PROJECT MANAGER

Project Manager is designed to control projects that have many individual tasks and have the potential for significant change. PM provides a process that quickly shows the impacts of new tasks and changes on the project bottom line.

Put figuratively, *PM* draws a circle around your project and deals with anything that crosses that boundary – new work, increases in old work, procedures, and physical changes.

Five on-line forms are used to identify the new task or problem, resolve, and document all issues and costs. Coupling the familiar use of management forms with a powerful totally behind the scenes database and email notifications provides management with needed information.

Project Manager is designed as a task oriented management tool for use on all types of projects in all types of industries including construction projects, IT development projects, municipal renovation projects, and commercial new builds. Wherever interaction between groups of people occur, *Project Manager's* unique perspective increases communications and ensures that daily problems are identified and resolved as soon as possible.

No other project management system is easier to use or more cost effective in terms of both monthly cost and your valuable time!

Project Manager is an online web based system project management system. This means a lot to the user! Never again will you have information scattered among many computers or will you have to wait while you find someone who can run the project management program or unlock a specific computer. With *Project Manager* ***your*** information is stored in one secure place and is available whenever you want it.

Nothing is stored on your computer. Additionally, with *PM's* ease of operation, no special training is necessary and information and all data, responses, directions, and decisions are on-line and available to you 24 x 7 - whenever and wherever it's needed!

Contents

OVERVIEW OF PROJECT MANAGER

Jump Right In!

Project Manager has been designed and built by professionals who have been there and we recognize that to be successful the program must be simple and logical in operation. In this regard, we believe we have succeeded. We believe that ***Project Manager*** is very simple to use and will require the average user less than an hour to be functional.

The attached manual is a good source of information but really the best approach is to jump right in.

1. First of all, understand the operation – you work on the forms and the database looks over your shoulder!

2. When a new task or problem is identified, the user fills out an RFI (on-line) – an email is sent to all project parties. The form presents a situation that a manager must address; either add the new work task or resolve the problem.

3. If new work is defined or the resolution of the problem will create new work, a variance exists in the project and a VN form is filled out by clicking a button on the RFI. Again, the project team is alerted via email that a new variance exists.

4. Management reviews the RFI/VN documentation and decides on a course of action. Depending on the type of work identified, the manager can:

    - Authorize new work
    - Process a back charge to recover cost associated with supplier issues
    - Process a non-conformance to deviate from plans, methods or procedures

Project Manager uses five industry standard looking forms to link all project parties together to identify new scope, changes, communicate issues to project parties, provide information to make a resolution, communicate resolutions to the project, and document all results.

The five forms include:

- RFI – identifies questions / problems from contractors
- VN – identifies a project variance from scope or schedule

- BCN – identifies a supplier back charge equipment or services issue
- WA – identifies a work authorization
- NCR – identifies changes in methods, quantities, criteria

The first step in the overview process would be a general run through of the menus – everything is done with the menus – no programming or setups are necessary. Start with the Main Menu and see where new RFIs and Variances are created. Next select the Edit Menu to see how all of the five forms are edited. The Reports Menu list all reports available – just select a report and it's there.

Common Data Tables should be the next stop in the overview process. These tables hold key project information such as company names and addresses, personnel, problem categories, and cost codes. It is suggested that you input as much information here as possible. The forms are self explanatory. The Common Data Tables are the source of the information that shows in pull down menus on all of the forms.

Basically that's all there is – go to the Main Menu, select "Add A New RFI" and begin. Enter all the data you can – you can always edit what you entered – select the Submit button at the bottom and you've started. You can print the form by selecting the Print button or go to the Reports Menu and select the RFI Log to see you're input.

You never saw the powerful data base behind the scenes – we tried to make it very simple.

About the Project Team....

Project Manager would be of limited use if only the project manager were involved and hence the next step in the process .... bring the rest of the project into the system. Once the project is set up with common tables, the manager creates sub-users from the Main Menu – Edit Profile button. The sub-users are the contractors, engineers, and architects in the project. The manager's next step is to set up the sub-users and their levels of permission – right on the Main Menu.

Notifying the sub-users of names and passwords allows them to enter the system and start contributing.

About Printing....

Printing reports is simple but different than what you are probably used to. The difference is that we are printing over the internet. There is no security, hardware, or programming issues but you have to deal with an internet program like MS Internet Explorer (IE). Depending upon the IE settings for fonts, etc. your actual printout may need some tinkering before satisfactory results are achieved.

Project Manager works best with Microsoft Internet Explorer version 8 and above. If you are not currently using version 8 (or above), we recommend you upgrade for the additional features it provides. For example with versions of IE below 8, page breaks in the report are not recognized.

IE Setup – nothing fancy here, just a few suggestions. First IE will add cumbersome headers and footers that eat up considerable space. We recommend, the user open IE, select the File Menu Item, then select Page Setup. The headers and footers IE inserts are displayed – just delete them. On the same Page Setup page, select Landscape format (all reports are in landscape), and set the top margin at 1" and all other margins equal to 0.5 inch. Select OK and you are done. You will be returned to the IE screen – select the print icon to print the report.

It is strongly recommended that the user do a "print preview" and adjust any margins necessary to obtain the best print. ***Project Manager*** believes a print setting of "Size to Fit" @ 95% will result in the best printing.

About Closing...

Close all forms (RFI, VN, BCN, WA, and NCR) by selecting either of the two options at the bottom of each form: "Submit" or "Return With No Change". These buttons will either save and close the files or not update the data and close the files. Do not use the windows "X" in the upper right corner of the screen or the IE return button. Selecting either of these will lose the data entered on the form.

Do not close a form by selecting the MS Windows "X" in the upper right corner of the screen menu. This will drop you out of the program and return the user to Internet Explorer.

Close any report by selecting the MS Windows "X" in the upper right corner of the screen menu. This will return the user to the Reports Menu.

Exit the program from the Opening Screen by selecting the MS Windows "X" in the upper right corner of the screen menu.

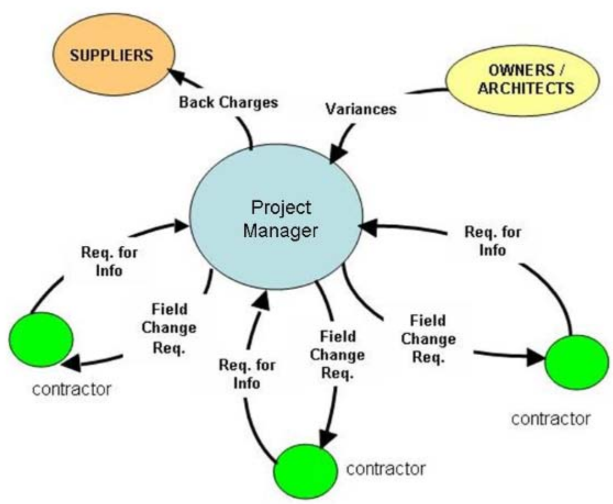
Section 1: What Does The Program Do?

Project Manager is a powerful task management and change control program that provides the user with a process to identify new tasks, problems, changes in scope, time or money. It documents the issues, communicates the resolutions to all parties and maintains logs and reports covering all contractor and internal impacts of the change.

Project Manager addresses the fact that issues comes at the manager from all directions: both internal and external to the project. Issues arise when:

- designs are incomplete,
- owners / architects alter project scope
- contracts are not definitive
- project conditions change

In order to succeed, the manager must address all issues from both inside and outside the project.

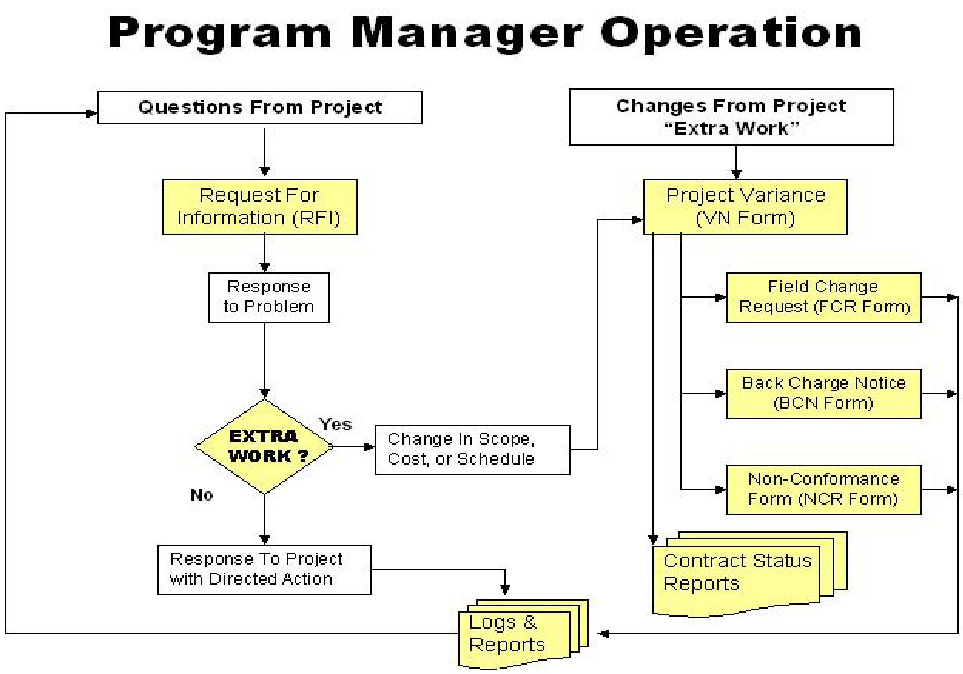


Project Manager addresses any issue that crosses the project boundary.

Section 2: How it works!

You enter ***Project Manager*** in one of two paths; changes that result from internal project issues and external issues. The internal, question (RFI), path allows all parties to request and receive answers to design, operation, implementation, or other questions impacting the work. However, the RFI often identifies additional missed scope and when this happens; the project has experienced a variance in scope and/or cost.

The second path identifies an external project change and does not generate an RFI. In this case a project variance in scope and or cost (VN form) is identified from the outset.



Comprehensive reporting gives management the visibility to ensure all questions are answered in a timely manner to minimize claims. Reports document all changes and the overall impacts to the project for contract management.

The Concept

1. If a project member identifies a problem, he completes an RFI and an automatic email is generated notifying the entire project team of a problem.

2. For the situation where an issue enters the project from an external source, an architectural change for example, no RFI (question) is created but the project has incurred a variance and a VN form is needed.

3. The manager reviews the RFI (or VN) and if the problem is a simple answer to a question, the response is provided and the information is logged to the database – no further work needed. – Issue resolved!

4. If the manager reviews the RFI and determines extra work results from the RFI, the manager clicks the “Yes-Open the VN Form” button, and a project variance is identified - a VN form is opened with all the RFI input information already entered.

5. Project management reviews the VN and develops a resolution which could be:

    a) Do nothing – return RFI or VN with comments to do no work
    b) Assign new work to a contractor
    c) Develop a non-conformance for installed work or equipment not to specification
    d) Create a back charge to recover incurred costs associated with equipment or services problems

6. For the issues above:

    For a): Mark the VN form closed – program will notify project members via email

    For b): From the VN create a work authorization form – WA - send to contractor – parties notified via email

    For c): From the VN form, create a NCR form detailing acceptance or rejection of the non-conforming issue. Note: a rejection may involve sending out a new work authorization or backcharge to resolve

    For d): From the VN create a BCN – backcharge form and send to supplier – email sent to project and supplier if desired

7. When work is complete, capture actual costs on VN and close the form

Section 3: A Sample to Show Operation

The Project: The Old Town Theater project involves the restoration of an old theater in the center of town. The project manager has hired an architect, engineers, and contractors to perform the work. Suppliers have started to deliver materials to the site.

The Problem: One day the carpentry contractor received 50 wooden panel doors for the project. His scope is to remove old doors and hang the new doors. However, upon receipt inspection, he noticed the doors are 2” too tall.

Upon receipt of an RFI from the contractor advising of the problem and requesting direction, the project manager realizes that the doors have to be fixed and it is his job to ensure the project does not incur additional costs as a result of this supplier problem.

Project Manager’s process resolves the problem via the following steps:

- The contractor submits an RFI requesting direction – an automatic email is sent out to all parties
- The manager receives the RFI and recognizes that new work is created by the need to fix the doors – he creates a variance form (VN) from the RFI form
- The manager discusses the problem with the contractor and arrives at a solution to repair the doors for $50 each.
- The manager realizes the supplier of the doors has a responsibility to deliver a satisfactory product and creates a BCN form (back charge) and Letter from the VN form and issues them to the supplier of the doors notifying him of the problem.
- The door supplier acknowledges the BCN and returns the letter with his direction on how to proceed – for this sample, assume the supplier directed that the doors not be shipped back to him but be repaired at the site – he accepts the BCN terms to repair the doors on site for $50 per door.
- The manager issues a WA from the VN form authorizing the work.
- When the WA is returned marked complete, the manager closes out the VN form with the agreed resolution - an agreed WA to perform the work for $2500 (50 doors @ $50 each), and an agreed BCN accepting the $2500 back charge. The VN is closed with a net $0 impact to the project.

Documentation created by this change:

RFI – identifying the problem

VN – a variance created by the extra work

BCN – issued to collect funds to correct the problem

WA – issued to contractor to authorize extra work

Reports will show a variance with a net to the project of $0, and WA increasing a contractor's scope $2500, and a BCN back charging the supplier $2500.

The overall elapsed time to complete and process the change will take a few days to get the emails returned, but the forms, because data is entered only once, take only a few minutes.

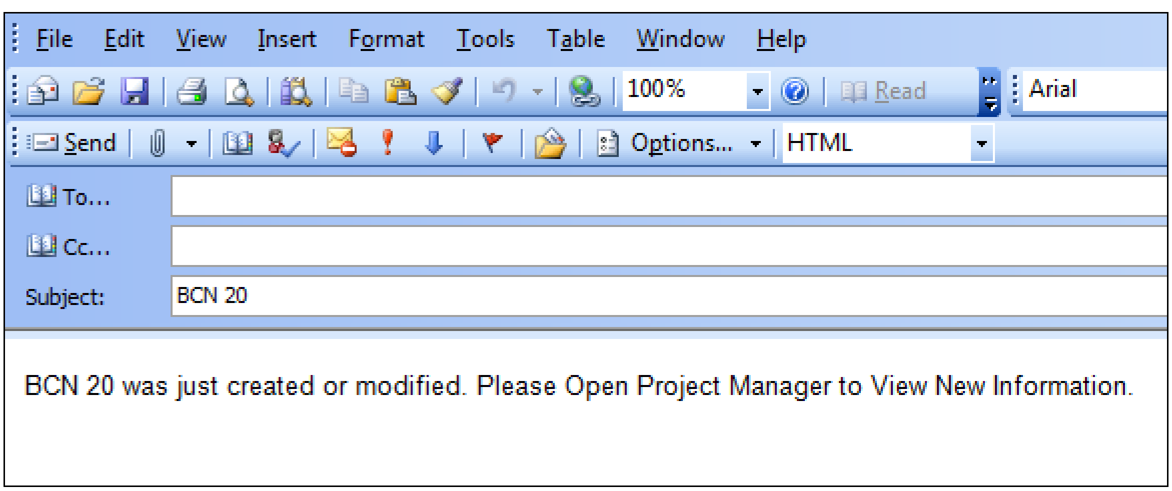
And, more importantly, a process of change management is established.

The process is simple, quick, and effective.

Email Notifications:

Every time a form is created or edited, an e-mail notification can be sent. This immediately notifies the project of a change. Often, because of quick notifications, changes are identified and resolved in the same day thus minimizing project impacts and reducing risks.

A typical notification – the user adds a distribution and sends to the project



Section 4: Program

To start ***Project Manager***, use your internet service to access the website: www.sitemanageinc.com.

Navigation around the menus is performed with a mouse. All selections are single left mouse clicks. All command buttons are large and rectangular in shape. All pull down menu selectors are small inverted triangles on the right side of a data entry location.

Opening Screen

When the website opens, click on the "Enter Program" button at the top left of the website main page, and the opening screen appears. On the opening screen, enter your Logon name and password and click the "Sign On" button. The Main Menu will appear if you have entered a valid name and password.

After a successful logon, the Main Menu opens.

The Main Menu

The Main Menu form is the starting point for all program operations.

From there, the user can:

- Add new RFIs
- Add a new Variances (VN)
- Edit previously created forms
- Maintain common data tables,
- Run reports, and
- Edit your sub-user's profiles.

The “Add A New RFI” button opens a new blank RFI form. The “Add A New Variance” button opens a new blank VN form. The “View/Edit Forms” button opens the Edit Menu, The “Common Tables” button opens the Common Data Tables Menu. The “Reports” button opens the Reports Menu, and, the “Edit Profile” opens a special sub-user form to add/edit sub-users of the program.

The user selects the desired operation by a single mouse click.

The Edit Menu

The Edit Menu has command buttons that allow editing of any of the previously created forms; Request for Information (RFI); Variance (VN); Backcharge (BCN); Work authorization (WA); and Non-conformances (NCR).

To edit a form, click on the pull down menu for the desired form under the “Select Form #”. Highlight the desired form number with a single left mouse click and then click the “Select Button” for that form.

The form will open and any edits can be made. All forms are edited in the same manner. When all changes to the form are complete, selecting the “Submit” at the bottom of the form saves the data and closes the form. Forms can be edited as many times as necessary. The “Return With No Change” button at the bottom of the form, cancel’s all inputs and returns the user to the Edit Menu.

The Reports Menu

The Reports Menu is accessed from the Main Menu. The Reports Menu uses simple pull down menu selectors to select specific reports.

The Reports Menu is in three parts; the upper part shows all RFI specific reports, the middle section shows all VN, BCN, WA, and NCR reports and the lower section contains Contract Change reports.

To run a report, select a report name from the pull down list and press the command button marked “Run Report”. After answering print range questions on pop-up boxes, the report should appear.

For restricted users, only the RFI Reports are available.

The Common Data Tables

The seven (7) Common Data tables are where frequently used information is stored. Data entered in these tables is available for the pull down menu selectors that are on every form. Adding as much information as possible in the Common Data forms will greatly speed up data entry and accuracy.

Once entered, information such as phone numbers, contact information, names, addresses, etc. are available to all forms.

The tables are:

Title Block: This table is used to define either a project title or project item.

Companies: This table contains a list of all companies or component information involved in the project. The information includes name, address and contact information.

Discipline: Defines the discipline breakdown such as piping, civil, etc.

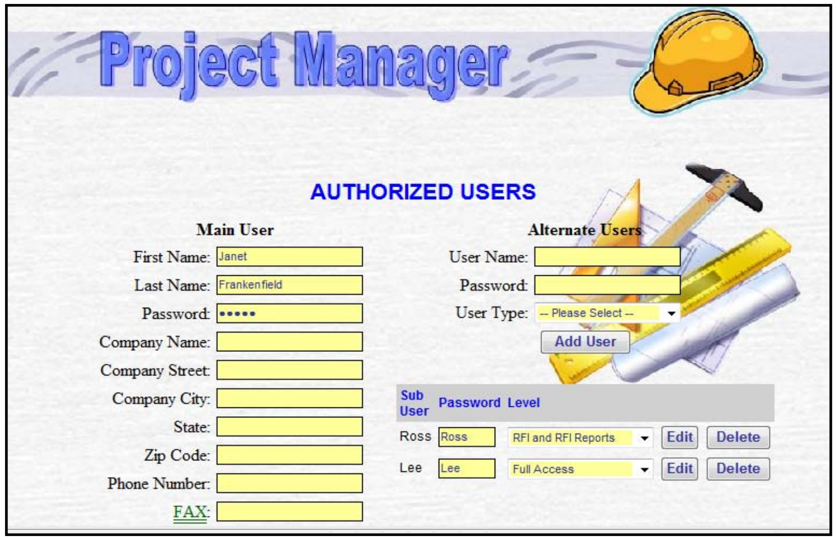
Cost Codes: This table is a listing of the allowable cost codes (and description) to charge work.

Personnel: This table provides a list of name and titles to select from.

Problem Category: This table contains listing of type of problems such as shipping damage, engineering, damaged during construction, etc.

Change Orders: This table defines contract identification numbers. Assign a number here and then, through the VN form, assign specific variances to the contract number.

The Edit Profile Form



The main user is allowed to have up to five sub-users that can have different use permissions.

Sub-users are other parties or contractors involved in the project and they can have complete or restricted levels of program access.

To add a sub-user, the main user inputs the data to the required fields, and selects the user permission type from the pull down menu.

Selecting the "Add User" button, completes the process and adds a new sub-user. At the bottom of the form is a listing of already assigned sub-users.

The main user may assign any one of the following to a sub-user:

- Full Access – allows all function – editing and updating
- RFI and RFI Reports – lets user create RFIs and read/print RFI reports
- Read Only – allows user to read all forms and reports – does not allow any changes
- Read Only RFI - allows user to read only RFI forms and reports – does not allow any changes

Section 5: Completing the Forms

The user completes the form sections by typing in the blank fields. Using the pull down menus for commonly used names, addresses, and types of problems quickly speeds up form completion. When data entry is complete, the user can print the form by selecting the command buttons in the upper right corner of each form. Selecting the “Submit” button in the bottom center of each form saves the data and closes the form. Selecting “Return with No Change”, returns control to the menu and does not update the data.

Each form has email notification. When the “Submit” button is selected, the program displays a message asking if the user wants to send an e-mail notification. An e-mail notification should be sent whenever a form is created or edited. Selecting “yes” for the e-mail question will open the e-mail program with an attached message stating:

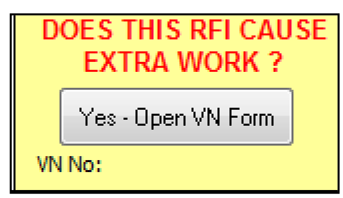
This is RFI “XX”. Please open program to view this RFI”.

All forms are completed in the same manner.

The RFI Form:

The first step in creating a new RFI starts with the Main Menu. The user selects “Add an RFI” and a blank RFI form appears. A unique RFI number is already inserted into the field provided - this cannot be changed. An RFI form, similar to the one below, appears. Enter all available data in the blank fields. Use the pull down menu selectors to assist in input. You can always go back through the Edit Menu to change or add information.

If the RFI simply asks a question and does not generate new work, it stands alone and does not have any other form associated with it.



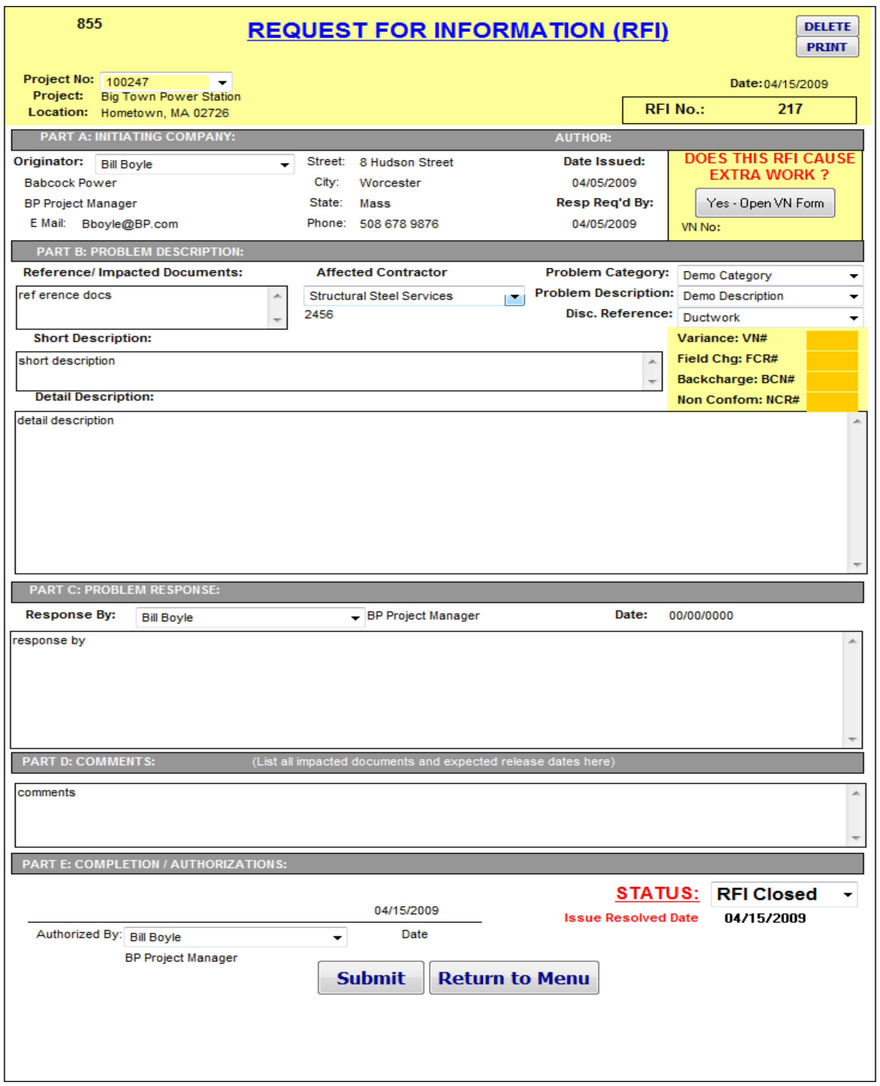
If new work results from the RFI, then a variance in the project scope exists and a project variance form needs to be created. In cases like these, there is a provision in the upper right corner of the RFI form to select the button “Yes – Open VN Form”. This links the RFI and the VN form and shares all data entered for the RFI with the VN form and automatically opens a new VN with the same number as the RFI.

In cases where a change comes from an external source and no RFI is created, a VN (variance) is created directly from the Main Menu. WAs, BCNs, and NCRs, if necessary, can be created from the VN form.

THE RFI FORM

Note:

- All data is entered directly into the fields on each of the forms.
- All data entered on the RFI will automatically be carried over to associated forms



855

REQUEST FOR INFORMATION (RFI)

DELETE
PRINT

Project No: 100247
Project: Big Town Power Station
Location: Hometown, MA 02726

Date: 04/15/2009
RFI No.: 217

PART A: INITIATING COMPANY:
AUTHOR:

Originator: Bill Boyle
Babcock Power
BP Project Manager
E Mail: Bboyle@BP.com

Street: 8 Hudson Street
City: Worcester
State: Mass
Phone: 508 678 9876

Date Issued: 04/05/2009
Resp Req'd By: 04/05/2009

DOES THIS RFI CAUSE EXTRA WORK ?
Yes - Open VN Form
VN No:

PART B: PROBLEM DESCRIPTION:

Reference/ Impacted Documents: ref erence docs

Affected Contractor: Structural Steel Services
2456

Problem Category: Demo Category
Problem Description: Demo Description
Disc. Reference: Ductwork

Short Description: short description

Variance: VN#
Field Chg: FCR#
Backcharge: BCN#
Non Confom: NCR#

Detail Description: detail description

PART C: PROBLEM RESPONSE:

Response By: Bill Boyle
BP Project Manager
Date: 00/00/0000

response by

PART D: COMMENTS: (List all impacted documents and expected release dates here)

comments

PART E: COMPLETION / AUTHORIZATIONS:

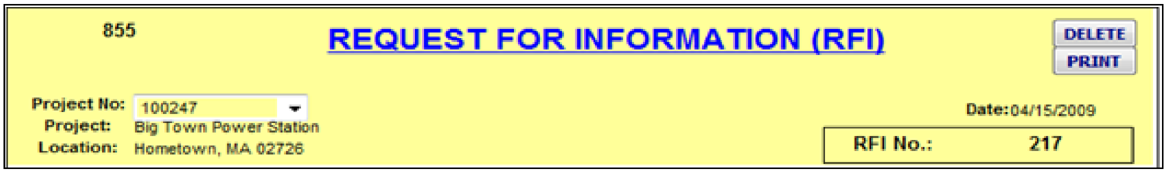
04/15/2009
Authorized By: Bill Boyle
BP Project Manager
Date

STATUS: RFI Closed
Issue Resolved Date 04/15/2009

Submit
Return to Menu

- Heading
- Part A – initiating company
- Part B – Problem Description
- Part C – Problem Response
- Part D - Comments
- Part E – Completions / Authorizations

Heading Inputs:


855
REQUEST FOR INFORMATION (RFI)
DELETE
PRINT
Project No: 100247
Project: Big Town Power Station
Location: Hometown, MA 02726
Date:04/15/2009
RFI No.: 217

- Project No: use pull down information to fill this and the following two lines. The second and third lines can be user entered or edited

- RFI No: is entered automatically – no editing is allowed

- RFI Rev No: (to right of RFI No) – direct entry

- Delete Button: deletes the RFI – if a Variance was created with the RFI, the VN is not deleted and must be deleted separately

- Print Button: prints the complete form on 8 ½ x 11 paper. Note: using a color printer makes forms standout on your desk.

Part A: Initiating Company


PART A: INITIATING COMPANY:
AUTHOR:
Originator: Bill Boyle
Babcock Power
BP Project Manager
E Mail: Bboyle@BP.com
Street: 8 Hudson Street
City: Worcester
State: Mass
Phone: 508 678 9876
Date Issued: 04/05/2009
Resp Req'd By: 04/05/2009
DOES THIS RFI CAUSE EXTRA WORK ?
Yes - Open VN Form
VN No:

Part A has four inputs.

- Originator: <person creating RFI> selecting the pull down here accesses the information in a common table and populates all of the fields associated with the originator

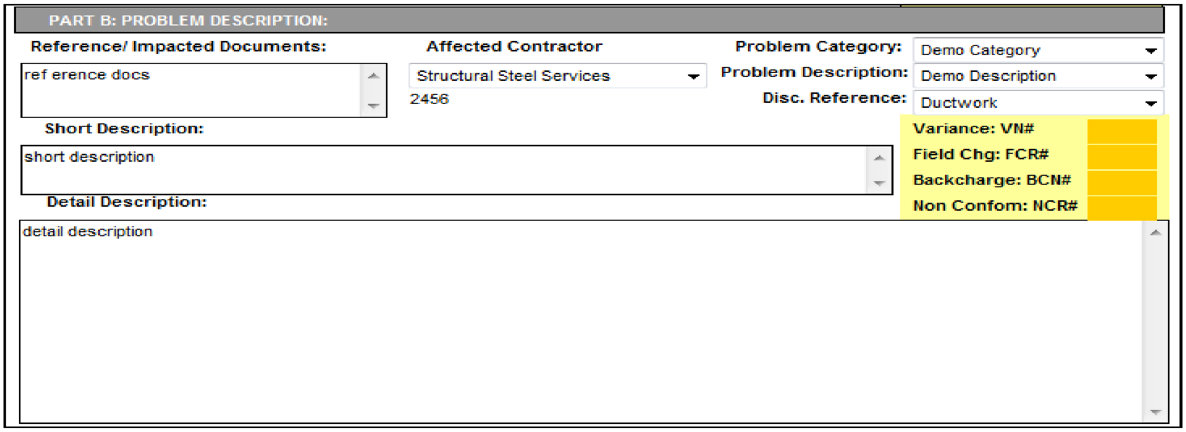
- Date Issued: <date RFI created> enter the date the RFI is issued

- Resp. Req'd By: <date response is required by> enter the date a response to the RFI is required

- "Yes – Open VN Form": select this button only when an RFI creates extra work. Selecting this button opens a new VN form linked to the RFI*

* Note: The user should complete as much of the RFI form as possible before selecting (clicking) the "Yes – Open VN Form" button. Missing information can be entered on the VN form. Do not click the "Submit" button on the RFI.

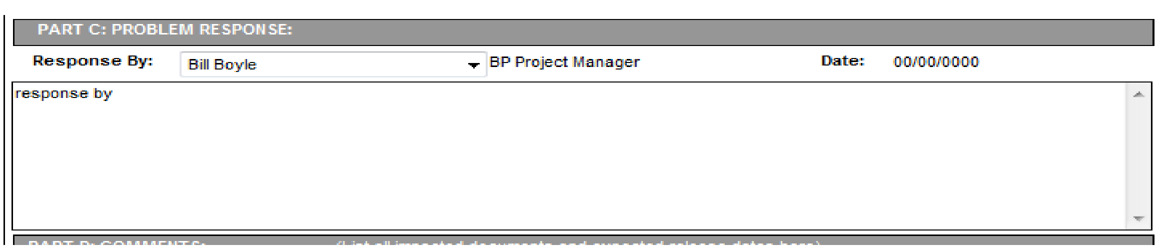
Part B: Problem Description:



Part B: This section defines the RFI problem. The fields in this section include:

- Reference documents: <enter the names of applicable reference documents> enter data directly into box
- Affected Contractor: <contractor impacted by RFI> use pull down to select from list of predefined contractors – direct entry allowed
- Problem Category: <identify problem type> use pull down to select from list of categories
- Problem Description: <defines the category of the change> use pull down to select from list
- Discipline Reference: <a discipline reference> use pull down menus to enter relevant discipline
- Short Description: <a brief description of problem> enter a short description of problem
- Detail Description: <enter a detail description of problem>

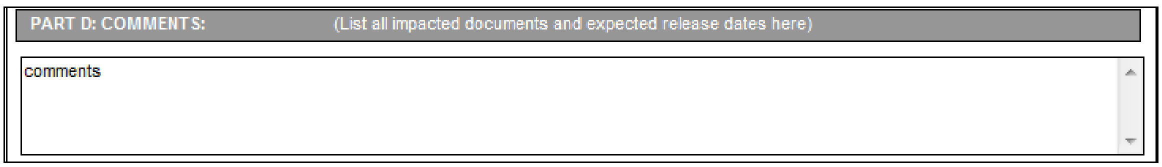
Part C: Problem Response



Part C has three inputs

- Response By: <enter the date a response is required by> select from pull down menu – title is automatically added from Common Table data
- Date: <enter the date a response is given>
- Response: <enter a detail description of problem> enter the directed response to the problem

Part D: Comments



- Comments: enter any special comments associated with the change

Part E: Completions and Authorizations

Part E: has six inputs

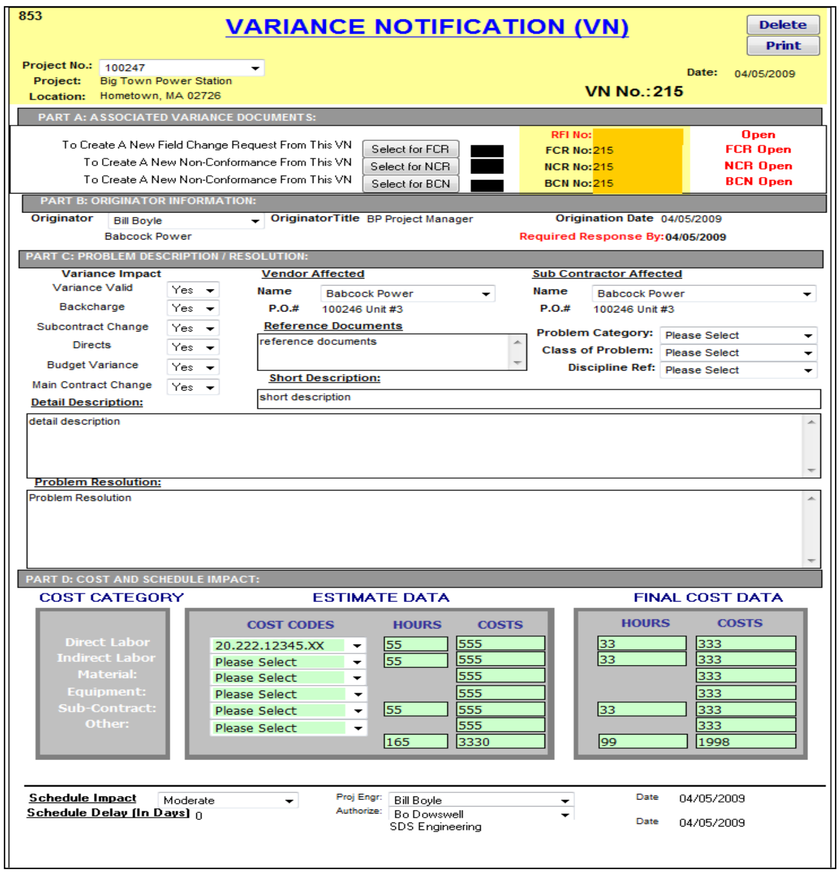
- Authorized By: <authorizing project manager> select from pull down menu to enter the person's name authorizing the change.
- Date: <enter authorizing date> the date the authorizing person authorizes the RFI action
- Status: select from the pull down menu list proving the status of the change – no direct input allowed
- Resolution Date: <date RFI answered> enter the date the change is resolved
- Submit: <Submit button saves data and closes form> when data entry is complete saves data and updates the database

- Return to Menu: select the Return to Menu button when the user wants to discard all changes made to form. No data is updated to database.

The VN Form (Main Variance Form)

The VN form is the "parent variance" document for all project scope change information. The VN form is the repository of all change information, costs incurred, resolutions arrived at, and directed actions.

To further document costs, resolutions, and assignments of new work, the VN form can create a work authorization (WA), a back charge notice (BCN) and/or a non-conformance in design or execution (NCR).

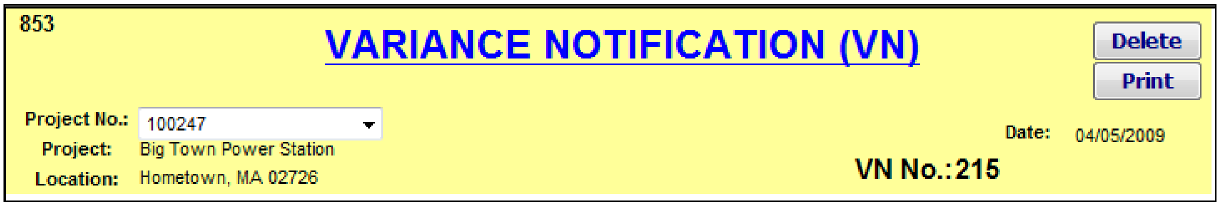


All information entered on any form is transferred to the database and is automatically available to all other forms.

Each of the children forms (WA, BCN, NCR) have places to enter final cost impacts. The VN form has a section that allows the user to enter the estimated cost impacts. This is useful in situations where the VN is open and final costs are not available.

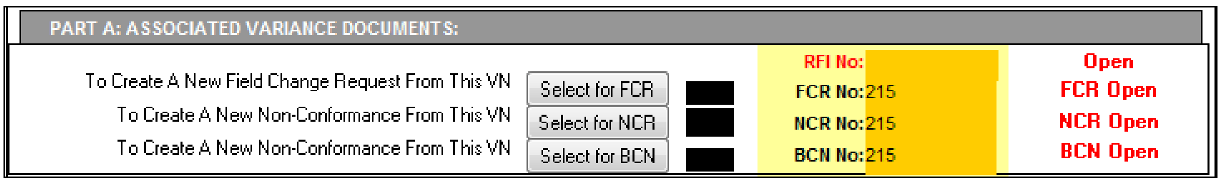
The VN form documents all associated costs and schedule impacts.

VN Heading: (see RFI – input is same)



The VN form is used to add new work or address any changes.

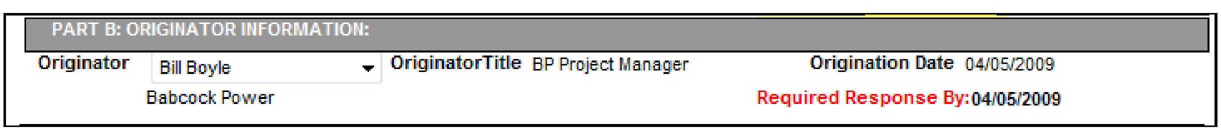
VN Part A: Associated Documents:



Part A: Creates the WA, BCN, and NCR forms. After the VN is created, the user can create a WA, BCN, or NCR at any time by using the edit process – open a specific VN through the Edit Menu and selecting one of the create buttons.

- Select for WA: this button creates a new WA from the parent VN form – WA number will be same as VN number
- Select for NCR: this button creates a new NCR from the parent VN form – NCR number will be same as VN number
- Select for BCN: this button creates a new BCN from the parent VN form – BCN number will be same as VN number

VN Part B: Originator Information

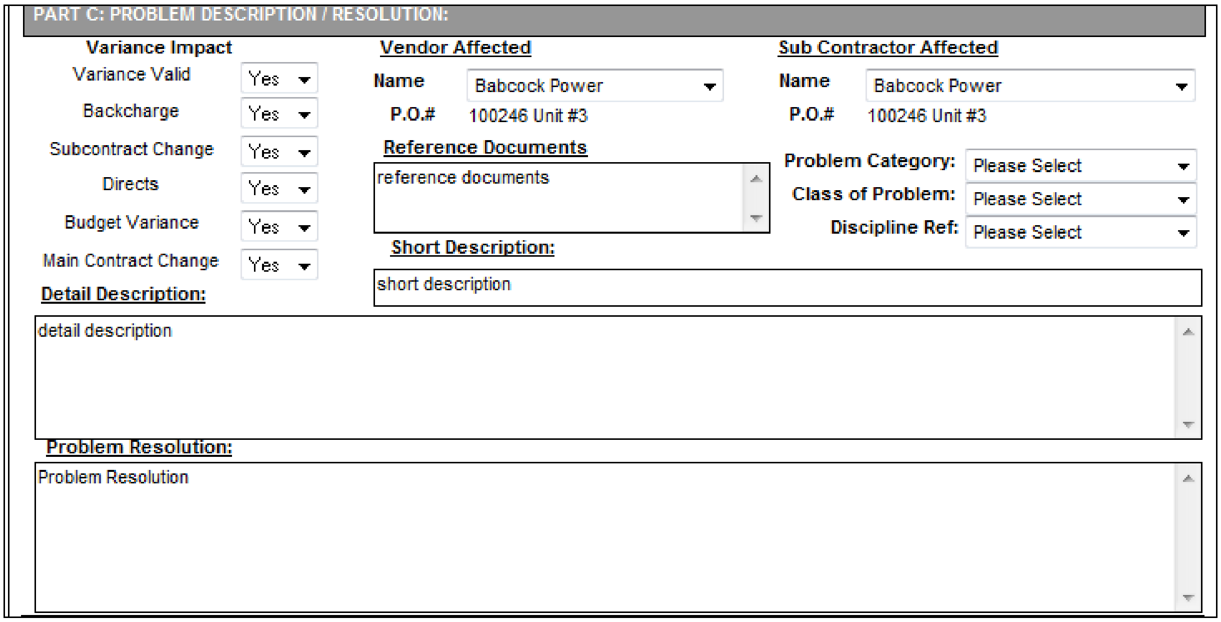


Part B has one text input and two date inputs;

- Originator: <enter name of person originating change> this field is a pull down menu that selects the user from common table entered data. Direct entry is not allowed
- Originator Date: <date change was identified> the date in mm/dd/yyyy format defines the date the change originated

- Required Response By: <date a response is needed by> this date in mm/dd/yyyy format is the date when a response to the query is expected.

VN Part C: Problem Description



VN Part C**:** has four text inputs, six “Yes/No” selectors for change differentiation, and five pull down menus

- Variance Impacts (Yes/No items)
  - Variance Valid: manager’s opinion if change is warranted
  - Back charge: manager’s opinion if change is back chargeable to a supplier
  - Subcontract Change: manager’s opinion if change results in an increase in a subcontract
  - Directs: manager’s opinion if change impacts direct accounts
  - Budget Variance: manager’s opinion if change is in current budget
  - Main Contract Change: manager’s opinion if change impacts Main contract with owner

- Vendor Affected: <enter the name of vendor that will be impacted> select from pull down menu to input supplier impacted by change

- Subcontractor Affected: <enter the name of the subcontractor that is impacted> select from pull down menu to input subcontractor impacted by change

- Problem Category: <enter the category of work> select from pull down menu to input category of change

- Classification of Problem: select from pull down menu to input classification of problem

- Discipline Reference: select the discipline from pull down menu

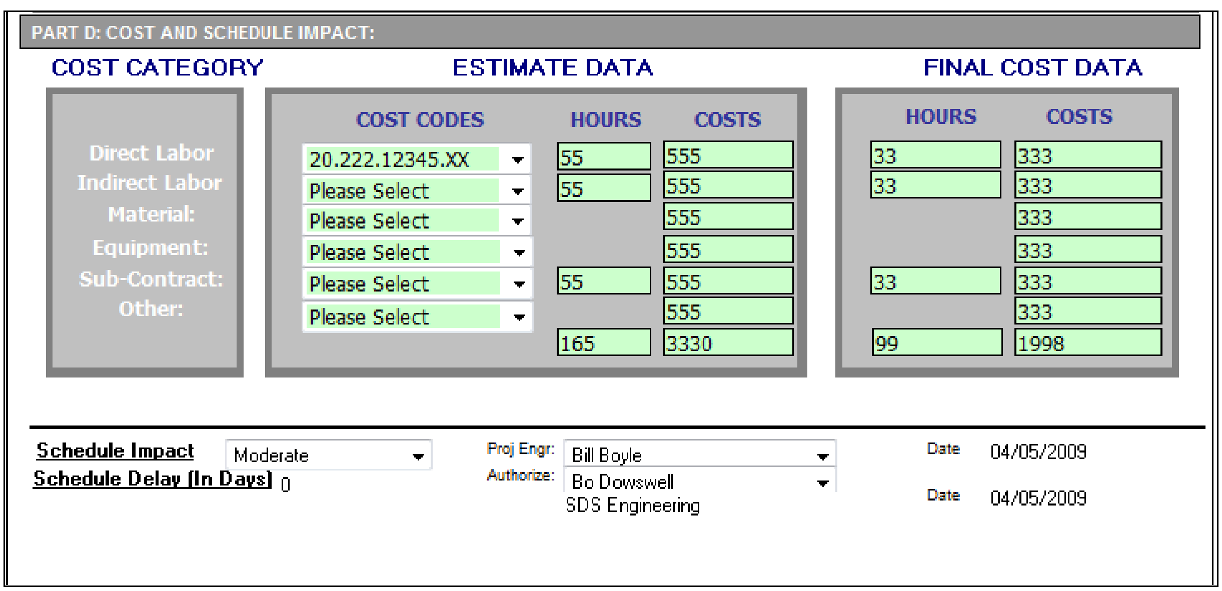
- Reference Documents: <enter the necessary reference documents that involve the change> input documents identifying change, drawings / specifications, etc. impacted

- Short Description: <enter a brief ~10 word – description> enter a short word description of change

- Detail Description: <enter a detailed description of change> enter a detail description of change – detail location – existing conditions - safety issues, etc.

- Problem Resolution: <completed by manager – describe problem resolution> – team's response to problem – provides directed action.

VN Part D: Cost and Schedule Impacts



Add cost code (account numbers) for the work through the Common Data tables. Select a cost code from the pull down menus to provide an account to accumulate the charges for execution of the variance. Two sections of cost information are provided. The first labeled “Estimate Data” can be used to reflect original information. The second section labeled “Final Cost Data” represents the final cost impact of the variance.

All cost information entered on the shortened cost section of the WA, BCN, and NCR forms will update the “Final Cost Data” fields of the VN report.

Part D: contains the cost impacts of change. For six cost categories, input cost accounts, hours and costs for estimated costs and, when information is final, hours and costs for final change costs.

- Cost Codes: <project or accounting codes used to summarize work> select from pull down menus to input the cost code to which this cost category is assigned

- Hours: <enter work hour estimates for effort> enter the estimated number of hours the change will take for each cost category

- Costs: <enter dollars> enter costs associated with hours and cost category

- Hours (final): enter the final change costs associated with cost category

- Costs (final): <dollars> enter final costs associated with change cost category

- Schedule Impact: use pull down menu to select level of schedule impact

- Schedule Delay: <In days> enter the number of days this change will make in the project – elaborate in Comments if necessary

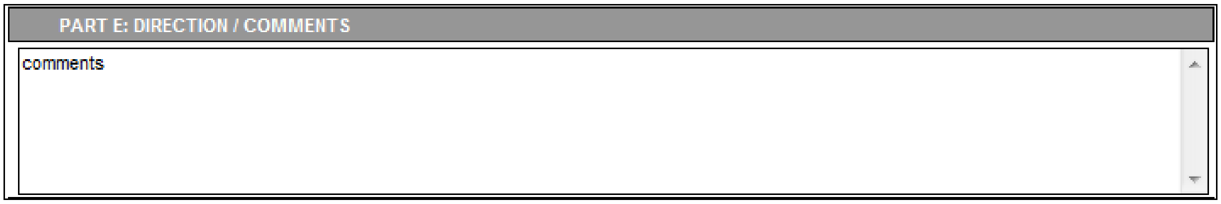
- Proj. Engr: <authorizing engineer> use pull down menu to enter name of engineer authorizing the change

- Date: <enter engineer/architect’s approval date> in mm/dd/yyy format for the date of the change

- Authorize: <enter authorizing project manager> use pull down menus to enter manager’s name authorizing the change

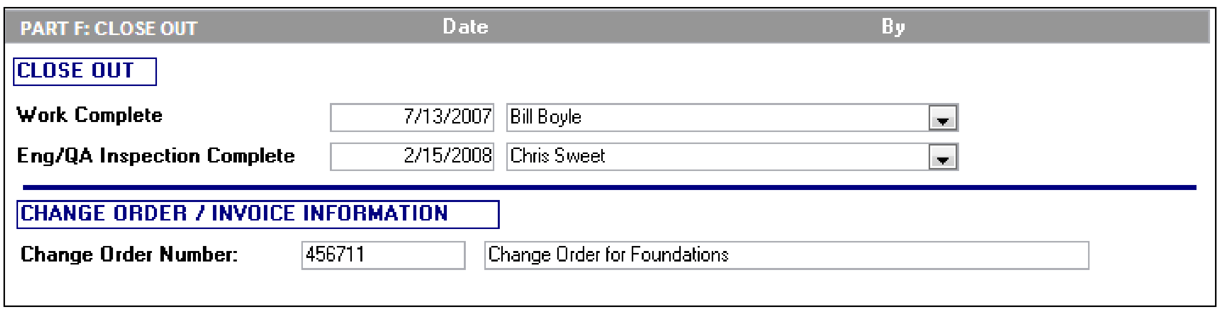
- Date: <enter project manager approval date> date in mm/dd/yyy format of date manager approves the change.

VN Part E: (page 2) Comments



Part E: contains only a “Comment” field. This should be used to document any unusual issues or schedule impacts

VN Part F: (page 2) Close Out – Contract Change Assignment



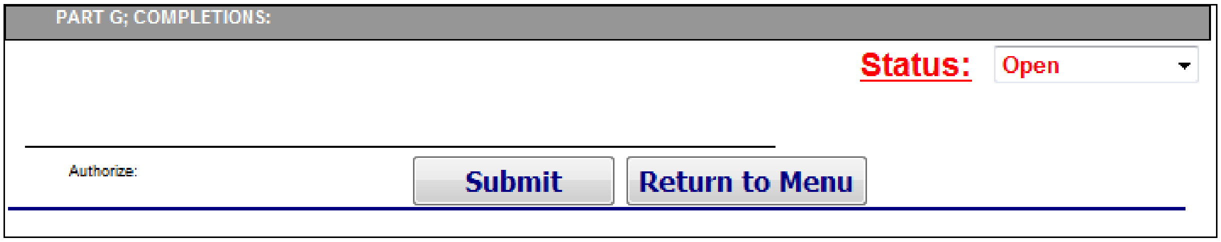
Part F: Close Out (two sections; a “close out” section and a contract assignment section)

- Work Complete: <enter date work is complete> this date is the date when the change is complete. The pull down menu assign a name of a person attesting work is complete

- Eng/QA Inspection Complete: <enter date and person of QA approval complete> enter date and person from pull down menu of QA inspector who confirms that the work is complete to acceptable standards

- Change Order Number: <enter the contract change number this change is associated with> The pull down menu shows a listing of contract numbers to which the change can be assigned. Selecting a contract number links this variance to a specific contract change order

VN Part G: Signature and Status



Part G: provides a place on hard copy form for final authorizing signature.

- Status: use the pull down menu to input a status for the VN form. Default is "VN Open"

Deleting Forms:

There is a delete button at the top of each form. Selecting the delete button on any forms will delete the form. However, there are rules to the deletion process. The user needs to follow these to avoid deletion of needed information:

Rule 1: RFI form – if the RFI has no associated variance (VN) form, deletion deletes the RFI – however, if a VN is associated, deleting the RFI does not delete the VN

Rule 2: deleting any child form (BCN, WA, or NCR) deletes that form only and does not delete the parent VN form

Rule 3: deleting the VN form deletes all associated children forms

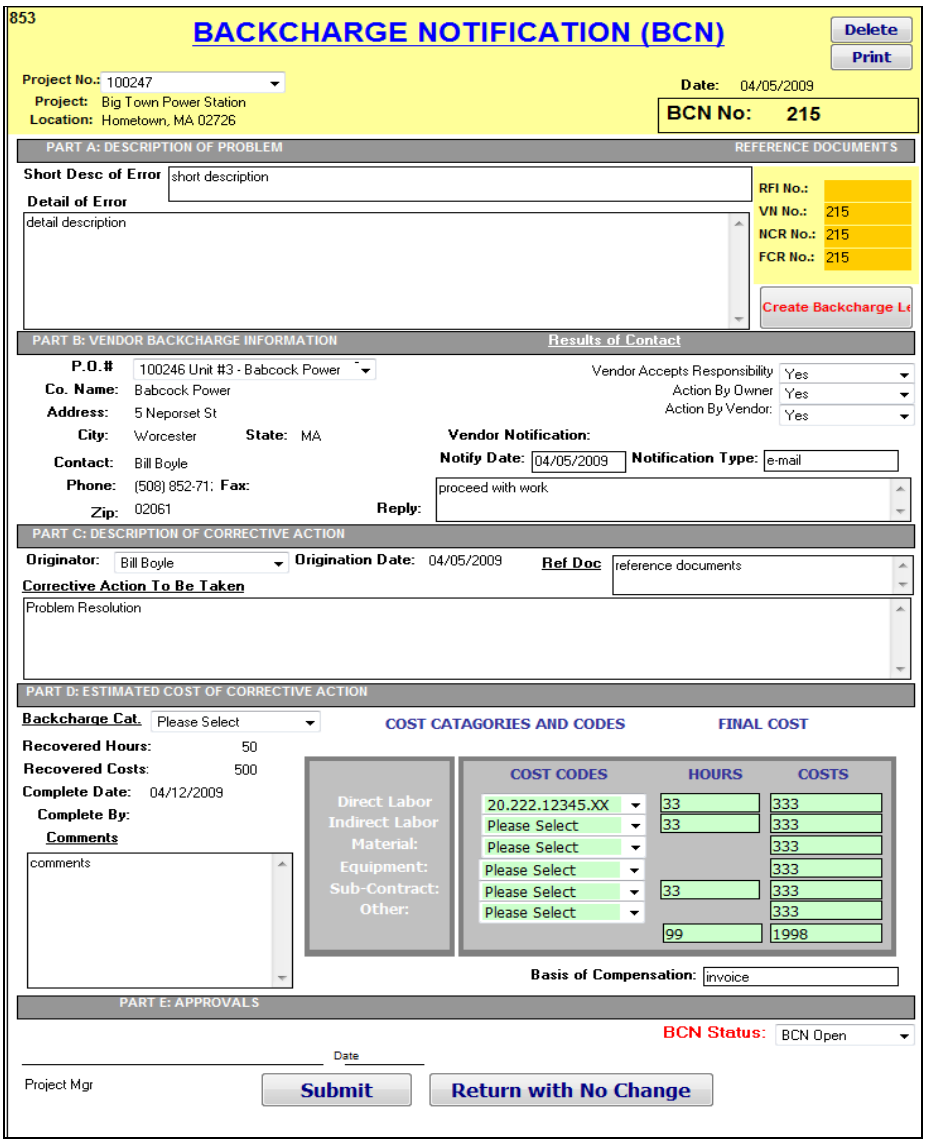
Note: Once a VN is deleted, the master record is gone. There is no undelete – be careful.

BCN / WA / NCR Forms

All children forms have data entered in the same manner as the RFI and VN forms.

The Back Charge Form

(BCN) (used to recover costs associated with faulty materials and/or services). To get to the form below, the user logs onto the program and arrives at the Main Menu. From the Main Menu, the user selects the "Edit Forms" button. This opens the "Edit Menu" where the user selects the pull down selector next to the BCN line. The pull down selector on the BCN line shows all available BCNs stored in the system. The user highlights a BCN and selects the "Edit This BCN" and the form appears.



853

BACKCHARGE NOTIFICATION (BCN)

Delete
Print

Project No.: 100247
Project: Big Town Power Station
Location: Hometown, MA 02726

Date: 04/05/2009
BCN No: 215

PART A: DESCRIPTION OF PROBLEM — REFERENCE DOCUMENTS

Short Desc of Error: short description
Detail of Error: detail description

RFI No.:
VN No.: 215
NCR No.: 215
FCR No.: 215

Create Backcharge Le

PART B: VENDOR BACKCHARGE INFORMATION — Results of Contact

P.O.#: 100246 Unit #3 - Babcock Power
Co. Name: Babcock Power
Address: 5 Neporset St
City: Worcester State: MA
Contact: Bill Boyle
Phone: (508) 852-71; Fax:
Zip: 02061

Vendor Accepts Responsibility: Yes
Action By Owner: Yes
Action By Vendor: Yes
Vendor Notification:
Notify Date: 04/05/2009 Notification Type: e-mail
Reply: proceed with work

PART C: DESCRIPTION OF CORRECTIVE ACTION

Originator: Bill Boyle Origination Date: 04/05/2009 Ref Doc: reference documents
Corrective Action To Be Taken: Problem Resolution

PART D: ESTIMATED COST OF CORRECTIVE ACTION

Backcharge Cat.: Please Select
Recovered Hours: 50
Recovered Costs: 500
Complete Date: 04/12/2009
Complete By:
Comments: comments

COST CATAGORIES AND CODES — FINAL COST

	COST CODES	HOURS	COSTS
Direct Labor	20.222.12345.XX	33	333
Indirect Labor	Please Select	33	333
Material:	Please Select		333
Equipment:	Please Select		333
Sub-Contract:	Please Select	33	333
Other:	Please Select		333
		99	1998

Basis of Compensation: invoice

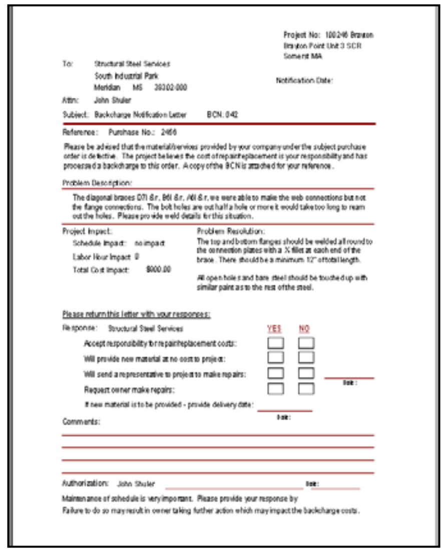
PART E: APPROVALS

BCN Status: BCN Open

Project Mgr — Date

Submit | Return with No Change

The only significant difference in data entry on the BCN form from all the other forms is the command button, “Create BCN Letter” in the middle of the BCN form.


Project No: 100246 Brayton
Brayton Point Unit 3 SCR
Somerset MA

To: Structural Steel Services
South Industrial Park
Meridian MS 39302-000

Notification Date:

Attn: John Shuler

Subject: Backcharge Notification Letter BCN: 042

Reference: Purchase No.: 2466

Please be advised that the material/services provided by your company under the subject purchase order is defective. The project believes the cost of repair/replacement is your responsibility and has processed a backcharge to this order. A copy of the BCN is attached for your reference.

Problem Description:

The diagonal braces D7I &r, B6I &r, A6I &r, we were able to make the web connections but not the flange connections. The bolt holes are out half a hole or more it would take too long to ream out the holes. Please provide weld details for this situation.

Project Impact:
Schedule Impact: no impact
Labor Hour Impact: 0
Total Cost Impact: $900.00

Problem Resolution:
The top and bottom flanges should be welded all round to the connection plates with a ¼ fillet at each end of the brace. There should be a minimum 12" of total length.

All open holes and bare steel should be touched up with similar paint as to the rest of the steel.

Please return this letter with your responses:

Response: Structural Steel Services

	YES	NO
Accept responsibility for repair/replacement costs:	☐	☐
Will provide new material at no cost to project:	☐	☐
Will send a representative to project to make repairs:	☐	☐
Request owner make repairs:	☐	☐

Date:

If new material is to be provided - provide delivery date:

Date:

Comments:

Authorization: John Shuler Date:

Maintenance of schedule is very important. Please provide your response by
Failure to do so may result in owner taking further action which may impact the backcharge costs.

This button, when selected, will create a form back charge letter, similar to that to the right. The letter contains all description information and the proposed resolution – if available. It’s intended use is to: (1) notify a supplier that a change is being processed, (2) notify the supplier of a proposed solution, and (3) identified estimated cost. The BCN Letter requests the supplier complete and return the form and advise the project on his preferred method of solution of the problem. The project manager uses the BCN Letter’s response to determine how to proceed.

This usually time consuming process is reduced to a few keystrokes.

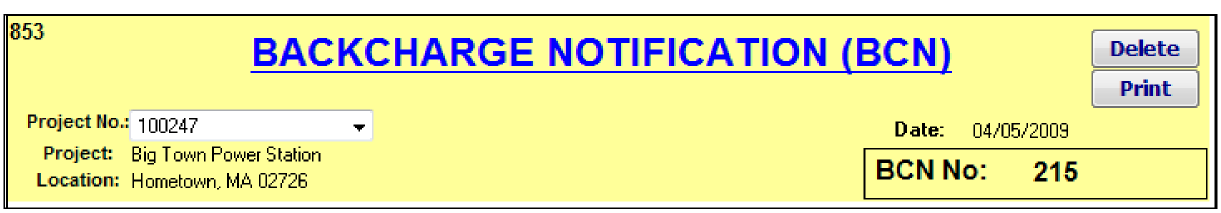
The BCN form contains the following sections:

- BCN: Heading
- BCN Part A: Description of Project
- BCN Part B: Vendor Information
- BCN Part C: Corrective Action
- BCN Part D: Estimated Costs
- BCN Part E Approvals /Authorizations

Note: The following section described the inputs for each field on the BCN. However, since the BCN is created from a VN form, most of the fields will already be filled in.

BCN: Heading

(input is same as for the RFI and VN forms)



- Project No: <project/contract number> use pull down information to fill this and the following two lines. The second and third lines can be user entered or edited.

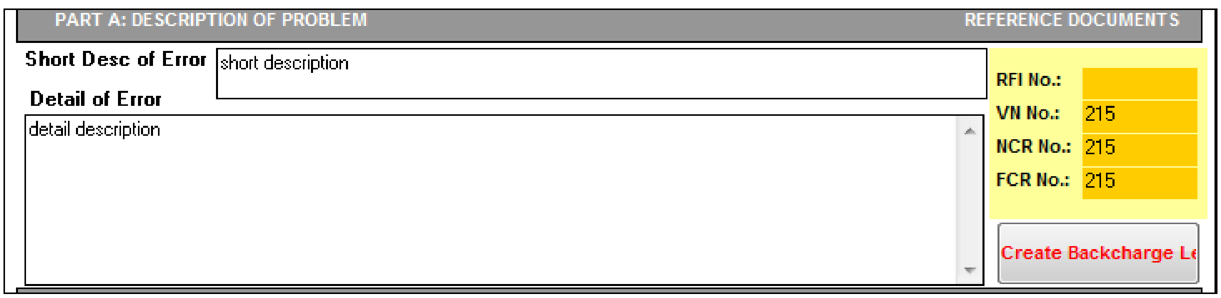
- BCN No: is entered automatically <same as VN number> – no editing is allowed

- BCN Rev No: <BCN revision number> (to right of BCN No) – user defined direct entry

- Delete Button: deletes the BCN – if a Variance was created with the BCN, the VN is not deleted and must be deleted separately.

- Print Button: prints the current form on 8½ x 11 paper.

BCN Part A: Description of Project

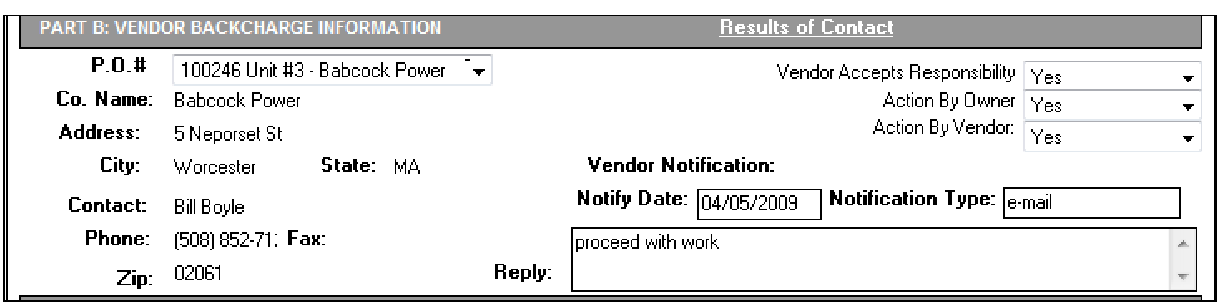


- Short Desc of Error: <brief description of problem ~ 10 words> direct entry of problem – short description – used in report headings

- Detail of Error: <detail description of problem> direct entry - complete description of problem

Note: orange section shows all other related forms – <u>do not enter changes in this section</u>

BCN Part B: Vendor Information



- PO#: <supplier of problem material> use pull down menu to fill in all vendor/supplier fields – direct entry allowed

- Vendor Accepts Responsibility: select yes or no from list

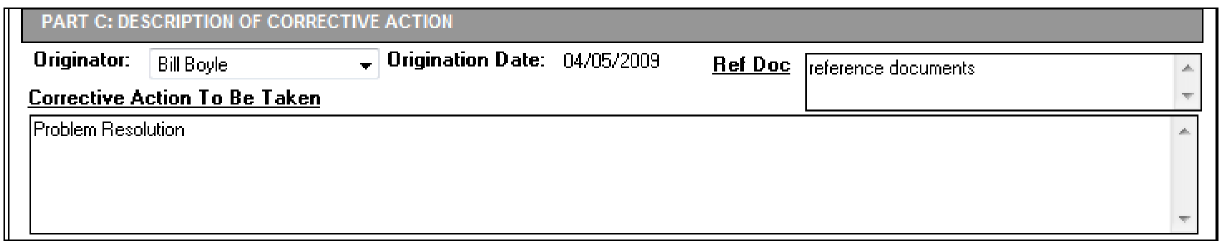
- Action By Owner: select yes or no from list

- Action By Vendor: select yes or no from list

- Notify Date: <date supplier notified> enter date vendor was notified of problem

- Notification Type: <type of notification> enter text describing form of supplier notification (mail, email, verbal, etc.)

BCN Part C: Corrective Action



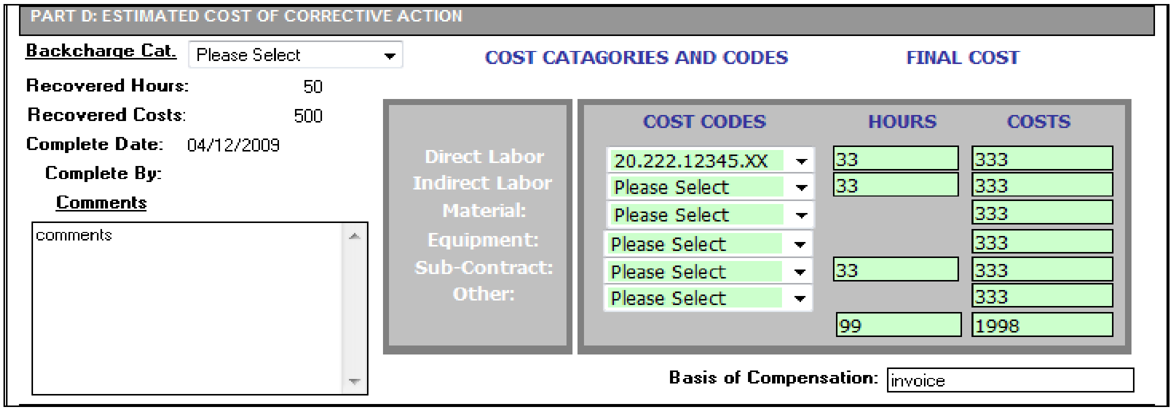
- Originator: <originator of BCN> use pull down menu to select a name of person directing the corrective action

- Originator Date: <date BCN created> enter date, mm/dd/yyyy format, of when back charge was initiated

- Ref Doc: <reference documents contributing to BCN> enter text describing reference documents impacted by problem

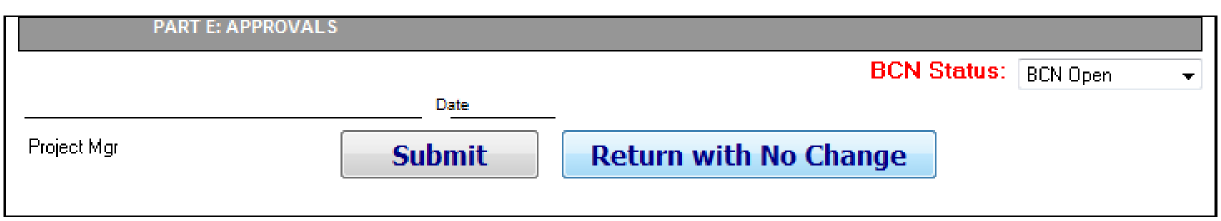
- Corrective Action To Be Taken: <problem resolution> enter text describing problem resolution

BCN Part D: Estimated Costs



- Back charge Cat: <back charge reason> select from pull down menu or direct entry
- Recovered Hours: <work hours supplier is willing to pay for> direct entry of number of hours
- Recovered Cost: <dollars supplier has agreed to pay in compensation for problem> direct entry of dollars
- Complete Date: <date BCN negotiations complete> direct entry of date
- Complete By: <name of person responsible for BCN resolution> direct entry of persons name
- Comments: <special comments related to BCN> direct entry of any comments pertaining to BCN resolution status
- Cost Table <enter all FINAL costs> select Cost Code from pull down selector or direct entry – enter hours and dollars into fields
- Basis of Compensation: <how BCN costs are recovered> enter description of how repayment for faulty work is recovered

BCN Part E: Approvals / Authorizations



- Signature: <approver hard copy signature> no entry on form – used for signature on hard copy of form

- Date: <date approver signed form> no direct entry – date entered on hard copy of form

- Submit: - Command Button <submits form data to the database> a single left mouse click to select – enters all form data and saves all information

- Return with No Change: -Command Button <closes form without updating database> – does not save data

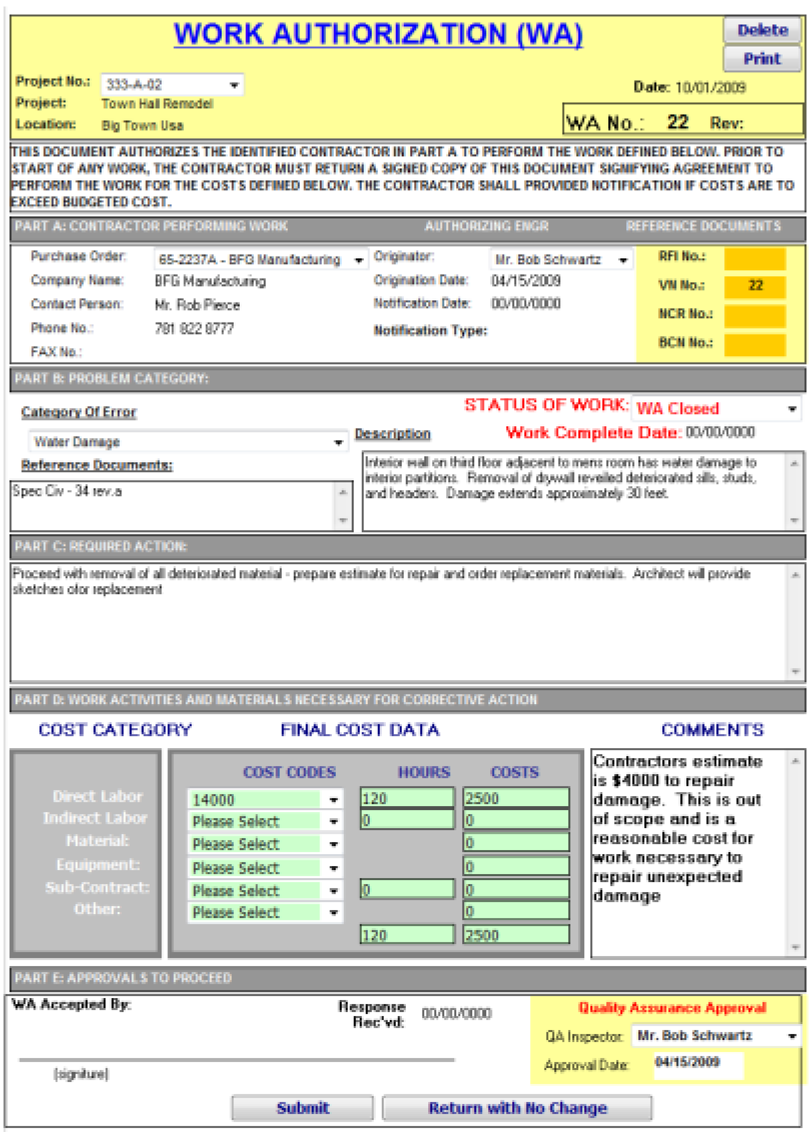
- BCN Status: use pull down menu to select from a list of BCN status conditions – no direct entry allowed

Work authorization (WA) (used to document assignments of new work)

The WA form contains the following sections:

- WA: Heading from Stored Data
- WA Part A: Contractor Performing Work
- WA Part B: Problem Category
- WA Part C: Required Action
- WA Part D: Work Activities and Estimated Costs
- WA Part E Approvals /Authorizations

Note: The following section described the inputs for each field on the WA. However, since the WA is created from a VN form, most of the fields will already be filled in.


WORK AUTHORIZATION (WA)
Delete
Print
Project No.: 333-A-02
Project: Town Hall Remodel
Location: Big Town Usa
Date: 10/01/2009
WA No.: 22 Rev:
THIS DOCUMENT AUTHORIZES THE IDENTIFIED CONTRACTOR IN PART A TO PERFORM THE WORK DEFINED BELOW. PRIOR TO START OF ANY WORK, THE CONTRACTOR MUST RETURN A SIGNED COPY OF THIS DOCUMENT SIGNIFYING AGREEMENT TO PERFORM THE WORK FOR THE COSTS DEFINED BELOW. THE CONTRACTOR SHALL PROVIDED NOTIFICATION IF COSTS ARE TO EXCEED BUDGETED COST.
PART A: CONTRACTOR PERFORMING WORK
AUTHORIZING ENGR
REFERENCE DOCUMENTS
Purchase Order: 65-2237A - BFG Manufacturing
Company Name: BFG Manufacturing
Contact Person: Mr. Rob Pierce
Phone No.: 781 822 8777
FAX No.:
Originator: Mr. Bob Schwartz
Origination Date: 04/15/2009
Notification Date: 00/00/0000
Notification Type:
RFI No.:
VN No.: 22
NCR No.:
BCN No.:
PART B: PROBLEM CATEGORY:
Category Of Error
Water Damage
Reference Documents:
Spec Civ - 34 rev.a
STATUS OF WORK: WA Closed
Description
Work Complete Date: 00/00/0000
Interior wall on third floor adjacent to mens room has water damage to interior partitions. Removal of drywall reveiled deteriorated sills, studs, and headers. Damage extends approximately 30 feet.
PART C: REQUIRED ACTION:
Proceed with removal of all deteriorated material - prepare estimate for repair and order replacement materials. Architect will provide sketches ofor replacement
PART D: WORK ACTIVITIES AND MATERIALS NECESSARY FOR CORRECTIVE ACTION
COST CATEGORY
FINAL COST DATA
COMMENTS
Direct Labor
Indirect Labor
Material:
Equipment:
Sub-Contract:
Other:

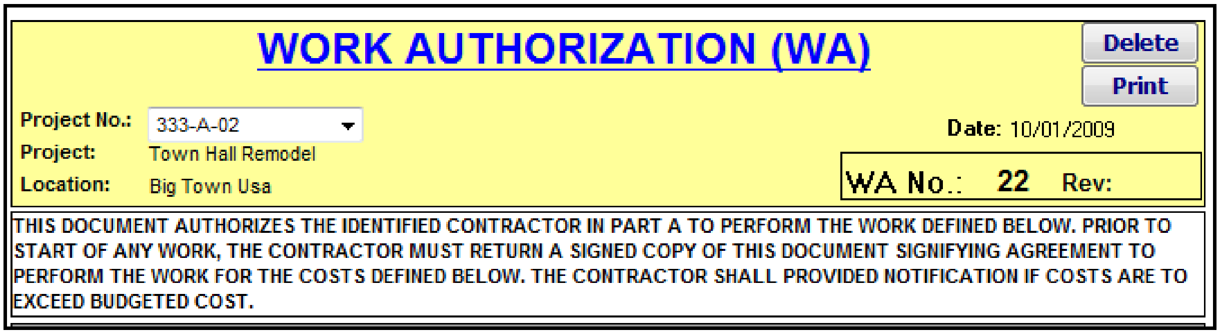
COST CODES	HOURS	COSTS
14000	120	2500
Please Select	0	0
Please Select		0
Please Select		0
Please Select	0	0
Please Select		0
	120	2500

Contractors estimate is $4000 to repair damage. This is out of scope and is a reasonable cost for work necessary to repair unexpected damage
PART E: APPROVALS TO PROCEED
WA Accepted By:
(signiture)
Response Rec'vd: 00/00/0000
Quality Assurance Approval
QA Inspector: Mr. Bob Schwartz
Approval Date: 04/15/2009
Submit
Return with No Change

To get to the WA form at the right, the user logs onto the program and arrives at the Main Menu. From the Main Menu, the user selects the "Edit Forms" button.

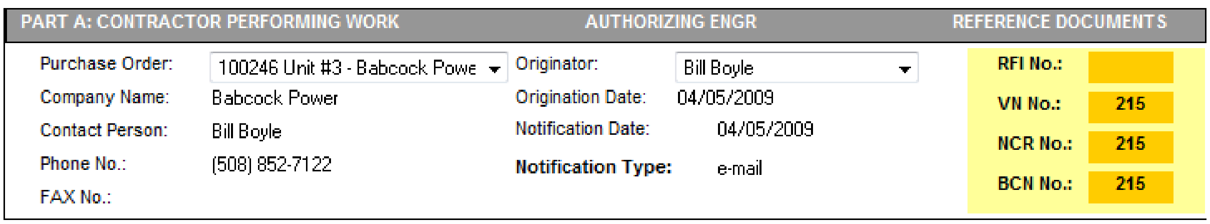
This opens the "Edit Menu" where the user selects the pull down selector next to the WA line. The pull down selector on the WA line shows the available WAs stored in the system. The user highlights a WA and selects the "Edit This WA" button and the form appears.

WA: Heading from Stored Data



- See VN form for Heading description

WA Part A: Contractor Performing Work



- Purchase Order: <contractor being assigned new work> use pull down menu to select subcontractor – all other fields are filled in from database – direct entry allowed

- Originator: <person authorizing new work> use pull down selector to enter the name of person responsible for new work

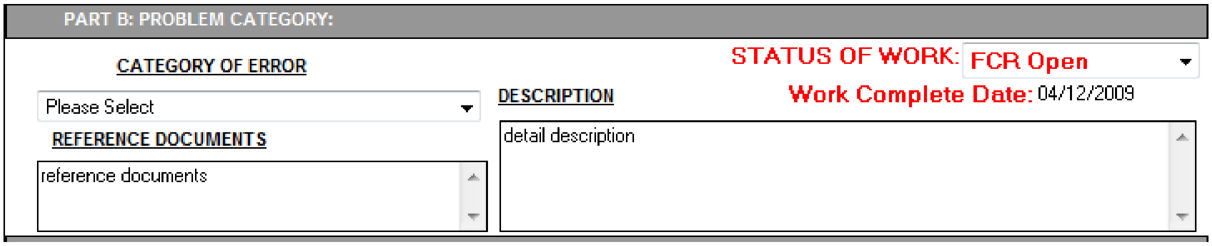
- Originator Date: <date this change was identified> direct enter data when change was identified

- Notification Date: <date contractor notified of new work> enter date when WA is authorized

- Notification Type: <form of notification> email, regular mail, verbal, etc.

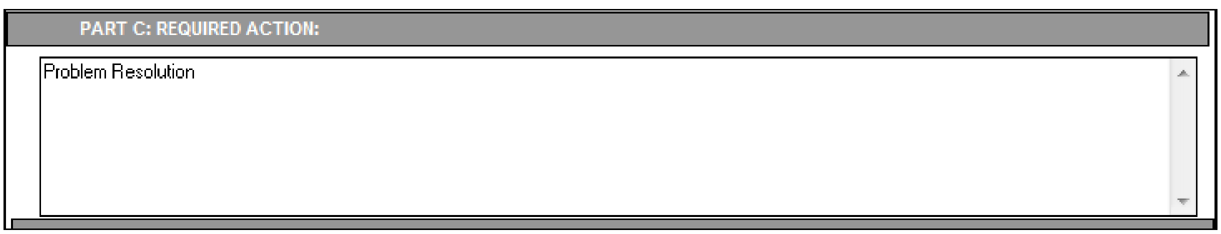
Note orange section to right shows all other related forms – <u>do not make changes in this area</u>

WA Part B: Problem Category



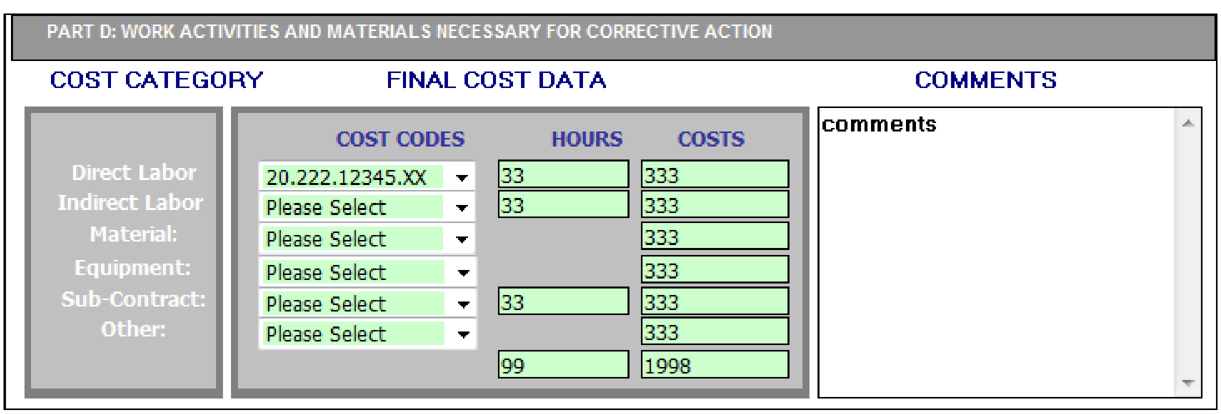
- Category of Error: <type of problem WA written to fix> use pull down selector or direct entry
- Reference Documents: <note any special reference documents that address the scope of the WA> direct entry into form
- Status of Work: <WA status> use pull down selector to define condition – no new entry allowed
- Work Complete Date: <date work is approved as complete> direct enter date

WA Part C: Required Action



- Required Action: <description of work to be performed> direct entry onto form

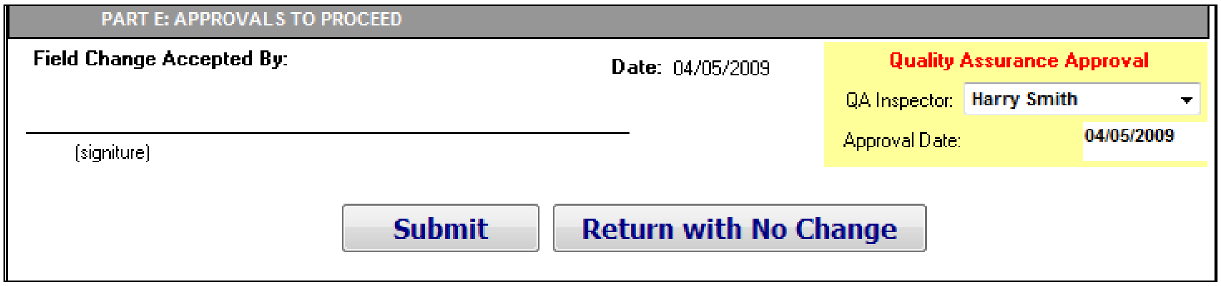
WA Part D: Work Activities and Estimated Costs



- Cost Table <enter all FINAL costs> select Cost Code from pull down selector or direct entry – enter hours and dollars into fields

- Comments: <enter any special comments>

WA Part E: Approvals / Authorizations



- Signature: <approver hard copy signature> no entry on form – used for signature on hard copy of form

- Date: <date approver signed form> direct entry – date entered on hard copy of form

- Submit Button: <submits form data to the database> a single left mouse click to select – enters all form data and saves all information

- Return with No Change Button: <closes form without updating database> selecting button closes form without updating database – does not save data

- QA Inspector: <quality inspector verifying acceptable work> use pull down menu to select from a list of names – direct entry allowed

- Approval Date: <date QA Inspector approved work> direct entry of date onto form

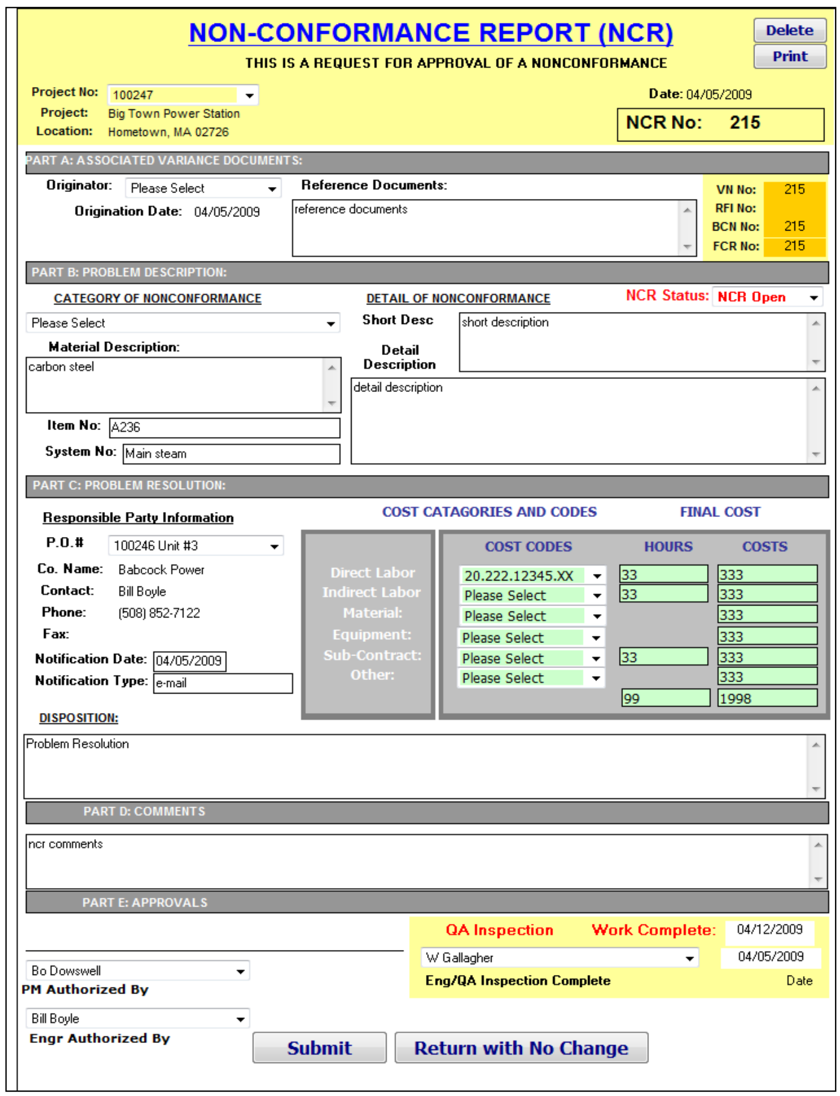
The Non-Conformance Report (NCR)

(used to document impact of design or work conditions changes)

The NCR form contains the following sections:

- NCR: Heading from Stored Data
- NCR Part A: Contractor Performing Work
- NCR Part B: Problem Category
- NCR Part C: Required Action
- NCR Part D: Work Activities and Estimated Costs
- NCR Part E Approvals /Authorizations

Note: The following section described the inputs for each field on the NCR. However, since the NCR is created from a VN form, most of the fields will already be filled in.


NON-CONFORMANCE REPORT (NCR)
Delete
Print
THIS IS A REQUEST FOR APPROVAL OF A NONCONFORMANCE
Project No: 100247
Project: Big Town Power Station
Location: Hometown, MA 02726
Date: 04/05/2009
NCR No: 215
PART A: ASSOCIATED VARIANCE DOCUMENTS:
Originator: Please Select
Origination Date: 04/05/2009
Reference Documents:
reference documents
VN No: 215
RFI No:
BCN No: 215
FCR No: 215
PART B: PROBLEM DESCRIPTION:
CATEGORY OF NONCONFORMANCE
Please Select
Material Description:
carbon steel
Item No: A236
System No: Main steam
DETAIL OF NONCONFORMANCE
NCR Status: NCR Open
Short Desc
short description
Detail Description
detail description
PART C: PROBLEM RESOLUTION:
Responsible Party Information
P.O.# 100246 Unit #3
Co. Name: Babcock Power
Contact: Bill Boyle
Phone: (508) 852-7122
Fax:
Notification Date: 04/05/2009
Notification Type: e-mail
COST CATAGORIES AND CODES
FINAL COST

	COST CODES	HOURS	COSTS
Direct Labor	20.222.12345.XX	33	333
Indirect Labor	Please Select	33	333
Material:	Please Select		333
Equipment:	Please Select		333
Sub-Contract:	Please Select	33	333
Other:	Please Select		333
		99	1998

DISPOSITION:
Problem Resolution
PART D: COMMENTS
ncr comments
PART E: APPROVALS
QA Inspection
Work Complete: 04/12/2009
W Gallagher
04/05/2009
Eng/QA Inspection Complete
Date
Bo Dowswell
PM Authorized By
Bill Boyle
Engr Authorized By
Submit
Return with No Change

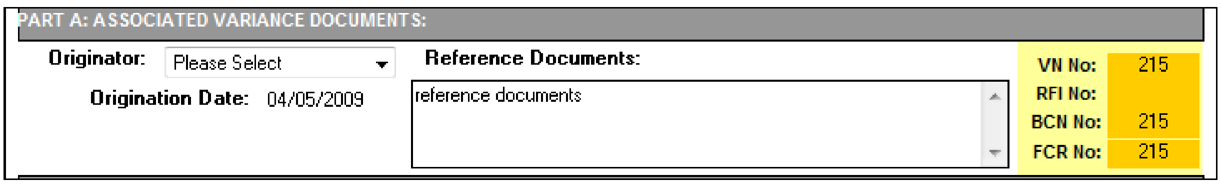
To get to the NCR form at the right, the user logs onto the program and arrives at the Main Menu. From the Main Menu, the user selects the "Edit Forms" button.

This opens the "Edit Menu" where the user selects the pull down selector next to the NCR line. The pull down selector on the NCR line shows all the available NCRs stored in the system. The user highlights an NCR and selects the "Edit This NCR" and the form appears.

NCR: Heading

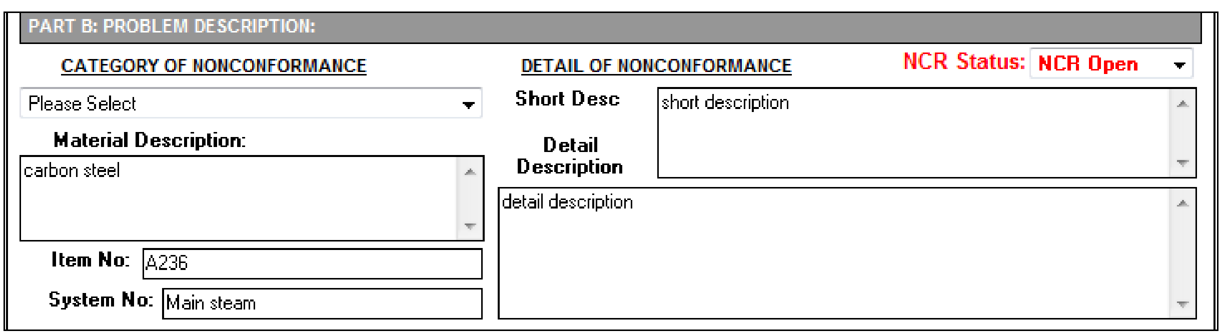
See VN form section for input to this section

NCR Part A: Contractor Performing Work



- Originator: <person authorizing new work> use pull down selector to enter the name of person responsible for new work
- Originator Date: <date this change was identified> direct enter data when change was identified
- Reference Documents: <note any special reference documents that address the scope of the NCR> direct entry into form

NCR Part B: Problem Category



- Category of Non-Conformance: <category of problem> use pull down selector or direct entry
- Material Description: <a text field that allows user to define specific material issues> direct form entry

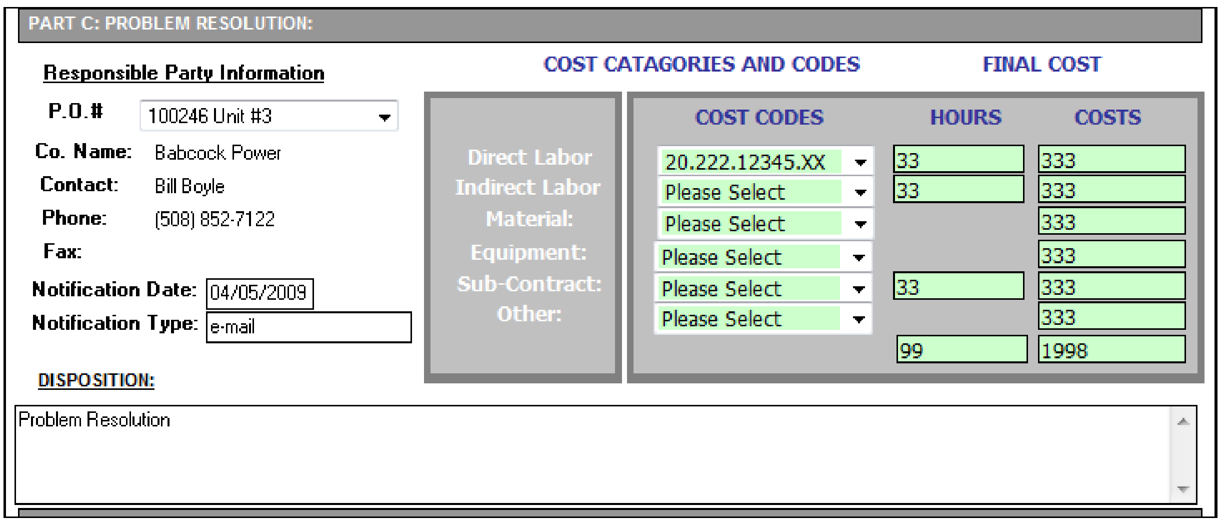
- Item No: <a text field that allows the user to identify a specific item number from a drawing, report, etc.> direct form entry

- System No.: <a text field that allows the user to identify a system identifier from a drawing, report, etc.> direct form entry

- Short Desc: <a brief description of the out of conformance issue> direct form entry

- Detail Description: <a detailed description of the non-conformance> direct form entry

NCR Part C: Work Activities and Estimated Costs



- Responsible Party Information: <enter the company responsible for the non-conformance> use pull down selector to select a company – selector fills in lower fields – direct entry is available

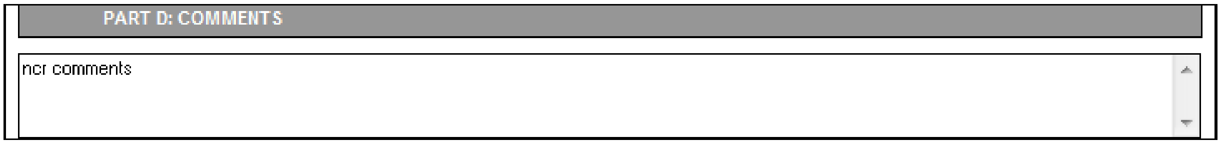
- Notify Date: <date supplier notified> enter date vendor was notified of problem

- Notification Type: <type of notification> enter text describing form of supplier notification (mail, email, verbal, etc.)

- Disposition: <enter problem resolution> direct form entry

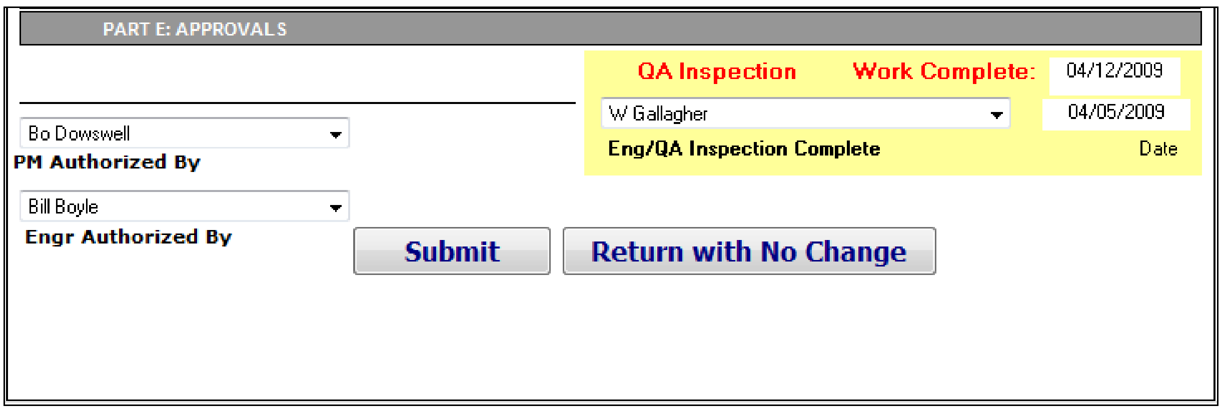
- Cost Table <enter all FINAL costs> select Cost Code from pull down selector or direct entry – enter hours and dollars into fields

NCR Part D: Comments



- Comments: <a text field that allows the user to enter any relevant comments> direct form entry

NCR Part E: Approvals / Authorizations



- Signature: <approver hard copy signature> no entry on form – used for signature on hard copy of form
- PM Authorized By: <enter authorized manager's name> use pull down menu selector or direct entry
- Engr Authorized By: <enter authorized engineer's name> use pull down menu selector or direct entry
- Date: <date approver signed form> direct entry – date entered on hard copy of form
- Submit: - Command Button <submits form data to the database> a single left mouse click to select – enters all form data and saves all information
- Return with No Change: - Command Button <closes form without updating database> selecting button closes form without updating database – does not save data

- EA/QA Inspection Complete: <quality inspector verifying acceptable work> use pull down menu to select from a list of names – direct entry allowed

- Date: <enter date EA/QA inspection is accepted> direct form entry

- Work Complete: <date worked complete> direct form entry

Section 6: Overview of Reports

The following process produces all reports.

From the Main Menu, select the button "Reports" – the Reports Menu should appear. All reports, except the BCN letter, are created from the Reports Menu to the right.

On this menu are three categories of reports. The RFI reports are accessible by all project parties. Variance and Contract reports, due to the sensitive nature of some information, are available only to people authorized by the manager.

The second group of reports, Variance Reports and Logs contain cost and status reports for variances, work authorizations, back charges, and non-conformances. This group is accessed only with high level permissions. The third group of reports is contract summarization reports and again is visible only with high levels of permission.

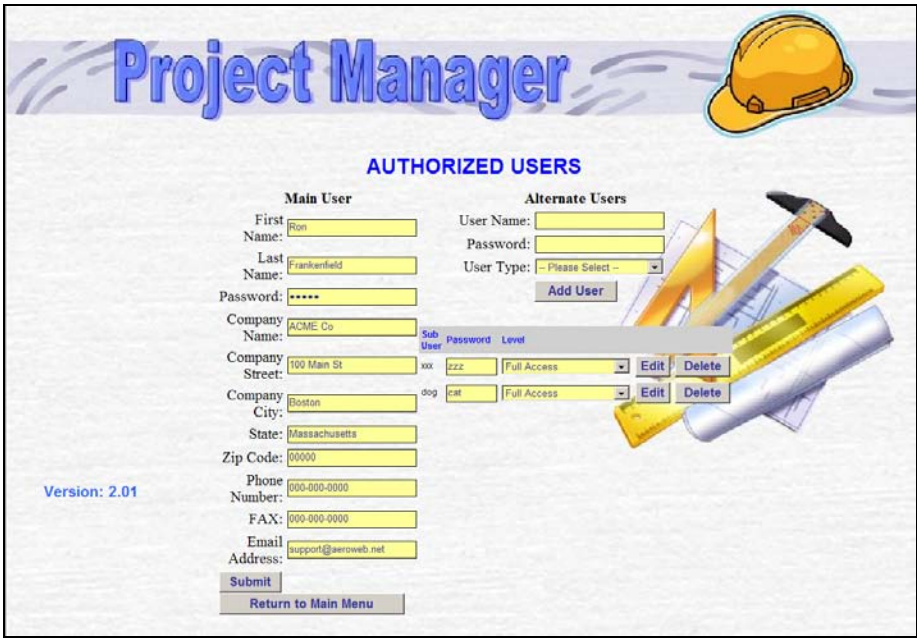
Adding An Alternate User

Project Manager allows the Main User to create alternate users so that subcontractors, engineers, other managers, etc. can actively participate and access the program. Each alternate user can be assigned a different level of access consistent with his project responsibility (full access, RFI and RFI Reports, Read Only, Read Only RFI).

The levels of permission or authorization are set by the main user from the Main Menu -> Edit Profile button. The Authorized User screen provides main user information (which can be updated) and a set of fields on the right of the screen that allows identification of Alternate Users.

Selecting this button opens the Authorized Users screen where the manager sets the level of permissions for each user. The process of assigning an alternate user is as follows; (1) assign and enter in the field a user name, (2) assign and enter a new password, (3) select from the pull down menu the permission desired for the alternate user and (4) click on the 'Add User" button. The table below the Alternate Users section shows all alternate users identified.

Edit and Delete buttons are available to Edit or Delete Alternate Users. When complete, click on the "Submit" button.



Running a Report

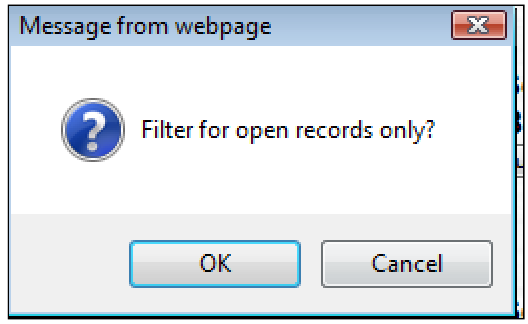
To run a report, the user selects one of the three report lists (RFI, Variance, and Contract) pull down menu selectors and a listing of available reports will be displayed – similar to that at right

Select a report from the list by highlighting it with a mouse click and the report will be highlighted.

The next step in running the report is selecting the "Run Report" button.

After the “Run Report” button is selected, two pop up forms appear where the user defines the range (i.e. start point to end point). In the first pop up form, the user enters the beginning RFI number (or VN, BCN, WA, or NCR number depending on report). The second pop up form is where the upper limit RFI (or VN, BCN, WA, or NCR number depending on report) is entered. This sets the range of printing for the report.

After pressing OK on the last range pop up, another popp up forms appears where the user tells the program to print all records or just the open records. Selecting “OK” restricts the report to only open records. Selecting “Cancel” prints all records in the database that meet the range restriction.



After this, the report should appear. To obtain the best print quality, however, the user should go to the Internet Explorer menu and select File – Page Setup.

The user should then select <u>landscape format</u> with the top margin set at 1” and all others at 0.5” – select OK and report will appear – ready for printing – select File Print to final print the report.

All reports are run in this fashion.

Selecting the “X” in the upper right corner closes the report and returns the user to the Report Menu.

Important Printing Notes:

Eliminate Internet headers and footers: Internet Explored uses default headers and footers that take up valuable space. Select the printer icon  and select Page Setup to find and delete the headers and footers

Page Breaks: The user should upgrade to Internet Explored 8 (or later) to see the page break capabilities.