



BUILDER  
INFORMATION  
SYSTEM

# DOCUMENT MANAGER

The BIS® Document Manager module is designed to help users deal with the avalanche of paperwork associated with each building project. Document Manager provides a means of managing the project paper trail through the entire project life. For each document form, Document Manager allows users to easily track, maintain, query, change, search and print the documents.

## Planning Stage Documents:

**BID REQUEST** - Formal Bid request for transmission to subcontractors.

**PLAN** - Tracks sets of plans that are loaned and returned to subcontractors.

**INSURANCE** - Provides quick and easy entry and access to subcontract insurance information.

**SUBCONTRACT** - Provides access to subcontract information, such as pay schedules, contract amounts, and work descriptions.

**SUBMITTAL** - Tracks the submittal of samples that are often requested of subcontractors by a project's architect, engineer, or general contractor.

**Best Construction Company**  
1200 Main Street  
Unit 100  
Arroyo Grande, CA 93420  
Telephone: (805)543-7000  
Fax: (805)534-1695

**To:** At Insulation  
1025 Highland Way Suite 305  
San Luis Obispo, CA 93401

**Bid Request**

Number	1000-1004
Date	01/02/05
From	Billy Johnson
Title	Owner
To	

**Plan - 3**

**Plan**

Plan Set # 1

Job: 1000  
Description: Pacific View Apartments

Vendor: 0201  
Company: BK Contracting  
Address: 16701 Douglas Way  
City: Oceano  
State: CA Zip Code: 93455  
Telephone: (805) 543-7000  
Fax: (805) 534-1695

**Insurance - 1-743W**

**Insurance**

Number: 1000

Job: 1000  
Description: Pacific View Apartments

**Subcontract**

**Best Construction Company**  
1200 Main Street  
Unit 100  
Arroyo Grande, CA 93420  
Telephone: (805)543-7000  
Fax: (805)534-1695

**To:** BK Contracting  
16701 Douglas Way  
Oceano, CA 93455  
Telephone: 805-543-7000

**Job:** Job Number: 1000  
Project: Pacific View Apartments  
Cost Code: 02000  
Site Work

**Subcontract**

Number	66710-22902
Start	01/01/05
Finish	04/20/05
Amount	4,500.00
Sent	/ /
Returned	/ /
Executed	/ /
Forwarded	/ /
Printed	04/04/05

**Description of Work:**

**Payment Schedule:**

Date	Amount	Description
01/15/05	1000	
02/15/05	2000	
04/20/05	1500	

**Notes:**

**Subject:**

Subject	Description	Notes
CL		

## Performance Stage Documents:

**CHANGE ORDER** - Tracks contract change orders between the general contractor and the owner (General Change Order), and the general contractor and the subcontractor (Subcontractor Change Order).

**TRANSMITTAL** - A cover letter usually sent to identify associated paperwork and related instructions.

**REQUEST FOR INFORMATION** - Tracks information requests to the project's architects and engineers that is required by the general contractor or subcontractor.

**DEFICIENCY NOTICE** - Generates professional quality deficiency notices, listing requirements that the subcontractor still needs to complete.

**LIEN RELEASE** - Generates release forms to be signed by the subcontractor for partial or final payment for work performed.

**MEETING MINUTES** - Records summary of meeting minutes, along with items discussed and names of those present, allowing dissemination of these notes to all interested parties.

**Best Construction Company**  
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Unit 100  
Arroyo Grande, CA 93420  
Telephone: (805)543-7000

**Change Order**  
Number: 1

**Subcontract Change Order**  
Number: 871245

**Transmittal**  
Number: 5454-5413

**Deficiency Notice**  
Number: 765332  
Date: 02/28/08

**Request for Information**  
Number: 223  
Date: 01/28/08  
From: Bill Johnson  
Title: Owner  
To:  
Title:  
Telephone:  
Fax:  
Printed: 06/04/05  
Dwg Ref:  
Spec Ref:

**Best Construction Company**  
1200 Main Street  
Unit 100  
Arroyo Grande, CA 93420  
Telephone: (805)543-7000  
Fax: (805)534-1595

**To:** Far West Properties  
1625 Parker Street  
Los Angeles, CA 90001  
Telephone: (805)543-7000

**Job:** Job Number: 1000  
Pacific View Apartments

**We are sending you the following items:**  
Please double-check the specifications on the paint color in the reception area. I don't think this is what was intended. Also, there is a problem with the class of insulation specified as well. See the attached note.

**For the following reasons:**  
☐ Lack of information  
☒ Interpretation of documents  
☐ Apparent conflict in documents

**Please respond on this form or send a separate note.**

**Response**

**Signature:**

**Best Construction Company**  
1200 Main Street  
Unit 100  
Arroyo Grande, CA 93420  
Telephone: (805)543-7000  
Fax: (805)534-1595

**To:** Al Insulation  
1825 Highland Way Suite 305  
San Luis Obispo, CA 93401  
Telephone: 805-543-7000

**Job:** Job Number: 1000  
Pacific View Apartments

**Punchlist**  
Number: 5453  
Date: 06/04/05  
From: Bill Johnson  
Title: Owner  
To:  
Title:  
Telephone:  
Fax:  
Printed: 06/04/05

**The following items have yet to be completed on this**

Item	Opened	Closed	Amount	Description
1	03/20/05		80.00	
2	03/20/05		125.00	

**Notes:**

**Signature:**

Form MIES-00001 (01/1995 - 2005 MICS Inc. All Rights Reserved)

## Completion Stage Documents:

**CLOSEOUT SUBMITTAL** - Tracks final job submittals, such as operating manual or warranty certificates, which need to be forwarded to the owner.

**PUNCHLIST** - The final list of touch-up tasks for a project that must be completed by the subcontractor.