

LBU PIMS IMPLEMENTATION

CONSTRUCTION MANAGEMENT TRAINING GUIDELINE

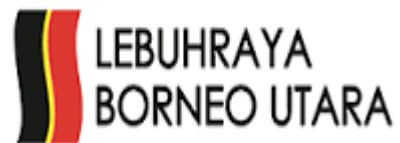


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About This Document

This document is prepared for the Construction Management (CMT) Department training course based on the LBU PIMS Implementation Requirement Specification Document. The targeted trainees will be from the CMT Department. Trainees will be introduced with the ProjectWise Construction Management (PWCM) solution module in the LBU PIMS and learn about the basis of functional operations of the system.

Chapter 1: Introduction of LBU PIMS

Chapter Overview

This chapter aims to provide an introduction of the LBU PIMS system to the CMT Department. As the CMT Department will be using PWCM solution module, this chapter will provide introduction of basic features included in the solution module.

Chapter Objectives

1. The objective of this chapter is to familiarize with the PWCM solution module user interface.

Overview of LBU Project Information Management System (PIMS)

PWCM is the proposed solution module in LBU Project Information Management System (PIMS) for the CMT Department. The solution module provides more project insight, allows management and construction team to share information and permits work flow in document process based on team members contractual obligation.

User Interface

The screenshot displays the LBU PIMS user interface. At the top, the header includes the LBUHARAYA BORNEO UTARA logo and project details: 01-TMS01, WPC Program, and Pan Borneo Highway Sarawak. A 'switch project' link is available. Below the header, a navigation bar contains tabs: Start, Message, Dailylog, Meeting, Calendar, and To Do. The 'Start' tab is active, showing a 'scheduler' link. On the left, a vertical sidebar lists modules: Start, Work, Documents, Report, Finance, Profile, Admin, and Help. The 'Start' module is highlighted. Below the sidebar, a 'Modules' section lists various project tasks. The main content area shows a dashboard with an 'Announcement' (Email Notifications Disabled), a 'View' dropdown (Default), and a 'Level' dropdown (project). The dashboard is divided into sections: 'Inbox' (listing 1 Dailylog Request, 6 IPA-IPC Responses, 1 NCR Response, 3 NCRs, 1 RFA Response, and 1 To Do Responses), 'Calendar', 'Documents Due', 'Meetings', and 'Outbox' (listing 18 To Do Responses and 19 To Dos). At the bottom, a table displays financial and project metrics.

Recent Documents		Spent:		IPA-IPCs Pending:		Project Days Remaining:-51	
Documentation # 31.1		39,900.00		62,000.00		Completion Date:	05/03/2017
Documentation # 31		PCO Spent:	0.00	Retention Pending:	0.00		
To Do # 77		Contracted:	1,901,234,234.00	IPA-IPCs Approved:	39,900.00		
To Do # 75 - To Do Response # 1		Contracted+VO:	1,901,234,234.00	Retention Approved:	0.00		
To Do # 75		Contracted Spent:	0.00%	PTIWVOS Pending:	410,000.00		
				PTIWVOS Approved:	0.00		
				VO Pending:	0.00		
				VO Approved:	0.00		
				Risk Items Pending:	0.00		
				Encumbered:	1,901,194,334.00		

Every module is in a different colour to make users easy to distinguish which module they are in. The module and tabs items cannot be seen if the users don't have the permissions to view them.

a. Start module

This module contains a customizable overview of the project, tools for managing and scheduling meetings, personal time management aids, and communication tools for the project's organization and personnel.

This module contains a Start 'Dashboard', Message tab, Meeting tab, Calendar tab, and To Do tab.

b. Work module

This module contains documents that are most commonly used in the management and oversight of the project during construction.

This module contains the RFI tab, RFA tab, DCR tab, WIR tab and NCR tab

c. Documents module

This module functions as a virtual file cabinet for project documents and drawings and contains the Drawing tab, INC/ACC Report, Visit by Authority, Picture and Documentation

d. Report module

This module contains the report tab which contains a number of pre-generated generic reports that can be customized by the user. Alternatively, users can create their own custom reports as needed.

Also included in this module are the Statistics tab, Alert tab, Relation tab and Organizational tab.

e. Finance module

This module contains a financial Summary, Funding Sources, Budgets, Contracts, PTIWVO, VO, IPA-IPC and Risk issue manager.

f. Profile module

This module contains configuration pages for Programs, Projects, Organizations, Users, Locations, Materials, Equipment, and Crafts. Access to most features within this group is severely limited unless the user has some kind of management permissions enabled.

g. Admin module

This module contains configuration pages for Folders, Templates, and Send Groups. Most users will not see the majority of these tabs as they are only accessible by System IT and users with the Organization, Program, and Project Manager roles.

h. Help module

From this module users can access the product documentation and help guides, view the contents of the updates, and request help by filing support requests when they encounter problems or have a question they need answered.

Document Action

Below is a list of commonly used action buttons with explanations of how they work;

- **New** - Create new request for assigning task to users.
- **Submit** - Submit the task or document.
- **Respond** - Users can respond to requests after receiving the request based on permission and attach files where needed.
- **Send** – Users can send any response or request to another user.
- **App/Rej** - Users can change a respond or request status as approved or rejected.
- **Close** - After a document has been responded to and there is no need for more responses, the document can be closed.
- **Copy** - Copy the request or respond and edit the fields as needed for a new request or respond.
- **Share** - Allows users to share closed documents and their responses with organizations that do not have permissions or were not involved with the request or response to that document.
- **Folder** - Allows users to save and store the document into their respective folders.
- **Reopen** - After a document is closed, a revision can be created. For example, clicking Reopen on a rejected request copies the original request information so user can edit it and resubmit it.
- **Delete** - Allows users to delete the request or responses based on permission.
- **Edit** - Allows users to edit the draft request or responses.

Document Status

- **Draft Documents** - Documents that have been created and saved but not submitted to an organization.
- **Pending Documents** - Documents that have been submitted. Pending documents can be sent and responded to.
- **Closed Documents** – Documents that are complete can be no longer be responded to. After a document is closed, revisions can be made.

Access Rights

Users in the system are given with specific access right to act on the project document used in the system. The access right is assigned at 2 levels, namely at organization and user level. In general, the To Do document has 6 access rights, namely: Create, View, Close, Submit, Respond and App/Rej access right. Every user in WPC, WPCO site planner and planning team in HQ are assigned with the sufficient access rights to allow them to perform their tasks in the system.

Sending Options

There are multiple options for selecting users;

a. Send to an organization

Sending a request to an organization means sending to all the persons registered under an organization. For example, if user select Sample Owner which is in PIMS LBU, all the persons that registered under LBU organization will receive the request. User can add another organization by clicking the Add button.

b. Send to an individual user

Sending a request to an individual user means sending to a particular person. User can add another user by clicking the Add button. If user just need to assign to one user and another user to keep on the request loop, check on the assign for related user which is responsible for the task.

c. Send to group

Send to group means sending the request to a group of users. This group of users can be only created by the System IT. If user need to create a user group, user can make a request to the System IT.

d. Email to someone outside eadoc

User can send the request to a user outside of LBU PIMS by inserting their email. However, this user cannot respond directly to the request in the system. The email will contain the summary and cover letter of the request. The user will be able to reply by email.

****Note:** If user send a request to multiple users, all the users can see all the responses under the request.

Tutorial 1: First Time Login

This tutorial describes the user account activation process for the LBU PIMS. The user will receive the PIMS invitation sent by PWCM through email. This tutorial can be used by key user of CMT Department to log in into PWCM.

1. Click on the link in the email. The link for the LBU PIMS is <https://lbupims.cm.bentley.com/>
2. Input **Login ID** which is the registered email and password as given in the email invitation.
3. User will be directed to the '**Master Subscription Agreement**' page. Click on **Agree** after reading the *Master Subscription Agreement*.
4. User will be directed to a '**New Password Creation**' page. Upon specifying a new password, click on **Save**.

****Note** that the password requirement is at least 1 uppercase, 1 lowercase, 1 number and a minimum of 8 characters.

5. User will be directed to the LBU PIMS account once finished.

Tutorial 2: Switching Projects

This tutorial describes the process of switching projects in the LBU PIMS. If user have multiple project permission, the switch project function allows user to switch from one project to another without logging out. The project list is based on the permissions that have been set up at the project level. If user do not have the permission, user will not see a particular project in the project list. This is to ensure that the accessibility is based on specific project participants.

1. At the top of the interface, click on the [Switch Project](#) hyperlink.
2. From the Project drop down list, select one of the project.
3. Click **Submit**.

Chapter 2: Submission of Report

Chapter Overview

This chapter aims to provide better understanding of Document Submission using To Do items in the LBU PIMS. The **To Do tab** is part of Start module, it allows user to create a To Do request and assigning the task to another user. Every document starts with a request created by a user in LBU PIMS. The request is then submitted to a user who can then send the document to another user or create a response. After there are no more responses to be added to a document, the request is closed. Revised documents can only be created after a document is closed.

As an example, the WPC will prepare and create a To Do request and send the Document (Man Power Record and Machinery Record sheet) to CMT Planner (Construction Planner). CMT Planner will received the notification and will review and respond for any comments if needed. Once reviewed the submission, the CMT Planner can approved and close the respective to do respond and request in the system.

User Involved in using To Do function for Document Submission

For the Construction related workflow, there are 3 workflows involved of using the To Do function in PIMS, namely the Submission of Man Power Record and Machinery Record sheet, Submission of Weekly Monitoring Work Done and Submission of Monthly Report of Dispute Items Log.

User who involves in each workflow is shown in the table below:

Workflow	Users
Submission of Man Power Record and Machinery Record sheet	<ul style="list-style-type: none"> • WPCs • WPCO's CMT Site Planner
Submission of Weekly Monitoring Work Done	<ul style="list-style-type: none"> • WPCO's CMT Contract Manager • WPCO's CMT Project Manager • LBU HQ Contract Manager • LBU HQ Head Construction Manager
Submission of Monthly Report of Dispute Items Logs	<ul style="list-style-type: none"> • WPCO's CMT Contract Manager • WPCO's CMT Project Manager • LBU HQ Contract Manager • LBU HQ Head Construction Manager

Tutorial 1: Initiating Document Submission

This tutorial describes the process of initiating To Do Document submission by creating a To Do Request and submitting the request to the respective user. This tutorial can be used by **Planner** of **CMT Site** to initiate document submission.

1. Log in to the LBU PIMS through a browser.
2. At the **Start** module, go to the **To Do tab**. The inbox and outbox is displayed. Click on **New**.
3. Insert related information in the fields. Ensure that the *Subject, Category, Month, Year* and *Type* fields are filled in for tracking purposes.
4. The summary of the To Do that have been created will be displayed. Before submitting, check whether all the information is correct. If not, click on **Edit** and do the correction. If it is correct, click on **Submit**.
5. Select a user from the drop-down and select WPCO's.
6. After selecting the user, click **Submit**. The request will then be sent to the related users for their next action.

Tutorial 2: Receiving the Response Which Include Document Submission for Review



This tutorial describes the process of responding to a To Do request to include report or document submission for the submission. This tutorial can be used by **Planner** of **CMT Site** to receive response which include document for review.

This tutorial is applicable for three scenarios:

- a) Conducted by the WPCO's **CMT Site Planner** to respond *Man Power Record* and *Machinery Record* sheet submission
- b) Conducted by the WPCO's **CMT Project Manager**, LBU HQ **Contract Manager** and LBU HQ **Head Construction Manager** to respond *Weekly Monitoring Work Done* and *Monthly Report* of dispute items logs

Below are the steps that must be taken to receive and response:

1. Log in to the LBU PIMS through browser.
2. At the start page, notice if there are any new To-Do Response notification in the inbox. Click on new To-Do Response and the page will go directly to the inbox and outbox page. User can also directly go to the To Do tab.
3. Click on the new **To Do Response**. The summary of the response is displayed. Click on the file hyperlink to download the file for review purpose.

****User can easily find the To Do and To Do Responses by using Search  or Browse  function at the very right of the interface.**

Tutorial 3: Forwarding submission for approval

This tutorial describes the process of forwarding the response of the request which include report or document submission. *In case if user need to forward to the respective user. This tutorial can be used by **Planner** of **CMT Site** to forward submission for approval from **Planning Manager (PDP)**.

1. At the top of the request or response summary page, click on **Send**.
2. Select the recipients from the send options.
3. Once finished, click **Submit**.

Tutorial 4: Approving or Rejecting Document Submission Response

This tutorial describes the process of approving and rejecting document submission response. This tutorial can be used by **Head Construction Manager** to approve or reject *Weekly Monitoring Work* and *Monthly Report* in addition for **CMT Site Planner** to approve or reject *Man Power Record* and *Machineries Record*.

This tutorial is applicable for these scenarios:

- a) Conducted by LBU HQ Head Construction Manager to approve or reject document submission response for *Weekly Monitoring Work Done* and *Monthly Report* of dispute items logs submission.
- b) Conducted by WPCO's CMT Site Planner to approve or reject document submission response for *Man Power Record* and *Machineries Record* sheet submission.

Below are the steps that must be taken to approve or reject the submission:

1. After reviewing process, click on **App/Rej**. The page is directly to status page is displayed.
** Note: User can click on *Response* if user just need to comment without approving or rejecting the report or document.
2. Choose **Approved** or **Rejected** from the Status selection and insert comment. Click **Save**.

Tutorial 5: Approving or Rejecting Request that have been Raised

This tutorial describes the process of approving and rejecting the request that has been raised. This tutorial is applicable for multiple users as per following scenarios:

This tutorial is applicable for these scenarios:

- a) Conducted by LBU HQ **Head Construction Manager** to approve and reject request that have been raised for *Weekly Monitoring Work Done* and *Monthly Report* of dispute items logs submission.
- b) Conducted by WPCO's **CMT Site Planner** to approve or reject request that have been raised for *Man Power Record* and *Machineries Record* sheet submission.

Below are the steps that must be taken to approve or reject the request:

1. Click on **Browse**  function and click on **Pending**. Browse the request by the request number or request subject.

2. Click on the request. The request summary is displayed. Click **App/Rej** and the status page is displayed.
3. Select **Approved** or **Rejected** from the Status selection and insert comment. Click **Save**.

Tutorial 6: Closing the Request and Ensure No Pending Responses on Request.

This tutorial describes the process of closing the request to ensure all the responses status is change from pending to closed. The request can only be closed when the response and request is approved. Note the system need at least one approve on response and then approve on request to enable the Close button. This tutorial describes the process of approving and rejecting the request that has been raised. This tutorial is applicable for users with following scenarios:

This tutorial is applicable for these scenarios:

- a) Conducted by LBU HQ **Head Construction Manager** to close the request of *Weekly Monitoring Work Done* and *Monthly Report* of dispute items logs submission.
- b) Conducted by WPCO's CMT **Site Planner** to close the request of *Man Power Record* and *Machineries Record* sheet submission.

Below are the steps that must be taken to close the request:

1. After the request is approved, the request summary is displayed.
2. Click on the **Close** button.

****Note:** If user close on request, all the responses status will change from pending to closed. The user cannot response to the request anymore.

Chapter 3: Storing Construction Related Document

Chapter Overview

This chapter aims to provide better understanding of storing documents into LBU PIMS. The document can be uploaded and stored in the PIMS for sharing purpose.

Chapter Objectives

The objective of this chapter is to understand the process to upload and store the documents into PIMS.

Tutorial 1: Uploading Document into PIMS

This tutorial describes the process of uploading and storing document into LBU PIMS. In this scenario, this step is conducted by respective Construction's user. This tutorial can be used by **Document Controller of PDP Site** to upload/store new document inside PWCM.

1. **Log in** to the LBU PIMS through browser. The **Start** page is displayed.
2. Go to Documents module and click on **Documentation tab**. At the top of the documentation page, click **New**.
3. Fill in all the required fields.
4. Click on **Add** to attach the document or just drag and drop the file into the '**Drag Files Here**' box. Browse the file and attach. Click **Open**.
5. Click **Save** once finished.
6. Click **on Publish** to store the document into respective folder. Click on **Add** and select the folder from the drop-down list.
7. Click **Save** once finished. The document now is stored into the folder and ready for view.

****Note:** For additional folder, user need to make a request to the System IT.

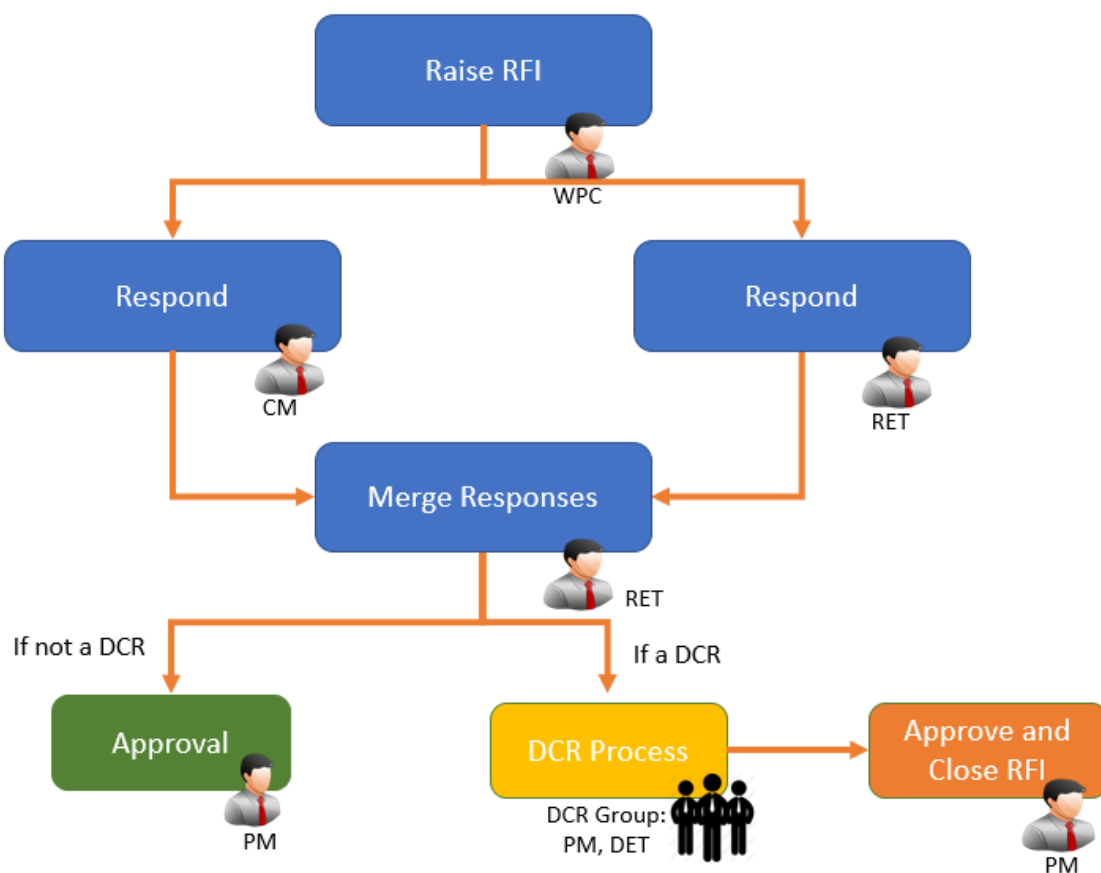
Chapter 4: Request for Information

Chapter Overview

This chapter aims to provide the steps for the Request for Information (RFI) process in the LBU PIMS. The RFI tab is where users create RFIs. An RFI is created by a project participant who is requesting information from another participant. For example, a WPC may request clarification on a conflict between the specifications and drawings.

To expedite the RFI process, users can create links to specific sections or drawings stored in the PIMS so that the reviewer has access to all of the information needed to answer the RFI.

The process of RFI is as below;



Chapter Objectives

The objectives of this chapter is to perform the RFI process in PIMS.


Tutorial 1: Raising RFI in PIMS

This tutorial describes the process of initiating RFI by raising the RFI from WPC and assigning the task to the CM and RET for their next action. In this scenario, this step is conducted by the **WPC**.

1. Go to the **Work module** and click on **RFI tab**.
2. Click **New**. The RFI creation page is displayed.
3. Fill in all the relevant details. User can add location, asset, link and file to RFI by clicking Add below related section.
4. Attach documents that is required. There are two ways to attach:
 - a. Click on **Add**, browse and select the file. Click Open to attach the file.
 - b. Drag and drop the file into the Drag Files Here box.
5. Once finished, click **Save**. The RFI draft summary is displayed.
6. To submit the RFI, click on **Submit**.
7. Select the recipients from the send options.
 - a. Select WPC01-RFI Submission from Send to Group option which consists of the CM and RET.
8. Click on **Submit**. The RFI will be sent to the CM and RET.

Tutorial 2: Receiving and Responding to the RFI


This tutorial describes the process of receiving and responding to the RFI raised by the WPC. In this scenario, this step is conducted by the **CM** and **RET**.

1. Upon receiving the RFI, the new RFI notification will appear in the Inbox section at the Start page. Click on the **new RFI** or directly go to the **Work module** and click on the **RFI tab**.
2. Click on the **new RFI** which is in bold. User also can click on the Browse  icon and click on the Pending hyperlink to view pending RFI. Once user click on the pending RFI, the RFI summary is displayed.
3. Click on **Response** to respond to the RFI. Fill in the details.

Note: If design change (DCR) is required, mention it in the Response text box.
4. Click **Save** and the summary will be displayed. If amendment is needed, click **Edit** and amend.
5. Click **Submit** to select the recipient of the MS request. Select the recipient from the drop-down list for Send Group: WPC01-RFI Response.
6. After selecting the group, click **Submit**. The request will then be sent to the recipients.

Tutorial 3: Receiving and Merging Responses

This tutorial describes the process of merging the responses for escalating the request with the responses to the Project Manager. The merging responses is important for the PM to view all the responses needed since the PM can't see the responses in the request unless the responses are shared to the PM. In this scenario, this step is conducted by the **RET**.

1. Upon receiving the RFI Responses from both CM and RET, **new RFI Responses** notification will appear in the Inbox section at the Start page. Click on the new RFI Responses or directly go to the **Work module** and click on **RFI tab**.
2. Click on the **new RFI Response** which is in bold. User also can click on the **Browse**  icon and click on the **Pending hyperlink** to view pending RFI. Click on the respective response in the Responses list, the response summary is displayed.
3. Once finished reviewing the responses, click on the **Request** hyperlink located on top of the page or click on the related RFI in the browse pane.
4. Click on the **Merge** at the Responses section. Edit the subject, for example 'Final Response to RFI #..' and tick on the check the boxes for the comments that need to be merged.
5. Click **Save** once finished. The RFI summary is displayed.
6. Click on the merged response in the Responses section to review them.
7. Click **Submit** to select the recipient of the merged response. Select the recipient from the drop-down list for Send Group:
 - i. If DCR is required, choose the RFI DCR Submission group.
 - ii. if DCR is not required just submit the RFI directly to PM.
8. After selecting the group, click **Submit**. The request will then be sent to the recipients.

Tutorial 4: Forwarding the RFI

This tutorial describes the process of forwarding the RFI to another user if needed. The **RET** can forward the merged Response to another preferred user.

1. At the top of the request or response summary page, click on **Send**.
2. Select the recipients from the send options.
3. Once finished, click **Submit**.

Tutorial 5: Approving the RFI

This tutorial describes the process of approving the RFI in PIMS. Once the process is completed, PM will close the RFI. If the process involving design change request (DCR), **PM** need to ensure the DCR process is approved and completed before approving the RFI and close the request.

1. At the top of the request summary page, click on **App/Rej**.
2. Select the **approval status** to approve. User can select either;
 - a. Approved - Without DCR
 - b. Approved - With DCR
3. Once finished, click **Save**. The approval notification will be sent to the respective users.

****Note:**

- For **Approval** or **Rejection**, there's no need to click the **submit** button to send. The status of the request will be updated and the initiator will receive the notification of approval/rejection.
- Click on **Response** if user just need to comment without approving or rejecting the report or document.

Tutorial 6: Rejecting the RFI

This tutorial describes the process of rejecting the RFI in PIMS. **PM** will have the permission to reject the RFI if the RFI is void or irrelevant. Follow the steps below to reject the RFI.

1. At the top of the request summary page, click on **App/Rej**.
2. Select the **approval status** to reject. User can select either;
 - a. Rejected (The RFI is rejected)
 - b. Void (The RFI is not valid)
3. Once finished, click **Save**. With that the RFI is rejected and approval notification will be sent to the respective users.

Tutorial 7: Closing RFI

This tutorial describes the process of closing the RFI in PIMS. Once the approval is updated, **PM** will need to close the RFI.

There are two scenarios to close the RFI;

- a. The RFI is approved and completed. To ensure all the responses are closed and users cannot respond to the request anymore.
- b. The RFI is rejected or void. To ensure all the responses are closed and if needed, to enable revision of the RFI can be created.

To close the RFI, PM or WPC need to follow the steps below;

1. Once the RFI's status is changed, the **Close** button will be enabled.
2. Click on **Close**. The RFI is closed and all the responses also will be closed. The notification will be sent to the respective users.

Tutorial 8: Reopen RFI

This tutorial describes the process of reopening the RFI in PIMS. If the RFI is already closed and user need to allow new responses on the RFI, the **PM** site need to reopen the RFI to enable the response.

1. Once the RFI's is closed. The **Reopen** button will be enabled.
2. Click on **Reopen**. With that the RFI will be reopened for new responses.

Tutorial 9: Revising RFI

This tutorial describes the process of revising the RFI in PIMS. If the RFI is rejected or void and there is a need to create a revision of the RFI, **WPC** need to revise the RFI if required in the approval status's comment.

1. Once the RFI's is closed. The **Revise** button will be enabled.
2. Click on **Revise**. A new RFI page is displayed.
3. Edit the fields as needed and click on **Save** once finished.
4. Click **Submit** to select the recipient of the merged response. Select the recipient from the drop-down list for Send Group: WPC01-RFI Submission.
5. Click on **Submit**. The RFI will be sent to the recipient in the group – the CM and RET. Note that the new RFI will capture the Revision number at the top of the RFI summary page and the previous version will be stated as 'Old Version' at the top of the RFI summary page.

Chapter 5: Issuing Site Direction

Chapter Overview

This chapter aims to provide the steps for the Site Direction process in the LBU PIMS. The Site Direction tab under the Work module is used. Site Direction is created by a project participant to give direction or an order to change something. For example, the PM will issue a site direction to WPC if some process on the site need to be changed.

To expedite the site direction process, users can create links to specification sections or drawings stored in the documents tab so that the reviewer has access to all of the information needed to implement the site direction correctly.

Chapter Objectives

The objective of this chapter is to provide understanding to the user on the Site Direction process in PIMS.


Tutorial 1: Issuing Site Direction

This tutorial describes the process of issuing site direction to related parties for an example to the WPC. The process of Site Direction issuance is usually conducted by the **PM**.

1. Go to the **Work module** and click on the **Site Direction tab**.
2. Click **New** button. The Site Direction creation page is displayed.
3. Fill in all the relevant details. User can add location, link and file attachment to the Site Direction by clicking Add below related section. User can also use drag and drop method to attach files.
4. Once finished, click **Save**. The Site Direction draft summary is displayed.
5. To submit the Site Direction, click on **Submit**.
6. Select the recipients from the send options. In the current process, select the respective WPC that need to receive the site direction.
7. Click on **Submit** button again to submit the Site Direction request.

Tutorial 2: Receiving and Responding to Site Direction

This tutorial describes the process of receiving and responding to the Site Direction issued by the PM. In this scenario, this step is conducted by the **WPC**.

1. Upon receiving the Site Direction, **new Site Direction** notification will appear in the Inbox section at the Start page. Click on the **new Site Direction** or directly go to the **Work module** and click on **Site Direction tab**.
2. Click on the **new Site Direction** which is in bold. User also can click on the **Browse**  icon and click on **the Pending hyperlink** to view pending Site Direction. Once user click on the **new Site Direction**, the Site Direction summary is displayed.

3. Click on **Respond** to respond to the Site Direction. Fill in the details and state user action regarding the site direction that has been issued.
4. Click on **Save**. The Response summary is displayed.
5. To submit the response, click on **Submit**.
6. Select the recipients from the send options. In current process, select Site Direction Verification from Send to Group option which consist of SRE to review and verify the work done by the WPC according to the Site Direction.
7. Click on **Submit** button again to submit the Site Direction respond.

Tutorial 3: Reviewing and Approving the Site Direction

This tutorial describes the process of reviewing and approving the site direction in PIMS. In this case, the SRE will inspect and verify the work done by the WPC before they can give approval to the site direction. This step is conducted by the **SRE**.

1. Upon receiving the Site Direction response, **new Site Direction Response** notification will appear in the Inbox section at the Start page. Click on the **new Site Direction** or directly go to the **Work module** and click on **Site Direction tab**.
2. Once user click on the **new Site Direction**, the Site Direction summary is displayed. After verification and inspection work has been done, the SRE can give approval to the site direction.
3. Click on the **Request** hyperlink located on right top corner of the summary page.
4. Click on **Approve** button to give the approval status. The approval status is either **Approve** or **Reject**.
5. Once approved, click the **Close** button to close the site direction.

Tutorial 4: Sharing the Site Direction Status

This tutorial describes the process of forwarding the site direction status to different users for reference and status update. For this case, the Site Direction status usually will be forwarded to the CM and a few other personnel by **SRE**.

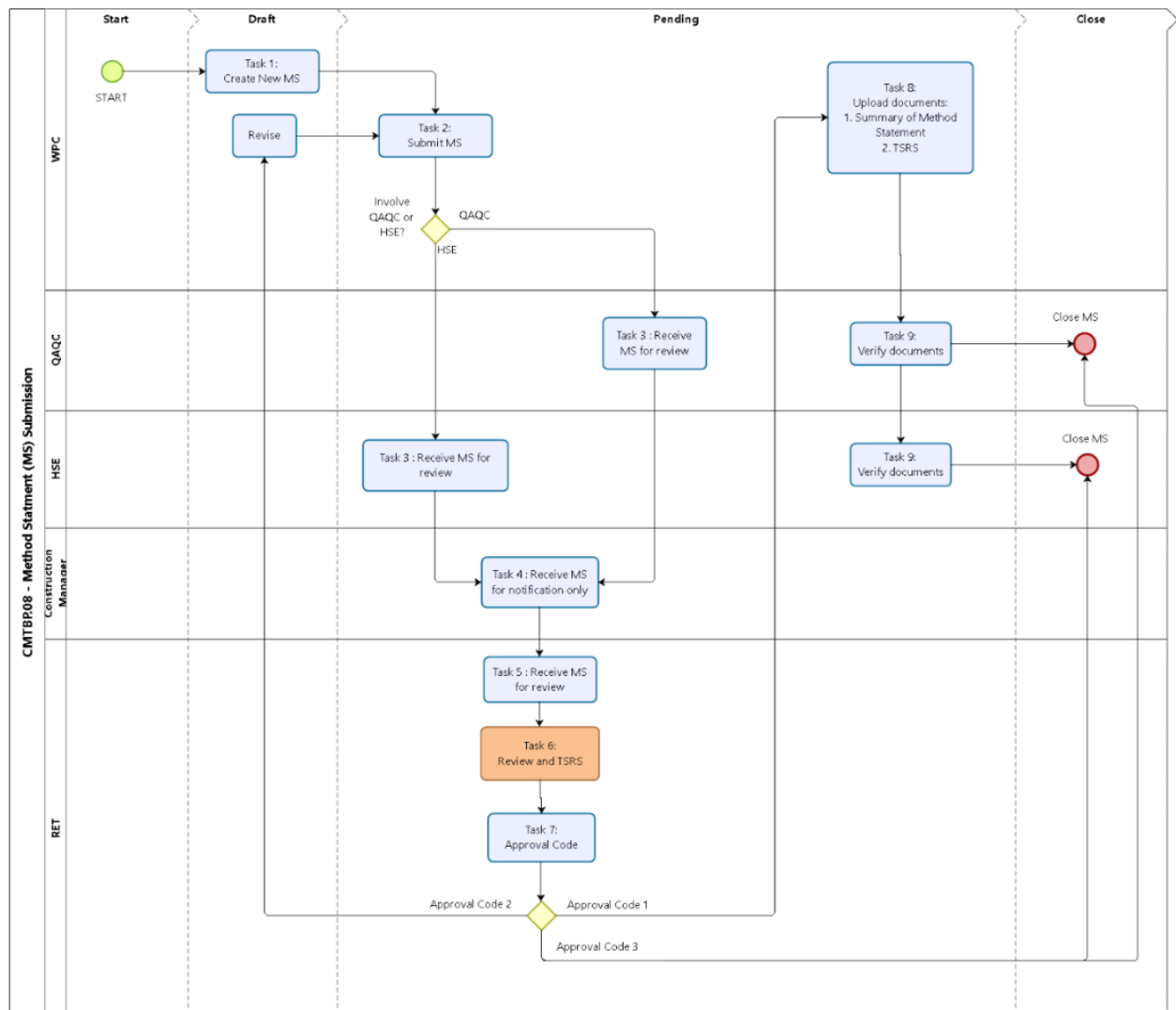
1. At the request summary page, click on the **Share** button to share the status of the site direction to related user.
2. At the sender selection page, choose from the Send to and Individual User dropdown list of the user that need to receive the site direction status.
3. Click **Share** once finished.

Chapter 6: Method Statement (MS)

Chapter Overview

This chapter aims to provide a guideline to conduct the Method Statement (MS) process in LBU PIMS. The RFA tab is used to conduct the MS, where users can create and submit RFAs for review and approval by the owner prior to the construction of the items covered by the RFA.

MS Workflow in PIMS



The users involved in the MS process in the system are:

1. Work package Contractors (WPCs)
2. Resident Engineer Team (RET)
3. Construction Management Team (CMT) for QAQC

The MS is registered by the WPC in the PIMS and submitted to the RET or site CMT members. Once the RET or Site CMT members receive the request in the system, the process is done offline. The conventional MS is conducted until completion. The MS has received and approval Code 1, 2 or Rejected, the RET will update the approval status in PIMS. If a Revision is required, the step is repeated in the system. The WPC need to revise the original request and re-submit. If the MS is rejected, the CMT QAQC team will close the MT. The WPC will then have to respond and attach all the relevant documents, such as the TSRS letter. The CMT QAQC team will then verify the documents and close the MT.

Tutorial 1: Creating a Method Statement (MS) request

This tutorial describes the process of conducting the MS in the LBU PIMS. In this scenario, this step is conducted by the **WPC**.

1. Log in to the LBU PIMS through the browser. The Start page is displayed.
2. Go to the **Work module** and click on the **RFA tab**.
3. At the top of the RFA page, click **New** button. The Master List will be displayed.
 - a. Choose the related discipline code for the MS from the master list.
 - b. For each discipline code, there will be one for MS and another for Method Statement (MS)
 - c. Choose the correct discipline code that starts with MS in the Subject field.
 - d. The numbering for MS in the system will follow the numbering of the master list.
4. Fill in the fields required for the MS.
 - a. **Subject:** Edit to include detailed information if needed
 - b. **Ref No.:** WPC reference number for the MT
 - c. **Type of Submission:** Select Material Submission (MT) from the list. (Mandatory field)
 - d. **SSRW/TCM/Drawings/BoQ:** Insert relevant information. (Mandatory field)
 - e. Fill in all material's information in required field.
5. Attach documents that is required. There are two ways to attach:
 - a. Click on **Add** button, browse and select the file. Click **Open** to attach the file.
 - b. Drag and drop the file into the Drag Files Here box.
6. Click **Save** once finished. The MS request is displayed for review before submitting.
7. Click **Submit** to select the recipient of the MS request. Select the recipient from the drop-down list for Send Group - Construction Method Statement Submission group.
8. After selecting the group, click **Submit**. The request will then be sent to the recipients.

Tutorial 2: Approving the Method Statement (MS)

This tutorial describes the process of updating the approval code for the MS after all relevant parties has decided. In this scenario, this step is conducted by the **RET** or Project Manager (**PM**).

1. Log in to the LBU PIMS through the browser.
2. Click on the **new RFA notification** and the page will go directly to the RFA tab displaying the inbox and outbox page.
3. Click on the **new RFA response** in the inbox page. The summary of the RFA response is displayed. Click on the **request** hyperlink.
4. Click on **App/Rej** button. The status page will be displayed.
5. Choose the appropriate Approval Code from the Status selection and insert comments as needed. Click **Save**.

****Note:**

- For Approval or Rejection, there's no need to submit or send. The request will be updated and the initiator will receive the notification of approval/rejection.
- Click on Response if user just need to comment without approving or rejecting.

Tutorial 3: Updating the Method Statement (MS) with updated info and documents

This tutorial describes the process of updating the MS with relevant details and documents that needs to be attached, such as the TSRS letter. This step is conducted by the **WPC**.

1. Log in to the LBU PIMS through a browser.
2. At the start page, notice the **new RFA notification** in the **Start tab**. Click on it and the page will go directly to the RFA inbox and outbox page.
3. Click on the RFA that has been approved. The summary of the RFA is displayed.
4. Click on the **Respond** button and choose Final as the type of response. Fill in any comment as necessary.
5. Attach documents that is required. There are two ways to attach:
 - i. Click on **Add** button, browse and select the file. Click **Open** to attach the file.
 - ii. Drag and drop the file into the Drag Files Here box.
6. Click **Save** and the summary will be displayed. If amendment is needed, click **Edit** and amend.
7. Click **Submit** to select the recipient of the MS request. Select the recipient from the drop-down list for Send Group: Construction Method Statement Submission.
8. After selecting the group, click **Submit**. The request will then be sent to the recipients.

Tutorial 4: Verifying and Closing the MS

This tutorial describes the process of verifying and closing the MS request. In this scenario, this step is conducted by the **CMT QAQC engineer**.

1. Log in to the LBU PIMS through a browser.
2. At the start page, notice the **new RFA response** notification in the **Start tab**. Click on the **new RFA notification** and the page will go directly to the RFA inbox and outbox page.
3. Click on the **new RFA response** in the inbox page. The summary of the RFA response is displayed. Verify the attached document (TSRS, etc) by downloading and viewing the file.
4. Once verified, click on the **request** hyperlink.
5. Click on the **Close** button to close the MS request.
6. After that is done, the status for the MS will be updated as closed.

****Note:** Once the request is closed, all the responses status will change from pending to closed. The user cannot respond to the request anymore.