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# Primavera Contract Manager Functional Overview



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# Primavera Contract Manager Executive Summary

## **Complete Project Control**

On-schedule, on-budget completion demands complete project control. Construction project management involves groups of people representing different disciplines, from project managers, contract managers and division managers to subcontractors, architects, suppliers and clients — all trying to collaborate on a multitude of issues and changes while juggling multiple documents and contracts.

Controlling your construction projects' schedules, budgets and deliverables is vital to the success of your projects and the future of your business. But this can be challenging with slow responses, missed deadlines and late deliveries. Every unbudgeted change or delay in the schedule can result in increased costs, risks and claims exposure. Contract Manager is a powerful solution that integrates these processes, brings together the entire project team and gives your organization confidence throughout the life of the project.

Contract Manager is a document management, job cost and project controls solution that will increase construction project management efficiency and speed, while reducing schedule delays and risk. Built on a collaborative platform, Contract Manager alerts team members and collaborators to new RFIs, questions answered, potential issues and changes. It provides instant and easy access to the latest project information, including the latest drawings, approved submittals and daily events.

By using Contract Manager, you will minimize delays, keep client costs low and accelerate completion time with improved communication and collaboration among your team.

# **Everyone is Accountable with Document Controls**

The enhanced collaboration capabilities enable more timely responses to critical and potentially scheduledelaying field issues. Contract Manager's flexible workflow and approval process allow you to know who is accountable for key items, and eliminate surprises during the overall project.

## **Comprehensive Change Management**

Contract Manager also is a comprehensive change management system that assures changes are resolved, payments are made and claims are avoided. Furthermore, you can analyze the cost or schedule impact of any change on the project and identify which contractors are affected and if new equipment or materials are needed. With Primavera, you are prepared for the unexpected and have the power to negotiate details for final resolution.

# **Superior Job Cost Management**

Contract Manager forecasts costs and simplifies contract control. A complete job cost control system, Contract Manager helps you analyze budgets and funding, review commitment documents and record requisitions and invoices. The Cost Worksheet automatically collects and summarizes detailed cost elements from contracts, requisitions, changes and proposals and dynamically displays them in one easy-to-read spreadsheet.

# **Key Performance Indicators Accessed** via Dashboards and Reporting

With Contract Manager, accurate and up-to-date information is always accessible. Primavera provides role-based dashboards with key performance indicators and powerful reports. Gain visibility early on so you can prevent minor issues from becoming major problems. With a personal dashboard, you can view the current project status, new issues and project alerts about potential problems. With two clicks, access the project details necessary to make decisions and keep projects on schedule. Use any of the 150 standard reports, or create your own, to track budgets, cost variances, project changes and analyze comparative trends and cause/effect among multiple projects. Contract Manager enables you to maximize efficiency while minimizing project costs, risks and safety issues

### **Integrated Construction Management**

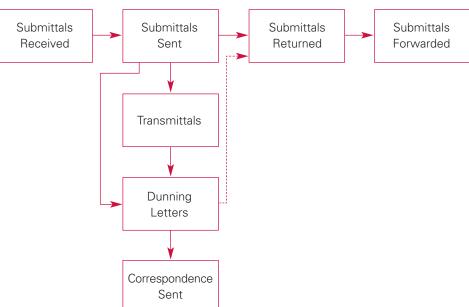
As construction projects have become increasingly complex, architecture, engineering and construction project managers are facing more difficult challenges. Projects have more subcontractors, issues, owner requirements, possible liquidated damages and other potential problems. Many general contracting firms are still rebuilding backlog from the lean years and operating at record-thin margins. Given the financial impact of changes to plans or schedules, construction projects today simply don't have any room for error. Primavera's Integrated Program Management (IPM) offering is the first and only integrated solution for construction that handles projects, contracts, changes and much more. This integrated, scalable solution links people, teams and projects. You can now control every aspect of a project's lifecycle, from the planning stages to the final deadline. And since Primavera IPM is role-based, it gives everyone exactly the functionality they need to fit their individual jobs. With Primavera IPM, you can ensure that everyone — employees and subcontractors - works toward the same goals: the success of the project.

Primavera Contract Manager facilitates team interaction options for creating, sharing and reviewing submittals by displaying information and turnaround graphs that in real time. help project managers immediately identify who is Use the Drawings Log to maintain and identify drawings, holding up the document approval process and what is specifications and other supporting documentation so relevant to each project team member in order to keep you meet contractual requirements and ensure completion the project going. Action lists, alerts and turnaround of your work. Track drawings through the Drawings graphs help project managers immediately identify who Log, which maintains a history of drawing revisions is holding up the process, when it was required and if it along with the dates each revision was received and sent. will impact the budget or schedule.

Furthermore, drawings can be packaged as sets to Feature 1.1 – Document Control control and manage the design review process from schematic to construction drawings, as well as to With hundreds of submittals underway, it's easy to let manage the distribution of drawings to ensure everyone one or even several slip - not to mention easy to forget has the latest drawings required to construct the to remind someone that action must be taken. building. Use sets of documents to make certain With Contract Manager, no one forgets. It provides contractors and vendors have the latest documents comprehensive tracking of every submittal to ensure to bid for, construct and close out the job.

that approved, contract-specified materials arrive on time and as ordered. Contract Manager gives you a complete list of all submittals and their status. You'll know instantly where design reviews and submittals are in the approval process — who is responsible for what and by when. Take advantage of flexible workflow

Figure 1.1 Industry standard submittals workflow that can be configured to meet your needs.



Use Brava! 5.0 from Informative Graphics Corp. to view and redline files that are attached to Contract Manager documents. Just click an icon to view latest document, redlines, comments and annotations.

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log out	School Addit	ion-Automotive	Center (DEMO)					Feb 18	8, 200
Submittal						Layou	t: Bar Chart>	G	0
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					Facing Tile Sample Facing Tile Base Mortar 34	Switchboards Light Fixtures "Stark" (04210-001)	(16500-002) ) -004)	Unsubmitted Underway Approved	

Submittals	Track all submittals and multiple reviewers are review submittals.
Submittal Package	Group submittals into p comments at each revi comprehensive screen
Submittal Log	Track detailed informati status, package and me
Graphical Submittal View	Simplify the process of Quickly identify critical
Ball-in-Court (BIC)	Keep track of who is re
Multiple Review Cycles	Create a flexible workfl reviewers. Capture con
Transmittals	Save time and effort in transmittal letters to ac appropriate parties for
Drawing Log	Maintain and identify documentation.
Drawing Sets	Create drawing sets to process, bid packages, (BIC), progress, phase

BENEFIT

FEATURE

Figure 1.1.1 Managing submittals is simplified with an easy-to-view schedule of the submittal process.

and identify who is responsible, when each is due and if are required. Use flexible workflow to create, share and

into packages to handle complex assemblies. Record In review cycle and review dates and status updates in one preen.

rmation on status and responsibility, such as vendor, dates, nd more.

ess of managing submittals with an easy-to-view schedule. itical submittal activities behind schedule.

is responsible for what.

vorkflow to establish multiple review cycles and multiple e comments and status every step of the way.

ort in document preparations by automatically creating to accompany shop drawing or other enclosures sent to s for review.

ntify drawings, specifications and other supporting

Create drawing sets to document drawing revisions from the design review process, bid packages, drawing distribution and as-builts. Record ball-in-court (BIC), progress, phase and priority.

# Feature 1.2 – Accelerate Submittal Approval Times

With turnaround graphs, alerts, action lists and reports, Contract Manager accelerates design reviews and approvals while increasing accountability among project participants.

*Figure 1.2* Track and record workflow distribution of design reviews, key deliverables, specifications and shop drawings. Identify days elapsed, days overdue and who is responsible.

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Select an action. 💌 Go	0		e expand all	e <u>collapse a</u>
Title		Storm Drain Type A		
Number		00005		
Category				
Туре				
Required Start Required Finish Latest Review Cycle	Sep 3, 2007 Sep 27, 2007 2.0	Held 16 Elåpsed 31 Overdue 14		
Status - * New Item • Workflow Received from	Jim Wesley			
Steve Johnson	(Submittel Coordinator)			
+				
Sent to < multip	le reviewers>			
- Freedom				
Returned by	<multiple reviewers=""></multiple>			
Steve Joh	nson (Submittal Coordin	nator)		
+				
Forwarded	tto Jim Wesley			
Review Cycles (Late	st is 2.0. BIC is Jim Wesley	1		
	0 <u>1.0</u>			

FEATURE	BENEFIT
Overdue Report	Run overdue report
Dunning Letters	Automatically create
Submittal Turnaround Graph	Compare performar turnaround graphs t and take corrective
Personal Action Lists	Be alerted to requir dashboard. Ensure and distribution for
Alerts	Create alerts to uno material delivery, ar Simply establish a t
Ensure Materials are Delivered on Time	Link with P6 to ider required start and f

rts to quickly view outstanding reviews and approvals.

ate dunning letters for overdue submittal items.

ance and response time by contractor. Use submittal to view who is holding up the process, evaluate trends e action.

ired actions using the action list portal available from the e documents keep moving according to the defined workflow r timely responses.

nderstand whether a design review is late and impacting and whether it may ultimately impact the project end date. threshold for the alert as required by project or program.

entify installation activity and easily backtrack to identify finish dates.

# Feature 1.3 – Accelerate RFI Turnaround Times

Documenting and managing changes are critical to successful projects. Primavera Contract Manager organizes potential project issues and provides project team members an opportunity to collaborate on the question, propose solutions and communicate the final answer. Keeping the RFI moving keeps the project on target and on budget.

*Figure 1.3* Use RFIs to solicit additional information or clarify some aspect of the project, such as procedures, equipment and materials. Quickly identify impact to the project, potential cost and schedule delays, and distribute to contractors impacted.

PRIMAVERA		🕒 Transmittal Queue 🗐 Print 🔍 Search 🤇
log out School Addition-Aut	omotive Center (DEMO)	Feb 18, 20
Control Center > Bequests Log > Request for Information		Eschedule Øissues @attachmer
Select an action. 💌 Go		expand all collapse a
Request for Information		
Type*	Request for Information	
To*	Philadelphia County <u>Michael Stull</u>	
From*	ACME General Contractors Steve Johnson	
Number*	00017	
Date	Feb 18, 2008	
Title	Additional Parking Required	
Review Status - * NewItem (BIC - Michael	Shulik	
Question		
Work Impact	Yes - Work Impeded	
Reason for Request for Information	Customer Request	
Question		Edit Question
We are requesting additional parking in Are	a A. Please notify us regarding the additional cost and schedule impact.	*
		*1
Question Signed By	Steve Johnson	

FEATURE	BENEFIT
Collaborative RFIs	The entire project to field-level security r within the documer
RFI Logs	Group, sort and org questions are receiv the project participa
Action Required Portal	Be alerted to requir dashboard. Ensure and distribution for
Flexible Workflow	Use standard ball-in advantage of flexibl all review parties m review and approval
Secured Field Access	Logical field-level se questions, answers the field cannot be
RFI Turnaround Graphs	Compare performar graphs to view who corrective action.

team can create, access and respond to RFIs. Appropriate restricts user access to the module, the document and data ent.

ganize RFIs by vendor, status or contract to ensure eived and prompt responses are provided and shared with pants.

ired actions using the Action List Portal available from the e documents keep moving according to the defined workflow r timely responses.

in-court (BIC) workflow process to move documents, or take ble workflow options based on type of RFI. Route RFIs where nust approve or anyone can approve, or route RFIs for linear al.

security, including add, edit and view rights for documents, rs and proposed solutions, ensures that the question from e edited to suit answer.

ance and response time by contractor. Use RFI turnaround no is holding up the process, evaluate trends and take

### Feature 1.4 – Master the Issues

It happens in every job. A problem, a misunderstanding, a difference of opinion that gets discussed, reviewed and debated and eventually spans an incredible number of people, documents and weeks of involvement. With Issues Management, no issue goes unresolved or unrecorded. Contract Manager ties documents together to create an electronic file, enabling the project team to maintain an accurate history of events, compiling what happened, when it happened and who is accountable.

*Figure 1.4* Link several documents of any type — such as a submittal, daily report, RFI or even attached files — to gather relevant documents related to a topic that led to a formal change order, such as an RFI.

Control Con	
ACME General Contractors (Ball in Court)         Number       Title       Status       Priority       Change Involved       Opened       Ball in Court <sup>©</sup> 0 0001       Underground Utility issue       Approved       Normal         Feb 26, 2007       ACME General Contractors       Print Preview <sup>©</sup> 0 0001       Underground Utility issue       Approved       Normal         Feb 26, 2007       ACME General Contractors       Print Preview <sup>©</sup> 0 0002       Rock in Trenches       New Item       High         Jul 11.2007       ACME General Contractors       E-Mail Form <sup>©</sup> 0 0002       Inappropriate Concrete Mix       New Item       Normal         Aug 17, 2007       ACME General Contractors       Send to Inbox <sup>©</sup> 0 0002       Inappropriate Concrete Mix       New Item       High <ul> <li>Send to Inbox</li> </ul> <b>Design Group (Ball in Court)</b> <ul> <li>Mumber</li> <li>Title</li> <li>Status</li> <li>Priority</li> <li>Change Involved</li> <li>Opened Ball in Court</li> <li>Mumber</li> <li>Number</li> <li>Title</li> <li>Status</li> <li>Priority</li> <li>Change Involved</li> <li>Opened Ball in Court<th>• Go</th></li></ul>	• Go
Number       Title       Status       Priority       Change Involved       Opened       Ball in Court <sup>®</sup> 9 0001        Underground Utility Issue        Approved       Normal        Feb 26, 2007       ACME General Contractors       Print Preview <sup>®</sup> 9 0002        Rock in Trenches       New Item       High        Jul 11, 2007       ACME General Contractors       E-Mail Form <sup>®</sup> 9 0005        Additional Parking       New Item       Normal        Aug 17, 2007       ACME General Contractors       Send to Inbox <sup>®</sup> 9 0002        Inappropriate Concrete Mix       New Item       High        Sen 12, 2007       ACME General Contractors       Send to Inbox <sup>®</sup> 9 0002        Inappropriate Concrete Mix        New Item       High        Sen 12, 2007       ACME General Contractors       Send to Inbox <sup>®</sup> 9 0002        Glazed Facing Tile       Approved       Low        Mar 29, 2007       Design Group        Print Preview <sup>®</sup> 9 0003        Brick Selections       New Item       Low        Jun 20, 2007       Design Group        Send to Corr Sent <b>Merchanical Contractors (Ball in Court)</b> Normal	collaps
■ 00001       Underground Utility issue       Approved       Normal       ✓       Feb 26, 2007       ACME General Contractors       Print Preview         ■ 00004       Rock in Trenches       New Item       High       ✓       Jul 11, 2007       ACME General Contractors       E-Mail Form         ■ 00005       Additional Parking       New Item       Normal       ✓       Aug 17, 2007       ACME General Contractors       Send to Inbox         ■ 00002       Inappropriate Concrete Mix       New Item       High       ✓       Sep 12, 2007       ACME General Contractors       Send to Inbox         ■ 00002       Inappropriate Concrete Mix       New Item       High       ✓       Sep 12, 2007       ACME General Contractors       Send to Inbox         ■ 00002       Inappropriate Concrete Mix       New Item       High       ✓       Sep 12, 2007       ACME General Contractors       Send to Inbox         ■ 00002       Glazed Facing Tile       Status       Priority       Change Involved       Opened Ball in Court       Print Preview         ■ 00003       Brick Selections       New Item       Low       ✓       Mar 29, 2007       Design Group       Send to Car Sent         Mechanical Contractors (Ball in Court)       Normal       ✓       Jul 20, 2007       Design Group	
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<sup>™</sup> • 00005 <sup>™</sup> • Additional Parking        New Item        Normal        Aug 17, 2007 ACME General Contractors        Send to Inbox <sup>™</sup> • 00002        Inappropriate Concrete Mix        New Item        High        Sep 12, 2007 ACME General Contractors        Send to Inbox <b>Design Group (Ball in Court)</b> Sep 12, 2007 ACME General Contractors        Send to Inbox <b>Number</b> Title        Status        Priority        Change Involved        Opened Ball in Court <b>P o</b> 00002         Glazed Facing Tile        Approved        Low           Mar 25, 2007 Design Group        Print Preview <b>P o</b> 00002         Glazed Facing Tile        Approved         Low           Mar 25, 2007 Design Group        Print Preview <b>P o</b> 00003         Brick Selections         New Item         Low           Jun 20, 2007 Design Group         Send to Corr Sent <b>Marchanical Contractors (Ball in Court)          Number         Title         Status         Priority         Change Involved         Opened Ball in Court           Print Preview     </b>	- G
Imappropriate Concrete Mix       New Item       High       Sep 12, 2007 ACME General Contractors       Send to Inbox         Design Group (Ball in Court)       Number       Title       Status       Priority       Change Involved       Opened Ball in Court         If 0 00002       Glazed Facing Tile       Approved       Low       Mar 29, 2007 Design Group       Print Preview         If 0 00002       Glazed Facing Tile       Approved       Low       Mar 29, 2007 Design Group       Print Preview         If 0 00002       Brick Selections       New Item       Low       Jun 20, 2007 Design Group       Send to Corr Sent         Mechanical Contractors (Ball in Court)       Number       Title       Status       Priority       Change Involved       Opened Ball in Court         Number       Title       Status       Priority       Change Involved       Opened Ball in Court         If 0 00005       Plugging Water Line       Approved       Normal       Aug 28, 2007 Mechanical Contractors       Print Preview         Philadelphia County (Ball in Court)       Number       Title       Status       Priority       Change Involved       Opened Ball in Court         Number       Title       Status       Priority       Change Involved       Opened Ball in Court	▼ G
Design Group (Ball in Court)         Number       Title       Status       Priority       Change Involved       Opened Ball in Court	💌 G
Number       Title       Status       Priority       Change Involved       Opened Ball in Court         If a 00002       Glazed Facing Tile       Approved       Low       ✓       Mar 29, 2007       Design Group       Print Preview         If a 00003       Brick Selections       New Item       Low       ✓       Jun 20, 2007       Design Group       Send to Corr Sent         Mechanical Contractors (Ball in Court)       Mar 28, 2007       Design Group       Send to Corr Sent         Number       Title       Status       Priority       Change Involved       Opened Ball in Court	G
Image: Weight of the status       Priority       Change Involved       Opened Ball in Court       Print Preview         Image: Philadelphia County (Ball in Court)       Number       Title       Status       Priority       Change Involved       Opened Ball in Court         Philadelphia County (Ball in Court)       Number       Title       Status       Priority       Change Involved       Opened Ball in Court         Philadelphia       Title       Status       Priority       Change Involved       Opened Ball in Court	
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Mechanical Contractors (Ball in Court)         Number       Title       Status       Priority       Change Involved       Opened Ball in Court            Ø          Ø 00005        Plugging Water Line       Approved       Normal        Aug 28, 2007 Mechanical Contractors       Print Preview            Philadelphia County (Ball in Court)        Number       Title       Status       Priority       Change Involved       Opened Ball in Court	• G
Number         Title         Status         Priority         Change Involved         Opened Ball in Court           Image: Status         Approved         Normal         Aug 28, 2007         Mechanical Contractors         Frint Preview           Philadelphia County (Ball in Court)         Number         Title         Status         Priority         Change Involved         Opened Ball in Court	• 6
Image: Second	
Philadelphia County (Ball in Court)           Number         Title         Status         Priority         Change Involved         Opened Ball in Court	
Number Title Status Priority Change Involved Opened Ball in Court	• 6
🕂 🔹 00008 Tree Removal Closed Low 🖌 Aug 13, 2007 Philadelphia County Send to Corr Rovd	
	• 6
Stesson Industrials (Bail in Court)	
Number Title Status Priority Change Involved Opened Ball in Court	
🖹 • 00005 Rebar New Item High Jul 27, 2007 Stesson Industrials Send to Corr Sent	• 6

F	FEATURE	BENEFIT
	Issue Tracking	A complete issue tr problems that can l project schedule or
	Issue History	Create an electronic compiling what hap
	Search	Search for docume
	Search Attached Documents	Search attachments drawings and more

tracking system organizes project information to resolve lead to contract changes or claims or impact the overall or completion cost.

nic issue file to maintain an accurate history of events, appened, when it happened and who is accountable.

ents on the fly and quickly link them to issues.

ts such as Microsoft® Word® documents, spreadsheets, e.

### Feature 1.5 – Meeting Minutes

Accountability starts from your day-to-day operation on the project. Primavera tracks meetings, business items and those responsible for issues that arise on a project.

These action items are displayed and alarms are generated for overdue actions, ensuring project issues are resolved quickly.

*Figure 1.5* Capture all relevant and important information from latest meeting held, including outstanding items, who was supposed to attend and didn't, and if action is required.

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Busin	ess Ite	ms												
-	Add				and the late	t data data di second			Conceptor Line					
n'	No. B0002	Description Masonrywork is s	cheduled to start	Status Approved	Ball in Court ACE Mason Contractors	BIC Contact Dave Barron	Due Aug 6, 2007	Started	Completed	Activity ID	Order Code 80002	Priority High		de
E	B0004	Structural steel dr		Closed	Design Group	Chris Atkinson	Jul 5, 2007		Jul 27, 2007		B0004	High		de
E		Standard Paving		Closed	ACME General Contractors			Jul 17, 2007			B0006	High	9	d
ľ		Submittal Items: P		New Item							B0007	High	-	de
F	B0008	The engineer's of	fice has no air	New Item	ACME General Contractors	Steve Johnson	Aug 7, 2007	Aug 6. 2007			B0008	High		de
F	B0009	Filed documentat	ion requirements:	NewItem							B0009	High		de
ľ	B0010	Requisition sched	duled values were	New Item	Brink Contractors	Lou Jackson	Aug 10, 2007				B0010	High		de
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FEATURE	BENEFIT
Meeting Minutes Log	The Meeting Minut documented for th easily add a new m
Meeting Minutes	Contract Manager starting with the pr items are resolved,
Distribution	Make copies for ev know what happen
Ball-in-Court (BIC)	Create BIC for the the meeting.
Priority	Set priority level fo the most critical ta
Alerts	Notify users of any Values in the alert i

utes Log contains a brief summary of every meeting his project. Quickly understand the details for a meeting, meeting or generate the agenda for the next meeting.

automates the task of listing a meeting's business items, previous meeting's agenda so you don't overlook anything. As d, Contract Manager automatically crosses them off the list.

veryone at the meeting and even for those who just want to ned.

e entire meeting, as well as for individual items discussed at

or each business item so team members can concentrate on asks.

ny business items from the latest meeting that are due. t indicate the number of days to the due date.

#### Feature 1.6 – Daily Reports

Events are recorded on a daily basis, tracking items such as material deliveries, weather conditions, project issues and operated equipment. The Daily Report tracks the project's progression. All citations are stored to record project particulars. This provides you with the day-to-day perspective and the required documentation going forward.

*Figure 1.6* Link several documents of any type — such as a submittal, daily report, RFI or even attached files — to gather relevant documents related to a topic that led to a formal change order, such as an RFI.

log out		School Addition-Au	tomotive Center (DEM	2)											Feb 18
ontrol Center	r > Daily Repo port	rts Log >										E st	hedule	Øissues	attachr
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Report Pe	eriod		Daily												
Contract			200												
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Work Activ	vity														
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Equipmen Add Sour Slan Slan Slan Slan Field Force Visitors Materials Schedule Add A M	nt reg Idard Paving a Idard Paving a re	Activity ID	D6 Bulldozer PC200 Hoe Title	1	I Caterpiller I 3/4 CY Hoe ES	A	All Areas Area B <u>EE</u>	Idle	PCT	00	BD	IE	EE		dele dele
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FEATURE	BENEFIT
Daily Report Log	Track all daily repor history of project e justify costs, and it
Daily Reports	For each daily repo description of phys job site, lists of res report of any proble
Generate Daily Reports	Daily reports often use the Generate V to reflect any differ
Capture Key Events	Report work activit materials delivered
Record Potential Changes	Changes are often unforeseen condition process from a dail
Get Planned Activities	You can include act dates include the d project. Contract N remaining duration,
Progress Activities	As the field or cont automatically updat before applying to

orts issued by the field or from contractors. An accurate events is important in case you need to explain delays or it can be used to defend against litigation.

ort, enter project events and progress, including a sical conditions, a summary of the work accomplished at the sources used and delivered, a log of visitors to the site and a lems encountered that day.

n contain several similar items. To reduce data entry time, Wizard to create a copy of a daily report, then edit the copy erences.

ity, equipment, field force, visitors, weather conditions and d.

n identified in the field, due to errors and omissions, ions and the like. Initiate the change management workflow ily report.

ctivities underway in which their early start and/or early finish day of the daily report from a linked Project Management Manager then displays the Activity ID, percent complete, n, total float and description of each activity.

ntractor updates progress on those activities, you can ate the P6 schedule and review the changes for accuracy the project schedule.

### Feature 1.7 – E-mail Integration

E-mail is used to collaborate among all project participants. The ability to capture and record correspondence and collaboration records is essential to fully document all project communication. With Contract Manager, capture e-mail from an external e-mail box. Contract Manager supports any IMAP/POP-compliant e-mail servers, including Microsoft<sup>®</sup> Outlook<sup>®</sup>, Lotus Notes and other popular e-mail servers.

The managing project administrator determines what information is collected when importing project-related e-mail documentation. The administrators can choose whether e-mail attachment files are imported and recorded and select how and how often e-mail is imported into their e-mail correspondence log.

The newly created e-mail record captures details including To, From, Subject, and the body of the e-mail. If attachments, such as drawings, documents, PDFs and scanned documents, are associated with that e-mail record, they are automatically uploaded to the predetermined attachments directory and associated with the e-mail correspondence record.

FEATURE	BENEFIT
Capture External E-mails	Capture and record a project communicati e-mail servers, includ e-mail servers.
E-mails Records	Record who e-mail w including subject lin scanned documents
Batch Processing	Set options to impor processing that runs

*Figure 1.7* Capture e-mail from an external e-mail system, such as Microsoft<sup>®</sup> Outlook<sup>®</sup>. Capture the entire body of an e-mail, any attached files and the corresponding parties.

log out School Addition-Automotive Center (DEMO)		Oct
Correspondence Received	Layout: <my layout=""></my>	<b>.</b>
Select an action . Go Find		
Subject	Date Received	Time Received
🕯 e-mail:RFI #00005	Oct 19, 2007	12:45
🖌 🔹 e-mail:Fw: Did everyone see this! Expedition Automation Results - FAIL	Oct 12, 2007	15:40
e-mail:Fw: Health Check and Performance Check	Oct 11, 2007	15:49
🕼 • e-mail:Fw: EJB Conversion Document in Wiki	Oct 11, 2007	15:30
e-mail:Fw: EJB Conversion Document in Wiki	Oct 11, 2007	15:28
🖌 💩 e-mail:Fw: White Paper Roundup: Top Ten 10G Ethernet Myths, RFID Asset Management, URL Filtering Best Practices and M	ore Oct 11, 2007	11:03
🛿 💩 <u>e-mail:Fw: List of items for your feedback</u>	Oct 9, 2007	13:43
🖌 💩 e-mail:Fw: PlanExpress latest code	Sep 18, 2007	12:27
🔹 e-mail:Fw: Modified Server Config for Everest	Sep 11, 2007	16:54
∦	Sep 7, 2007	6:21
Additional Parking COR	Sep 6, 2007	9:04
8 • Water Line COR	Sep 4, 2007	5:53
Water Line Change in Condition	Aug 28, 2007	5:37
🕼 🛛 Parking RFI	Aug 17, 2007	8:26
s Utility CO	Jul 24, 2007	9:18
≰ <u>Utilities COR</u>	Jul 18, 2007	4:13
🖞 💩 <u>Glazed Facing Tile</u>	Jul 17, 2007	12:33
	Jun 25, 2007	3:23
Glazed Facing Tile	Jun 25, 2007	10:58

d all external e-mail correspondence to fully document all ation. Contract Manager supports any IMAP/POP-compliant cluding Microsoft<sup>®</sup> Outlook<sup>®</sup>, Lotus Notes and other popular

I was to, from and distributed parties. Capture all e-mail text, line and body of an e-mail. Upload attached files, including hts, PDFs and drawing files.

ort the e-mail on demand or use a predetermined batch ns daily at a specific time.

# Change Management

Nothing is as predictable as changes in a construction project. Tracking, documenting, negotiating, getting paid and making payments for changes also are part of the job. Contract Manager gives you a better way to track the change process, create supporting documentation and analyze the financial and schedule impacts a change may have at any stage in the negotiation process.

# Feature 2.1 – Change Management Workflow Processing

Controlling changes involves notifying and coordinating affected project participants, as well as containing costs

and the schedule for the project. The Contract Manager Change Management processing window provides an overview of each change from the estimate phase to final approval for both budgeted and committed costs. Since the change process in a project differs according to the nature of the change and the company's process for recording and tracking changes, the Change Management module of Contract Manager enables you to create a customized workflow to meet your company's change management needs. Using Change Management simplifies the change process.

*Figure 2.1* At a glance, get a complete understanding of total costs of changes on a project or program.

Image: Second Structure     Image: Second Structure       Construction Deficiency (Reason)       Trile       Image: Second Structure       Customer Request (Reason)       Trite       Image: Second Structure       Image: Second Structure <t< th=""><th></th><th>Find Quoted Budget \$0.00 Quoted Budget</th><th></th><th>Negotiated Budget</th><th>Negotiated Commitments</th><th></th><th>expand all</th><th></th></t<>		Find Quoted Budget \$0.00 Quoted Budget		Negotiated Budget	Negotiated Commitments		expand all	
Change Management         Select an action.       Co         Reason)       Co         Thie       S         Image: Select an action.       Co         Thie       S         Image: Select an action.       Co         Thie       S         Image: Select an action.       S	Status New Item Status	Quoted Budget \$0.00 Quoted Budget			Negotiated Commitments	Final Budget	expand all	• collaps
(Reason)       Title         Title       S         Image: Second Facing Tile       F         Construction Deficiency (Reason)       Title         Title       S         Image: Second Facing Tile       F         Construction Deficiency (Reason)       F         Title       S         Image: Second Facing Tile       F         Customer Request (Reason)       F         Title       S         Image: Second Facing Tile       F         Errors and Omissions (Reason)       F	Status New Item Status	Quoted Budget \$0.00 Quoted Budget			Negotiated Commitments	Contraction of the local division of the loc	Se nuntur	Scope
Title     S       Image: Section of the section	New Item Status	\$0.00 Quoted Budget			Negotiated Commitments	Contraction of the local division of the loc	Final Commitments	
Image: Second Structure     Image: Second Structure       Construction Deficiency (Reason)       Trile       Image: Second Structure       Customer Request (Reason)       Trite       Image: Second Structure       Image: Second Structure <t< td=""><td>New Item Status</td><td>\$0.00 Quoted Budget</td><td></td><td></td><td>Negotiated Commitments</td><td>Contraction of the local division of the loc</td><td>Final Commitments</td><td></td></t<>	New Item Status	\$0.00 Quoted Budget			Negotiated Commitments	Contraction of the local division of the loc	Final Commitments	
Construction Deficiency (Reason) Title Customer Request (Reason) Title S Additional Parking Required Errors and Omissions (Reason)	Status	Quoted Budget	Quele d Carrowitz	\$0.00		\$0.00		100 March 100
Title S Customer Request (Reason) Title S Additional Parking Required P Errors and Omissions (Reason)			Overheid Committee - 1					Out of Sco
Image: Second state state     Image: Second state       Customer Request (Reason)     Image: Second state       Title     Second state       Image: Second state     Second state			Quele d Committee t					
Customer Request (Reason) Title S Additional Parking Required P Errors and Omissions (Reason)	Approved	** ***	Guoted Commitments	Negotiated Budget	Negotiated Commitments	Final Budget	Final Commitments	Scope
Title S Additional Parking Required F Errors and Omissions (Reason)		\$6,200.00	\$5,800.00	\$0.00	\$5,500.00	\$7,200.00	\$5,500.00	Out of Sco
Title S S Additional Parking Required Errors and Omissions (Reason)		Brendy (Production			2.0.001 - 0.1			
Errors and Omissions (Reason)	Status	Quoted Budget	Quoted Commitments	Negotiated Budget	Negotiated Commitments	Final Budget	Final Commitments	Scope
	NewItem	\$9,600.00	\$7,000.00	\$0.00	\$0.00	\$0.00	\$0.00	Out of Sco
		1.57	17.4154	1.000				-
	Status	Quoted Budget	Quoted Commitments	Negotiated Budget	Negotiated Commitments	Final Budget	Final Commitments	Scope
🖬 🔹 Underground Utilities	Approved	\$3,300.00	\$3.000.00	\$0.00	\$0.00	\$3,300.00	\$3,000.00	Out of Sco
Se Inappropriate Concrete Mix	NewItem	\$0.00		\$0.00		\$0.00		Out of Sco
Field Conditions (Reason)		2011				A1.000		
	Status	Quoted Budget	Quoted Commitments	Negotiated Budget	Negotiated Commitments	Final Budget	Final Commitments	Scope
🗹 🔹 Rock in Trenches	Proceed	\$6,000.00	\$5,500.00	\$0.00	\$0.00	\$6,000.00	\$5,500.00	Out of Sco
Unforeseen Conditions (Reason)								
Contraction of the second s	Status	Quoted Budget	Quoted Commitments	Negotiated Budget	Negotiated Commitments	Final Budget	Final Commitments	Scope
Glazed Facing Tile	Approved	\$0.00	\$9,850.00	\$0.00	\$0.00	\$9,850.00	\$9,850.00	Out of Sco
Loa Totals:		\$25.100.00	\$31.150.00	\$0.00	\$5.500.00	\$26.350.00	\$23.850.00	ļ
bu roas.	•	\$23.100.00	\$31.130.00	30.00	\$3.300.00	\$20.350.00	\$23.030.00	

FEATURE	BENEFIT
Change Management Log	A complete change impact the overall
Custom Reason Code	Develop standards unforeseen conditi
Layouts	Create custom lay Microsoft® Excel® f

Change Management provides one location to enter a necessary contract, contractor and costing information about a change. At any stage of the process, you can

**Diagram 2.1** Change Management process workflow is based on standard change management processing and provides flexible configuration options to support an organization's or program's specific needs.

Phase Estimated Cost Quot Budget Commitments

ge tracking system organizes change information that may I project schedule and total project cost.

s and procedures based on classification of change, including ions, material delays or errors and omissions.

youts to group, sort and organize changes, and export to for quick reporting.

all	see the current status of the change, including estimates,
n	costs, documents and responsibilities of all parties.

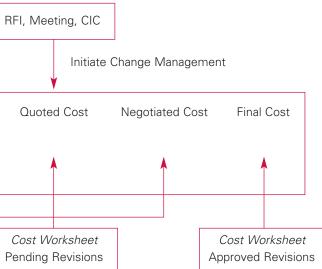


Figure 2.1.1	Capture, record and document the entire change process, including parties involved, schedule
	delays and costs, from initial estimate to approved change.

PRIMAVERA	Contact of the second se			Transmittal Queue	
log out Scho	ol Addition-Automotive Center (DEMO)				Feb 25,
Control Center > Change Managen				Bissues Dattach	ments Contract sum
Change Managemen				and the second sec	
Select an action Go				= <u>ex</u>	(pand all • collaps)
Change Management					
Number*	00002				
Dated	Jul 7, 2007				
Title	Underground U	Juilities			
Phase	Estimated Cost	Quoted Cost	Negotiated Cost	Final Cost	Projected Co:
Budgeted Committed	4000.000 \$4,000.00 (1 of 1)	3300.000 \$3.000.00 (1 of 1)	\$0.00 \$0.00	3300.000 \$3.000.00 (1 of 1)	\$3,300.0 \$3,000.0
and the second sec					
Add Add Multip		Estimated (RFP) Cost Time Date	Quoted (COR) Cost Time D	ommitments \$3,000.00 Copy Com Negotiated (PRO) ate Cost Time	Final (CC Date Cost
Add Add Multip			Quoted (COR) Cost Time D	Negotiated (PRO) ate <u>Cost Time</u>	Final (CC Date Cost
Add Add Multip		Cost Time Date	Quoted (COR) Cost Time D	Negotiated (PRO) ate <u>Cost Time</u>	Final (CC
Add Add Multip	Paving and Concrete, Inc. (AA450-01000)	Cost <u>Time Date</u> • <u>\$4,000.00</u> 10 Jul 18, 2003	Quoted (COR) <u>Cost Time</u> D 7 • <u>\$3.000.00</u> 1 Jul 10	Negotiated (PRO) ate <u>Cost Time</u> 8, 2007	Final (00 Date Cost + \$3.000.0
Add Add Multip  Add Contract/PC  Standard	Paving and Concrete, Inc. (AA450-01000)	Cost <u>Time Date</u> • <u>\$4,000.00</u> 10 Jul 18, 2003	Quoted (COR) <u>Cost Time</u> D 7 • <u>\$3.000.00</u> 1 Jul 10	Negotiated (PRO) ate <u>Cost Time</u> 8, 2007	Final (CC Date Cost \$3,000.0
Add Add Multip  Add Contract/PC  Standard  Remarks	Paving and Concrete, Inc. (AA450-01000)	Cost <u>Time Date</u> • <u>\$4,000.00</u> 10 Jul 18, 2003	Quoted (COR) <u>Cost Time</u> D 7 • <u>\$3.000.00</u> 1 Jul 10	Negotiated (PRO) ate <u>Cost Time</u> 8, 2007	Final (CC Date Cost + \$3,000.0 \$3,000.0
Add Add Multip  Add Contract/PO  Standard  Remarks Documents by Phase	Paving and Concrete, Inc. (AA450-01000)	Cost <u>Time Date</u> • <u>\$4,000.00</u> 10 Jul 18, 2003	Quoted (COR) <u>Cost Time</u> D 7 • <u>\$3.000.00</u> 1 Jul 10	Negotiated (PRO) ate <u>Cost Time</u> 8, 2007	Date         Final (CC           Date         2031           \$ \$3,000.0         \$\$3,000.0
Add Add Multip Add Contract/PC Standard Remarks Documents by Phase Details	Paving and Concrete. Inc. (AA450-01000) Total Included:	Cost Time Date = <u>\$400000</u> 10 Jul 18, 2003 <b>\$4,000.00</b>	Quoted (COR) <u>Cost Time</u> D 7 • <u>\$3.000.00</u> 1 Jul 10	Negotiated (PRO) ate <u>Cost Time</u> 8, 2007	Final (CC Date Cost \$3,000.0 \$3,000.0
Add Add Multip  Add Contract/PO  Standard  Remarks Documents by Phase	Paving and Concrete, Inc. (AA450-01000)	Cost Time Date = <u>\$400000</u> 10 Jul 18, 2003 <b>\$4,000.00</b>	Quoted (COR) <u>Cost Time</u> D 7 • <u>\$3.000.00</u> 1 Jul 10	Negotiated (PRO) ate <u>Cost Time</u> 8, 2007	Final (CC Date Cost + \$3,000.0 \$3,000.0
Add Add Multip Add Contract/PC Standard Add Multip Standard Add Multip Add Mul	Paving and Concrete. Inc. (AA450-01000) Total Included:	Cost Time Date = <u>\$400000</u> 10 Jul 18, 2003 <b>\$4,000.00</b>	Quoted (COR) <u>Cost Time</u> D 7 • <u>\$3.000.00</u> 1 Jul 10	Negotiated (PRO) ate <u>Cost Time</u> 8, 2007	Final (C Date Cost + 13.0001 \$3.000.0
Include Contract/PO     Standard     Standard     Remarks Documents by Phase Details	Paving and Concrete. Inc. (AA450-01000) Total Included:	Cost Time Date = <u>\$400000</u> 10 Jul 18, 2003 <b>\$4,000.00</b>	Quoted (COR) <u>Cost Time</u> D 7 • <u>\$3.000.00</u> 1 Jul 10	Negotiated (PRO) ate <u>Cost Time</u> 8, 2007	Final Date Co. • 13.00 \$3.00

FEATURE	BENEFIT
FEATORE	DENEFII
Change Management Tracking	A complete change tracks each change budgeted and comr
Flexible, Custom Workflows and Approvals	Customize documen requirements. Route approvals, or build o review and approve can approve, or line
Centralized Processing	A central location e costing information the current status of responsibilities of a
Notifications	Use Contract Mana changes that might
Negotiations	Use Contract Mana contractors or subc contractors or subc

e management workflow processing center captures and e, from the estimate phase to final approval, for both nmitted costs.

ent workflow based on program and organization deployment te documents using standard ball-in-court (BIC) and date-driven I custom workflows in which multiple parties are required to re. Circulate approvals where all parties must approve, anyone lear approval is required. Establish monetary limits per user.

enables you to enter all necessary contract, contractor and n about a change. At any stage of the process, you can see of the change, including estimates, costs, documents and all parties.

ager Change Management to notify the owner of any nager the schedule or value of the budget contract.

ager Change Management to receive quotes from contractors and negotiate with both the owner and contractors to properly compensate the affected parties.

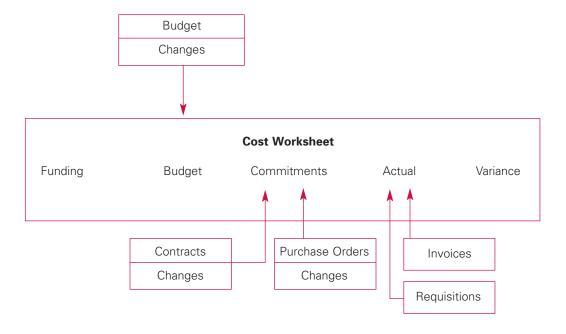
# Job Cost Management

### Feature 2.2 – Markups

With Contract Manager, you may mark up change documents and add additional costs, such as overhead and profit, to change orders and proposals. You can set default values or percentages for each markup category. Typically, you will collect all proposals from committed parties and roll up the costs and codes of each document to create a change document for the customer or owner of a project. With Contract Manager, you can forecast project costs and simplify contract control. The Cost Worksheet enables you to review the detailed implications of even cost and profit element in your control. Analyze budget and funding, review commitment documents and

*Figure 3.0* Cost elements are summarized automatically based on project funds, budgets and commitments to date to analyze trends and predict cashflow.

FEATURE	BENEFIT
Default Mark-up Values by Contract or Purchase Order	Set default mark-up values for overhead, profit and other mark-up categories that you create. The default values are used in all mark-up calculations. Establish separate mark-up values for different contracts and purchase orders, and add mark-up values on the fly as needed.
Mark-up Based on Cost Type	Establish different mark-up values based on total labor, material and equipment costs.
Mark-up Based on Percent or Flat Value	Assign mark-up categories using a percentage rate or a flat amount for overhead and profit.
Roll Mark-up Values to Collected Changed Order	Contract manager provides end-to-end process flows. Contract administrators can choose to maintain mark-up values and automatically roll them from proposed change orders (proposals) to the final change order used for approval.



ts	record requisitions and invoices as they are received.
	The Cost Worksheet automatically collects and
əry	summarizes detailed cost elements from contract,
ets	requisitions, changes and purchase orders and
	dynamically displays them in one easy-to-read form.

Figure 3.0.1 Create layouts to group and organize job cost information for quick reports and analytics.

gout	School Addition-Automotive	Center (DEMO)						Feb 25
trol Center >	(Displayed in U.S. dollar	C1				5	Layout (my layout)	▼ G
lect an action.	and the second	] [<< Previous] 1 2	3 [Next >>] [] as	t] Find			expan	nd all collaps
	L. M.		a prostant prost	Line			- OAPG	id all a contapo
1 (01 : General Co	onstruction Requirements)							
Cost Code	Title	Original Budget	Revised Budget	Projected Budget	Original Commitment	Revised Commitment	Projected Commitment	Projected Varian
Subtotals:		\$1,516,500.00	\$1,516,500.00	\$1.516.500.00	\$576.775.88	\$576.775.88	\$576.775.88	\$939.724.
2 (02 : Sitework)					a second second second second	and the second second		
Cost Code	Title	Original Budget	Revised Budget	Projected Budget	Original Commitment	<b>Revised Commitment</b>	Projected Commitment	Projected Variance
🛯 🔹 <u>02 02050 D</u>	Basic Site Materials	\$121,000.00	\$121,000.00	\$121,000.00	\$0.00	\$0.00	\$0.00	\$121,000.0
02 02100 D	Site Remediation	\$150,000.00	\$150,000.00	\$150,000.00	\$0.00	\$0.00	\$0.00	\$150,000.0
02 02100 S	Excevation	\$75,000.00	\$75,000.00	\$75,000.00	\$0.00	\$0.00	\$5,500.00	\$69,500.0
02 02110 S	Site Remediation Supervision	\$26,000.00	\$26,000.00	\$26,000.00	\$0.00	\$0.00	\$0.00	\$26.000.0
02 02200 S	Site Preparation	\$48,000.00	\$48,000.00	\$48,000.00	\$0.00	\$0.00	\$0.00	\$48,000.0
02 02 300 S	Earthwork & Landscaping	\$250,000.00	\$250,000.00	\$250,000.00	\$0.00	\$0.00	\$0.00	\$250,000.0
a 02 02500 S	Utility Services	\$105.000.00	\$108,300.00	\$108,300.00	\$0.00	\$3.000.00	\$3,000.00	\$105,300.0
2 • <u>02 02700 S</u>	Bases and Paving	\$66,500.00	\$66,500.00	\$74,500.00	\$0.00	\$0.00	\$7,000.00	\$67.500.0
🔮 🔹 <u>02 02950 D</u>	Site Restoration & Rehabilitat	\$120,000.00	\$120,000.00	\$120,000.00	\$100,000.00	\$100,000.00	\$100,000.00	\$20,000.0
Cost Code	Title	Original Budget	Revised Budget	Projected Budget	Original Commitment	Revised Commitment	Projected Commitment	Projected Varian
Subtotals:		\$961,500.00	\$964,800.00	\$972,800.00	\$100,000.00	\$103,000.00	\$115,500.00	\$857,300.
3 (03 : Concrete)		a second second	e unis de	01212-012	San Northeast		And a first state of the	and for the second
Cost Code	Title	Original Budget	And a second sec	Projected Budget	A REAL PROPERTY AND A REAL	<b>Revised Commitment</b>	Projected Commitment	Projected Variance
• <u>03 03300 S</u>	Cast-in-Place Concrete	\$1,755.000.00	\$1,755,000.00	\$1,759,000.00	\$1,736,600.00	\$1,736,600.00	\$1,736,600.00	\$22,400.0
	Precast Concrete	\$35,000.00	\$35,000.00	\$35,000.00	\$31,500.00	\$31,500.00	\$31,500.00	\$3,500.0
Log Totals:		\$10.100.000.00	\$10.119.150.00	\$10.146.900.00	\$8.039.685.88	\$8.058.035.88	\$8.090.545.88	\$2.056.354.1
-								

FEATURE	BENEFIT
Cost Worksheet	Organize budgets, comprehensive vie
Cost Code Definitions	Customize cost coo cost information in represents direct co Institute [CSI] divis
Standardize Cost Structure	Standardize cost d project to the next
Budgets	Calculate the origir budget, revised bu to the budget and
Commitments	Use the Cost Work revisions to comm revisions to comm and tally the overal
Funds	Understand how jo state, federal and l
Actuals	As invoices are rec actuals to date to g
Variances	The Cost Workshe committed costs. I approved variance projected variances

, funding accounts, commitments and actuals for a ew of the job, with detail for every cost item.

ode definitions to enable Contract Manager to sort and display n custom reports. For example, the cost code "06 100 D" costs (D) related to rough carpentry (Construction Specifications ision 06 100).

definitions and share the cost code structure from one t.

nal budget amount for the project, approved revisions to the udget amount, pending budget revisions, manual adjustments the projected budget.

rksheet to understand original commitments, approved mitted costs, the revised commitment to date, pending mitted costs and estimated revisions to committed costs, all projected commitment.

job costs are being funded by outside sources, including local agencies.

aceived and payments are made, automatically calculate get a complete picture of cash flow to date.

eet calculates the difference between budgeted and . Understand such variances as the original planned variance, e to date, pending variance, and overall line item and job cost es.

### **Feature 3.1 – Approval Processing**

Primavera Contract Manager offers two types of approval processing: a standard process in which simple approval is required based on the document To and From vendors, and a configurable workflow routing

process. Contract Manager's document routing process is designed to be flexible enough to meet an organization's standard business processes yet easy enough to use so these companies can get up and running quickly.

Figure 3.1.1 Anyone can approve: workflow process in which all reviewers receive notification that a document requires review and approval. Once the first reviewer approves, the document status is changed to approved.

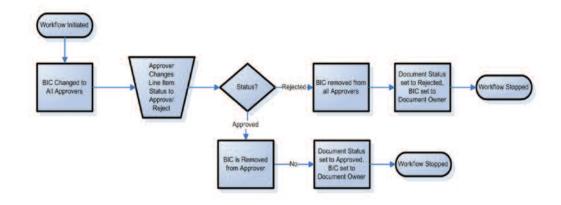
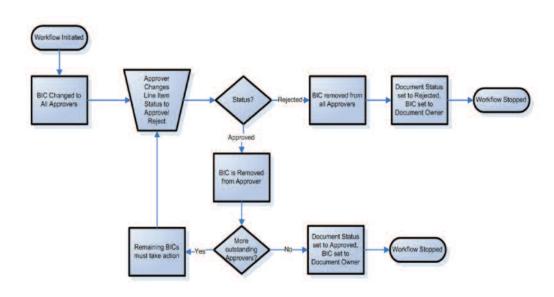
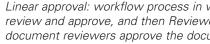


Figure 3.1.2 All must approve: workflow process in which all reviewers receive notification that a document requires their review and approval. Once all reviewers approve the document, the document status is changed to approved.





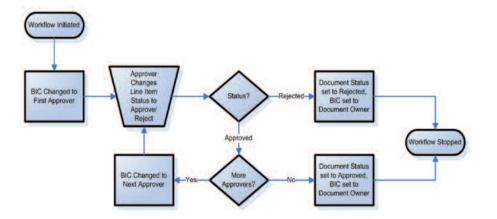




Figure 3.1.3 Linear approval: workflow process in which reviewers are established linearly. Reviewer 1 must review and approve, and then Reviewer 2 receives notification to review and approve. Once all document reviewers approve the document, the document status is changed to approved.

### Feature 3.2 – Summarize Contract Detail

The contracts module improves contractor, vendor and supplier management. Contract managers can create, manage and understand the status of a contract and how the contractor is performing by viewing one simple screen. Verify that a contractor's insurance is current, submissions were delivered as specified and payment requisitions have been submitted, and reflect the cost of schedule impact due to any change.

*Figure 3.2* Understand all details about a contract, including approval status, payments and changes to date, insurance compliance and submittal reviews.

log out School Addition	n-Automotive Center (	DEMO)					Feb 25,
ontrol Center > Contracts - Committed Log Contract	>		Contract summar	y 🔠 line items 🛙	a <sub>details</sub> Eschedu	ule Ø <u>issues</u> a	2 attachm
Select an action. 💌 Go						expand all	collaps
Contract							
To*		ndard Paving and Co Wesley	oncrete, Inc.			address	
Fram*		AE General Contrac <u>re Johnson</u>	tors			address	
Number*	AA4	50-01000					
Deted	Jun	11,2007	Spec Section		Earthwork		
Total Cost	\$522	2,983.00					
Review Status - * New Item (BIC - <no< td=""><td>BIC selected&gt;&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td></no<>	BIC selected>>						
Contract Summary						top	p of pag
Original Contract/PO Sum	\$522,9	83.00	Original	Completion Date		Jan 6, 2008	
Approved Changes	\$3,0	00.00					
Revised Contract Sum	\$525,9	83.00	Revised	Completion Date		Jan 7, 2008	
Actual to Date	\$128,0	00.00					
Balance	\$397,9	83.00					
Changes							
Initiate Change Management	t						
Title ~		Type	Change Management	Change Date		Approved Chang	<u>pes</u> E
<ul> <li>Additional Parking Required (I</li> <li>Rock in Trenches (00003, Sep</li> </ul>		Change Order Request Change Order	<ul> <li>Additional Parking Required (00005, Aug 17, 2007)</li> <li>Rock in Trenches (00003, Jul 11, 2007)</li> </ul>	Aug 18, 2007 Sep 5, 2007			
		Change Order	<ul> <li>Underground Utilities (00002, Jul 7, 2007)</li> </ul>	Jul 26, 2007		\$3.	000.00
<ul> <li>Underground Utilities (00001, J</li> </ul>							

FEATURE	BENEFIT
Contracts	Create, copy and m contracts and unit-p
Contract Logs	Organize all contrac Create layouts, grou
Spec Section	Contract Manager i MasterFormat stan Construction Specif Canada (CSC). Use for your type of bus
Contract Summary	View at a glance the of contract.
2 Clicks to Anywhere	From the Contract s policy information, or reject changes a
Negotiate Terms	Establish terms for individual contract.
Schedule	Contract Manager i identifying work pa
Alerts When Contract Not Approved	Alerts notify users of scheduled to start. or after the contract



manage all contract details, including both lump sum -price contracts.

acts, including committed, budgeted and custom contracts. bup, sort, organize and subtotal for quick reports and analytics.

includes a specification dictionary that is part of the ndard coding system, which was developed by the ifications Institute (CSI) and Construction Specifications e this dictionary as a starting point and modify as necessary usiness. Assign spec section item to best describe a contract.

he total cost, approved and pending changes and balance

Summary screen, use a single click to request updated , create dunning letters for outstanding submittals, approve and certify requisitions.

r payment requisitions and markups for changes by

is fully integrated with P6. Establish links to the schedule by ackages associated with each contract from the P6 schedule.

of contracts that are not approved and when they are . Values entered in the alert are the number of days before ct start date.

### Feature 3.3 – Procurement

Contract Manager organizes the complex purchasing process. The procurement model manages and easily analyzes each bid. A thorough review of each bid allows for a quick comparison by bid item and vendor. As a result, be sure the best contract for the project is selected.

*Figure 3.3* Create procurement items and initial estimate, track bids from contractors, compare bids and award lowest bidder with the click of a button.

log out School Ad	ddition-Automot	ive Center (DEMO)							Feb 25, 2
ontrol Center > Procurement Items Lo	nd >					# bid tabulation	schedule	Øissues	attachme
Gelect an action. 💌 Go								xpand all	collapse
Title *		Site Remediatio							
Purchase Type*		Subcontractor							
CSI Division *		Site Work							
Original Estimate		\$760,000.00							
Procurement Estimate		\$760,000.00							
Bid Tabulation III									top of page
Status - * Approved <bic -="" <no="" bi<="" td=""><td>ic selected // -</td><td>on bids complete</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></bic>	ic selected // -	on bids complete							
Bid Tabulation #*									
						Add F	lidder	Organia	e Biddere
						Add E	lidder	Organiz	e Bidders
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🕼 Show Details	20.111.112.25.1.1	ete/Plug/Incomplete		- Charles and the	Procurement Est	imate	T Sho	Organiz	re Bidders
	ţ		JP. Johnson Paving	- Charles and the	and the second second second		T Sho		e Bidders
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Scope Items	Add 2100 D) king (02100)	Procurement Estimate g		Ľ	Standard	imote I Paving and Concrete, Inc. 📧	F Sho	w Full Grid	× delete
Scope Items Site Remediation (02 0) Remove Asphalt park General Items	Add 2100 D) king (02100) Add	Procurement Estimate \$750,000.00 \$75,000.00	\$735.0	<b>800.00</b> \$0.00	Standard	imote I Paving and Concrete, Inc. K	E Sho X E 1.000.00 \$0.00	w Full Grid	× delete
Scope Items Cope Items Site Remediation (02 0) Remove Asphalt park General Items Permits and EPA (01 01 30)	Add 2100 D) king (02100) Add	Procurement Estimate \$750,000.00 \$75,000.00 \$75,000.00 \$10,000.00	\$735.6	<b>000.00</b> \$0.00	Standard	imote I Paving and Concrete, Inc. K	Sho × S 1,000.00 \$0.00 \$0.00	w Full Grid	•
Scope Items Site Remediation (02 0) Remove Asphalt park General Items	Add 2100 D) king (02100) Add	Procurement Estimate \$750,000.00 \$75,000.00	\$735.0	<b>000.00</b> \$0.00	Standard	imote I Paving and Concrete, Inc. K	E Sho X E 1.000.00 \$0.00	w Full Grid	× delete
Scope Items Cope Items Site Remediation (02 0) Remove Asphalt park General Items Permits and EPA (01 01 30)	Add 2100 D) king (02100) Add	Procurement Estimate \$750,000.00 \$75,000.00 \$75,000.00 \$10,000.00	\$735.6	<b>000.00</b> \$0.00	Standard	imote I Paving and Concrete, Inc. K	Sho × S 1,000.00 \$0.00 \$0.00	w Full Grid	× delete
Scope Items Constraints Site Remediation (02 0) Constraints Remove Asphalt park General Items Permits and EPA (01 01 30 Total	Add 2100 D) king (02100) Add 00 D)	Procurement Estimate \$750,000.00 \$75,000.00 \$75,000.00 \$10,000.00	\$735.0 89. \$744.5	<b>000.00</b> \$0.00	Standard	imote I Paving and Concrete, Inc. K	Sho × S 1,000.00 \$0.00 \$0.00	w Full Grid	× <u>delete</u>
Scope Items Site Remediation (02 0) Site Remove Asphalt park General Items Permits and EPA (01 01 30 Total Alternates	Add 2100 D) king (02100) Add 00 D)	Procurement Estimate \$750,000.00 \$75,000.00 \$75,000.00 \$10,000.00	\$735.6	<b>000.00</b> \$0.00	Standard	imote I Paving and Concrete, Inc. K	Sho × S 1,000.00 \$0.00 \$0.00	w Full Grid	× delete
Scope Items Site Remediation (02 0) Site Remove Asphalt park General Items Permits and EPA (01 01 30 Total Alternates	Add 2100 D) king (02100) Add 00 D)	Procurement Estimate \$750,000.00 \$75,000.00 \$75,000.00 \$10,000.00	\$735.0 89, \$744.5	\$0.00 \$0.00 \$555.00 \$555.00	Standard	imote I Paving and Concrete, Inc. K	Sho × S 1,000.00 \$0.00 \$0.00	w Full Grid	× delete
Scope Items Ste Remediation (02 02 Remove Asphalt park General Items Permits and EPA (01 01 30 Total Alternates (none>	Add 2100 D) king (02100) Add 00 D)	Procurement Estimate \$750,000.00 \$75,000.00 \$75,000.00 \$10,000.00	\$735.0 89, \$744.5	<b>000.00</b> \$0.00	Standard	imote I Paving and Concrete, Inc. K	Sho × S 1,000.00 \$0.00 \$0.00	w Full Grid	× <u>delete</u>
Scope Items Site Remediation (02 0) Site Remove Asphalt park General Items Permits and EPA (01 01 30 Total Alternates	Add 2100 D) king (02100) Add 00 D)	Procurement Estimate \$750,000.00 \$75,000.00 \$75,000.00 \$10,000.00	\$735.0 89, \$744.5	\$0.00 \$0.00 \$555.00 \$555.00	Standard	imote I Paving and Concrete, Inc. K	Sho × S 1,000.00 \$0.00 \$0.00	w Full Grid	× <u>delete</u>
Scope Items Ste Remediation (02 02 Remove Asphalt park General Items Permits and EPA (01 01 30 Total Alternates (none>	Add 2100 D) king (02100) Add 00 D)	Procurement Estimate \$750,000.00 \$75,000.00 \$75,000.00 \$10,000.00	\$735.0 89, \$744.5	\$0.00 \$0.00 \$555.00 \$555.00	Standard	imote I Paving and Concrete, Inc. K	Sho × S 1,000.00 \$0.00 \$0.00	w Full Grid	× <u>delete</u>

FEATURE	BENEFIT
Procurement	Contract Manager p procurement items item, including mat
Bid Management	Track bids from con track who is bidding individual compone contract or purchas
Top-Down/Bottom-Up Calculations	The top-down/bottc can roll up (add up Use the re-sync fea
Alert to When Commitments Exceed Procurement Estimate	Alerts notify users i original commitmer
Procurement Statistics	View procurement awarded, classificat Institute (CSI) divisi
Bidder Statistics	Understand the sta items and items bio award procurement
Procurement Analysis	Using the Cost Wor versus the original of effectiveness and e



procurement enables you to enter and track information for s and the related scope items that make up the procurement aterials, equipment or labor.

ontractors on materials or jobs. Once an item is open for bid, ng, how much they bid for each procurement item and its ents, and then award the procurement item and issue a se order to the winning bidder.

tom-up feature applies to procurement tables where values p into) into higher levels, and all levels are potentially editable. Pature to equalize the top-down/bottom-up calculations.

if the variance between the procurement estimate and the ents has reached a threshold.

t items for a job and understand the percentage of job ation goals and statistics by Construction Specification sion.

atus of all bidders, including outstanding procurement id but not awarded, and compare lowest bidders and nt items.

orksheet, quickly understand total procurement estimate I estimate to calculate estimation accuracy, buyout estimated gross profit.

### **Feature 3.4 – Award Contracts**

Reviewing all items to be purchased, the Contract Wizard consolidates contracts and project administration. Multiple items can also be awarded to one vendor. The Wizard assists in selecting the most efficient contract

for the optimum overall project delivery. From start to finish, the Wizard helps you achieve the most efficient processing of contracts for best overall project delivery.

Figure 3.4 With a single click, award contracts or purchase orders to the most qualified bidder.

Award Contract/F	20	help
Set Up Contract/PO Det	ails	
Procurement Item	Site Remediation (02100)	
Award Type *	Contracts - Committed	
Award To *	Michael Keane (JP Johnson Paving)	select
From *	Steve Johnson (ACME General Contractors)	select
Contract/PO Document For	Site Remediation	-
Award Amount	\$752,565.00	
Create line items for		
<ul> <li>Procurement item or</li> </ul>	nly	
C Each scope and ger	neral item	
Create/Select Materi	al records per line item?	
© yes		
Cno		

FEATURE	BENEFIT
Award Contract	Award a contract or purchase order to the winning bidder of procurement items. Award a single item or multiple items at the same time.
Create Contract Line Items	Contract Manager offers great flexibility and is complete in managing the procurement process. Consolidate and create one line item in the contract/PO for each procurement item being awarded, or create individual line items for every scope and general item of each procurement item being awarded.

### Feature 3.5 – Expedite Payments

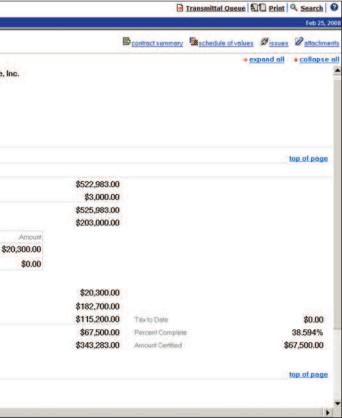
Contract Manager facilitates the preparation and negotiation of monthly payment requisitions. It streamlines the process by consolidating contractor requisitions into monthly requisitions, dramatically

and payment due.

tog out	School Addition A	utomotive Center (DEMO)
	ayment Requisitions Log >	
Requisition	1	
Select an action.	Go	
From*		Standard Paving and Concrete, Jim Wesley
Period To*		Aug 27, 2007
Application N	lumber	00003
Review Statu	s - 🕴 <bic -="" johnson="" steve=""></bic>	Not Certified
Contract Sum	mary 🖻	
<ul> <li>Requisition S</li> </ul>	ummary	
Original Contr	act Sum	
Net Change		
Contract Sum	to Date	
Completed a	nd Stored to Date	
Percent	Retainage	
10.000%	Completed Work	\$
0.000%	Stored Material	
	Total Retainage	
Total Earned	- Retainage	
Previous Am	ount Certified	
Current Paym	ent Due	
Balance to Fi	nish + Retainage	
Schedule of V	tabura De	
Schedule of V	raives 'a	

improving the time required to prepare and submit the requisition payment. Contract Manager easily integrates with your accounting system for complete cost control.

*Figure 3.5* Expedite payments with payment requisitions. Establish retainage by contract based on completed work and stored materials. Automatically collect approved change orders, and calculate retainage



FEATURE	BENEFIT
Payment Requisitions	Contract Manager creates payment requisitions, the schedule of values to accompany the requisition, the approved change orders and materials for delivery quantities and costs applicable to the requisition this period, and helps to certify the requisition by the contracting parties.
Automatic Requisition Creation	Contract Manager can use lump sum and/or unit price line items from the contract to automatically create the requisition schedule of values.
Subsequent Payment Requisitions	Save time and money by easily processing subsequent pay applications. Contract Manager provides options and moves money by automatically tallying previous application line items and finding approved change orders and materials delivered for inclusion.
Base Payment on Schedule Performance to Date	Contract Manager is tightly integrated with P6, so you can be sure a contractor's payment is based on performance to date. You can automatically synch line items with tasks and calculate the "this-period" value based on percent complete to date.
Print to Standard AIA Forms	Contract Manager is based on AIA standards and allows you to use standard reports to form-fill the AIA G702 and G703 standard forms.
Flexible Options for Calculating Retainage	Each contract is different, including payment terms. Choose from different options for calculating retainage either at the summary page based on percent of completed work or percent of stored materials, enter retainage amounts or percentage for each line item, or manually enter retainage in the contract summary.
Set Standards	Contract Manager calculates tax and permissions to allow a requisition to exceed the original budgeted value based on the contract.

# Feature 3.6 – Invoices

Contract Manager facilitates the preparation of vendor invoices. Easily establish billing criteria and bill based on installments or delivery. Contract Manager records the receipt of each installment and automatically assigns the next sequential number to each invoice. Automatically distribute costs to the worksheet. Optionally link issues to invoices and associate attachments, including shop drawings, spec sheets and more.

## Feature 3.7 – Trends

Contract Manager enables you to account and track for anticipated costs and changes that may occur during the project. Use trends to anticipate rate hikes, fuel increases and administrative costs that may impact your overall budget and bottom line.

## Feature 4.1 – Clear Accountability

Primavera Contract Manager facilitates team interaction. Role-based views display the information that is relevant to each project participant. Every project team member will have the information they need to keep the project going. Action list, alerts and turnaround graphs help project managers immediately identify

Figure 4.1 Role-based dashboard displaying key performance indicators across multiple projects and programs.



who is holding up the process, when each deliverable was required and if the delay will impact the budget or schedule. With the Contract Manager ball-in-court (BIC) feature, you can clearly see who needs to act next within the approval workflow process.

FEATURE	BENEFIT
Dashboards	Role-based views display the key performance indicators and action-oriented portlets, including actions required, alerts and schedule status, that are relevant to each project participant.
Personalized Action List	With your personalized Action List, documents awaiting your attention will no longer slip through the cracks. This cross-project, interactive to-do list enables you to quickly drill down to the most critical documents needing your attention.
Automatic Alerts	Establish alerts for managers to be notified when change requests or budget adjustments exceed a set monetary threshold, if contracts are not approved, if a contractor's insurance is expired, and if safety incidents are reported. Define different types of alerts, set critical levels and subscribe to alerts.
Turnaround Graphs	View the average turnaround time for RFIs based on criteria that you set. Group by vendor or spec section and configure turnaround time based on organization standards.
2 Clicks to Anywhere	Drill down from dashboard portlets to documents and take action. Close issues, respond to RFIs, complete meeting business items and much more.
Run Reports	Display and run reports for a single project, multiple projects or programs enterprise-wide.

# Feature 4.2 – Safety Reporting

Companies are committed to eliminating workplace injuries and conforming to OSHA requirements. Recording safety violations, safety concerns and injuries on the job site is critical for compliance with

The Safety module addresses the following:

FEATURE	BENEFIT
Injury or Illness Reports	Reports enable you at a site. Also, reco prevent future mis send an e-mail to a
Safety Violation Notices	Inform a vendor of
OSHA's Federal Reporting Requirements	The safety module severity of work-re must be kept on fil
Form 301	Contract Manager fill out when an inji
Form 300	Contract Manager every work-related involved.
Form 300a (300 Summary)	This summary is re April 30 of the year former employees upon request as pa

OSHA regulations in case of possible lawsuits. The Contract Manager Safety module enables you to track safety violations and accidents.

but to document each time there is an accident, injury or illness cord "near miss" items and use them for training to help ishaps. Once an injury or illness report is recorded, you can a distribution list to inform contacts about what is documented.

a potential hazard, and e-mail it to contacts in a distribution list.

e helps the employer and OSHA understand the extent and related incidents. According to public law 910596, this form file for 5 years following an incident.

provides Form 301, one of the first forms a company must jury or illness has occurred.

provides Form 300, the log that must be completed for d illness or injury. One form is required for each person

required to be posted at the workplace from February 1 to ar following the one covered on the form. All employees and s are entitled to review Form 300 entries in their entirety part of OSHA's record-keeping rules. The Primavera Integrated Program Management Solution (IPM) is the first and only integrated solution that handles construction projects, contracts, changes, and much more. This scalable solution links people, teams and projects so you can control every aspect of a project's lifecycle, from the planning stages to the final deadline. And since Primavera IPM is role-based, it gives everybody exactly the functionality they need to fit their particular job. With Primavera IPM you can be sure that everyone — employees and subcontractors work toward the same goals: the success of the project.

#### Feature 5.1 – Dashboards

Primavera IPM provides interactive, action-oriented dashboards that provide users with role-specific information based on their needs — from key performance indicators and division-level costs for executives to action lists and assigned tasks for the field and contractors. Everyone on the team has the information they need when they need from any where and at any time.

*Figure 5.1* Project dashboards include costs, milestone status, critical activities behind schedule and latest RFIs and submittal status.

PRIMAVERA®P6						
Dashboards 📀 Portfolios	Projects 🔹 🍰 Reso	ources III Administrati	ion			
jects > Office Building /	Addition					
space Activities Issues Risk	s Documents Details					
rkspace of Office Buildin						Launch Contract Ma
and All   Collapse All   Customi	and the second sec				20	Laundi Contract Ma
Cost Worksheet					2000	? 🔁 🗗 :
Cost Code		Title	Original Budget	Projected Budget	Original	Projected
Project: DEMO			\$10,100,000.00	\$10,145,100.00	\$8,039,685.88	\$8,090,545.88
🜔 01 - General Constructi	on Requirements		\$1,516,500.00	\$1,516,500.00	\$576,775.88	\$576,775.88
💿 02 - Sitework			\$961,500.00	\$972,800.00	\$100,000.00	\$115,500.00
02 02050 D	Basic	Site Materials	\$121,000.00	\$121,000.00	\$0.00	\$0.00
02 02100 D	Site R	emediation	\$150,000.00	\$150,000.00	\$0.00	\$0.00
02 02100 S	Excav	ation	\$75,000.00	\$75,000.00	\$0.00	\$5,500.00
02 02110 S	Site R	emediation Supervision	\$26,000.00	\$26,000.00	\$0.00	\$0.00
02 02200 S	Site P	reparation	\$48,000.00	\$48,000.00	\$0.00	\$0.00
02 02300 S	Earth	work & Landscaping	\$250,000.00	\$250,000.00	\$0.00	\$0.00
						<u></u>
Milestone Status		? 0 5 X	S Contract Issues			? 0 5
Critical Activities behind Sch	edule	7 69 5 X	RFI Turnaround			? 0 8
Activity	Days Late	Total Float	RFI Turnaround Time	(8)		
Erect Structural Frame	27d	b0	From Vendor			
Floor Decking	20d	b0	MECH			
Concrete First Floor	20d	b0	ACHECC	ni		
Structure Complete	20d	b0	ACMEGC			
Brick Exterior Walls	20d	b0	MASON-			
Insulation and Built-up Roofing	20d	b0	PHILASCH			
Building Enclosed	20d	b0	0	10	20	30
Install Wiring and Cable	20d	b0				
	10.000	04				

### Feature 5.2 – Interoperability

The Primavera Integrated Program Management Solutionmaterial deliveries and view documents linked to new(IPM) delivers complete interoperability so users canactivities, such as contracts, changes or design reviews.understand which activities are impacted due to lateactivities

FEATURE	BENEFIT			
Contracts	Group and organize contracts. Identify t materials required a			
Performance-Based Payments	One of the most im based payments. By sure you are paying Monthly payments are calculated autor			
Design Reviews	Many users will tr However, Primave can be ordered, fa Contract Manager, determine reason			
Changes	If a change occurs, estimate to final ap time delays. Once t to activities and up			
Daily Reports	Optionally require th day, users can auto Furthermore, you c completed and per Primavera, you can not to merge the ac			

e activities based on work package and link to committed tasks and create activities for each contractor. Identify and link costs and tasks required.

mportant capabilities in an IPM solution is performance-By linking requisitions line items to activities, you can be ing the contract based on schedule performance to date. Is can be made based on schedule percent complete and comatically upon document creation.

ack design reviews in the schedule to plan for installation. ra IPM goes further to track when the item is reviewed so it bricated and delivered in time to install. Using both P6 and you can backtrack based on the installation activity and able time required for review and approval.

s, Primavera IPM documents the entire process from initial pproval based on impact to project and contract cost and the change is approved, you can import relevant information odate changes to schedule.

the field or contractors to submit daily reports. Each omatically receive their assigned tasks to be performed. can collect status from the users, including activities ercent complete, etc. By using reflection processing in n collect this data, review it and then choose whether or activity updates on an activity-by-activity basis.

# Tight Integration with ERP and Accounting Systems

Organizations can extend the project and cost-control capabilities to your existing systems with Contract Manager. Easily establish connections to existing enterprise applications, including ERP, (JD Edwards®, Oracle<sup>®</sup> Projects and SAP<sup>®</sup>), accounting and estimating.

Contract Manager comes complete with an XML API that enables organizations to create an integrated solution that best fits their requirements. Enter project data into the appropriate application and it will flow into your other systems.

# Sample Reports

# Report 1 – Multiple Cost Worksheet Report

View cost information from multiple projects and programs. Group, organize and subtotal by cost account.

MAVERA			Lange and the second						1		8	-
📔 🔚 Save a Copy 🚔 Pr	int   Email	N Search			89%	• •	1 💥 🔊	1	Revie	w & Commen	t 🔹 🥖 Sigr	•
Select Text -												
and the second secon		Anton										
		Mult	i-Project	Budgeted	, Commit	ted, and A	ctual C	osts Rep	port			
Date: 2/25/2008											Page:	18 of 26
		Budget		Committed			Actu	ials	-	Varia	ance	
Cost Code	Original Amount	Revised	Projected	Original Amount	Revised	Projected	Received	Issued	Original	Approved	Pending	Projected
DEMO School Addition-Auto	motive Center											
D1 01500 S Temporary Facilities and Controls	\$35,000.00	\$35,000,00	\$35,000,00	565,000,000	\$65,000.00	\$65,000.00	\$0.00	\$35,000.00	(\$30,000.00)	(\$30,000.00)	(\$30,000.00)	(\$30,000,00
01 01700 D Execution Safety Requirements	\$150,000.00	\$150,000,00	\$150,000.00	\$55,000.00	\$55,000.00	\$55,000.00	50.00	\$112,500.00	\$95,000.00	\$95,000.00	\$95,000.00	\$95,000.0
01 01700 O Execution - Insurance & Taxes	\$65,000,00	\$65,000,00	\$65,000.00	\$45,000.00	\$45.000.00	\$45,000.00	\$9.000.00	\$48,750.00	\$20,000.00	\$20,000.00	\$20,000,00	\$20,000.0
01 01740 O Execution Requirements - Permits	\$100,000,00	\$100,000.00	\$100,000,00	\$90,000.00	\$90,000.00	\$90,000.00	\$0.00	\$75,000.00	\$10,000.00	\$10,000.00	\$10,000,00	\$10,000.0
01 01750 O Execution Requirements -Legal Fees	\$100,000.00	\$100,000.00	\$100,000,00	\$90,000.00	\$90.000.00	\$90,000.00	\$0.00	\$25,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000 0
02 02050 D Basic Site Materials	\$121,000.00	\$121.000.00	\$121,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30.250.00	\$121,000.00	\$121.000.00	\$121.000.00	\$121,000.0
02 02100 D Ste Remediation	\$150,000.00	\$150,000.00	\$150,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$37,500.00	\$150,000.00	\$150,000.00	\$150,000,00	\$150,000.0
02 02100 S Excavation	\$75,000.00	\$75,000.00	\$75,000.00	\$0.00	\$0.00	\$5,600.00	\$87,500.00	\$18,750.00	\$75,000.00	\$75,000.00	\$69,600.00	\$69,500.0
02 02110 S Site Remediation Supervision	526.000.00	\$26,000,00	\$20,000.00	\$0.00	\$0.00	\$3.00	\$0.00	\$6,500.00	\$26,000.00	\$26,000.00	\$26,000,00	\$26,000.0
02 02200 S	\$48,000.00	\$48,000.00	\$48,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$12,000.00	\$48,000.00	\$48,000.00	\$48.000.00	\$48,000.0

### **Report 2 – Submittals by BIC**

Quickly understand who is holding up the process by witholding submittals.

Culou T			nu 🖂 Eman	Dearch	•		070	• • • •	5 5 10	19 1 2	Heview & Con	nment • 🖊 Sig	<u>n</u>
Select I	ext • 🚺												
	_												
	ACM	E Gene	ral Contracto	ors					Schoo	Addition	n-Automot	ive Center	- 8
						Subm	ittals						
	Job	No:	JBAA450			by Ball	In Court				Date:	2/25/2008	
	Proje	ect No:	PRJAA450								Page:	1 of 1	
				Latest			Re	quired		Late	st Dates		
	BIC	Package	Submittal	Revision	Title	Status	Start	Finish	Received	Sent	Returned	Forwarded	- 8
	A&S	Supply											- 8
		00060	08000-001	1.0	Custom Frantes	NEW							
		00080	08000-002	1.0	Custom Doors	NEW							
	ACE M	lason Con	tractors	11.5									
		04400	04400-002	1.0	Mortar Type S	NEW	8/20/2007	9/18/2007					
	ACME	General C	ontractors										
			03100-001	1.0	Formwork shop drawings	APP	6/18/2007	6/29/2007	6/18/2007	6/22/2007	7/3/2007		
			03100-002	1.0	Wall formwork	APP	6/18/2007	6/29/2007	6/20/2007	6/22/2007	7/3/2007		
			09900-001		Paint Submittal	UNS							
			11000-001		Lockers	UNS							
			15600-001		Fan Coil Units	UNS							
	Design	Group											
		03200	03200-004	1.0	Foundation wall rebar	NEW	7/21/2007	8/17/2007	7/31/2007	7/31/2007			
		04400	04400-001	1.0	Mortar Type N	NEW	8/20/2007	9/18/2007	8/30/2007	8/30/2007			

### **Report 3 – Pending and Approved Changes**

Prepare and run reports across all your projects and programs and understand the impact of pending changes on your cashflow.

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	I Contractors					nge Manage				Sc	hool Addi	ition-Automo	tive Center 2/25/2008	
Job No: J Project No: F	and the second second				Status Report						Date: 2/25/200 Page: 1 of			
Number Title	Status	Date	Reason Code	Change Issue	Scope	Esti	imated Budget	Quo	ted Budget	Nego	biated Budget	Fin	Budget	
ON No.: AA450-0	COLUMN A STOCK	C CJ From 6/7/2007	PHILASCH MS	TILE	Out of Scope		\$0.00		S0.00		50.00		S0.00	
ON No.: AA450-00 0005 Additiona Required		C CJ From 8/17/2007	CUSTREQUEST	PARK	Out of Scope	\$8,000.00	\$9,000.00	\$7,000 00	\$9,600.00		50.00		\$0.00	
CON No.: AA450-0 0002 Undergro	012 To: ACMEG ind Utilities APP	C CJ From	ERRORCMIN	UTIL	Out of Scope	\$4,000.00	\$4,000.00	\$3,000 00	\$3,300.00		50.00	\$3,000.00	\$3,300.00	
ON No.: A4450-0 10003 Rock in T	and a factor of the second	C CJ From 7/11/2007	FIELDCOND	ROCK	Out of Scope	\$7,500.00	\$7,500.00	\$5,500.00	\$6,000.00		S0.00	\$5,500.00	\$6,000.00	
CON No.: AA450-00 00001 Glazed Fi	king Tile APP	7/17/2007	UNFORESEEN	TILE	Out of Scope	\$11,000.00	\$11,000.00	\$9,850.00	\$0.00		S0.00	\$9,850.00	\$9,850.00	
ON No.: AA450-0 0004 Plugging	Nater line APP	8/28/2007	DEFICIENCY	WATER	Out of Scope	\$5,000.00	\$5,000.00	\$5,800.00	\$6,200.00	\$5,500.00	50.00	\$5,500.00	\$7,200.00	
CON No.: AA458-01 10006 Inappropr Mix	012 To: ACMEG ate Concrete NEW	C CJ From 9/12/2007	ERROROMIN	CONC	Out of Scope		\$4,000.00		\$0.00		50.00		50.00	

