



Facility Management Contracts System [FMCS]

BUSINESS REQUIREMENTS DOCUMENT

KAUST WEB SOLUTIONS TEAM

REVIEW & APPROVAL

ROLE	NAME	DEPARTMENT	SIGNATURE	DATE

1 Introduction

This Business Requirements Document (BRD) outlines the requirements for the “**Facility Management Contracts System [FMCS]**” Solution project. It contains both functional and non-functional requirements and an overview of the workflow. It is used to determine what needs to be done, and as a starting point for solution design.

The System will be working as communication channel between FM Contractors and FM Procurement Team.

After approval of budget, FM Contracts Manager would select vendors to to invite to bid on the scope of work with a deadline to submit their proposals. Approval of proposals or rejection with notifications would be performed by the contract administrator.

Any changes to the initial information and minimum requirements must be recorded and time stamped.

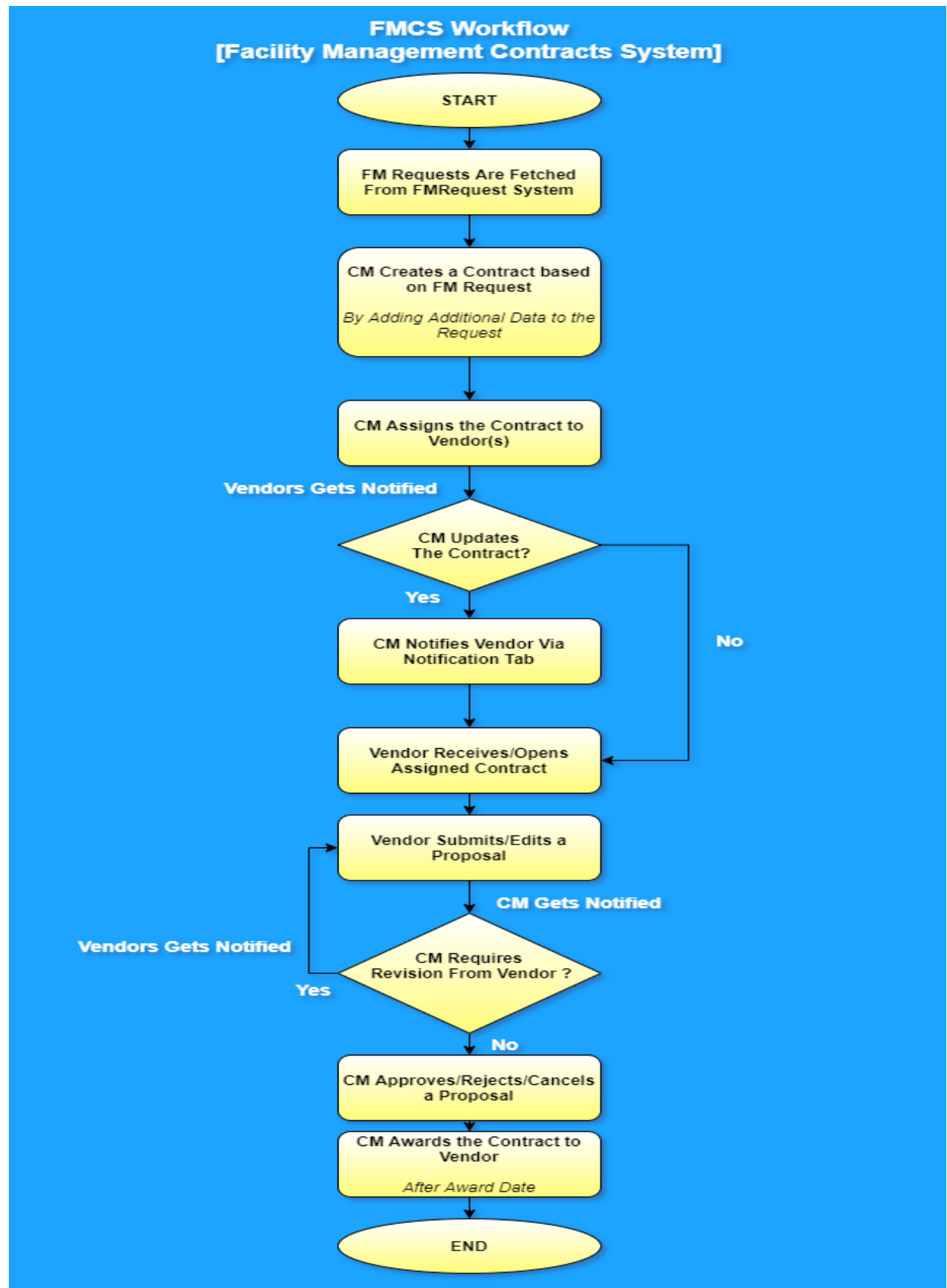
2 Objectives

- A. An internet face platform to communicate with Contractors
- B. Archive information and documents
- C. One unified channel of communication (reduce emails/phone calls traffic)
- D. Faster reference for future events
- E. Better deployment of resources

3 Definition of Terms

- **Contractors:** FM Vendors, Construction Contractors that provide various services such as maintenance, supply of equipment, construction and execution of FM projects
- **Contracts Manager:** FM Procurement & Contracts Specialist
- **Project Proponent:** Entity Sponsoring the Project
- **Project Owner:** Decision Maker from Proponent Side
- **BO Project Owner:** Business Operations Project Controller

4 Workflow



5 Acrynomns

Term	Explanation
FM	Facilities Management
FMRequest	FM Request Management system
FMIMS	FM Invoice Management System
FMCS	FM Contractors Management System

6 Requirements

Role	ID	Requirements	Sprint
Admin		Manages the Users Membership to The Various Roles in The System Through the UI	
	1.1	Contractors role should be created by emails not from Active Directory	
	1.2	Views Currently Available Roles in the System	
	1.3	Configures/Edits Email Notification Templates	
	1.4	Manages Master Data That Appears in DDLs	
Contracts Manager		Manages Vendors (one or more representative for each vendor) There should be more than one Vendor representative. We should be able to create accounts and assign it to a vendor and each account would see all the contracts for particular vendor	
	1.5	Admin will be responsible for adding the vendor accounts with email addresses, vendor will receive an email to set the password for his account. Once the vendor sets the password, he can use the account to submit proposals for assigned contracts. If the vendor forgets his password, then admin has the option to send reset password email to vendor.	
	2.1	Views a List of FM Requests Fetched From FMRequest System - With Status Fetched Fields are: <ul style="list-style-type: none"> - Request Number. - Title - Scope - Attachments - Status 	
	2.2	Views/Opens an FM Request Details	
	2.3	Views List of Vendors Fetched From FMIMS System All the details will be fetched	
	2.4	Views/Opens Vendor Details	
	2.5	Assigns Request to Vendor(s)	

		<ul style="list-style-type: none"> - Can select multiple vendors on this request - Request Status will be "Awaiting Contractor" - Only active vendors will be listed 	
	2.6	<p>Submits a New Contract</p> <p>These Fields will be part of Contract Submission Form:</p> <ul style="list-style-type: none"> - Site Visit (Yes/No) - Technical Quiries (Yes/NO) with a comment - Due Date (Calendar) - Technical Drawings - Bill of Quantities Forms (Multiple Attachements) - Contract conditions: <ul style="list-style-type: none"> ➤ Last Technical Query (datetime) ➤ Last Respond to Technical Query(datetime) ➤ JobEX details (datetime) with Location (textbox) ➤ BCD-Submission date (datetime) alongwith textbox ➤ Award date (datetime) ➤ Technical contacts ➤ Any other specific information <p><i>Above fields would be text boxes to accept input and would go out as a pdf file to selected Contractor. Sample Contract would be provided to develop the template</i></p> <p><i>Type of contract and Payment terms would be configurable Drop Down fields</i></p>	
	2.7	Edits a Contract (Only In Case Status is Draft)	
	2.8	Saves Contract As Draft	
	2.9	<p>Updates Contract Before Awarded</p> <p>Can update the contract details (due date etc.) for the contract and notify the vendors using Notification tab</p>	
	2.10	<p>Approves / Reject Vendor Proposal</p> <p>Status will be changed automatically to "Approved" or "Rejected"</p>	

	2.11	Requests Revision From Contractor Status will be changed automatically to "Revision Required"	
	2.12	Cancels a Proposal Status will be changed automatically to "Cancelled"	
	2.13	Awards the contract to vendor - separate step <ul style="list-style-type: none"> - Award the contract to any vendor (selected for proposals) - Cannot award the contract before Award Date 	
	2.14	Cancels the Contract <ul style="list-style-type: none"> - If cancelled before awarding, then all the vendors will be notified that contract has been cancelled. - If cancelled after awarding, then only the awarded vendor will be notified 	
	2.15	Puts the Contract "On Hold" When On Hold - contractors will not be allowed to submit the proposals, with an Option to resume.	
	2.16	Sends Manual Notifications to Vendors (Separate Tab) Should be able to send notifications to vendor for any modification in contract with a custom message	
	2.17	Views a List of Requests	
	2.18	Views a Request	
	2.19	Views all responses from vendors (given that one contract can be assigned to many vendors)	
	2.20	Views Proposal Details	
	2.21	Proposal Listing View for All Contracts	
Contractor (Vendors)	3.1	Views List of Requests Assigned by the Contracts Manager	
	3.2	Views a Contract The view will be based on the provided template, with the ability to download the Contract as PDF.	

	3.3	Submits a Proposal to Contract Manager Upon "Submit", the proposal status will be changed to "Awaiting Review" Fields to Submit are: <ol style="list-style-type: none"> 1. Bill of Quantities 2. Prices and rates 3. Conditions & Deviations 4. Technical literature & Brochures Each field will have attachement(s) and one comment box	
	3.4	Edits and Resubmits a Proposal ONLY in case Status is "Revision Required" Status will be changed automatically to "Awaiting Review"	
	3.5	Proposal Listing View for All Contracts	
	4.1	Logs All Actions = Who Did What and When	
System	4.2	Authorizes the Users Via Their Active Directory Account (Contractors will be authorized through email)	
	4.3	Captures Time-stamp at Each Step	
	4.4	Shows a Message to the User Before Logging Out When The Session Ends When the session ends, please, don't logout the user automatically, and instead trigger an alert message to the users "You will be logged out in 60 seconds from the system. Would you like to continue?" Choose YES and NO. If YES, don't end the session, and if NO, end the session, logout the user, and redirect to the login page.	
	4.5	Maintains The Status of the Two Entities in The System Request Statuses: <ul style="list-style-type: none"> - Draft (When contracts manager saves as draft) - Awaiting Proposals - Awarded - Cancelled 	

		<ul style="list-style-type: none"> - On Hold - Expired <p>Proposal Statuses:</p> <ul style="list-style-type: none"> - Awaiting Review. - Approved. - Rejected. - Revision Required. - Cancelled. 	
	4.6	Changes Proposal Status to "Expired" When it Passes Due Date	
	4.7	Change the Contract status to On Hold when the actual request in FM Request System is reverted back to BS Approval	
	4.8	Vendors sync with FMIMS	
	4.9	Email Job	
	4.10	FM Request API	
	4.11	FM Request Code Updates	
	4.12	FMIMS API	
	4.13	FMCS API	
Additional Features	5.1	All Information Are Presented in Searchable Lists	
	5.2	Validation: Once request is expired, no action is allowed from contractor	
System Auto-Generated Notifications	6.1	Building Notifications Infrastructure	
	6.2	[On: Requist Assigned to Contractor] [To: Contractor]	
	6.3	[On: Proposal Submitted to Contract Manager] [To: Contract Manager]	
	6.4	[On: Contract Manager Requires Revision on Proposal] [To: Contractor]	
	6.5	[On: Contract Manager Awards a Proposal] [To: Contractor]	
	6.6	[On: Contract Manager Rejects a Proposal] [To: Contractor]	
	6.7	[On: Contract Manager Cancels a Proposal] [To: Contractor]	

	6.8	[On: Contractor Opens the Contract Link First Time on The System] [To: Contracts Manager]	
System Administrator	7.1	Can view the list of all Contracts and Proposals (view only)	
	7.2	Can manage user lists including vendors, assign roles to users	
	7.3	This role will NOT BE visible to Admin users. This is used by IT to manage the system.	
	7.4	Can send password reset emails to vendor accounts	

7 Document History

Version	Date	Changes	Author
0.1	5 th July 2020	Created	Hossam Barakat
0.2			
0.3			
0.4			
0.5			