

LBE Utilization Tracking System User  
Training Guide  
for Prime Contractors

# Overview

- Purpose
- System Overview & User Responsibilities
- Using the System
  - Registering with Elation
  - Assigning Subcontractors to a Project
  - Accepting Payment Information
  - Creating and Sending Payment Information to Subcontractors
  - Rejecting Payment Information
  - Voiding Incorrect Payment Information
- Resources

# Purpose

*The LBE Tracking System enables the Contract Monitoring Division (CMD) to ensure that City departments are in compliance with the provisions of the Local Business Enterprise (LBE) Ordinance, whose purpose is not only to assist small local businesses to compete effectively for City contracts, but also to provide for an overall fair City-wide contracting process.*

# System Overview & User Responsibilities

The LBE UTS allows users to do the following:

- Input descriptive information about each contract  
Responsible User: City Department
- Build a team of subcontractors associated with a particular contract  
Responsible User: Prime Contractors
- Associate payment information from FAMIS (the CCSF's accounting system) to a contract;  
Automated
- Add, edit, and accept payment information from CCSF to Prime Contractor;  
Responsible User: Prime Contractor
- Add, edit, and accept payment information for subcontractors on multiple tiers;  
Responsible User: Subcontractor
- Generate reports  
Responsible User: CMD

*All of the steps mentioned about are to be reviewed and verified by CMD staff*

## Registering with Elation Systems

All prime contractors using the LBE Tracking System **must** have an account. To register with Elation, go to [www.elationys.com](http://www.elationys.com) and click on “**New Registration.**” Enter “SFGOV-2013” in the promo code field to waive the registration fee, complete the application and click submit.

Enter Promo Code  
“SFGOV-2013”

The screenshot shows the Elation Systems website header with the logo and navigation menu. Below the header is a navigation bar with links: HOME, COMPANY, PRODUCTS, SOLUTIONS, SUPPORT, CAREERS, CONTACT US, NEWS & PRESS. The main content area features a green 'New Registration' button and a note: "\*\* Elation Systems supports Microsoft IE 8.0 or higher versions and Firefox 2.0." The registration form is divided into two sections: 'Business Information' and 'Administrative Contact Information'. The 'Business Information' section includes fields for Promotion Code, Company Name, Federal ID No. (with an example: 90-0123456), Contractor License Number, Contractor License Issued By (a dropdown menu showing '<-Select State->'), Services (a link to 'Select Services'), Address1, Address2, Zip Code, City (N/A), State Code (N/A), Business Phone, Business Fax, and Business Web site address. The 'Administrative Contact Information' section includes fields for First Name, Last Name, Email, and Phone. A 'Next' button is located at the bottom of the form, and a link for 'About SSL Certificates' is in the bottom right corner.

ES Elation Systems

HOME COMPANY PRODUCTS SOLUTIONS SUPPORT CAREERS CONTACT US NEWS & PRESS

New Registration \*\* Elation Systems supports Microsoft IE 8.0 or higher versions and Firefox 2.0.

Promotion Code:

**Business Information**

Company Name:

Federal ID No:   
(Example: 90-0123456)

Contractor License Number:

Contractor License Issued By:

Services: No Services Selected [Select Services](#)

Address1:

Address2:

Zip Code:

City: N/A

State Code: N/A

Business Phone:  -

Business Fax:

Business Web site address:

**Administrative Contact Information**

First Name:

Last Name:

Email:

Phone:  -

[About SSL Certificates](#)

## Assigning the Contractors

- New projects are added to the LBE Tracking System by City Departments
- You will receive an email notification once your company has been added to a contract as a prime contract
- When you have been added to a contract log into the LBE Tracking System at [www.elationsys.com](http://www.elationsys.com)
- To find your project in the LBE Tracking System, click the search button in the Workplace sidebar. Enter the contract name or contract ID or contractor name or click "Go."
- Next click on your contract and the "Assign Contractor" link under the project name.

The image shows two screenshots of the LBE Tracking System interface. The top screenshot shows the search process. The bottom screenshot shows the project details for 'Pier 35 North Apron Repair' with the 'Assign Contractor' link circled in blue.

**Top Screenshot: Search Process**

Navigation: Payroll | Payments | Reports | Configuration | Training | Certifications | Local Hire

Home | **Projects** | Add Projects | Messages | CPR Status | CPR Report

Workplace << | My Project Search

As Oversight

Project Name: pier 35

ContractID: [ ]

Contractor Name: [ ]

Go Reset

Searching Parameters

Show Project by Type:  All Type  Construction  Pro

Search Project by Name [ ]

Search Project By Contract ID [ ]

Project Name	Role	Contract ID
<a href="#">1 South Van Ness 8th..0-7229A</a>	Oversight	J12-10-7229A
<a href="#">15th Avenue Pavement..(1680JR)</a>	Oversight	1680JR

**Bottom Screenshot: Project Details**

Navigation: Payroll | Payments | Reports | Configuration | Training | Certifications

Home | **Projects** | Add Projects | Messages | CPR Status | CPR Report

Workplace << | My Project Search

As Oversight

[Pier 35 North Apron Repair](#)

Edit Project

**Assign Contractor**

Controlled Insurance

Project Specific Rates

Workforce Requirements

Apprentice Certificate

Inactivate Project / Archive

Comments

[Pier 35 Restro..\(J12-15-7237A\)](#)

Report(s) for: Pier 35 North Apron Repair

Project Manager: [Tim Leung](#) Last Login: 1

Project Team

[MH CONSTRUCTION \(Prime Con](#)

Activity Started: **10/30/11**

Total Payroll Reports Submitted: **20**

[A. Ruiz Construction Co. & Assoc..](#)

Activity Started: **12/31/11**

Total Payroll Reports Submitted: **12**

[Annuzzi's Concrete Service, Inc.](#)

Activity Started:

Total Payroll Reports Submitted: **0**

## Assigning the Contractors

- In the "Search Companies" function, type in the first word of the company's name. The system will list all of the companies who have registered with Elation Systems. If you don't find the name of the company you are trying to add to the project team, please contact that company and ask them to register with Elation Systems at [www.elationsys.com](http://www.elationsys.com) (See previous slide entitled "Registering with Elation").
- *If the company name appears* in the left side panel, click and hold on the company name, drag it directly onto the name of prime contractor. The system will refresh and the company name will appear on the right side panel as a subcontractor in your project team.
- *To remove a contractor* from the project team, click and hold your cursor over the company's name; drag and release. The system will refresh and the company's name will automatically disappear from the right panel.

The screenshot displays the 'Assign Subcontractor(s)' interface. On the left, the 'Search Companies' panel is active, showing search criteria: 'Name Contains: flores', 'License ID:', 'Name Starts with:', 'Federal Tax ID:', 'Zip:', and 'Vendor ID:'. A 'Search' button and a 'Reset' button are visible. Below the search criteria, it indicates 'Total: 2' and a 'DBE Firms' checkbox. The search results list two companies: 1. Flores Drywall, Inc. (OAKLAND, CA 94601 ((510) 842-8470)) and 2. J. Flores Construction Company, Inc. (LBE) (415-337-2934). On the right, the 'Project Team' panel shows 'MH CONSTRUCTION-CM/PC (LBE)' as the prime contractor with 1 item(s) valued at 2752 (\$786,000.00). Below it, several subcontractors are listed: A. Ruiz Construction Co. & Assoc., Inc.--Tier 1 (LBE), Annuzzi's Concrete Service, Inc.--Tier 1 (LBE), JOSEPH J ALBANESE, INC--Tier 1, and Power Construction, Inc.--Tier 1.

If you don't find the name of the company you are trying to add to the project team, please contact that company and ask them to register with Elation Systems at [www.elationsys.com](http://www.elationsys.com).

## Adding Award Information

- To add award information to prime and subcontractors (CMD form 2A information), double click on the head icon next to the contractor's name. The **"Add/Edit Subcontract/Change Order"** pop-up window will appear. Please note that all the fields must be completed for the information to be saved.
- In the **"Subcontractor ID"** field enter a unique number for that payment. An invoice number or any unique identifier you chose will work.
- Complete the **"Subcontractor Name"** field, write a brief description of the services provided in the **"Description"** text box, then click the blue **"Select Services"** link to select an appropriate NAICS code for the service provided. Enter the appropriate dates and the dollar value at the time of award and click **"Save Details."**

**Assign Subcontractor(s)** Activate/Deactivate Subcontractor(s)

Project Team | Contract Tree

- Roebuck Construction, Inc.--CM/PC (LBE)  
SubContract: 2743 (\$2,835,000.00)--Prime Contract
- AAA Fence Company, Inc.--Tier 1  
SubContract: 0000 (\$10,432.00)
- Ascent Elevator Services--Tier 1  
SubContract: 0007 (\$63,500.00)
- Bannon Construction Inc--Tier 1  
SubContract: 81713 (\$117,000.00)
- C & J PAINTING--Tier 1  
SubContract: 0006 (\$88,000.00)
- Cal Pacific Plumbing Systems--Tier 1  
SubContract: 84365 (\$96,800.00)
- Chris Plumbing, Inc--Tier 1
- corish electric corporation--Tier 1 (LBE)  
SubContract: 0008 (\$479,700.00)
- Dees-Hennessey, Inc.--Tier 1  
SubContract: 0002 (\$9,875.00)
- Eco Bay Services, Inc.--Tier 1 (LBE)  
SubContract: 76842 (\$17,500.00)
- Gorman Pipeline Inc--Tier 1 (LBE)  
SubContract: 802121 (\$70,850.00)

**Add/Edit Subcontract/Change Order**

Subcontract  Work Order/Change Order/Sub Project

New Subcontract between **Roebuck Construction, Inc.**  
and **AAA Fence Company, Inc.**

Reference Contract ID: 2743

Subcontract ID:

Subcontract Name:

Description:

Services Required: No Services Selected [Select Services](#)

Award Date:

Dollar Value:

Start Date:

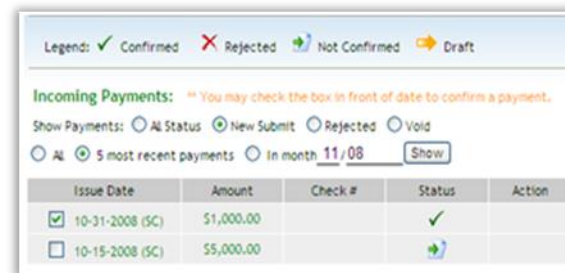
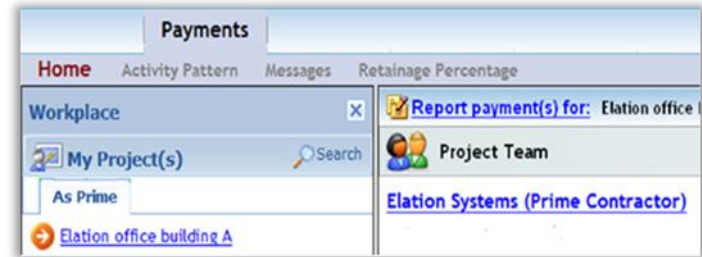
End Date:



# Adding Payment Information

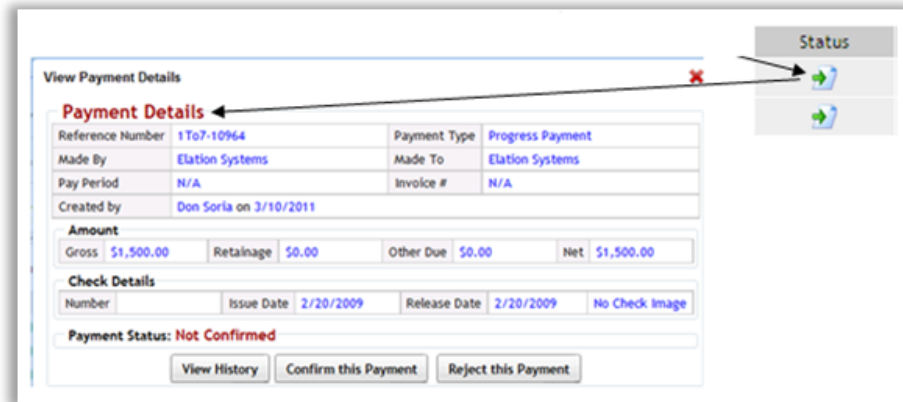
- To accept payment information for a particular contract begin by clicking on the Project name.
- Under the Incoming Payments section, all of the payment notification will be listed for review and confirmation. Under the Outgoing Payments sections, all of the Payment Notifications sent to the subcontractors will be listed.
- To confirm a payment, click  in the box to the left of the payment that you want to confirm.

All steps will be verified by CMD contract compliance officers



## Adding Payment Information

- To reject a payment, right click on the status icon and select “Reject this Payment.” Rejecting a payment will notify the prime contractor that there is an issue with the payment.
- Click on the “Reject this Payment” button to input a comment explaining why you are rejecting the payment and click submit when done.



The screenshot shows a 'View Payment Details' window with a title bar containing a close button (X) and a status icon (a green arrow pointing right). An arrow points from the status icon to the 'Payment Details' section. The 'Payment Details' section contains a table with the following information:

Payment Details			
Reference Number	1To7-10964	Payment Type	Progress Payment
Made By	Elation Systems	Made To	Elation Systems
Pay Period	N/A	Invoice #	N/A
Created by	Don Sorla on 3/10/2011		

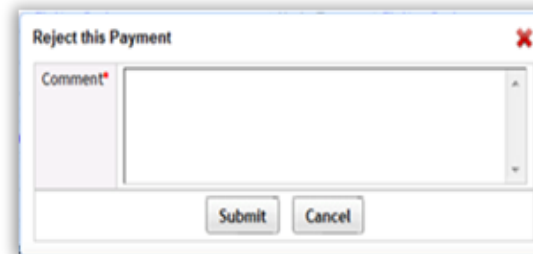
Below the table is an 'Amount' section with a table:

Amount			
Gross	\$1,500.00	Retainage	\$0.00
Other Due	\$0.00	Net	\$1,500.00

Below the amount section is a 'Check Details' section with a table:

Check Details			
Number	Issue Date	Release Date	No Check Image
	2/20/2009	2/20/2009	

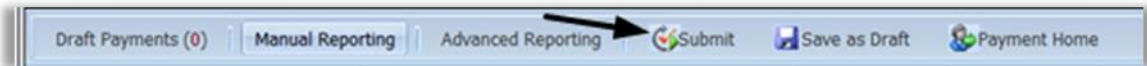
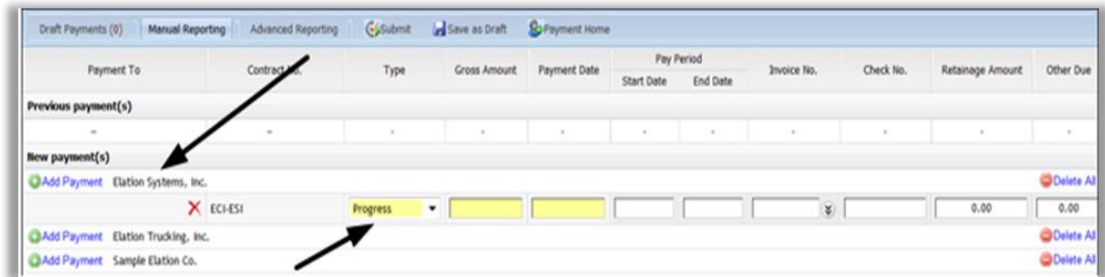
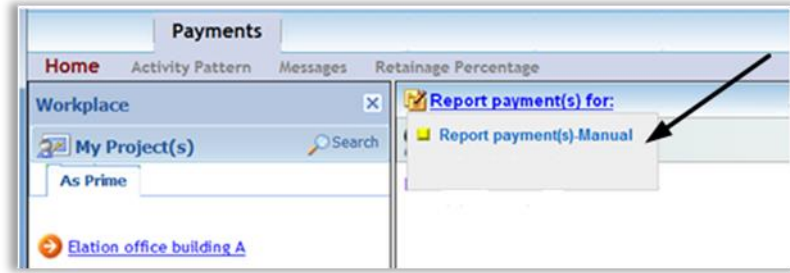
Below the check details is a 'Payment Status: Not Confirmed' section with three buttons: 'View History', 'Confirm this Payment', and 'Reject this Payment'.



The screenshot shows a 'Reject this Payment' dialog box with a title bar containing a close button (X). The dialog box contains a 'Comment' field with a red asterisk indicating it is required. Below the comment field are two buttons: 'Submit' and 'Cancel'.

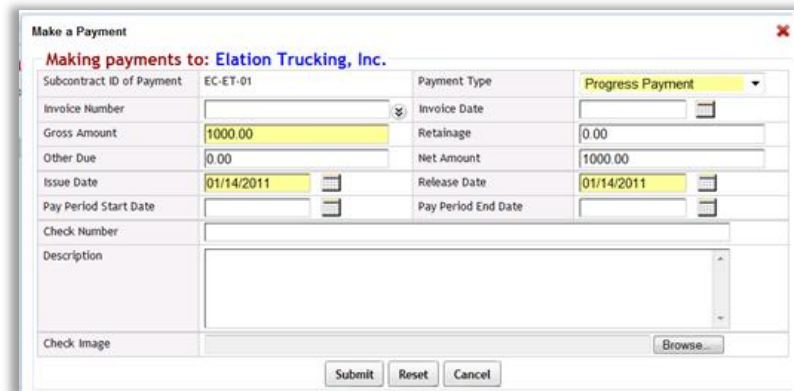
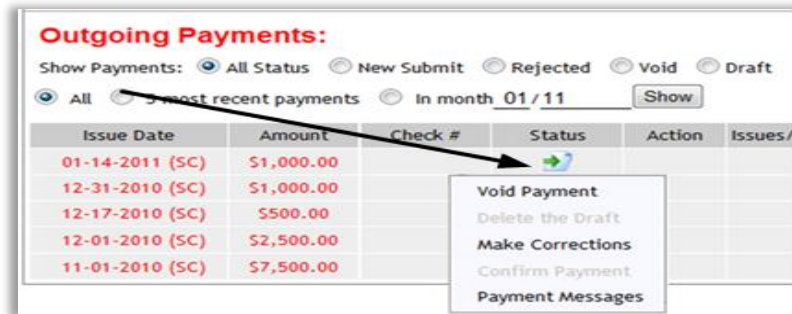
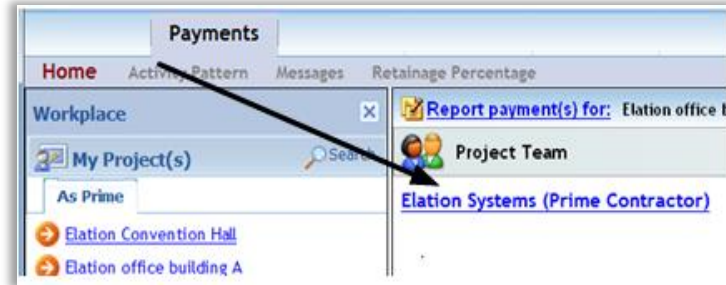
# Creating and Sending Payment Information

- To enter subcontractor payment information click on the Report Payments and select Report Payment(s)-Manual
- Click on the blue “Add Payment” link in front of the Contractor name that you want to send a Payment notification. This will open an input line under the contractor’s name.
- The three yellow boxes are mandatory fields. The additional fields are optional, but contain very useful information displayed in the Payment Detail window.
- Click submit to send the Payment Notification to the Contractor
- Click on the “Save as Draft” link to save your payment information or click on the red X to delete a draft payment.



## Void or Correcting a Payment Notification

- Click on the **“Payments”** tab and select the project of interest on the left side panel. Click on the relevant contractor’s name.
- In the **“Outgoing Payment”** section, right click on the icon in the **“Status”** column.
- To void a payment, select **“Void Payment.”** The subcontractor must accept the void payment request to completely void the transaction.
- To edit a payment, right click on the icon in the **“Status”** column and select **“Make Correction”**, and edit the yellow fields as needed. Click submit when done.



# Resources

- The Contract Monitoring offers free monthly training for City contractors every 4th Tuesday of the month in room 421 of City Hall beginning at 10:30 AM.
- Training Manuals and additional information are posted on the CMD website here:  
[www.sfgov.org/cmd](http://www.sfgov.org/cmd)
- Elation staff & CMD Contact Information
  - Elation contact info: 925-924-0340 or [support@elationsystems.com](mailto:support@elationsystems.com)
  - CMD contact info: 415-581-2310