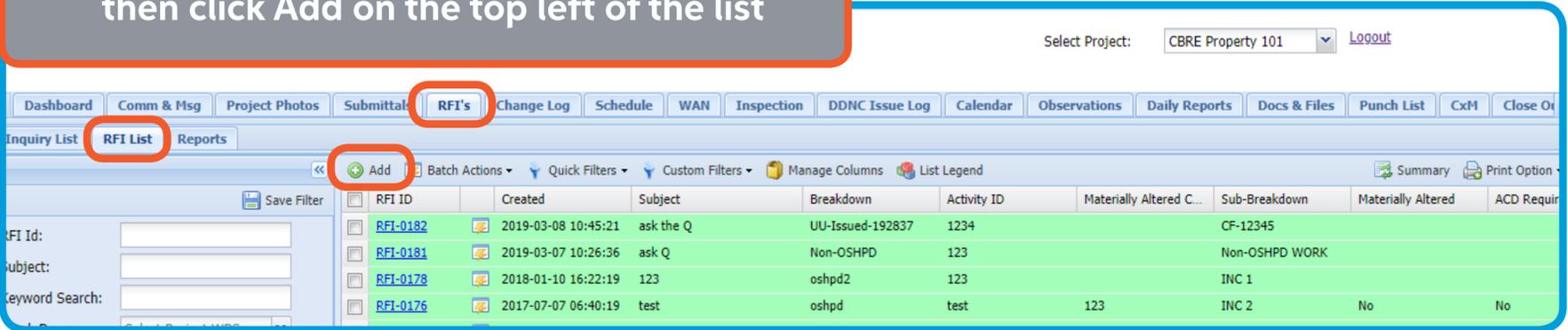


Quick Guide: RFI's and Inquiries

How to create an RFI or Inquiry and submit it for review
(Sub Contractor Guide)

1

Select the RFI tab and RFI List tab, then click Add on the top left of the list



2

Enter any necessary info and questions - some fields may be automatically filled or locked

Upload files

Use the map to highlight any areas relevant to your Inquiry

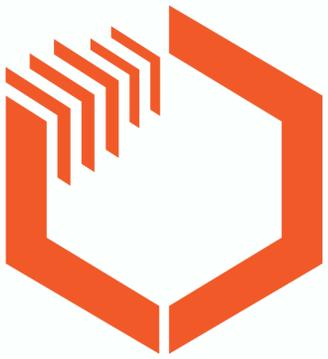
Fill the required fields on the Add New Item tab with the correct information. Attach any desired files and indicate the location of the RFI on the map

3

Save it!

Success
Inquiry has been saved successfully!

You're done!



Quick Guide: RFI's and Inquiries

How to create an RFI or Inquiry and submit it for review
(Universal Guide)

1

Select the RFI tab and RFI List tab, then click Add on the top left of the list

RFI ID	Created	Subject	Breakdown	Activity ID	Materially Altered C...	Sub-Breakdown	Materially Altered	ACD Requir
RFI-0182	2019-03-08 10:45:21	ask the Q	UU-Issued-192837	1234		CF-12345		
RFI-0181	2019-03-07 10:26:36	ask Q	Non-OSHDP	123		Non-OSHDP WORK		
RFI-0178	2018-01-10 16:22:19	123	oshpd2	123		INC 1		
RFI-0176	2017-07-07 06:40:19	test	oshpd	test	123	INC 2	No	No

2

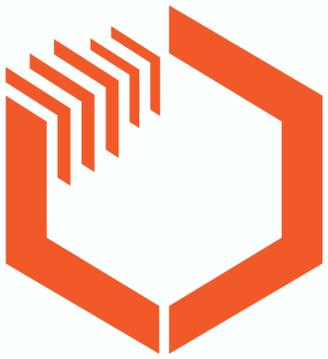
Enter any necessary info and questions - some fields may be automatically filled or locked

Upload files

Use the map to highlight any areas relevant to your Inquiry

Custom Title	ID	
136	68538	<input type="checkbox"/>
141	68597	<input type="checkbox"/>

Fill the required fields on the Add New Item tab with the correct information. Attach any desired files and indicate the location of the RFI on the map

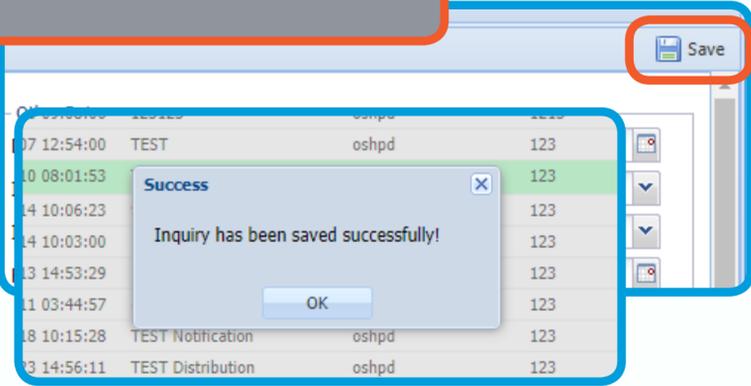


Quick Guide: RFI's and Inquiries

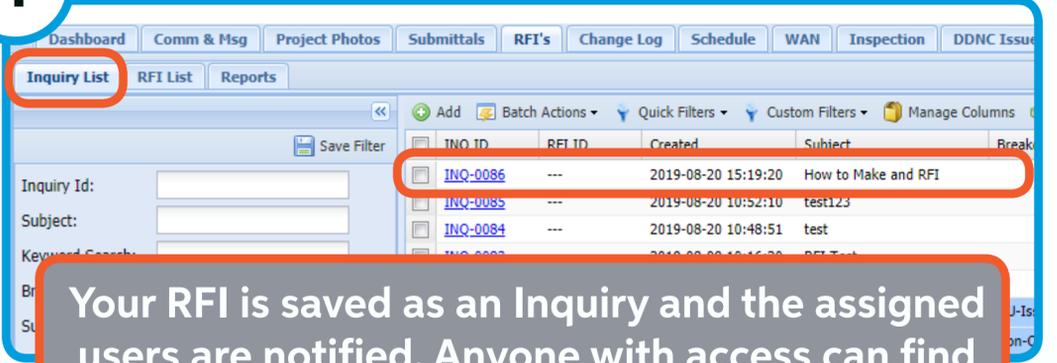
How to create an RFI or Inquiry and submit it for review
(Universal Guide)

3

Save it!



4

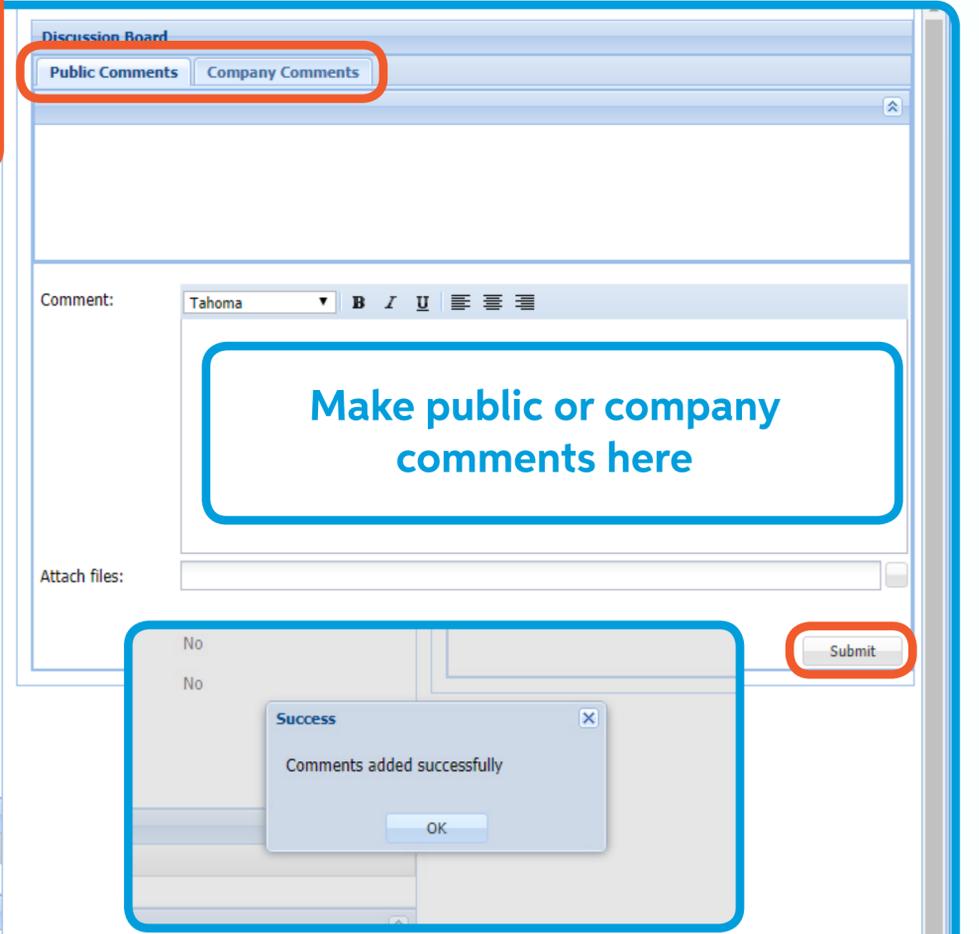


Your RFI is saved as an Inquiry and the assigned users are notified. Anyone with access can find your inquiry on the Inquiry List tab

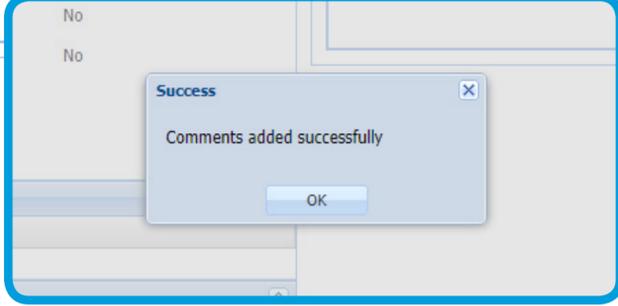
5

You can post or request comments, make edits, take snapshots, or void the inquiry. All changes are recorded on the Inquiry and can be reviewed if needed

Break Down:		Sub Break Down:	
Created:	2019-08-20 15:19:20	Inquiry Open Date:	---
Created By:	Test Sub	Assigned To:	Imran Tester
Creator Company:	Small Sub Co 1	Stage:	Sub Contractor
Installing Company:	Small Sub Co 1	Activity ID:	34566
Impact Cost:	TBD	Impact Schedule:	TBD
Priority:	standard	Due Date:	2019-08-31
Revision No:	0	Trade:	---
Spec Section:		Drawing Reference:	
Root Cause Classification:	Constructibility	Root Cause Period:	TBD
Root Cause Comments:			
Required By Date:	2019-08-31	Record Posted	No
Project Wise:	No	Plan Table	No
Subject:	How to Make and RFI		
Question:	How do I make an RFI in Inertia?		

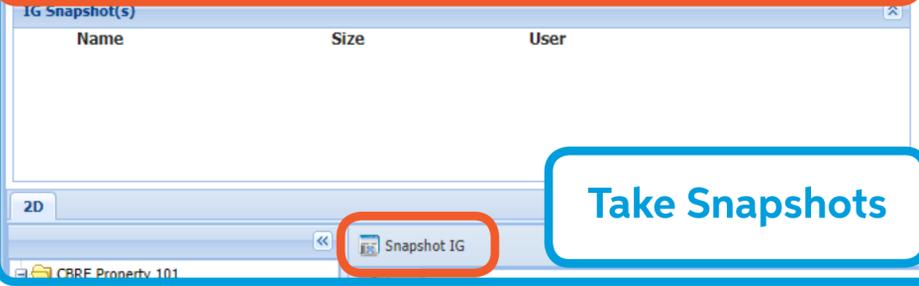


Make public or company comments here

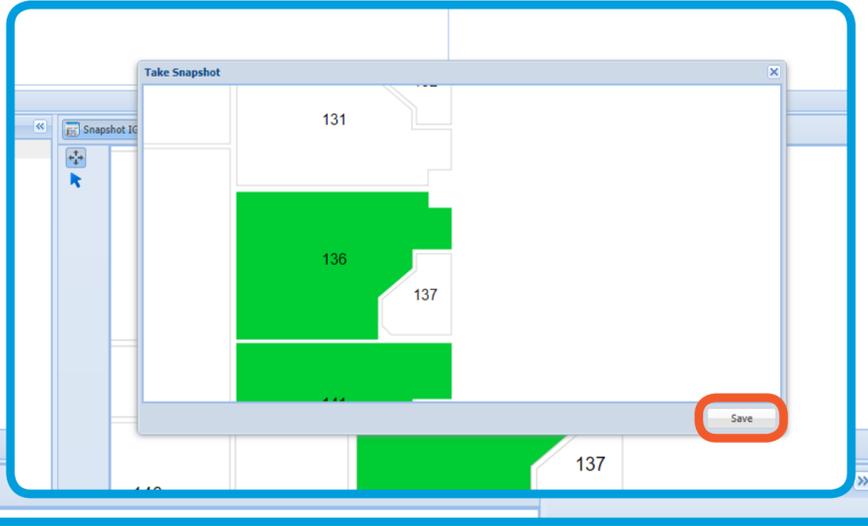


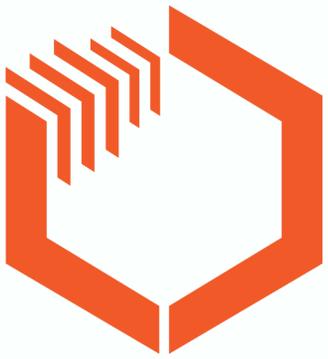
History tracks all document activity by users

Date	User Name	Action	Comment	Assign To
2019-08-20 15:19:20	Test Sub	Create		Imran Test



Take Snapshots





Quick Guide: RFI's and Inquiries

How to create an RFI or Inquiry and submit it for review
(Universal Guide)

6

Users with permission can open Inquiries to RFI by clicking the Open to RFI button

7

Fill the Inquiry with the necessary information and click Save to open it as an RFI

8

Once an Inquiry is opened as an RFI it moves to the RFI list. The assigned users will be notified

9

Users with permission to submit final responses on RFI's can click the Official Response button.

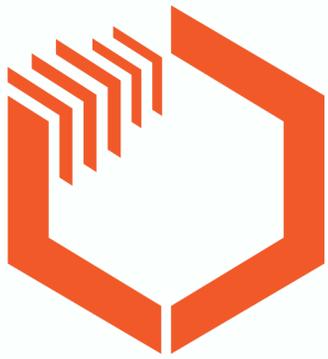
10

Fill the Official Response and click Save

11

The Final Response can be seen by all users with access

You're done!



Quick Guide: WAN

How to create a WAN and attach documents

1

Click the WAN tab and navigate to WAN List

WAN #	Start Date	End Date	Permit	Work Type	Installing Company	Title
	09/11/2019		INC 1	Masonry	Coreslab Structures	122
	09/09/2019		INC 1	Mechanical	DK Mechanical	12312
	08/22/2019		INC 1	Mechanical	ABC Construction	carry
	02/28/2018		INC 1	Thermal & Moisture Protection	Hensel Phelps	Test

2

Select the Add button on the top left of the WAN List

WAN #	Start Date	End Date	Permit	Work Type
0045	09/09/2019	09/11/2019	INC 1	Masonry
0044	09/05/2019	09/09/2019	INC 1	Mechanical
0043	08/01/2019	08/22/2019	INC 1	Mechanical
0042	02/14/2018	02/28/2018	INC 1	Thermal & Moisture Protection

3

Fill out the required information, add a deescription, work start and end dates, and attach any relevant files including submittals and RFI's. Click Save in the top right corner

Description Here

Work Type: Mechanical
 Work Title: MECHTEST
 Work Description: Describe the WAN
 Work Location: Floor 2, room 204

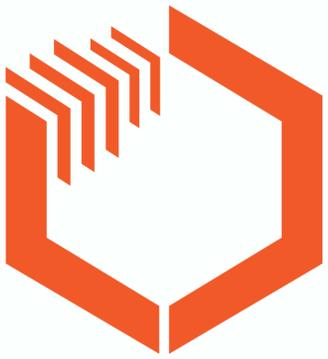
Other Data:
 Permit: INC 1
 Installing Company: ABC Construction

Work Data:
 Work Start Date: [Date Picker]
 Work Start Time: N/A
 Work End Date: [Date Picker]
 Work End Time: N/A
 Work Status: [Dropdown]

Related Data:
 Submittal: N/A
 ACD/Change Order: N/A
 RFI: N/A

Contact Data:
 Contact: [Text Field]
 Contact Number: [Text Field]

Misc Data:
 Floor: [Text Field]



Quick Guide: WAN

How to create a WAN and attach documents

3

WAN #	Start Date	End Date	Permit	Work Type	Installing Company	Title
0045	09/09/2019	09/11/2019	INC 1	Masonry	Coreslab Structures	122
0044	09/05/2019	09/09/2019	INC 1	Mechanical	DK Mechanical	123123112
0043	08/01/2019	08/22/2019	INC 1	Mechanical	ABC Construction	carry madan
0042	02/14/2018	02/28/2018	INC 1	Thermal & Moisture Protection	Hensel Phelps	Test Create
0041	09/29/2017	09/30/2017	INC 2	Mechanical	Big Contractor Co	TEST

Navigate back to the WAN List and locate your new WAN. Open it by clicking the blue number on the left or double clicking

4

Item Details

Installing Company: ABC Construction Permit: INC 1
 Floor: Crew Number:
 RFI: N/A Change Order: N/A
 Submittal: N/A Building Area:
 Contact Name: Contact Number:
 Work Title: MECHTEST Work Type: Mechanical
 Work Location: Floor 2, room 204 Work End Date: 09/25/2019
 Work Description: Describe the WAN

Process

Permit: INC 1 Assign To: -----
 Work Start Date: 09/20/2019 Work End Date: 09/25/2019
 Work Status: Scheduled WAN Status: Notified

History

Date	User Name	Action	Comment
09/05/2019 11:13 ...	Paul Stefanski	WAN issued	Describe the WAN

View details and full history of the WAN. The options in the upper right can be used to Edit, Duplicate, Share, or Print the WAN. Click Open IR to create an Inspection Request attached to the WAN

5

Submittal Date Type Filter By Company Filter By Event Type Color Key Day Week 2

Mon 2 Tue 3 Wed 4 Today 11:14am Fri 6

RFI # 16310 test34 SUB # 7640 (Completion Date) ... WAN # 0044 - 123123112 ⚠

RFI # 16309 43241234 SUB # 7639 (Completion Date) ... SUB # 7644 (Completion Date) ...

RFI # 16308 TEST RFI SUB # 7640 (Date Due) New S... SUB # 7643 (Completion Date) ...

RFI # 16307 123 SUB # 7639 (Date Due) New S... SUB # 7642 (Completion Date) ...

RFI # 16306 123 SUB # 7640 (Trade Partner Due... SUB # 7641 (Completion Date) ...

RFI # 16305 123 SUB # 7639 (Trade Partner Due... SUB # 7644 (Date Due) New S...

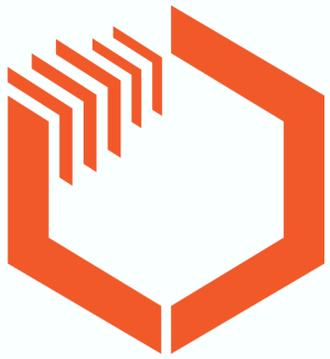
SUB # 7638 (Completion Date) ... SUB # 7643 (Date Due) New S...

SUB # 7638 (Date Due) 123 SUB # 7642 (Date Due) New S...

SUB # 7638 (Trade Partner Due...

Click the calendar to see WANs and other project files with scheduled dates. Files can be opened by clicking them directly in the calendar

You're done!



Quick Guide Key Terms

BIM	Building Information Modeling. A 3D layout of a project, usually produced by an architect, that outlines a project
CC List	A list of people that will be notified of something.
CxM	Commissioning - Commissioning ensures that the new building operates initially as intended
DFM	Document and File Management
Inquiry	An unofficial RFI that can be addressed directly or published as an RFI and then addressed
Inquiry List	The list of Inquiries found in the RFI tab
IR	Inspection Request
IR ID Code	An identification code for an inspection request that lives inside the Inertia platform and can be used to organize and identify IRs
IR Main List	The master list of all IRs
LEED	Leadership in Energy and Environmental Design - organization responsible for providing green building certifications
OH	Overhead
OSHPD	The Office of Statewide Planning and Development - the organization that oversees government mandated inspections in California
PL	Punchlist
Register Item	A file on the submittal list that has not been filled out or published as an official submittal
RFI	Request for Information
RFI List	The list of all RFIs in the Inertia project
Submittal	A document providing necessary information to a General Contractor, Design professional, or Owner
WAN	Work activity notice - provides advanced notice of upcoming work