**LBU PIMS**

**IMPLEMENTATION**

**CONTRACT MANAGEMENT**

**TRAINING GUIDELINE**

Table of Contents

[About This Document 4](#_Toc487375724)

[Chapter 1: Introduction of LBU PIMS 5](#_Toc487375725)

[Chapter Overview 5](#_Toc487375726)

[Chapter Objectives 5](#_Toc487375727)

[Overview of LBU Project Information Management Solution (PIMS) System 5](#_Toc487375728)

[Tutorial 1: First Time Login 8](#_Toc487375729)

[Tutorial 2: Switch Project 8](#_Toc487375730)

[Chapter 2: Contract Details in PIMS 9](#_Toc487375731)

[Chapter Overview 9](#_Toc487375732)

[Chapter Objectives 9](#_Toc487375733)

[Tutorial 1: Record and Store Contract Details 10](#_Toc487375734)

[Tutorial 2: Deleting an Existing Contract 10](#_Toc487375735)

[Tutorial 3: Recovering a Deleted Document 11](#_Toc487375736)

[Tutorial 4: Editing an Existing Contract 11](#_Toc487375737)

[Chapter 3: IPA-IPC Submission 12](#_Toc487375738)

[Chapter Overview 12](#_Toc487375739)

[Chapter Objectives 12](#_Toc487375740)

[Tutorial 1: Creating a New IPA-IPC 13](#_Toc487375741)

[Tutorial 2: Submitting IPA-IPC 13](#_Toc487375742)

[Tutorial 3: Reviewing and Approving IPA-IPC 13](#_Toc487375743)

[Chapter 4: PTIWVO 14](#_Toc487375744)

[Chapter Overview 14](#_Toc487375745)

[Chapter Objectives 14](#_Toc487375746)

[Tutorial 1: Creating PTIWVO 15](#_Toc487375747)

[Tutorial 2: Linking Location, Asset and Activity to the PTIWVO Request 15](#_Toc487375748)

[Tutorial 3: Attach Document to the PTIWVO Request 15](#_Toc487375749)

[Tutorial 4: Submitting the PTIWVO Request 15](#_Toc487375750)

[Tutorial 5: Receiving and Responding to the PTIWVO Request 16](#_Toc487375751)

[Tutorial 6: Approving or Rejecting the PTIWVO Request 16](#_Toc487375752)

[Tutorial 7: Closing the PTIWVO Request 16](#_Toc487375753)

[Tutorial 8: Revising the PTIWVO Request 17](#_Toc487375754)

[Chapter 5: Using Report in PIMS 18](#_Toc487375755)

[Chapter Overview 18](#_Toc487375756)

[Chapter Objectives 18](#_Toc487375757)

[Tutorial 1: Creating Report 18](#_Toc487375758)

# About This Document

This document is prepared for Contract Management training course based on the LBU PIMS Implementation Requirement Specification Document. The targeted trainees will be from Contract Management Department. Trainees will be introduced with the ProjectWise Construction Management 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 Contract Management Department. As Contract Management Department will be using ProjectWise Construction solution module, this chapter will provide introduction of basis features included in the solution module.

## Chapter Objectives

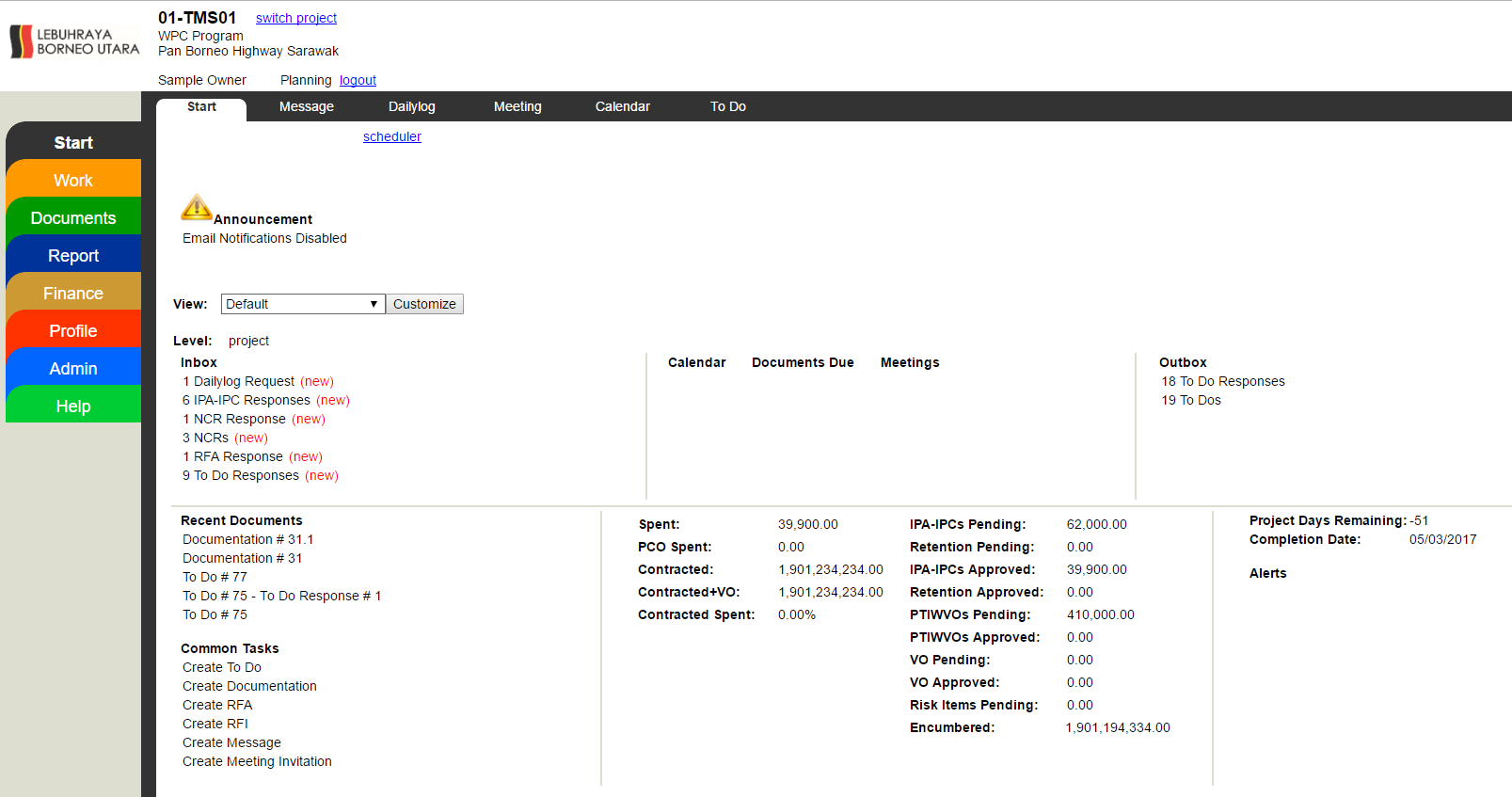
The objectives of this chapter are as follow: -

* To familiarize with the ProjectWise Construction Management solution module user interface.

## Overview of LBU Project Information Management Solution (PIMS) System

ProjectWise Construction Management (PWCM) is the proposed solution module in LBU Project Information Management Solution for Contract Management 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**



**Tabs**

1

**Modules**

2

Every module is in different colour to makes user easy to distinguish which module they are in. The module and tabs items cannot be seen if you have

1. **Start module**

The Start module contains a customizable overview of the project, tools for managing and scheduling meetings, personal time management aids, and communication tools for project’s organizations and personnel.

This module contains Start ‘Dashboard’, Message tab, Meeting tab, Calendar tab, and To Do tab.

1. **Work module**

The work module contains the 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.

1. **Documents module**

This tab 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.

1. **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, user can create their own custom reports as needed.

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

1. **Finance module**

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

1. **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.

1. **Admin 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.

1. **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**

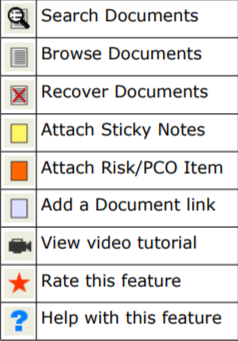
Below is a list of commonly used action buttons with explanation of how they work;

* **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 the file as needed.
* **Send** - When you receive a respond or request, you can send it to another user by clicking Send button.
* **App/Rej** - User can change 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 the 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, it still can be Reopen for revision or allowing response.
* **Revise** - After a closed document is Reopen, a document can be revised. The Revise button will copy the original request information so you 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.

**Documents 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 -** Completed that can be no longer be responded to. After a document is closed revisions can be made.

**Additional Features**



## 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.

1. Click on the link as 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. You will be directed to the ‘Master Subscription Agreement’ page, Click on Agree after reading the Master Subscription Agreement.
4. You will be directed to a ‘New Password Creation’ page. Upon specifying password, click on the Save button.

\*\*Note that password requirement need at least 1 uppercase, 1 lowercase, 1 number and minimum 8 characters.

1. You will be directed to the LBU PIMS account once finished.

## Tutorial 2: Update User Details

This tutorial describes the steps to update user details that is recorded in the LBU PIMS. Some of the details that can be edited include, User name, Position, Picture and Phone numbers. Users can also upload a Picture, Signature, web links or relevant files. Apart from these details, users can manage the document notifications received through email. The type of notifications such as Submit, Response and other, for each process can be controlled by ticking or unticking the check boxes.

1. Click on the user name which is at the top of the interface, listed below the project details.
2. Click on the Edit button to start editing current information or add new details.
3. Click Save once completed.

On the right-hand pane of the interface for the User tab, you can find the user list for the project. It will be listed according to what you click on, whether to view All users or the Assigned which only list the users for the particular project you’re on. Effectively, the Assigned users listed will be less than the All user list.

## Tutorial 3: Switch Project

This tutorial describes the process of switching project in the LBU PIMS. If you have multiple project permission, the switch project function allows you to switch project to another project without logging out. The project list is based on the permission that have been set up at the project level. If you do not have the permission, you will not see 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 Switch Project hyperlink.
2. From the Project drop down list, select one of the project.
3. Click Submit.

# Chapter 2: Contract Details in PIMS

## Chapter Overview

This chapter aims to provide better understanding of registering contract details in PIMS. Contracts are created for each organization that you have signed a legal contract with. This will allow you to track the spending on your Project and apply that spending to various Funding and Budget sources. All the information regarding the WPC’s contract particulars such as contract amount and retention value will be captured in Contract tabs under the Finance module.

## Chapter Objectives

The objectives of this chapter are as follow: -

* To record WPC’s contract details for WPC contract into PIMS.
* To store WPC’s contract particulars into PIMS

## Tutorial 1: Record and Store Contract Details

This tutorial describes the process of recording WPC’s contract details into PIMS.

1. Log in to the LBU PIMS through browser.
2. Go to the Finance module and click on Contract tab.
3. Click on the New button to start registering contract details.
4. At the contract creation page, enter the contract name and associated details. If an organization other than contractor or contractee will need access to the financial information related to the Contract, click the Add button below the appropriate share finance summary heading and select the organization from the drop down.
5. Click Add button under Files section. Browse the contract particular file and click Open.

Or

Click Link to link the contract with any document that has already been stored in the system.

1. Click Save once finished.
2. Click on Publish to issue the contract details.

\*\*Below are the document actions that associated with the contract tab;

**Publish** - After a new document is created and saved, you can click the Publish button to publish the document. Once a document is published, all users on the project that have permission to view this tab will be able to view this document.

**Unpublish** - To make changes to a document or to delete a document you must first click on the Unpublish button to move the document back to draft where only your organization can view it. Only the user that publish the document can Unpublish it. The Unpublish button will disappear once the document has been linked to.

**Revise** - After a document is published, a revision can be created if revision control is active for the document. The Revise button will only appear after the documents has been Published. When the Revise button is clicked it creates a new version of the document and copies the original document information so that it can be edited and reposted.

## Tutorial 2: Deleting an Existing Contract

This tutorial describes the process of deleting an existing contract. You should only delete Contracts that are in draft status, all other Contracts should be closed and/or revised normally.

1. Within the Contract tab, click on the Browse  function.
2. Click on the Draft hyperlink then select the document you want to delete.
3. Click on the Delete button.

\*\*Only draft documents can be deleted.

## Tutorial 3: Recovering a Deleted Document

This tutorial describes the process of recovering an existing contract.

1. Within the Contract tab, click on the Recover Deleted Documents  function.
2. Select the document you want to recover from the list of displayed documents by clicking on the document name.
3. Click the Recover button.

## Tutorial 4: Editing an Existing Contract

This tutorial describes the process of editing an existing contract. The contracts can only be edited while they are in draft status. If a user publishes a contract, it must be unpublished to return it to a draft status and it can then be edited.

1. Within the Contract tab, click on Browse  function and click on Draft hyperlink. Browse related document.
2. Click on the Edit button. Edit the contract details.
3. Click Save once finished.
4. Click on Publish to issue the contract details.

## Tutorial 5: Customizing Contract Summary View

This tutorial describes the steps to customize the Contract Summary that is viewable in user’s LBU PIMS. Users can add or remove columns to view the necessary information and customize the title of the columns chosen. The customized view can be saved for yourself or shared with other users.

1. Within the Contract tab, click on Customize at the bottom of the contract summary view.
2. Choose the columns from the Optional table on the left by highlighting an item and clicking Add. You can also double click the item to add it to the Selected list.
3. Edit the title of the item by putting your cursor on the item in the Selected list and type or delete the existing text.
4. Move the sequence of the item by highlighting the item and clicking Up or Down.
5. Remove an item from the Selected list by highlighting the item and clicking Remove. You can also double click the item to remove it from the Selected list.

Note: Once an item that has been selected, it will not be listed in the Optional list. It will only appear once the item is removed from the Selected list.

1. Once you finish customizing, enter a unique name in the Save as box. Tick the Share box if you want the view to be shared with other users.
2. Click Save and the customized summary view will be shown.

## Tutorial 6: Creating Budget Item

This tutorial describes the steps to create a new budget item. The new budget item will be added to the list.

1. Go to the Budget tab.
2. Click New and fill in the details required such as the budget item Name, the amount and currency.
3. Click Save once completed.

## Tutorial 7: Copying Budget Item

This tutorial describes the steps to copy an existing budget item and save it as a new one. This saves time when creating a new budget item that has the same details with an existing one except for the name and amount.

1. Within the Budget tab, click on an existing budget item that you want to copy.
2. Click Edit to amend the details such as the name and amount.
3. Click Save once done.

## Tutorial 8: Associating Budget Item to Contract document

This tutorial describes the steps to associate a budget item to an existing Contract document. The budget item must be created first in order for it to be associated to a contract.

1. Go to the Contract tab and click on the contract in the summary list that you want to associate a budget item to.
2. Click Unpublish.
3. Click on Edit to add the budget item to the contract.
4. Click on Add to add a new budget item from the drop-down list.
5. Fill in either the Amount or the Contract Distribution % for the new budget item. The system will calculate the % or amount respectively.
6. Click Save once completed.

## Tutorial 9: Creating BQ document

This tutorial describes the process to create a BQ document.

1. Go to the BQ tab and click on New to create a new BQ.
2. Link the BQ to the correct Contract.
3. Fill in the BQ details.
4. Attach a BQ document as necessary.
5. Click Save to complete the new BQ.

## Tutorial 10: Adding BQ item into BQ document

This tutorial describes the process to add BQ items into the BQ document.

1. Within the BQ tab, click on Add under the Items section.
2. Fill in the item details such as Item ID, Description, Schedule ID, Quantity, Price and other relevant details.
3. Click Save to complete adding the new BQ item.

## Tutorial 11: Associating Budget item with BQ item

This tutorial describes the steps to associate a budget item with a BQ item.

1. Within the BQ tab, click on Edit under the Items list.
2. To associate the BQ item with the budget item, choose from the Budget column, the correct budget item from drop-down list.
3. Click Save once done for all the BQ items.

## Tutorial 12: Storing Contract Deliverables document

This tutorial describes the process of storing a contract deliverable document such as the EOT, LAD, CPC, CNC, CMGD and Final Account. These documents are stored and published in the relevant folders in the LBU PIMS.

1. Got to the Documentation module and choose the Documentation tab.
2. Click on New.
3. Fill in the title, month and year. Write in the comment box if necessary.
4. Attach or drag the contract document.
5. Click on Save.
6. Click on Publish and choose from the drop-down menu the relevant folder to store the document in. The document can be stored in multiple folders by clicking on the Add button and choosing another folder.
7. Click on Save once done.

# Chapter 3: IPA-IPC Submission

## Chapter Overview

This chapter aims to provide better understanding of IPA-IPC Submission in the LBU PIMS. IPA-IPC allow contractors, consultants and vendors to submit progress payments or invoices to the Project Manager for payment.

**The IPA-IPC Process**

IPA-IPC is created and tied to an approved and closed BQs which is used for progress billing on the Project. Regardless of which version of a IPA-IPC is used the IPA-IPC must be associated with a contract.

## Chapter Objectives

The objectives of this chapter are as follow: -

* To create and submit IPA-IPC through PIMS.
* To conduct digital approval for IPA-IPC process.

## Tutorial 1: Creating a New IPA-IPC

This tutorial describes the process of creating a new IPA-IPC LBU PIMS.

1. Log in to the LBU PIMS through browser. The Start page is displayed.
2. Go to Finance module and click on IPA-IPC tab.
3. Click on New button.
4. Select the Contract the IPA-IPC is being created for.
5. Enter the IPA-IPC subject and associated details.
6. Click Save button once finished. The IPA-IPC draft summary is displayed.
7. On the Bill of Quantity items on the same page, click the Edit button to give input on the amount that need to be claims with respective work.
8. Once all quantities or amounts have been entered click Save. The total amount to claims then is updated.

## Tutorial 2: Submitting IPA-IPC

This tutorial describes the process of submitting IPA-IPC LBU PIMS.

1. Click submit button on the IPA-IPC summary page.
2. In the Send to Group option list, select related user group.
3. Click submit once it is ready to be sent to the respective user for the next action.

## Tutorial 3: Reviewing and Approving IPA-IPC

This tutorial describes the process of reviewing and approving IPA-IPC in LBU PIMS. For the reviewing and approving process, only users that have permission to approve can run this process. This process has multiple approval process. Until all the respective users approved the IPA-IPC, only then the IPA-IPC can be closed. If one of the respective users rejected, the IPA-IPC will be void and new IPA-IPC need to be created.

1. Log in to PIMS through the browser. The Start page is displayed.
2. Notice new IPA-IPC in the inbox section at the start page. Click on the new IPA-IPC to direct to the inbox and outbox page of IPA-IPC or go to the Finance module and click on IPA-IPC tab.
3. Click on the new IPA-IPC and the Claims summary page will be displayed for reviewing process.
4. After done reviewing the claims, click App/Rej to choose the status for the claims then the status page will be displayed.
5. Select Approve or Reject from the status selection dropdown and comment can be added in the provided

# Chapter 4: PTIWVO

## Chapter Overview

This chapter aims to provide better understanding of PTIWVO process in LBU PIMS. The PTIWVO consists of two parts. First the PTIWVO request is generated by the owner and submitted to an Organization for pricing. Second the PTIWVO response is created with cost and time change details by the Organization and submitted to the owner.

## Chapter Objectives

The objectives of this chapter are as follow: -

* To create PTIWVO request through PIMS.
* To link location, asset and activity to the PTIWVO request.
* To attach document to the PTIWVO request.
* To submit PTIWVO request through PIMS
* To response on the PTIWVO request through PIMS.
* To approve or reject on the PTIWVO request through PIMS.

## Tutorial 1: Creating PTIWVO

This tutorial describes the process of creating PTIWVO through PIMS. For example, the Site Team will create the PTIWVO request and submit to the Organization for the pricing.

1. Log in to LBU PIMS from browser. The Start page is displayed.
2. Go to Finance module and click on PTIWVO tab.
3. Click on New button.
4. Select the Contract the PTIWVO will be applied to from the Contract drop down menu.
5. Enter the PTIWVO subject and associated details.

\*\* The "Estimated Amount (MYR)" number is a reference number and will not limit the amount of the proposal submitted by the Organization that responds to the PTIWVO.

## Tutorial 2: Linking Location, Asset and Activity to the PTIWVO Request

This tutorial describes the process of linking location, asset and activity the PTIWVO request through PIMS. In the PTIWVO request, user can link any activity or attach any document as a supporting document.

1. Continue from the PTIWVO request creation, click Add button under Location or Asset or Link section whichever is needed.
2. Select related items that need to be link to the PTIWVO request from the drop-down list.

## Tutorial 3: Attach Document to the PTIWVO Request

This tutorial describes the process of attaching document to the PTIWVO request through PIMS. In the PTIWVO request, user can attach any document as a supporting document.

1. Continue from the PTIWVO request creation, click Add button under File section.
2. Browse the document that need to be added and click Open. The document will be added into the File section.

\*\*User also can drag and drop the file into the Drag Files Here box to attach the files.

## Tutorial 4: Submitting the PTIWVO Request

This tutorial describes the process of attaching document to the PTIWVO request through PIMS. In the PTIWVO request, user can attach any document as a supporting document.

1. Continue from the PTIWVO request creation, click save once finished inserting all the details.
2. The PTIWVO summary is displayed. Click on Submit button.
3. Select respective user that will responsible for the PTIWVO. Click on Submit button to submit the PTIWVO request.

## Tutorial 5: Receiving and Responding to the PTIWVO Request

This tutorial describes the process of responding to the PTIWVO request that has been raised. For example, upon receiving the request from the Site Team, Head of Contract may need to response to the request for comments, updates, summary or attaching documents from the DRCC, ADC, VAC or CCC meeting.

1. Log in to the PIMS through browser. Start page is displayed.
2. In the inbox section, notice new PTIWVO items at the Start tab. Click on the new DCR or directly go to the Finance module and click on PTIWVO tab.
3. Click on the new PTIWVO request. The summary of the PTIWVO is displayed. Review the PTIWVO request summary and click on the file hyperlink to download documents if any.
4. Once finished reviewing, click on the Respond button.
5. Insert the comment and link any related items or attach the file if needed. Click on Save.
6. Click on Submit at the response summary page.
7. Select respective user which is the requester, click Submit to send the response.

## Tutorial 6: Approving or Rejecting the PTIWVO Request

This tutorial describes the process of approving or rejecting PTIWVO request that has been raised. Note that if the PTIWVO request is rejected, the request will be void and user need to create another request or the personnel which responsible for approval need to close and revise the request. For approving and rejecting process, follow the steps below;

1. Browse the PTIWVO request from the Pending hyperlink. Click on the request.
2. Click on the App/Rej button. On the status selection list, select Approved or Rejected.
3. Click on Save button. The approval notification will be sent to the respective users.

## Tutorial 7: Closing the PTIWVO Request

This tutorial describes the process of closing PTIWVO request that has been raised. The closed request means the is no responses and approval process is allowed anymore except the respective user reopen the request.

1. Once the request status changed to Approved or Rejected, Close button will be enabled. Click on Close button.
2. The request will be closed and all the responses status also changed from pending to closed.

## Tutorial 8: Revising the PTIWVO Request

This tutorial describes the process of revising PTIWVO request that has been raised. For example, if the user rejected the PTIWVO document and need to create a revision of that PTIWVO request, the respective user need to close the rejected request and reopen for revision process. This process will create a new revision number for the request. To revise on the request, follow the steps below.

1. Once the PTIWVO request is closed, the Reopen button will be enabled. Click on Reopen button will enabled Revise button.
2. Click on Revise button. The PTIWVO request creation page is displayed.
3. Input all the details and click Save. The PTIWVO request summary page is displayed.
4. Click on Submit to submit the new request.
5. Select on respective user that responsible for the PTIWVO request. Click Submit. The PTIWVO request with the new revision number will be submitted.

# Chapter 5: Using Report in PIMS

## Chapter Overview

This chapter aims to provide better understanding of using report in LBU PIMS. Reports allow users to create custom reports that filter the data in the PWCM application. Users can create as many reports with different criteria as they want and save them to be run later. A report is created once and is customized by the user creating the report to display the data the user needs to see. After the report is created, it's settings are saved and the report can be run at any time by any user with access to the report. When the report is run it displays the report information based on the document access and permissions of the user running the report. So, two different users running the same report will get different information based on the documents that each user has access to.

## Chapter Objectives

The objectives of this chapter are as follow: -

* To create custom report that filter data which that have been registered in application.

## Tutorial 1: Creating Report

This tutorial describes the process of creating and using report in LBU PIMS.

1. Go to Report module and click on Report tab.
2. Click New button.
3. Enter Report Name.

\*\*Report name should be formatted in a way that communicates to the user what kind of information the Report provides when the Report is run.

1. Enter a short description a what information the report will display in the space provided.
2. Check the box next to be shared if you want to share this report with other organizations on your project team.

\*\*If this check box is not selected then the Report will only be available for use by users of the Organization that created the Report.

1. Specify the number of results you would like the Report to display. You can specify first 10, first 30, or all results.
2. Select which type or types of documents you want to receive Report information on by clicking the check box next to the document name. You can specify as many document types as desired.
3. Set the Report filters by clicking the check box to the left of each filter type label. Filters control the return results by only including results that match the selected filter criteria.
4. You will see which columns are currently selected to be displayed in the Report under the Selected list and which can be added to the Report under the Optional list. You can move items between the selected and optional lists by either selecting and clicking the Add and Remove buttons or double clicking on an item. Double clicking on an item in either list will move it to the other list.
5. You can also control where a column will display within the Report after it is added to the selected list. Select the column you want to relocate within the Report and click the Up and Down buttons.

\*\*Moving a column Up will move that column to the left in the displayed results when the Report is generated and moving a column Down move that column to the right in the displayed results when the Report is generated.

1. Once you have finished configuring the Report click the Save button at the top of the screen
2. You can click Cancel at the top of the screen at any time to exit the screen without saving.
3. Click Run button.