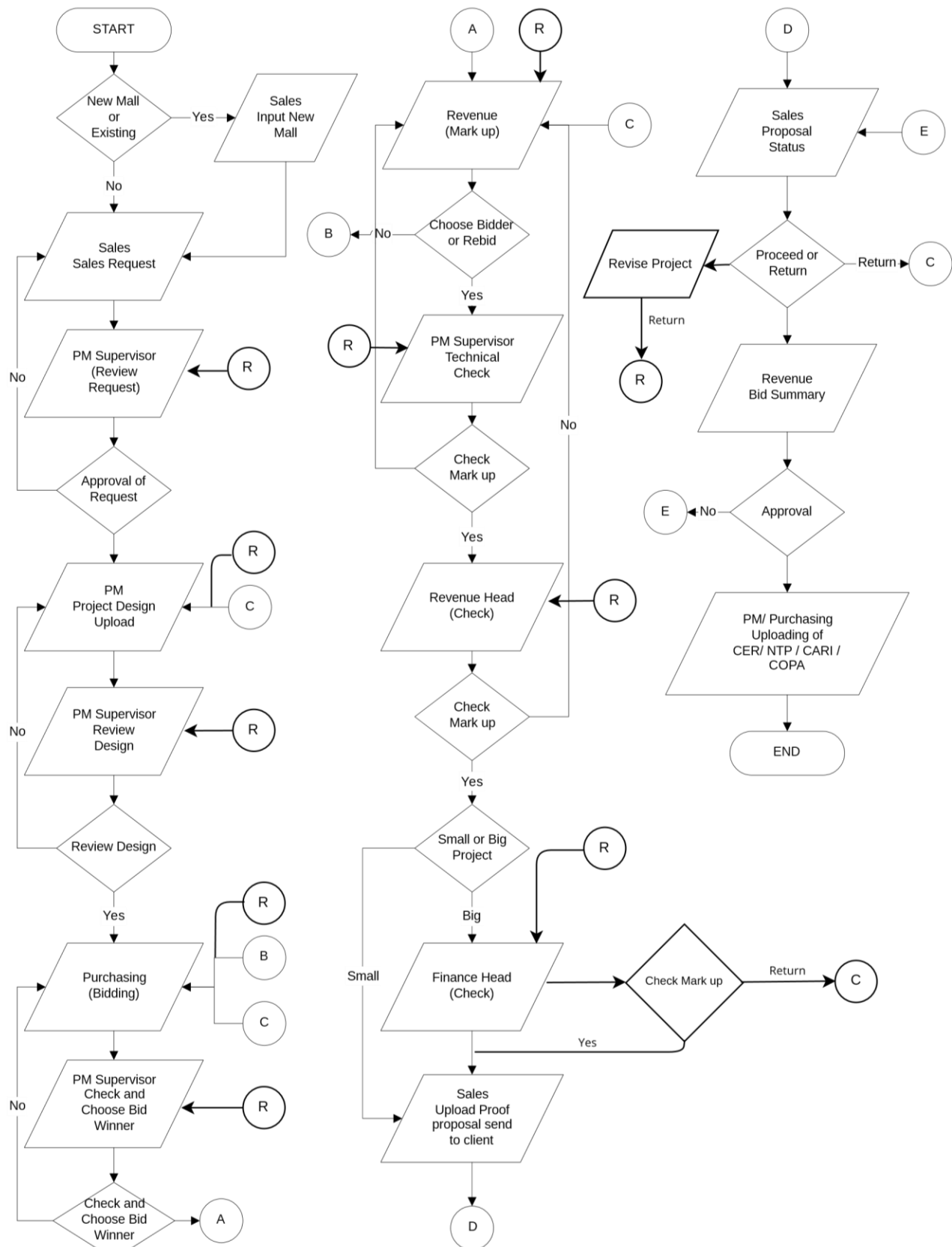




# Project Management System Manual

# Process Flow Diagram of Project Management System



## About

The purpose of the project management system is to streamline and organize the process of creating, reviewing, and executing sales requests for various projects. This system ensures that each stage of a project, from sales request generation to project completion, is handled efficiently by designated team members while maintaining checks and balances through reviews by supervisors and department heads. Ultimately, the project management system aims to provide a smooth, collaborative workflow that results in successful project proposals and execution for the client.

## User Guide

### Step 1 - Adding a New Sales Request: Sales

To initiate a new sales request, follow the steps below:

1. Log in to pm.philcom.com using your account credentials. If you do not have an account yet, please contact the Admin or PM supervisor to create one for you.
2. Once you have logged in, navigate to the "Sales Request" option in the side menu of the system.
3. Click the "Add New Record" button to create a new sales request.
4. You will now need to provide the following information:
  - Mall Name: Select from the dropdown menu. If the mall name is not in the dropdown, you can add it under the "Sales" tab in the "Mall" section.
  - Quotation Addressee: Enter the name of the person or company to whom the quotation will be addressed.
  - Requester: Enter the name of the person who is making the sales request.
  - Project Title: Provide a descriptive name for the project.
  - Proposal Target Date: Select the desired date for the proposal to be submitted.
  - Select whether the project requires a site survey.
  - Comment: Enter any additional information or comments related to the sales request.
  - Project Requirement File: Attach any relevant project requirement files.
  - Category: Select the appropriate category for the project from the following options: Small, Medium, Large, or Special.
5. Once you have provided all the necessary information, click the "Submit" button.

6. Your sales request will now be reviewed by the PM supervisor. If any additional information is required, they will contact you directly.

## **Step 2 - Reviewing the Sales Request: PM Supervisor**

Once a new sales request has been submitted, the PM supervisor will need to review it before assigning it to an active project engineer. Follow the steps below to review a sales request:

1. Log in to your account on pm.philcom.com. Once you have logged in, the "New Sales Request" option will appear on your dashboard.
2. Click on the "New Sales Request" option to view the newly submitted sales request.
3. Click on the sales request code to review the details of the sales request.
4. Once you have reviewed the sales request, choose between "Yes" or "No" when approving the project.
  - If you choose "Yes", select an active project engineer to assign the project to.
  - If you choose "No", leave remarks for this action so that the sales team can review the comments and make any necessary changes to the sales request. The sales request will then be returned to the sales team.
5. If the project is approved and assigned to an active project engineer, the project will be received by the assigned PM.

## **Step 3 - Project Design and Design Upload: Assigned PM Engineer**

Once a sales request has been approved and assigned to an active project engineer, the project design phase can begin. Follow the steps below to design and upload the necessary files:

1. Log in to your account on pm.philcom.com. Once you have logged in, the "Projects for Designing" option will appear on your dashboard.
2. Click on the "Projects for Designing" option to view the project that you need to design.
3. Review the project details and requirements carefully before proceeding with the design phase.
4. Upload the necessary files for the project, including:
  - **Single Line Diagram:** This is a diagram that shows the electrical connections of the project.
  - **Bill of Quantities:** This is a document that lists all the materials and quantities needed for the project.
  - **Layout:** This is a drawing that shows the physical layout of the project.
5. Once you have uploaded all the necessary files, click the "Submit" button.
6. The project design will now be reviewed by the PM supervisor.

## **Step 4 - Reviewing Project Design: PM Supervisor**

Once the project design phase is completed, the PM supervisor will need to review and approve the design before the project can proceed to the purchasing team. Follow the steps below to review and approve the project design:

1. Log in to your account on pm.philcom.com. Once you have logged in, the "Project Design for Review" option will appear on your dashboard.
2. Click on the "Project Design for Review" option to view the project design that needs to be reviewed.
3. Carefully review the project design and ensure that it meets all the requirements specified in the sales request.
4. Approve the project design if it meets all the requirements.
5. If the project design is disapproved, leave remarks for the reason why the design is not approved. The project design will then be returned to the project engineer for revision.
6. Once the project design is approved, it will proceed to the purchasing team for procurement of materials and equipment.

## Step 5 - Project Bidding: Purchasing

Once the project design is approved, the next step is to initiate the project bidding process. Follow the steps below to complete the project bidding process:

1. Log in to your account on pm.philcom.com. Once you have logged in, click on the "Project Bidding" option.
2. View the project details, including the project design, bill of quantities, and layout.
3. Add multiple bidders by providing the following information for each bidder:
  - **Trade:** This is the type of work that the bidder will perform (e.g., electrical, mechanical, civil, etc.).
  - **Contractor Name:** This is the name of the contractor or supplier that is bidding for the project.
  - **Total Cost:** This is the total cost of the bidder's proposal.
  - **Upload the Bid File:** This is the document or file that contains the bidder's proposal.
4. Click the "Submit" button to complete the bidding process.
5. The PM supervisor will now review the bidders and choose the winning bid based on several factors, including the bidder's experience, expertise, cost, and reliability.

## Step 6 - Choosing the Winning Bidder: PM Supervisor

After the bidding process is completed, the PM supervisor will review the bids and choose the winning bidder. Follow the steps below to complete this process:

1. Log in to your account on pm.philcom.com. Once you have logged in, click on the "Check Contractor Cost" option.

2. Review the bids that were submitted by the bidders. Consider several factors when choosing the winning bidder, including the bidder's experience, expertise, cost, and reliability.
3. Choose the winning bidder and notify them of their selection.
4. If there are any disapproved bidders, return their bid file to the purchasing team for rebidding.
5. Once the winning bidder has been chosen, review their bid file to ensure that it is complete and accurate.

## **Step 7 - Revenue Markup: Revenue**

After the winning bidder has been chosen, the next step is to apply the revenue markup to the project. Follow the steps below to complete this process:

1. Log in to your account on pm.philcom.com. Once you have logged in, click on the "Projects for Markup" option.
2. Check the winning bidder chosen by the PM supervisor, or choose the winning bidder yourself.
3. Approve the project if the bid file is accurate and complete.
4. If the project is disapproved, leave remarks and choose the type of revision required, whether it is a major or minor revision. The project will then return to the purchasing team for rebidding.
5. If the project is approved, upload a **Philcom proposal** and choose the project size (**Small or Big**).
6. The project will now proceed to the PM supervisor for review and approval.

## **Step 8 - Technical Check: PM Supervisor**

After the revenue markup process is completed, the PM supervisor will review the Philcom proposal for technical feasibility. Follow the steps below to complete this process:

1. Log in to your account on pm.philcom.com. Once you have logged in, click on the "Philcom Proposal Technical Checking" option.
2. Review the project and check its technical feasibility. Ensure that the project design is practical and can be executed as planned.
3. Approve the proposal if the project is technically feasible.
4. If the proposal is disapproved, leave remarks and notify the revenue team. The project will then return to the revenue team for further revision.
5. If the proposal is approved, the project will proceed to the Revenue Head for final review and approval.

## **Step 9 - Check Proposal: Revenue Head**

Once the Proposal has been technically approved, it will be sent to the Revenue Head for a final review. Follow the steps below to complete this process:

1. Log in to your account on pm.philcom.com. Once you have logged in, click on the "Philcom Proposal for Checking" option.
2. Review the project and ensure that it meets the company's standards and objectives. Ensure that the project is financially viable and profitable.
3. Approve the proposal if it meets all the necessary requirements.
4. If the proposal is disapproved, leave remarks and notify the revenue team. The project will then return to the revenue team for further revision.

5. If the proposal is approved, upload the **P&L (Profit and Loss)** file and click submit.
6. The project will now proceed to the Finance Head for checking and approval if the project size is marked as big.

## Step 10 – Check Proposal: Finance Head

Once the project has been checked by the Revenue Head and the P&L file has been uploaded, it will be sent to the Finance Head for a final review. Follow the steps below to complete this process:

1. Log in to your account on pm.philcom.com. Once you have logged in, click on the "Philcom Proposal for Checking" option.
2. Review the project and ensure that it meets the company's financial requirements and policies.
3. Approve the proposal if it meets all the necessary financial requirements.
4. If the proposal is disapproved, leave remarks and choose where to return the project. You can choose to return the project to the Purchasing, Revenue, or Revenue Head team for further revision.
5. If the proposal is approved, the project will proceed to the Sales team, who will then send the proposal to the client.

## Step 11 - Releasing of Proposal: Sales

After the Finance Head approves the project proposal, it will be sent to the Sales team for releasing to the client. Follow the steps below to complete this process:

1. Log in to your account on pm.philcom.com. Once you have logged in, click on the "Releasing of Proposal" option.
2. Upload the proof of sending the proposal to the client. This could be an email confirmation, a signed proposal from the client, or any other relevant document.
3. Wait for the project proposal status from the client.

## Step 12 - Proposal Status: Sales

After the proposal has been sent to the client, the sales team needs to check the status of the project proposal. Log in to the dashboard and click on "Sales Proposal Status." Here, you will see the list of all the projects for which you have sent proposals to clients.

1. If the project proceeds, you need to upload the **PO/NTP** files and the proposal file. These files will be used to generate the contract, and the project will proceed to the next phase.
2. If the project is disapproved, you need to add remarks and return the project to the appropriate team for revision. The project can be returned to the
  - a. PM (Project Design),
  - b. Purchasing (Bidding),
  - c. Revenue (Proposal) .
3. If the project needs revision, go to the Sales tab in the left corner of the screen and click on "Revise Project."
4. Find the project you need to revise and click on "Revise."
5. Provide the reason for revision and choose where to return the project. The project can be returned to the

- a. PM (Project Design),
- b. Purchasing (Bidding),
- c. Revenue (Proposal)
- d. PM Supervisor (Review Request),
- e. PM Supervisor (Review Design),
- f. PM Supervisor (Review Check and Choose Bid Winner),
- g. PM Supervisor (Technical Check),
- h. Revenue Head (Check),
- i. Finance Head (Check).

### **Step 13 - Check and Upload Bid Summary: Revenue**

1. Log in and click “Uploading of Bid summary” on the dashboard.
2. Review the project and approve or disapprove it.
3. If the project is disapproved, add remarks and return the project to sales.
4. If the project is approved, upload a bid summary file and click “Submit”.

### **Step 14 - Upload of Documents: Assigned PM and Purchasing**

#### **For Purchasing:**

1. Login to the system and navigate to the “Upload Files” section.
2. Find the project you are working on and click on “Upload”.
3. Upload the following documents:
  - Contractor NTP (Notice to Proceed)
  - Contractor PO (Purchase Order)
  - CARI (Contractor Acceptance of Responsibility and Insurance)

#### **For PM:**

1. Login to the system and navigate to the “Upload Files” section.
2. Find the project you are working on and click on “Upload”.
3. Upload the following documents:
  - CER (Contractor Evaluation Report)
  - First COPA (Certificate of Payment Approval)
  - Second COPA (Certificate of Payment Approval)
  - COCA (Certificate of Completion and Acceptance)

Successful uploading of all required files will set the project status to “Project Completed”.