

An aerial night photograph of a city, likely London, showing a large, dark, curved structure under construction that spans across the city. The structure is supported by numerous cables. The city below is illuminated with lights from buildings and streets, creating a dense pattern of light against the dark sky.

# NEC3 ENGINEERING AND CONSTRUCTION SHORT CONTRACT

**CEMAR**<sup>®</sup>  
a thinkproject! company

QUICK START GUIDE

[www.cemar.co.uk](http://www.cemar.co.uk)

## WHAT IS CEMAR?

CEMAR is a secure, intuitive, cloud-based system which brings compliance, consistency, governance and business intelligence to the management of £75bn of works and services.

## CEMAR FEATURES

### Cloud-based

Collaborative environment with event registers for all parties



### Alerts & reminders

Countdowns and email alerts keep teams up-to-date



### Audit & archive

Automatically archives correspondence to build an audit log



### Secure data

All data is backed-up hourly, encrypted and sent to a UK Tier III graded data centre



### Built by experts

Developed by construction industry practitioners with extensive NEC expertise

### Compliant

Easy, intuitive workflows ensure contractual compliance

### Real-time reporting

CEMAR Analytics generates charts and dashboards for real-time reporting

### Easy-to-use

Intuitive workflows with training videos and 'how-to' guides

## DID YOU KNOW?

CEMAR is also available for other contract forms including: ECC, PSC, TSC, ECS, TSSC and FIDIC.

[www.cemar.co.uk](http://www.cemar.co.uk)

01452 547140

## Introduction

This guide will help you get started with the basics of using CEMAR to administer the NEC3 Engineering and Construction Short Contract. It gives a brief overview of each process workflow from both the *Employer* and *Contractor* perspective. Further information is available from CEMAR's integrated help and support centre including video tutorials at: [www.cemar.co.uk](http://www.cemar.co.uk)

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## Logging on

### Website address

To login, go to this web address.

<https://secure.cemar.co.uk>

1

### User Name

Enter your unique Username.

### Password

Enter your unique password.

### Submit

Click **Submit** to login.

### Forgotten password

Click **Forgotten your password?** then type your Username to receive an email that will allow you to reset your password.

## Login




[Forgotten your password?](#)

### My Contracts

Click on **My Contracts** to view a list of all contracts.

Got Another Account?




### Modules




2

### Client Administrators Programme

This is a function for Superusers only and may not appear. It is used for adding and removing users amongst other contract administration tasks.

### CEMAR Analytics

Analytics is a global reporting tool used to report on all contracts on a portfolio basis. There is a section at the end of this Quick Start Guide dedicated to CEMAR Analytics.

### Select a Contract

Click on the **Contract** you wish to work on from the list below.

### Filter by Contract title

Type into this box to filter the Contract list by Contract Title.

Please select a Contract.

Contract Title	Party	Type
A99 Design Works 2	Employer	PSC
A99 Earthworks Subcontract	Contractor	ECS
A99 Emergency Works	Employer	ECSC
A99 Steepletown Link Road	Employer	ECC
A99 Steepletown Link Road - Section 2	Employer	ECC
A99 Upgrade Works	Employer	FIDIC
Practice ECC Project	Employer	ECC
Practice ECS	Contractor	ECS
Steepleshire Community Housing Association	Employer	TSC
TSSC 23-7	Employer	TSSC

[Main Menu](#)

3

### Filter by Party

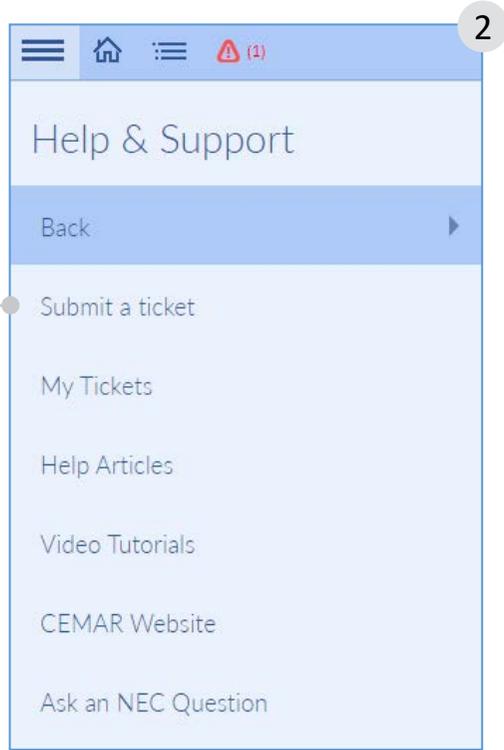
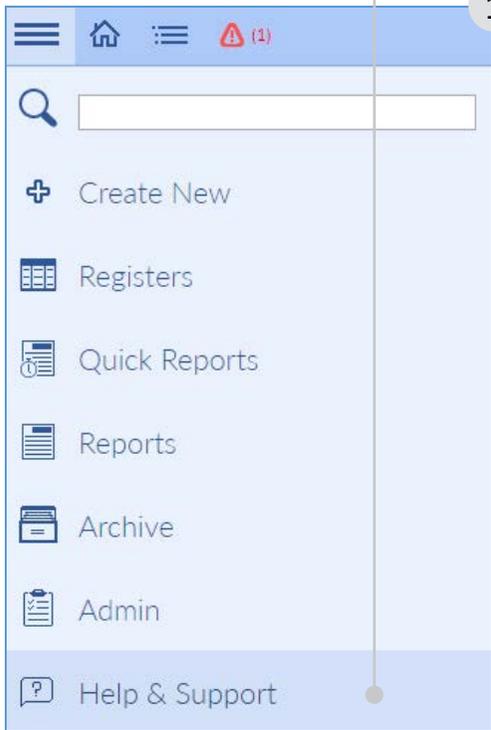
Type into this box to filter the Contract list by Party.

### Filter by Type

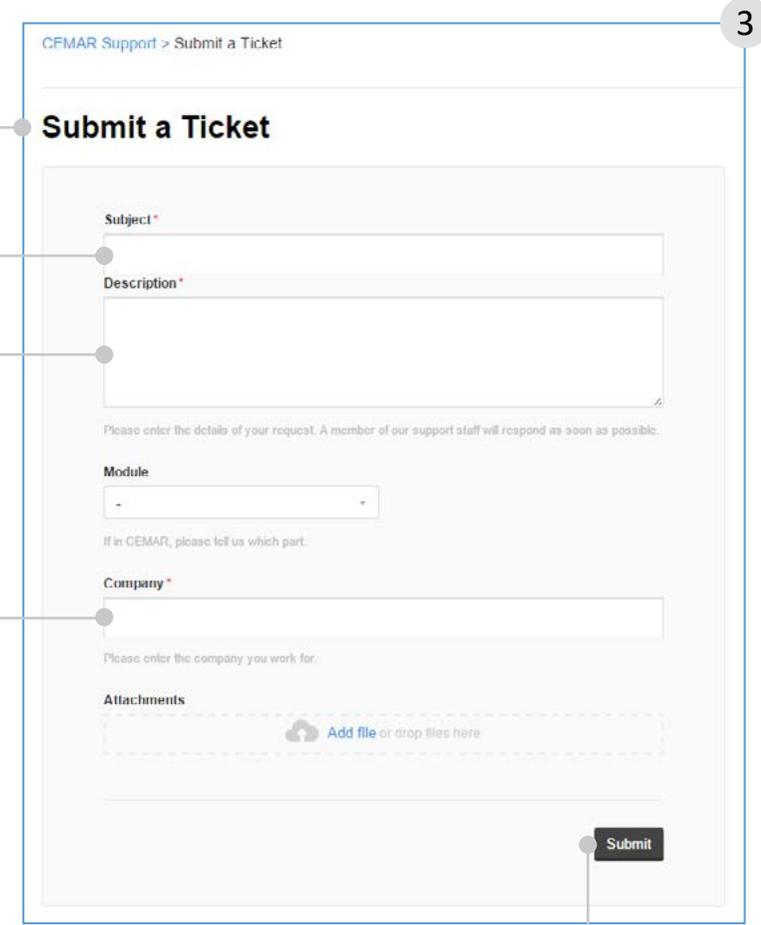
Type into this box to filter the Contract list by type.

# Sending a support ticket

**Help & Support menu**  
To submit a ticket, click on the **Help & Support** button from the left hand side menu. Select **Submit a ticket** from the options.



**Submit a Ticket**  
After clicking **Submit a ticket** from the menu, a separate window will open.



**Subject, Description and Company**  
Type the contents of your ticket into the **Subject** and **Description** box. If a help article contains a keyword found in your subject, CEMAR will show the article which may answer the support query. Finally, fill in the **Company** name.

**Submit**  
When all of the information has been entered, click **Submit** and our support team will get back to you as soon as possible.

Quick Start Guide

Navigating CEMAR

Side menu

Clicking on an icon in the left hand side menu will expand it to reveal more options: create new events, view registers, reports, archived communications, admin and help and support.

Expand the menu

The left hand side menu will expand when you hover over it.

Home icon

Click the **home** icon to go to your home page. Each page in CEMAR can be set to your home page.

Reminders icon

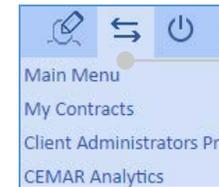
Click the **reminders** icon to go to your reminders page.

Internal Alerts icon

If the user has any internal alerts pending, this icon will show.

Contract title

The Contract title appears in this top ribbon.



Switch module

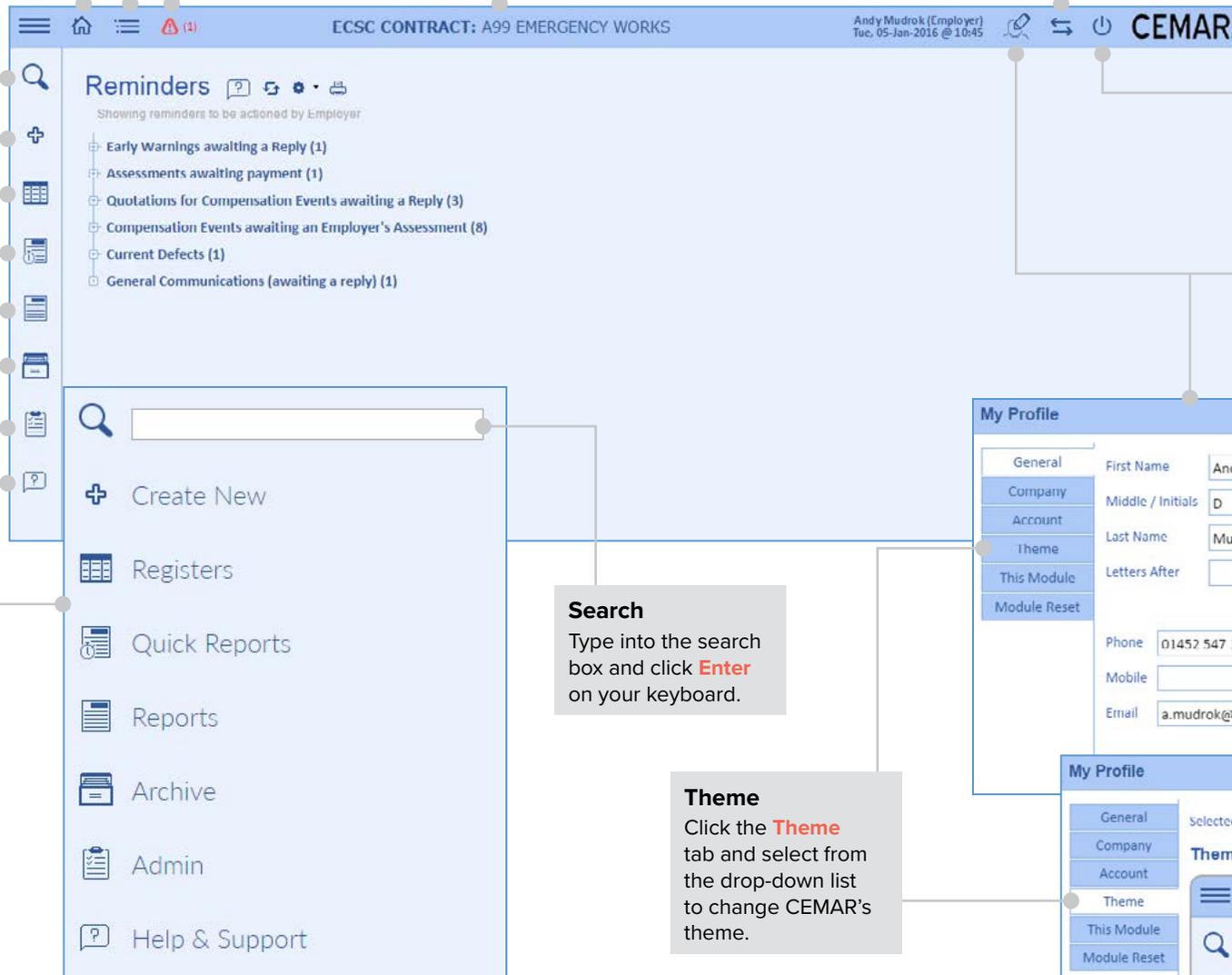
Click the **Switch Module** icon then select an option from the list.

Log out

Click the **Log Out** icon to log out of CEMAR.

My Profile

Click on the **My Profile** icon to edit any of your details.



Search

Type into the search box and click **Enter** on your keyboard.

Theme

Click the **Theme** tab and select from the drop-down list to change CEMAR's theme.

# Reminders, extensions and discussions

## Reminders

If a reply or action is required following a communication, it will show in the reminders page. Click the **plus** icon to expand the section then click the **event** to open it in the event form.

## Colour coding

The reminders will change colour depending on the amount of time remaining:

- **Green** – more than half the time remaining
- **Amber** – less than half the time remaining
- **Red** – no time remaining or overdue

**Reminders**  
Showing reminders to be actioned by Project Manager

- Early Warnings awaiting a Reply (1)
  - EW-240: Ice on the road - due on Tue, 08-Dec-2015 7 day(s) to go
- Programmes Submitted (1)
- Current Payment Assessments (2)
- Quotations for Compensation Events awaiting a Reply (4)
  - QTE-335 for CE-321: Additional Culvert - due on Thu, 19-Nov-2015 12 day(s) overdue
  - QTE-336 for CE-323: Change to pavement thickness - due on Wed, 02-Dec-2015 1 day(s) to go
  - QTE-341 for CE-345: Exit Works - due on Thu, 03-Dec-2015 2 day(s) to go
  - QTE-340 for CF-340: New Structures - due on Tue, 08-Dec-2015 7 day(s) to go
- Compensation Events Notified by Contractor awaiting Project Manager's Decision (1)
- Compensation Events awaiting a Project Manager's Assessment (4)
- Technical Queries awaiting a Reply (1)
- General Communications (awaiting a reply) (1)
- Communication discussion / extension (1)

## View other reminders

To view the other Party's reminders, or all reminders, click the **cog** icon then select an option from the drop-down list.

- To be actioned by Employer
- To be actioned by Consultant
- All reminders

## Print and export

To print the reminders page, any register or report, click on the **print** icon. To export the selected item, click the **export** icon and choose a file type from the list.

- pdf
- xls
- xlsx
- rtf
- txt
- csv
- png

## Extensions and discussions

To discuss the response period for an event, right click on the event from the reminders page and select **Discuss Response Period**.

- View item
- Discuss Response Period

## Adding an extension / discussion

Complete the form with detail of the discussion or extension and use the send/submit button to communicate the event. The **Change Due Date** option is reserved for the *Project Manager's* Party.

**Adding a Discussion for: Giving reply to 'QTE-110 for CE-64'**

Please note that the action of changing the due date for this communication is based on agreement between both parties in accordance with the relevant contractual clauses.

Discuss  
 Change Due Date

Current Due Date: Thu, 07 Jul 2016  
 Set New Due Date: [Date Picker]

Send/Submit Cancel

## Remove from reminders

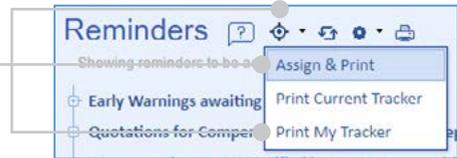
To remove an event which does not require an action, right click the event and select **Remove from reminders**.

- View item
- Remove from reminders

# Action tracker and everything about events

## Action tracker

The action tracker allows reminders to be assigned to specific users. To assign and print actions, click the **action tracker** icon then click **Assign & Print**. Each reminder can be given an owner, action and colour. Users can print their own action tracker by clicking the **action tracker** icon then by selecting **Print My Tracker**.



## Print action tracker

To print the action tracker, select **Print** then either **All** or **Mine**.

## Assign actions

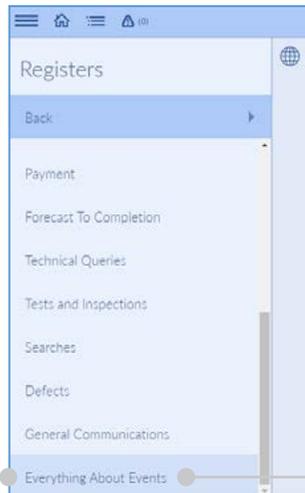
To assign actions, select an owner from the drop-down list of **users**, type the detail into the **action** box and choose optional **colour** coding.

Reminders Action Tracker - Edit Tracker

Ref	Title	Due Date	Days To	Owner	Actions	Colour
DEF-2	Pole formed on A136			Andy Mudrok	Correct.	Red
DEF-1	Access road 1 has damaged B123 where it connects			Archie Lamb	Actions...	Black

## Everything about events

This register can be found by clicking **Registers** from the left side menu, then by scrolling to the bottom and selecting **Everything About Events**. This register contains all associations, attachments, notes and any other additional information surrounding that event.



Everything About Events (from 28 Sep 2016 to 28 Oct 2016)

- Early Warnings (5)
  - EW-1: Fri, 22 Aug 2014 - Road surface unsuitable for heavy machinery
  - EW-2: Wed, 05 Aug 2015 - Inclement Weather forecast
  - EW-3: Wed, 05 Aug 2015 - Weather warning
  - EW-4: Thu, 06 Aug 2015 - Test 1
  - EW-5: Tue, 05 Jan 2016 - Potential flooding
- Associations
  - CE-13 on Wed, 05-Aug-2015
  - PROG-2 on Tue, 05-Jan-2016
- Attachments
  - Bad weather.jpg: uploaded by Andy Mudrok on Fri, 28 Oct 2016
- Notes
  - Weather looks as though it is worsening over the weekend.: originated by Andy...
- Activities
  - EW-2, change to activity Activity 1 in the amount of 0.00 being a change of 0.00
- Employer's Instructions (39)
- Programmes (2)
- Payment Assessment (3)
- Compensation Events (24)



Please specify any parameters / filters to report by, then click Get Report

Include the following on the report...

- Early Warnings
- Contractor's Instructions
- Programmes
- Payment Assessment
- Compensation Events
- Proposed Instructions / Changed Decisions
- Project Manager's Assessments
- Quotations
- Technical Queries
- Opportunities
- Tests or Inspections
- Results for Test or Inspections
- Searches
- Defects
- General Communications
- Forecast To Completion
- Design Submissions

Date Range

From: 25/07/2016 To: 21/09/2016

Get Report Cancel

## Filter

The everything about events register can be filtered by clicking the **cog** icon. If a Range of Events is chosen, options to filter the register will pop-up. Click the event types to include, then select the **Date Range** from the From and To date pickers.

# Registers and push events

**iBalloon**  
To view the help article for each register, click the **iBalloon**.

**Home page**  
To set any register to the home page, click on the **home page** icon.

**Refresh**  
To refresh the register, click the **refresh** icon.

**Print and export**  
To print a register, click on the **print** icon then select either **Summary** or **Detailed** report. This register may then be exported.

**Icons**  
The **plus** icon will show more information on the specific event, in this case a risk reduction proposal could be viewed. The other icons represent an **association**, an **attachment** and a **note**.

**Filter the register**  
The register is filtered by typing in this row. Where there are drop-down boxes, more options can be selected.

**Sorting the register**  
The register can be sorted in ascending or descending order by clicking on the **column title**.

**Draft and void events**  
To make a draft event void, right click on the event and click **Mark this draft event as VOID**. To re-instate a void event, right click on the event and click **Re-instate this draft event**. A communicated event cannot be marked as void.

**Push events**  
Early warnings can be pushed to other contracts in draft form by right clicking the event and clicking **Create as draft in another contract(s)**. Select the contract on the pop-up and click **Create Draft(s)**.

# Event form common features

## Drafts

This event is in draft. When it is communicated to the other Party, it will be stamped with the next available number from the register.

Early Warning: EW-236

## Event type

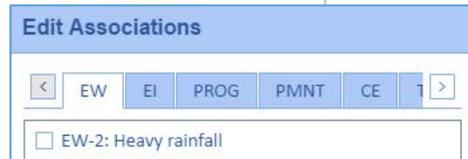
The event type will always be shown in the top left of the event form.

## Event tabs

The tabs relevant to the particular event type are always on the left hand side of the event form. There may be a single or multiple tabs depending on the workflow.

## Associations (see also next page)

Associations allow you to link events within CEMAR. Click the **Associations** tab, then click **Edit** and select which events to associate. Select related events and click **Add**, then **Save and Close**. The associations tab is only available once the event has been communicated. The reverse associations are automatically created.



## Attachments

To attach a file to an event, click the **Attachments** tab then click **New**. Click **Browse** then select a file to attach and click **Upload**.



## Notes

To add a note click the **Notes** tab then click **New**. Enter text into the box and click **Done**. To make the note private to your Party select the checkbox on the pop-up.

## Close

To close the event, click on the **Close** icon. This will also save the event form.

## Save

To save the event, click on the **Save** icon.

## Send / Progress

To communicate the event, click **Send / Progress**.

Send / Progress

# Associations, attachments and notes



## Associations

Associations allow you to link events within CEMAR. Click the **Associations** tab, then click **Edit** to view other events that can be associated to the current event.



## Notes

To add a note, click the **Notes** tab then click **New**. This will display the pop-up window shown below.

## Event type

Each event type has been grouped into tabs. To select a specific event, select the correct tab then choose from the list.

## Filter

To filter the selection of events on the left, type into the filter box.

## Attachments

Attachments can be added to an event in CEMAR by clicking the **Attachments** tab, then by clicking **New**. The pop-up window below will show options to upload the attachments.

## Browse

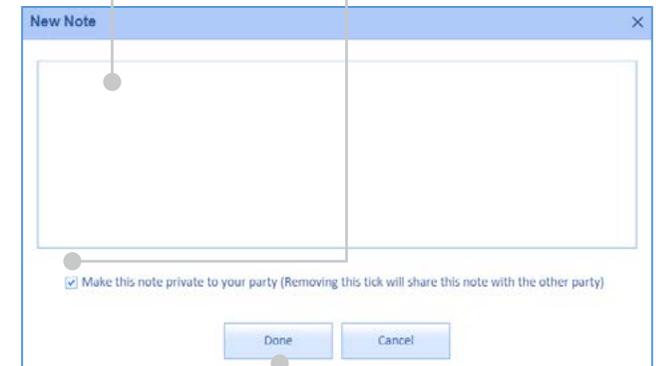
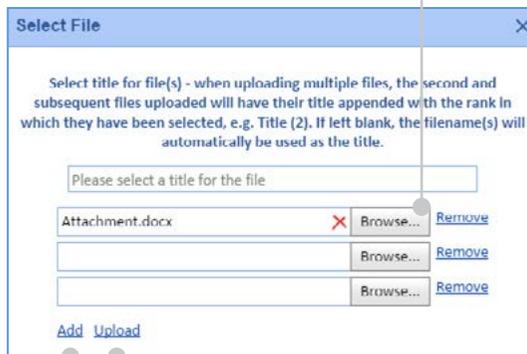
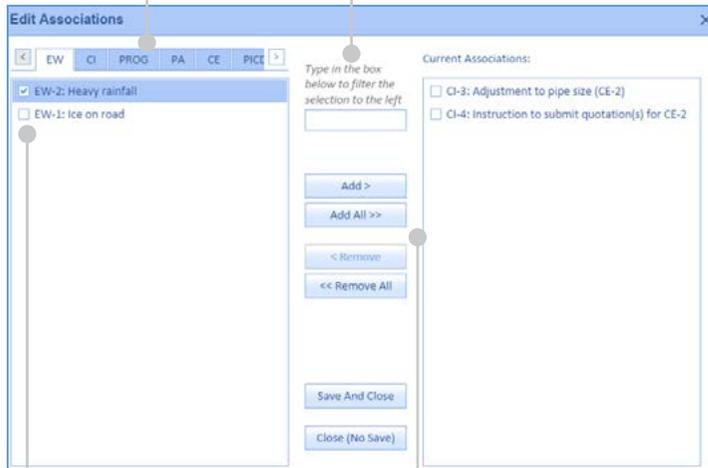
To attach a file, click on **Browse** and select the file from your computer.

## Note text

Type the text of the note into the pop-up box.

## Party private

Notes can be Party private or shared. To select an option, **check** or **uncheck** the box at the bottom of the pop-up window.



## Association selection

Click on the checkbox to select an event, then click **Add** to add the selection to the list of current associations. To remove associations, select the checkbox next to the event from the current associations on the right and click **Remove**.

## Add

To attach more than 3 items at once, click **Add** and more lines will be added.

## Upload

After the file has been selected, click **Upload** to attach the file.

## Done

When complete, click the **Done** button to save the note to the event.

Archive and document log

Archive

Back

- < Early Warnings
- < Project Manager's Instructions
- < Programme
- < Payment
- < Compensation Events
- < Proposed Instructions / Changed D...
- < Quotations / PMAs
- < Technical Queries
- < Tests and Inspections
- < Searches
- < Defects
- < General Communications
- < Forecasts

Communications Archive: Early Warnings

EWs Notified by Employer

EWs Notified by Contractor

EW Replies from Employer

EW Replies from Contractor

	Author	Title
FW-3	Andrew Dale	Gas Supply
EW-1	Andrew Dale	Protestors at gates
	Andrew Dale	Inclement weather forecast
	Andrew Dale	Ice on road

**Archive**

In addition to the events themselves, all communications made in CEMAR are stored in two places; the archive and the document log. Each communication is filed by event type then segregated further by simple drop-down menus. To access the communications archive, select **Archive** from the left hand side menu, then choose an event type and an option based on the event type. Superusers can download this entire archive from the Client Administrators Programme.

**View communications**

To view communications from the archive or the documents log, click anywhere in the row and a pop-up window will appear.

**Filters**

To filter the archive or document log, type into the filter boxes below the title row.

**Document log**

Communications are tracked in the document log. Unlike the communications archive, this log records all communication activity in one list. To access the document log, select **Admin** from the left hand side menu then choose **Document Log**.

Document Log (3782)

Ref	Date	Author	Type	Description
DOC-3782	01-Dec-2015	Andy Mudrok	QTE REPLY	Acceptance of quotation QTE-337 for CE-324
DOC-3781	01-Dec-2015	Andy Mudrok	DUE DATE EXTN	Extension of reply due date for QTE-340
DOC-3780	01-Dec-2015	Andy Mudrok	DUE DATE EXTN	Extension of reply due date for QTE-341
DOC-3779	01-Dec-2015	Andy Mudrok	DUE DATE EXTN	Extension of reply due date for QTE-336
DOC-3778	24-Nov-2015	Sam Hale	EW NOTIFN	EW-240 early warning notification
DOC-3777	17-Nov-2015	Andy Mudrok	DS REP	DES-4 acceptance of design
DOC-3776	17-Nov-2015	Andy Mudrok	QTE REPLY	Acceptance of quotation QTE-315 for CE-287
DOC-3775	17-Nov-2015	Heather Mudrok	EW NOTIFN	EW-239 early warning notification
DOC-3774	13-Nov-2015	Morgan Lamb	DS REP	DES-5 rejection of design

# Communications



### Preview communication(s)

The **View Communication(s)** drop-down box is available in the top right of every event form. If the event has not been communicated, a preview of the communication will be available. Click on **View Communication(s)** then **Preview Communication** to see the hard copy representation of the communication.

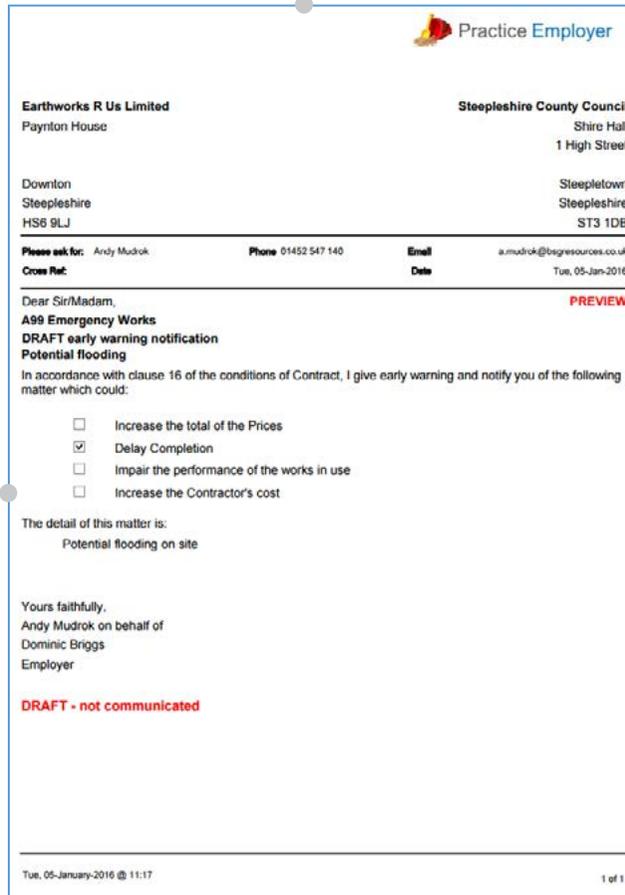
### View communicated communication

After an event has been communicated, the drop-down box from **View Communication(s)** will change from a preview to view. It has been stamped with a Document Log number and the communication can also be found in the **Document Log** and the **Archive**. This PDF file cannot be changed and will form the audit trail that CEMAR creates.

### Contractual communication conventions

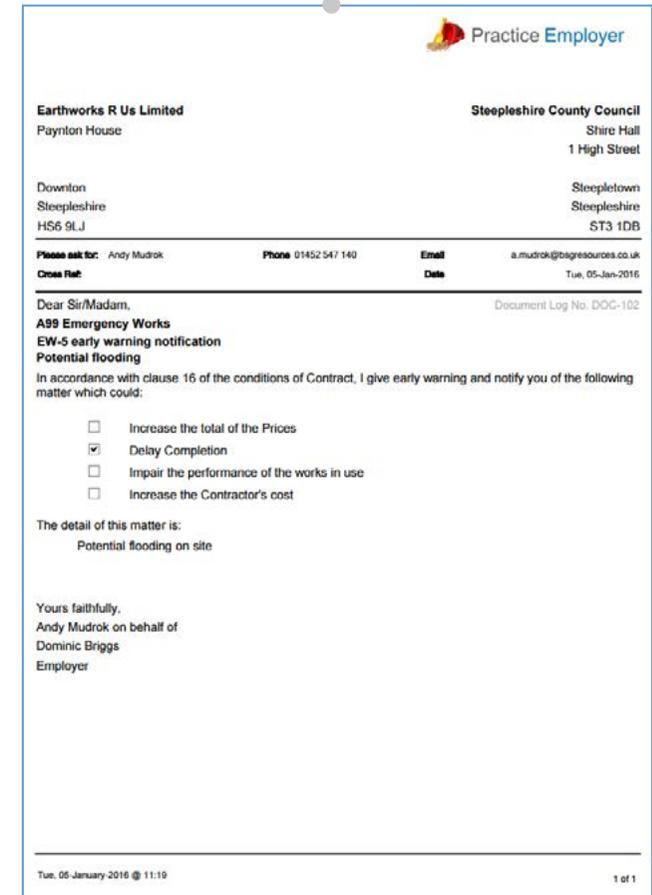
Each communication in CEMAR will follow a consistent and simple design and will include:

- Logo of author Party
- Address of both Parties from Contract Data
- Author bar
- Contract title
- Reference to relevant clause in the contract
- Correct sign off respecting delegated authorities
- Time and date stamp



### Preview communication

The PDF to the right shows an example of a communication before the event has been communicated. It clearly states it is a preview / draft. These can be printed or saved but should never be signed or posted.



## Communicate an early warning

### Create new early warning

To create a new early warning, click on **Create New** from the left hand side menu then select **Early Warning**.

### Draft event

This event is in draft; it is Party private until communicated. This event can be closed at any point and all the information will remain saved within the register.

### Risk Reduction tab

Record actions from your risk reduction meetings by adding proposals from the risk reduction tab and selecting **New**. Click **Save** when finished to update the Risk Register.

### Title

An early warning requires a title.

### Cross Ref

This is not required but allows users to refer to systems outside of CEMAR.

### Description

An early warning requires a description.

### Risk Status

Score the early warning from 1 to 5 for severity and likelihood. The product of these will give a risk score (maximum of 25). This score can be updated any time whilst the risk is still current. The Risk Status can only be changed by the *Employer's* team from the risk reduction tab.

### Allocate Activities

Use the **Allocate Activities** button to reference this early warning to activities on the Activity Schedule.

### Select from options

Select at least one option for this early warning.

### Send / Progress

Click **Send / Progress** to communicate this early warning and make it visible to the other Party.

### Create Draft CE

After notification, a compensation event can be drafted based on the early warning by clicking **Create Draft CE** in the details tab.



# Reply to an early warning

**Reply tab**  
Select the **Reply** tab.

**Reply details**  
Give details of the reply to this early warning by typing here.

**Risk Reduction tab**  
Record actions from your risk reduction meetings by adding proposals to the risk reduction tab.

**Risk Reduction Proposal**  
Fill in the form and click **Save**.

**Reply not applicable**  
If a reply is not applicable to this early warning, select this checkbox and close the event form.

**Send / Progress**  
Click **Send / Progress** to communicate the reply and make it visible to the other Party.

**Create Risk Reduction Proposal**  
Click **New** to create a new risk reduction proposal.

## Communicate a *Employer's* instruction (general)

### Create new EI (general)

To create a new EI (general), click on **Create New** from the left hand side menu, then select **EI (general)**.

### Why use a EI (general)?

Where the *Employer* considers instructions to have no effect on the prices or timings of the contract, he may choose to issue an instruction in isolation of a compensation event. The *Employer's* instruction (general) offers this as an option, together with other general instructions he may be required to give.

### NB:

If you are aware a compensation event will result from this EI, exit this screen and use the EI / Compensation Event option from the **Create New** menu button.

### Title

This *Employer's* instruction (general) requires a title.

### Description

This *Employer's* instruction (general) requires a description.

Ref: Employer's Instruction DRAFT

View Communication(s) [?] [ ] [X]

Instruction Associations (0) Attachments (0) Notes (0)

**NB:** If you are aware a compensation event will result from this EI then exit this screen and use the EI/Compensation Event option from the 'Create New' menu button.

Title: Submission of contract data - Screwpile Ltd

Description

Enter the description of this Employer's instruction here.

Information

Instructed By: Andy Mudrok  
 Email: a.mudrok@bsgresources.co.uk  
 Phone: 01452 547 140

Send / Progress

### Send / Progress

Click **Send / Progress** to communicate this *Employer's* instruction (general).

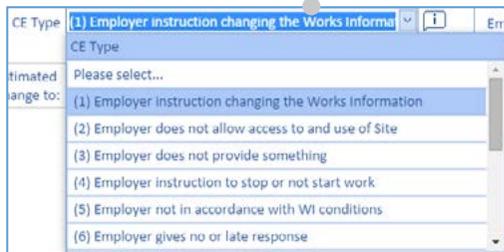
## Communicate a compensation event

### Create new compensation event

To create a new compensation event, click **Create New** from the left hand side menu, then select **EI / Compensation Event** if *Employer* or **Compensation Event** if *Contractor*.

**Title**  
A compensation event requires a title.

**CE Type**  
A CE Type must be selected. Click on the **drop-down box** and select an option from the list.



**Estimates (Employer only)**  
The *Employer* may estimate the price and days change that this compensation event may cause. This is Party private and will not be seen by the *Contractor*.

**Detail**  
A compensation event requires some detail.

**Send / Progress**  
Click **Send / Progress** to communicate this compensation event.

**Contractor notified compensation events**  
When a *Contractor* notifies a compensation event, it requires a response from the *Employer*.

Ref: CE-22 by Contractor

**Responding to a Contractor notified compensation event**  
Select the appropriate checkbox. In all cases **Detail of Decision** must be given before clicking **Send / Progress**.

# Submit a quotation

## Create new quotation

A quotation may be submitted against a compensation event. To create a new quotation, select the event from the **reminders page** or select the event from its respective **register**.

Employer awaiting Quotation(s) for Compensation Events (1)

## Details

A quotation requires some detail, type into this box.

## Completion date

If this quotation changes the Completion Date, select the amount of days change or select from the date picker to the right.

Quotation: DRAFT for CE-22

View Communication(s) [?] [ ] [X]

Details Reply Attachments (0) Notes (0) This is an alternative quote [ ] This is a revised quote [ ]

**Details**

Please see the attached breakdown.

**Information**

Author: Louise Flores  
 Email: l.flores@bsgresources.co.uk  
 Phone: 01452 547140  
 Notification Date: DRAFT  
 Reply Due: DRAFT

Proposed change to the total of the Prices: 1,000.00

Ref	Description	Current Date	Days	Proposed Date
KD-1	Key Date 1	01-Oct-2015	2	03-Oct-2015

**Estimation of timing** Edit time Profile

05-Jan-2016 To 05-Jan-2016

**Effects on Contract Dates (in calendar days)**

Completion Date Wed, 26-Aug-2015 1 27-Aug-2015

Allocate Activities Send / Progress

**Price**  
Type the **Proposed change to the total of the Prices** into this box.

**Key dates and sectional completion dates**  
Select the days change or select from the date picker to the right.

Allocate Event to Activity Schedule

Change Activity Schedule Prices

Save & Close

Ref	Name	Original Price	Price Change	New Price
Group: A99 Works				
A1	Site Clearance	121,850.00	500.00	122,350.00
A2	Construct Access Road	46,422.00	0.00	46,422.00
A3	Setup Site Offices & Accommodation	22,323.00	500.00	22,823.00

Amount to Allocate 1,000.00

Amount Allocated 1,000.00

Balance to Allocate 0.00

**Allocate activities**  
To allocate activities to the Activity Schedule, click **Allocate Activities**. Then allocate the total price change across the options and click **Save & Close**. At the bottom of the pop-up it will state the totals to allocate.

## Accept a quotation / Employer's assessment

### Open quotation

There are three ways to open a quotation. The first is to click on the **Quotations and EAs** register. The second is to click the Quotation from inside the Quotation / EA tab of the compensation event or PICD form. The third is from the reminders page by clicking on the Quotation.

Ref: CE-22 by Contractor View Communication(s) ? [ ] X

Details Quotations/EA (1) Associations (1) Attachments (0) Notes (0)

Ref	Alt.	Rev.	Submitted	Author	Amount	Delay Days	Status
QTE-12	<input type="checkbox"/>	<input type="checkbox"/>	05-Jan-2016	Louise Flores	1,000.00	1	Submitted

- Quotations for Compensation Events awaiting a Reply (4)
- QTE-9: CE-8: 3rd floor redesign - due on Tue, 18-Aug-2015 140 day(s) overdue
  - QTE-10: CE-13: Flood damages - due on Wed, 19-Aug-2015 139 day(s) overdue
  - QTE-11: CE-21: Change to pipework system - due on Wed, 21-Oct-2015 76 day(s) overdue
  - QTE-12: CE-22: Change to signalling equipment - due on Tue, 19-Jan-2016 14 day(s) to go

**Quotation Options**

Quotation due: Tue, 19-Jan-2016

Instruct Alternative Quote i

### Instruct alternative quotation

To assess an alternative quotation, go to the **Quotations / EA** tab of the compensation event then select **Instruct Alternative Quote** in the bottom left corner of the form. The *Contractor* must then submit an alternative quotation to the compensation event.

### Accept this quotation

To accept this quotation, select the **Accept this quotation** checkbox.

Quotation: QTE-12 (Submitted) for CE-22 View Communication(s) ? [ ] X

Details Reply Attachments (0) Notes (0) This is an alternative quote  This is a revised quote

Pending

Accept this quotation

Notify does not agree

Please supply further information

Information

Author: Andy Mudruk

Email: a.mudrok@bsgresources.co.uk

Phone: 01452 547 140

Reply Date: ???

A reply is due by: Tue, 19-Jan-2016

Send / Progress

### Notify does not agree

To notify the *Contractor* that the *Employer* does not agree, select the **Notify does not agree** checkbox. The *Contractor* may submit a revised quotation after notification.

### Detail of reply

Type into this text box to give detail of the reply to quotation.

### Employer's assessment

If two quotations have not been agreed by the *Employer*, the *Contractor* cannot submit any further quotations. The *Employer* may assess the compensation event by clicking the **Add** button and filling out the assessment event form. When this assessment is notified, it will automatically implement this compensation event.

Ref: CE-8 by Contractor View Communication(s) ? [ ] X

Details Quotations/EA (2) Associations (2) Attachments (0) Notes (0)

Ref	Alt.	Rev.	Submitted	Author	Amount	Delay Days	Status	Add
QTE-13	<input type="checkbox"/>	<input checked="" type="checkbox"/>	05-Jan-2016	Louise Flores	1,200.00	0	E not agreed	
QTE-9	<input type="checkbox"/>	<input type="checkbox"/>	04-Aug-2015	Chloe Tyler	8,000.00	0	E not agreed	

## Instruct a programme submission

### Instruct a programme submission (Employer only)

To instruct a programme submission, click **Create New** from the left hand side menu, then select **EI to submit a revised programme**.

### Title

An *Employer's* instruction to submit a revised programme requires a title. CEMAR will provide this title initially but it can be edited by typing in the text box.

### Description

A *Employer's* instruction to submit a revised programme requires a description. Type this in the text box.

### Send / Progress

When complete, click **Send / Progress** to communicate this to the *Contractor*.

### Reminder

The *Contractor* will have a reminder to submit a programme. To open this programme submission, click on the reminder.

# Submit a programme

### Submit a programme (Contractor only)

To submit a programme, click on **Create New** from the left hand side menu, then select **Programme** or click the **reminder** in the reminders page.

**Already a draft**

Only one DRAFT programme is permitted. Please progress the current DRAFT available from the Programme register.

OK

### Only one draft programme

Only one draft programme is permitted. The most recent draft should always be used to submit a programme.

**Title**  
A programme requires a title. Type this into the text box.

**Description**  
A programme requires a description. Type this into the text box.

**Programme Submission PROG-DRAFT** View Communication(s) ? [icon] X

Submission | Reply | Associations (0) | Attachments (0) | Notes (0)

---

**Title**

**Cross Ref**

**Description**

Please enter the details of the Programme Submission here.

**Information**

Author: Reece Summers  
 Email: rsummers@cemardevelopment.co.uk  
 Phone: 079 1355 0723  
 Submission Date: ??  
 Submission Due: Wed, 04-Jun-2014  
 Reply Due: ??

---

**Dates**

Ref	Title	Previous	Planned	Met / achieved	Diff.	Completion Date
PC	Completion	10-Dec-2015	08-Dec-2015		198	01 Sep 2015
						Key Date
KD-1	Surcharge period complete	01-Oct-2014	01-Oct-2014		0	01 Oct 2014

**Clear planned dates**  
To clear the planned dates from the selection below, click **Clear planned dates**.

**Dates**  
Enter important programme dates, either planned or met / achieved by typing in the date or selecting from the date picker.

Submission Due: Thu, 21-Sep-2016

« < April 2019 > »

Mon	Tue	Wed	Thu	Fri	Sat	Sun
14	1	2	3	4	5	6
15	8	9	10	11	12	13
16	15	16	17	18	19	20
17	22	23	24	25	26	27
18	29	30	1	2	3	4
19	6	7	8	9	10	11

01/04/2019

## Reply to a submitted programme

### Reply to a programme submitted for acceptance (*Employer only*)

To reply to a submitted programme, click on it from the programme register or click on the **reminder** from your reminders page.

Programme PROG-27 (PMI-664) View Communication(s) [?] [?] [X]

Instruction Submission **Reply** Associations (0) Attachments (0) Notes (0)

Description

Please enter the details of your reply here.

Reply Details

Reply by: Andy Mudrok  
 Email: a.mudrok@bsgresources.co.uk  
 Phone: 01452 547 140  
 Reply Due: Thu, 31-Dec-2015  
 Reply Date: ???

Pending Reply  
 **Accept Programme**  
 Reject Programme

Plans are not practicable  
 Does not show information required  
 Plans not realistically represented  
 Does not comply with Works Information  
 Other reason (give details)

Send / Progress

#### Description

Enter the description of the reply to this programme by typing here.

#### Accept programme

To accept the programme, select the **Accept Programme** checkbox.

#### Reject programme

To reject the programme, select the **Reject Programme** checkbox. If the programme has been rejected, a reason must be selected.

Status
Submitted
<b>Accepted</b>
Rejected
Superseded

#### Programme status in the register

The programme register will show one of four statuses for programmes. Once a programme is accepted, it will change colour to green and supersede the most recently accepted programme.

#### iBalloons

There are iBalloons across CEMAR. Click these for hints and tips referencing the area you are using.

## Instruct a design submission

### Instruct a design submission (*Employer only*)

To instruct a design submission, click on **Create New** from the left hand side menu, then select **EI to submit a design**.

#### Title

An *Employer's* instruction to submit a design requires a title. CEMAR will provide this title initially but it can be edited by typing in the text box.

#### Description

An *Employer's* instruction to submit a revised quotation requires a description. Type this in the text box.

**Design of Equipment: EI-DRAFT** View Communication(s) [?] [Print] [Close]

Instruction Submission Reply Associations (0) Attachments (0) Notes (0)

Title:

The Employer instructs the design of an item of Equipment to be submitted.

Instruction Details

Information

Author: Andy Mudrok  
 Instructed On: DRAFT  
 Phone: 01452 547 140  
 Email: a.mudrok@bsgresources.co.uk

Enter the details of the Employer's Instruction to submit a Design here.

Send / Progress

#### Send / Progress

When complete, click **Send / Progress** to communicate to the *Contractor*.

## Submit a design submission

### Submit a design (Contractor only)

To submit a design, click on the event from the design register or click on the **reminder** from your reminders page. To create a new design submission, select **Create New** from the left hand side menu then click **Design Submission**.

#### Title

Type the title of this design submission into the text box.

#### Details

Type the detail of this design submission into the text box.

The screenshot shows a web form titled "Design: DRAFT". At the top, there are tabs for "Submission", "Reply", "Associations (0)", "Attachments (0)", and "Notes (0)". The form is divided into several sections:

- Title:** A text box containing "Bridge Design".
- Cross Ref:** A text box containing "No cross reference supplied".
- Submission Details:** A rich text editor with a toolbar (bold, italic, underline, link, unlink, list, indent, font size) and a text area containing "Please see the attached bridge design.".
- Information:** A box containing: Author: Louise Flores, Submitted On: DRAFT, Phone: 01452 547140, Email: l.flores@bsgresources.co.uk.
- Design Submission Type:** Two radio buttons: "Works design submission" (selected) and "Equipment design submission".
- Common Language Reference:** Five empty text boxes.
- Send / Progress:** A button at the bottom right.

#### Design submission type

Select the design submission type by clicking the radio button next to either **Works design submission** or **Equipment design submission**.

#### Common language reference

The common language reference field is not required, but can be used by typing into the text boxes.

#### Send / Progress

When complete, click **Send / Progress** to communicate.

# Reply to a design submission

## Reply to a design submission (Employer only)

To reply to a design submission, click on the event from the design register or click on the **reminder** from your reminders page.

Ref	Common Language Ref	Design Type	Instruction Date	Submission Due	Submitted	Title	Reply Due	Date Replied	Status
DES-7	12345 - ABCDE - 98765 - ZYXWV - 12345	Equipment	17-Dec-2015	31-Dec-2015	18-Dec-2015	Bridge Design	01-Jan-2016		Pending

**Submission**

Please see the attached Bridge Design.

**Reply**

## View submission

To view the detail and reply of the design submission from the register, click the **plus** icon on the left hand side of the row containing the event. To minimise this row, click the **minus** icon.

## Accept design

To accept a design submission, click on the **Accept design** radio button.

## Withhold acceptance

To withhold the acceptance of a design submission, click on the **Withhold acceptance** radio button. A reason must then be selected as to why acceptance has been withheld.

**Design: DES-1 (Submitted)** View Communication(s) [?] [print] [x]

Submission | Reply | Associations (0) | Attachments (0) | Notes (0)

Pending reply

**Accept design**

Withhold acceptance

does not comply with Works Information

does not comply with applicable law

other reason (give details) [i]

**Information**

Reply by: Andy Mudrok  
 Reply Date: DRAFT  
 Phone: 01452 547 140  
 Email: a.mudrok@bsgresources.co.uk  
 Reply Due: Mon, 18-Jan-2016  
 Status: Pending

**Reply Details:**

(Font Size) [v] B

**I** **U** **S** X<sub>1</sub> X<sub>2</sub> [color] [font] [align] [list] [link] [img]

**Send / Progress**

## Reply details

A reply to a design submission requires some detail. Type this in the text box.

## Send / Progress

When complete, click **Send / Progress** to communicate.

## Submit a forecast to Completion

### Submit a forecast to completion

A *Contractor* can create a forecast to Completion from the left hand side menu by selecting **Create New** then clicking **Forecast To Completion**.

The *Employer* can see this draft and edit it, however the *Contractor* is the only Party that can communicate it.

### Detail

A forecast to Completion requires an explanation of the changes since the previous forecast. Type this in the text box.

Ref: Forecast: DRAFT (Please note draft FTCs are visible to both parties) View Communication(s) ? [Save] [Close]

Submission Detailed Profile Associations (0) Attachments (0) Notes (0)

Title:

Cross Ref:

Information

Author: Louise Flores  
 Phone: 01452 547140  
 Email: l.flores@bsgresources.co.uk  
 Total FTC: 0  
 Submit Forecast By: 15-Jan-2016  
 Status: DRAFT

Explanation of changes since previous forecast

Enter an explanation of changes since the previous forecast here.

[Send / Progress]

### Title

A forecast to Completion requires a title. Type this in the text box.

### Send / Progress

When complete, click **Send / Progress** to communicate this.

### Add period

If an extra period (month) is required in the **Detailed Profile** tab to complete the forecast to Completion, click **Add Period**.

Ref: Forecast: DRAFT (Please note draft FTCs are visible to both parties) View Communication(s) ? [Save] [Close]

Submission Detailed Profile Associations (0) Attachments (0) Notes (0)

Reporting Period	Previous Actual	Current Actual	Previous Forecast	Current Forecast	Cumulative Total
Dec 2015		<input type="text" value="2,490"/>	2,300	<input type="text"/>	2,490
Jan 2016		<input type="text"/>	3,400	<input type="text" value="3,400"/>	5,890
Feb 2016		<input type="text"/>	4,200	<input type="text" value="4,110"/>	10,000
64 Months	Totals: 0	2,490	1,284,500	7,510	10,000

[Add Period] For information only, the amount due on the last payment certificate was: 7,102,400

### Forecast figures

Go to the **Detailed Profile** tab and type the current forecast figures into either the **Current Actual** column or the **Current Forecast** column.

# Submit an application for payment

## Submit an application for payment (Contractor only)

To submit an application for payment, click on either the existing event from the Payment register or click on the reminder from your reminders page. To create a new Application for payment, select **Create New** from the left hand side menu then click **Application for Payment**.

Assessment Date: 01/01/2016

Finance Code:

Cross Ref:

Price for Work Done to Date:

Other amounts to be paid or retained:

Amount due: 0.00

Previous amount due: 0.00

Buttons: Today, Clear

### Select an assessment date

This Application for payment requires an assessment date. This is done by selecting from the date picker of the **Application** tab.

### Finance Code

Similar to the Cross Ref field, the Finance Code is an area where other systems outside of CEMAR can be referenced. Enter a **Finance Code** here.

### Price for Work Done to date

Type the **Price for Work Done to Date** into this text box. Please note that this is a cumulative amount to date.

### Other amounts to be paid or retained

Type any other amounts to be paid or retained into this text box. Please note that this is a cumulative amount to date.

**Payment Assessment: DRAFT** View Communication(s)

Application | Payment | Associations (0) | Attachments (0) | Notes (0)

Assessment Date: Fri, 01-Jan-2016

Finance Code: Not Supplied

Cross Ref: No cross reference supplied

Price for Work Done to Date: 450,000.00

Other amounts to be paid or retained: 6,000.00

Amount due: 456,000.00

Previous amount due: 306,000.00

Change in the amount due (applied for under this assessment): 150,000.00

**Please note - the Price for Work Done to Date and the other amounts are cumulative to date.**

Information: Author: Louise Flores, Phone: 01452 547140, Email: l.flores@bsgresources.co.uk

Further Details: Enter the details of this Application for Payment here

Buttons: Send / Progress

### Details

An application for payment requires some detail. Type this in the text box.

### Send / Progress

When complete, click **Send / Progress** to communicate this.

# Certify a payment assessment

## Certify a payment assessment (*Employer only*)

To certify a payment assessment click on either the existing event from the Payment register or click on the reminder from your reminders page. To create a new payment assessment select **Create New** from the left hand side menu then click **Payment Assessment**.

## Use Contractor's assessment

If the *Contractor's* assessment is satisfactory, select **Use Contractor's assessment**.

## Mark as paid

After this payment assessment has been certified, the *Employer* may later mark it as paid by clicking the checkbox for **Payment has been made for this application** then selecting a date from the date picker.

## Use Employer's corrected assessment

To correct the *Contractor's* assessment, select **Use Employer's corrected assessment** and continue to fill out the details of the form shown.

The screenshots show the 'Payment Assessment: PA-3' form. The first screenshot shows the 'Application' tab selected. The second screenshot shows the 'Payment' tab with radio buttons for 'Pending', 'Use Contractor's assessment' (selected), and 'Use Employer's corrected assessment'. A 'Send / Progress' button is visible. The third screenshot shows the 'Payment' tab with the 'Payment has been made for this application' checkbox checked and a date picker set to January 5, 2016. Below this, there is a text area for 'Reason(s) for Employer making own assessment' and a table for financial details.

Field	Value
Price for Work Done to Date:	440,000.00
Other amounts to be paid/retained:	5,000.00
Corrected amount due this assessment:	445,000.00
Amount due at previous assessment:	306,000.00
Corrected change in the amount due (this assessment):	139,000.00

**Please note - the Price for Work Done to Date and the other amounts are cumulative to date.**

## View application for payment

To view an application for payment, click the **Application** tab.

## Send / Progress

When complete, click **Send / Progress**.

## Price for Work Done to Date

Type the **Price for Work Done to Date** into this text box. Please note that this is a cumulative amount to date.

## Other amounts to be paid / retained

Type any other amount to be paid / retained into this text box. Please note that this is a cumulative amount to date.

## Raise a technical query

### Raise a technical query

To create a new technical query, select **Create New** from the left hand side menu then click **Technical Query**.

### Description

A technical query requires some detail. Type this in the text box.

### Title

A technical query requires a title. Type this in the text box.

### Send / Progress

When complete, click **Send / Progress**. This will open the **Discussion** tab to both Parties and the reply tab to the other Party. The reply is for the Party responding to the query.

### Discussion tab

To discuss the technical query, click **New** and enter the text into the pop-up window. Both Parties can discuss the technical query.

### Reply details

To add detail to this technical query reply, type in the text box.

### Send / Progress

When complete, click **Send / Progress**. Only the Party that did not author the technical query can reply.

# Notify a test / inspection

## Notify a test / inspection

To create a new test / inspection, select **Create New** from the left hand side menu then click **Test / Inspection**. Both Parties can create a test / inspection, however only the *Employer's* team can notify the results.

### Works Title

A test / inspection requires a title. Type this in the text box.

### Description

A test / inspection requires a description. Type this in the text box.

### Change status

To change the status of this test / inspection to **Dead** click this checkbox.

### Date

Select the date and time when this test / inspection will be carried out by clicking on the date and time pickers.

### Result description

To input a result, click on the **Result** tab where the result of this test / inspection will require a description. Type this in the text box.

### Notify a Defect

When this test / inspection result has been communicated, the option to notify a Defect will become available. To create a Defect from this test / inspection, click **Notify Defect**.

## Instruct a search

### Instruct a search

To create a new search, select **Create New** from the left hand side menu then click **Search**.

### Title

An search requires a title. Type in the text box.

### Description

A search requires a description. Type in the text box.

### Send / Progress

When complete, click **Send / Progress**.

### Change status to Dead

The status of the search can be changed to Dead. This is done by clicking on the checkbox labelled **The status of this search is 'Dead'** inside the event form.

### Allocate activities

To allocate activities from the Activity Schedule to this search, click **Allocate Activities**.

# Notify a Defect

## Notify a Defect

To create a new Defect, select **Create New** from the left hand side menu then click **Defect**.

## Description

A Defect requires a description. Type in the text box.

## Title

A Defect requires a title. Type in the text box.

## Send / Progress

When complete, click **Send / Progress**.

## Notify test / inspection

After notification, a test / inspection can be drafted directly from this Defect by clicking **Notify Test / Inspection**.

Ref	Title
EI-33	Submission of contract data - Screwpile Ltd
EI-29	Road surface unsuitable for heavy machinery (CE-19)
EI-25	PMI (CE-16)
EI-21	changes to equipment (CE-11)
EI-20	submission of contract data - screwpile ltd
EI-18	Change to signalling equipment (CE-10)
EI-17	Submission of contract data

## Defect state

After notification, the option to change the status of this Defect to corrected or accepted becomes available. To change the status, click **This Defect has been corrected** or **This Defect has been accepted**. If the latter is selected, a pop-up will appear to link this acceptance to a PMI. When this PMI is selected, click **Link**.

## Communicate a general communication

### Communicate a general communication

To create a new general communication, select **Create New** from the left hand side menu then click **General Communication**.

### Mark as private

To mark this general communication as private, click the **Mark as Private** checkbox. This will only allow the recipients to view this general communication (whilst the service is live).

### Subject

A general communication requires a subject. Type in the text box.

### Reference

General communications can be themed with a reference. Select a reference from the drop-down list.

### Attachment options

To include this general communication as an attachment to the email alert, click this checkbox.

Select Email Recipients			
<input type="checkbox"/>	Full Name	Company	Email
<input type="checkbox"/>	Andy Mudrok	Mudrok Inc	a.mudrok@bsgresources.co.uk
<input type="checkbox"/>	Archie Dennis	West Edge Consulting	a.dennis@cemardevelopment.co.uk

Please use the space below to send this GC to email addresses outside of this contract (separated by a semicolon):

No external email addresses supplied.

**General Communication: DRAFT by Project Manager** View Communication(s)

Details Associations (0) Attachments (0) Notes (0)

To... a.dennis@cemardevelopment.co.uk; a.mudrok@bsgresources.co.uk

Send / Progress

Author: Andy Mudrok  
Email: a.mudrok@bsgresources.co.uk  
Tel: 01452 547 140

Mark as Private (please see 'i' balloon to left. Not for internal communications)

Subject: Meeting minutes

Reference: Please select...

Reply Required  01-Jan-2016

Type any correspondence into this area of the General Communication.

Andy Mudrok  
on behalf of  
Dominic Briggs  
Project Manager

Include this new General Communication as an attachment to the email  Include other attachments uploaded in CEMAR as attachments to the email

### Recipients

This general communication must be sent to at least one member of the other Party. To add recipients, click **To...** then select the recipients from the list. If an external email address is required, type it into the bottom text box of the pop-up form.

### Reply required

If a reply to this general communication is required, click the **Reply Required** checkbox and select a date from the date picker.

### Communication

Type the information to be communicated in the text box.

### Attachment options

To include the attachments to this general communication as an attachment to the email alert, click this checkbox.

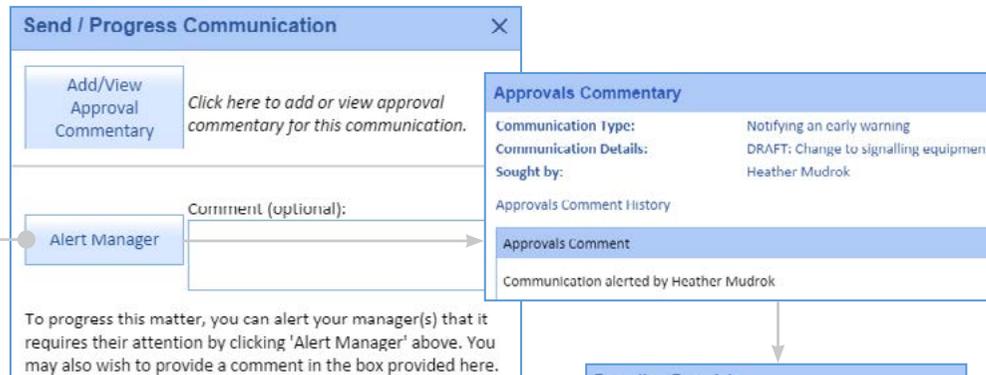
# Alert manager approvals

## Approvals

There are three types of approvals; alert manager, multiple approvals and global approvals. Each is explained in this Quick Start Guide, beginning with the simplest approval set-up of alert manager. If you are unsure which approval type you have, please ask your Superuser.

### Team drafter user

A team drafter user cannot typically communicate and will have to alert their manager to send a communication. After clicking **Send / Progress**, the pop-up window will give the option to **Alert Manager**. This will email all of the alerted managers who can then send this communication. The event will show in the Internal Alerts register.



### Alerted manager

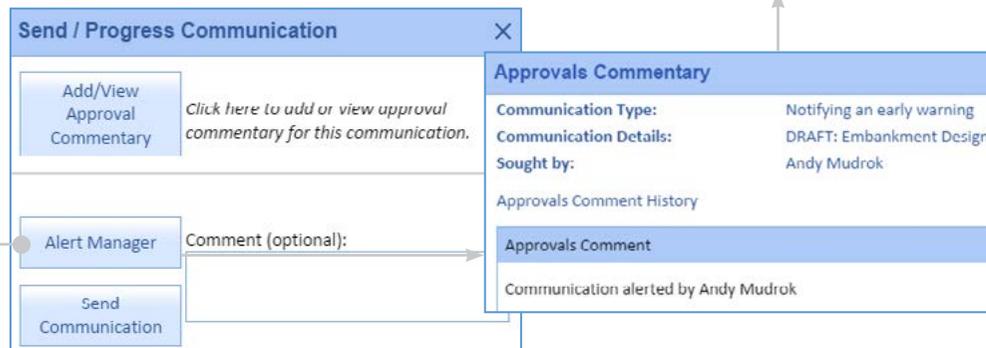
When events require approval, the alert icon will be shown in the top left hand side of the screen. Clicking the **alert** icon will show the **Internal Alerts** register. To open the event form, click on the event.

### Communicate the event

There are two ways to communicate the event. Both start with clicking **Send / Progress** in the event window which will show the window below. The simplest option is to click **Send Communication** to communicate the event to the other Party. The second option is to click **Add/View Approval Commentary** then click **Perform Action** to show the drop-down list of options, then click **Send Communication**.

### Full permissions user

A full permissions user typically has the ability to communicate. Both the **Alert Manager** and **Send Communication** options will be available after clicking **Send / Progress**. Clicking **Alert Manager** will email all of the alerted managers who can then send this communication. The event will show in the Internal Alerts register.



# Multiple approvals

## Multiple approvals

This approval type sends the communication to a group of approvers. Each approver must give approval before the communication can be communicated. There can be a different set of approvers for different event types.

### Non-approver

A non-approver cannot approve any events and will have to seek approval to send a communication. After clicking **Send / Progress**, the pop-up window will give the option to **Seek Approval**. This will email all of the approvers of this communication. The event will show in the Internal Alerts register.

Approvals Comment	Author	Date
Approval sought by Heather Mudrok	System	21-Dec-2015 09:03

Approver	Email	Approver	Date
Andy Mudrok (Mudrok Inc)	a.mudrok@bsgresources.co.uk	There are currently no approvals given for this matter	
Dominic Briggs (Steepleshire County Council)	dbriggs@cemardevelopment.co.uk		

### Approver

An approver will have to give approval along with any other approvers to send a communication. After clicking **Send / Progress**, the pop-up window will give the option to **Seek Approval** or to **Approve without Sending**. This will email all of the approvers of this communication. The event will show in the Internal Alerts register.

Approvals Comment	Author	Date
Approval given by Andy Mudrok	System	21-Dec-2015 09:03

Approver	Email	Approver	Date
Dominic Briggs (Steepleshire County Council)	dbriggs@cemardevelopment.co.uk	Andy Mudrok (Mudrok Inc)	21-Dec-2015 09:03

### Final approval

For the event to be communicated, all of the approvers must approve the event before it can be sent. The final approver will see the **Approve and Send Communication** button which, when clicked, will communicate the event. The other option is to click **Add/View Approval Commentary** then click **Perform Action** before selecting an option from the drop-down list.

### Approvals commentary

The Approvals Commentary states who has given their approval and who is required to give their approval before the event can be communicated.

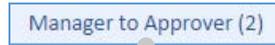
# Global approvals

## Global approvals

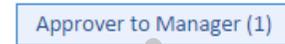
This approval type sends the communication to a group of approvers. Unlike multiple approvals, only one approver must give approval before the communication can be communicated.



**Internal alerts - Team to Manager tab**  
 The internal alerts register is different when using global approvals. There are three tabs, the first of which is Team to Manager. All draft users will have to click on **Alert Manager** after they have clicked **Send / Progress**. The communication will then be sent to all alerted managers who can then Seek Approval. This event will be placed in the Team to Manager tab of internal alerts.



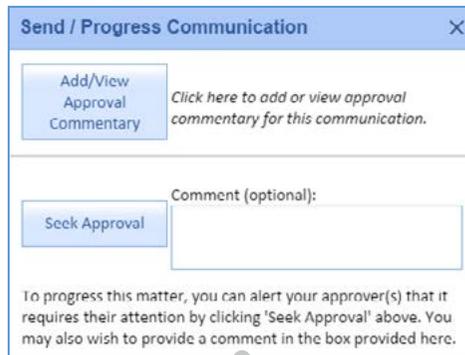
**Internal alerts - Manager to Approver tab**  
 The Manager to Approver tab shows all events which require approval from an approver. Alerted managers and users with full permission will see the window below after they have clicked **Send / Progress**. They will have the option to **Seek Approval**, the communication will then be sent to all approvers. This event will be placed in the Manager to Approver tab of internal alerts.



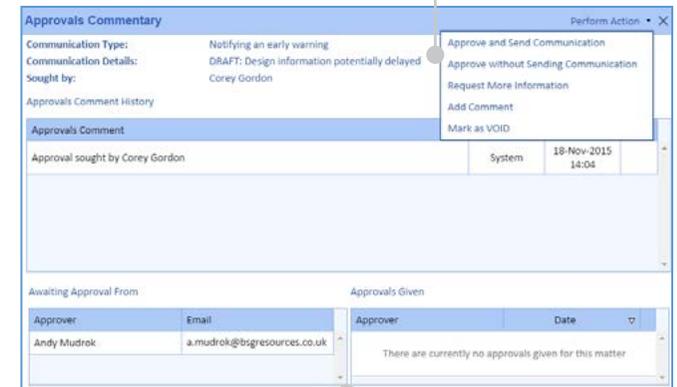
**Internal alerts - Approver to Manager tab**  
 The Approver to Manager tab shows events which have been pushed from an approver to a manager which have not been sent. An approver has three options; to **Approve and Send Communication**, to **Approve without Sending Communication** or to **Request More Information**. If the option to **Approve without Sending Communication** is chosen from the Approvals Commentary window, the event will be placed in the Approver to Manager tab. These events will be marked as approved and are ready to be communicated to the other Party by an alerted manager. If **Request More Information** is selected, the approver can give a comment, then the event will be placed in the Approver to Manager tab but will show that approval has not yet been given.



What a Draft user will see.



What an Alerted Manager who is not an approver will see.

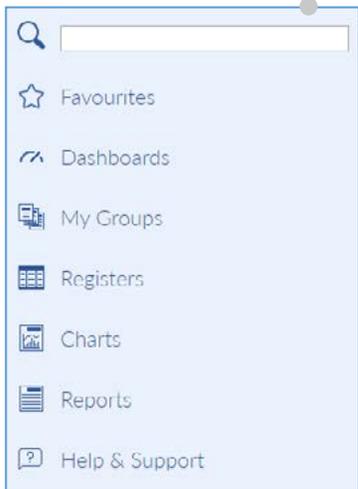


What an Approver will see.

# Navigating Analytics

### Navigating the menu

Clicking on an icon in the left hand side menu will offer more options to view favourites, dashboards, groups, aggregated registers, charts, reports or help and support.

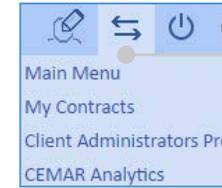


### Select Contracts icon

Click the **Select Contracts** icon to select which contracts CEMAR Analytics will report on.

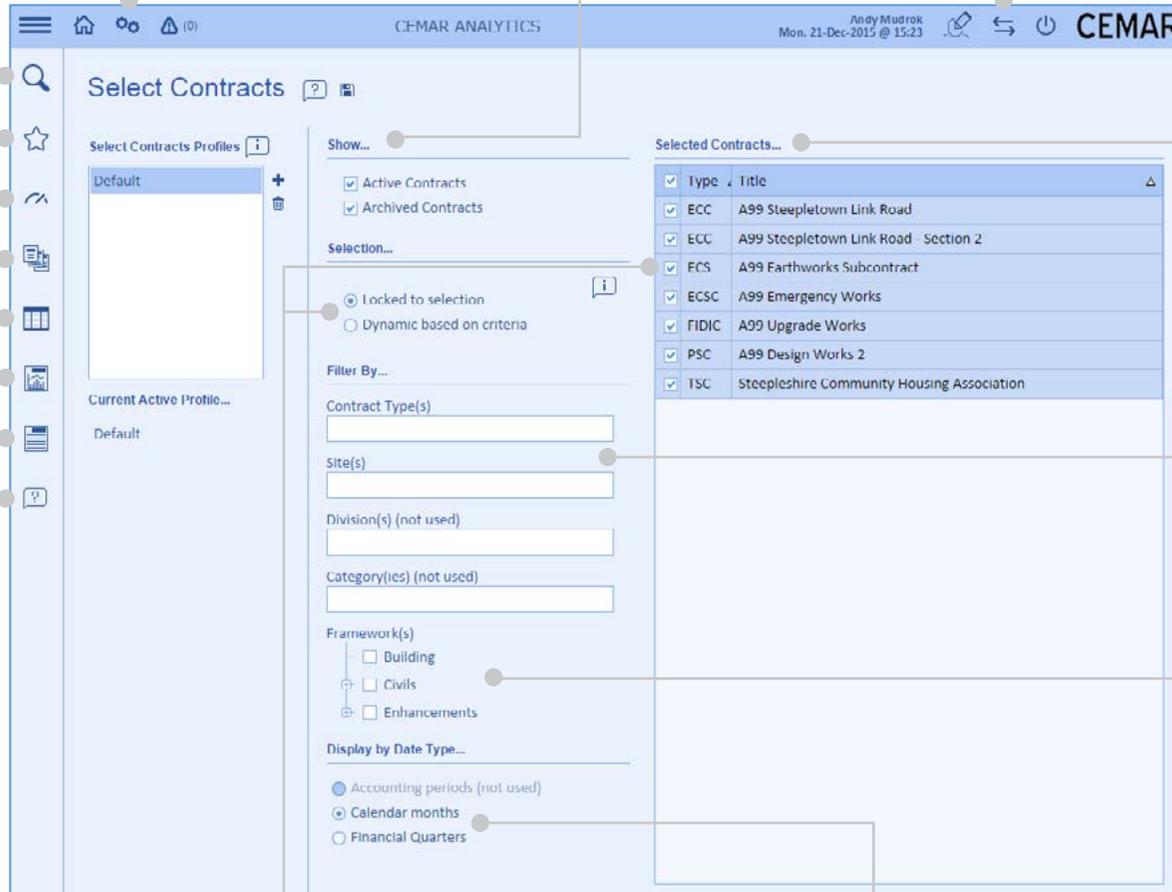
### Show...

Both Active and Archived Contracts can be viewed in Analytics, select an option by clicking the appropriate checkbox.



### Switch module

Click the **Switch Module** icon then select an option from the list.



### Select contracts

Analytics will only report on the Contracts that have been selected. To select a Contract, click on the checkbox next to the Contract title.

### Filter by...

There are several options to filter Contracts. Type into the boxes or click the box to view the options. This will alter the list of Contracts to the right hand side of the filters.

### Framework(s)

If framework(s) have been used, select them by clicking on the checkboxes to filter the list of Contracts to the right hand side.

### Selection...

Click **Locked to selection** then the checkbox next each Contract to report on its contract events. If you would like the Contract selection to adjust depending on the criteria selected, click **Dynamic based on criteria** and continue to select from the filter options below.

### Display by Date Type...

The reports built by Analytics can show the data by Calendar month or Financial Quarter. Select a choice by clicking the checkbox.

## Reports

### View reports

To view the list of reports, hover over the left hand side menu and select **Reports** then either **Aggregated** or **General**.

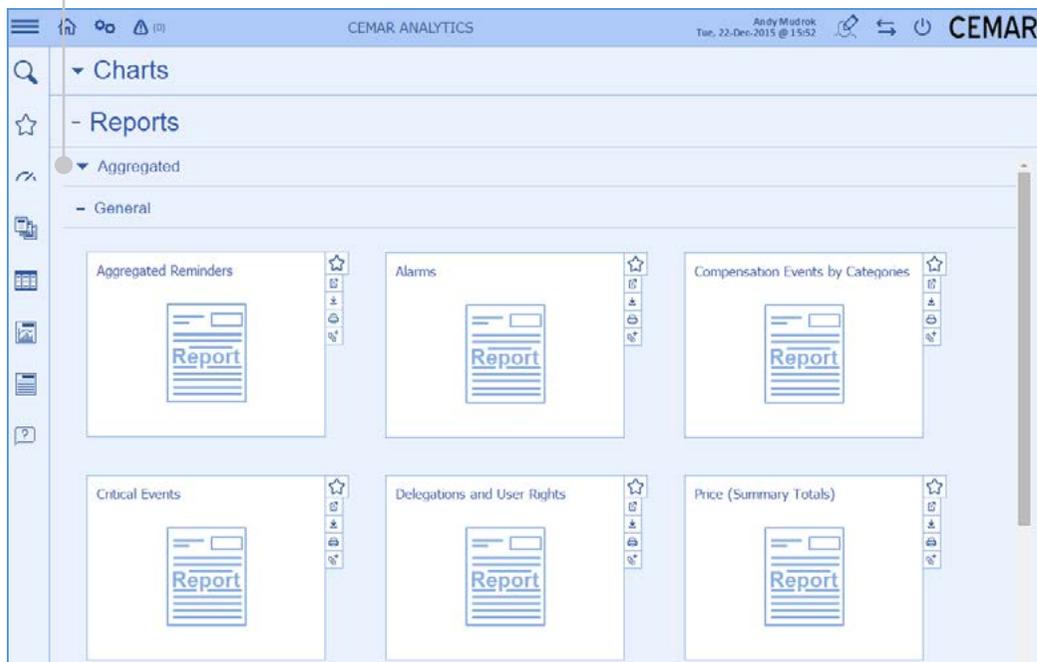
### Expand sections

To expand the Aggregated or General Report section, click the **down arrow** next to the title.



### Open a report

To open a report, click the **white box** with the title of the report you require or click the **open** icon to the right of the report.

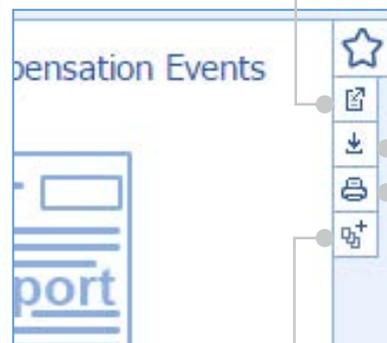


### Favourites

To add a report to favourites, click the **favourite** icon. These reports / charts will then be listed in the favourites section found in the left hand side menu.

### Download

Click the **download** icon to bring up a list of available file types. Select a file type and click Download / Export.



### Add to group

Click the **Add to group** icon to add the report to a group. Either create a new group and add the report to it, or add the report to an existing group.

### Print

Click the **print** icon to bring up the print window.

# Filters

## Filters

The filters shown are taken directly from the aggregated compensation event report. Many of these filters are available across Analytics.

### Show by Party...

To filter the report by Party select either Party 1 (*Employer / Project Manager*) or Party 2 (*Contractor / Consultant*). In a subcontract Party 1 = *Contractor* and Party 2 = *Subcontractor*.

### Days change is...

Click the **days change is...** checkbox then choose an option from the drop-down list and type the number of days to filter by days change.

### By date of

Select by date of **notification** or **implementation** from the drop-down list then select from the dates.

### Title, Author, Cross ref contains...

Type a title, author or cross ref into the relevant fields to only show events which contain the keyword.

**Filters...**

Show by party...  Party 1  Party 2

title contains...

author contains...

cross ref contains...

Show events that/where...

await  quotation(s) only

are implemented  are not implemented

require(d) assessment  do not require assessment

of type(s)...:

of origin(s)...:

of category(ies)...:

Filter by price  absolute

and

and

### Show events that / where...

These filters will change depending on which report is being viewed, in this case the filters are compensation event specific. Click the checkbox to show the events that (for example) are implemented.

### Type, origin or category

To filter by type, origin or category select the appropriate drop-down box and choose an option from the list.

of type(s)...	of origin(s)...	of category(ies)...	Total #	Type
			281	(1) PM instruction changing the Works Information
			27	(2) Employer does not allow access to and use of Site

### Filter by price

Choose an option from the drop-down list (shown right) and type in a price to filter by price.

days change is...  absolute

equal to  and

by date of

by date  to

by period

for contracts of type(s)...

ECC  ECS  ECSC  PSC

TSC  TSSC

greater than

equal to

greater than or equal to

greater than

less than or equal to

less than

is between

### By period or by date

Select the **by date** or **by period** checkbox. The by period date picker can be dragged by clicking either end point.

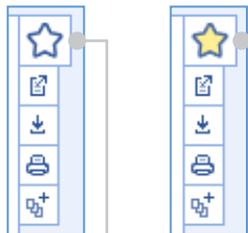
### Filter by Contract type

Click the checkbox next to the Contract type to show the relevant Contracts.

## Favourites

### Favourites

To view favourites, hover over the left hand side menu and click on **Favourites** then select an option from the list.



### Add a favourite

To add a report or chart to favourites, click the **favourite** icon. The icon will change colour to yellow. These reports / charts will then be accessible in the favourites section found in the left hand side menu.

### Edit favourites

To edit the order of the favourites, click the **edit** icon. This will bring up the drag & drop function shown below.

### Remove favourite

To remove a favourite, click on the **favourite** icon and it will be immediately removed from the page.

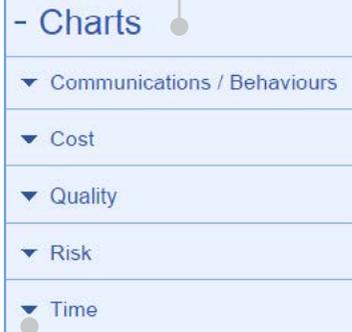
### Re-order favourites

After clicking the **edit** icon, the drag & drop reordering page will be shown. To reorder the reports / charts, simply click and drag the report to where it should show on the favourites page. When complete, click the **close** icon.

## Charts - last period data

### View charts

To view the list of charts available in Analytics, hover over the left hand side menu and click **Charts** then select from **Communications / Behaviours**, **Cost**, **Quality**, **Risk** or **Time**.

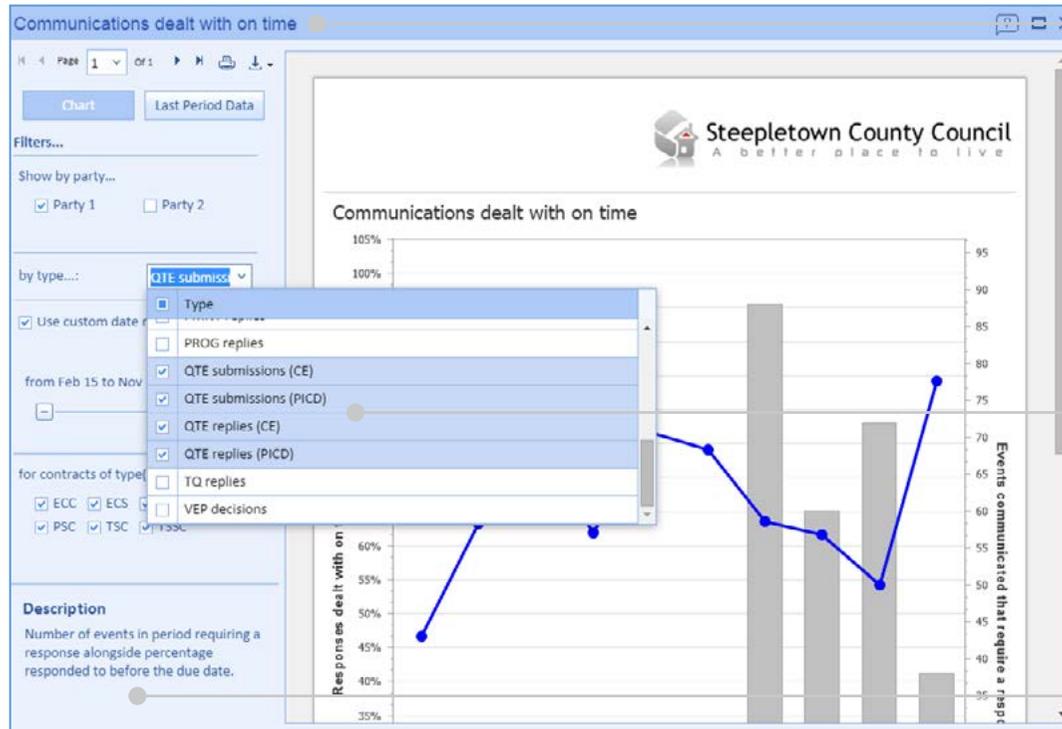


### Expand sections

To expand a section, click the **down arrow** next to the title.

### Last period data

To view all data from the last period (either calendar month or financial quarter) click **Last Period Data** and view the report to the right.



### This chart

This example is from the Communications / Behaviours section of charts and is called Communications dealt with on time.

### Filters

To filter the data on this report, click the drop-down box and select the communication type that should be included.

### Description

Each chart / report has a description to the bottom left hand side of the pop-up window. This will give an explanation of the chart / report.

**Communications dealt with on time**

Showing events for Party 1. The report is also filtered on selected by type

Contract Name	% On Time	On Time	Out Of Time	Total Comms	Division	Site	Contact Name
A00 Design Works 2	0.0%	0	0	0		South	Dominia Briggs
A00 Earthworks Subcontract	0.0%	0	0	0		East	Sam Hale
A00 Emergency Works	0.0%	0	0	0		West	Dominia Briggs
A00 Steepletown Link Road	100.0%	8	0	8		West	Dominia Briggs
A00 Steepletown Link Road - Section 2	80.0%	28	8	31		North	Dominia Briggs
A00 Upgrade Works	0.0%	0	0	0		South	Dominia Briggs
Steepleshire Community Housing Association	100.0%	1	0	1		West	Dominia Briggs
<b>Totals:</b>	<b>84.21%</b>	<b>32</b>	<b>8</b>	<b>38</b>			

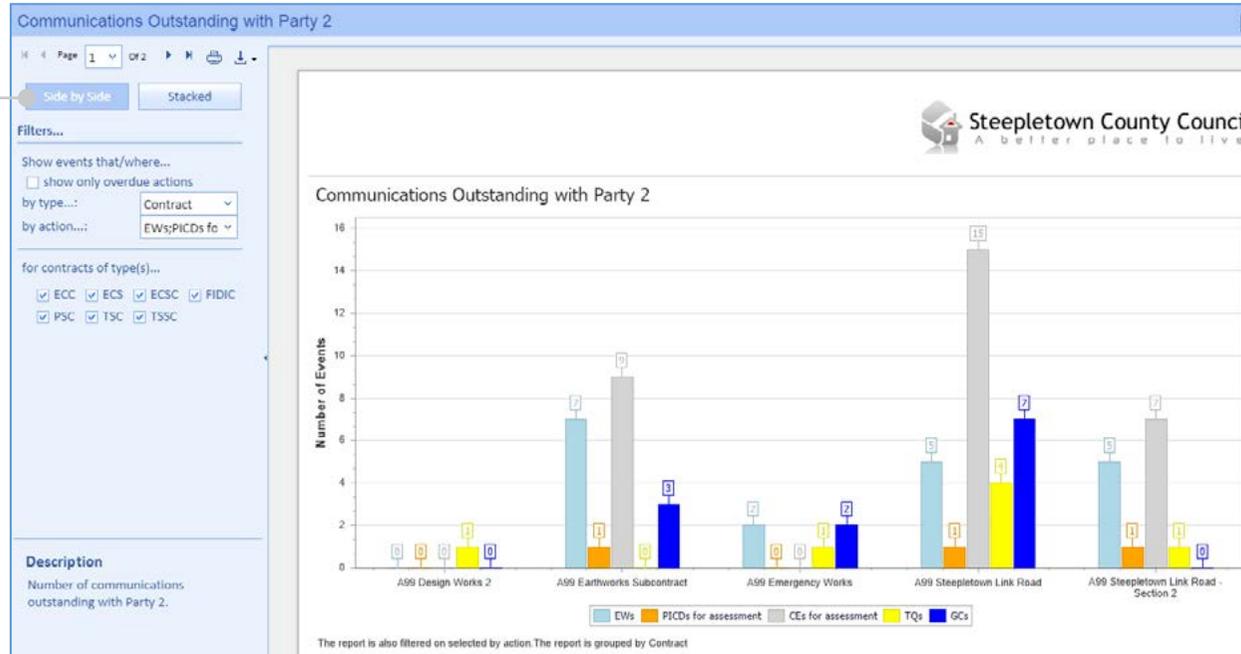
### Last period data report

The information shown in this chart / report is from the last period. Each chart has this option.

## Charts - side by side and stacked

**Side by side**

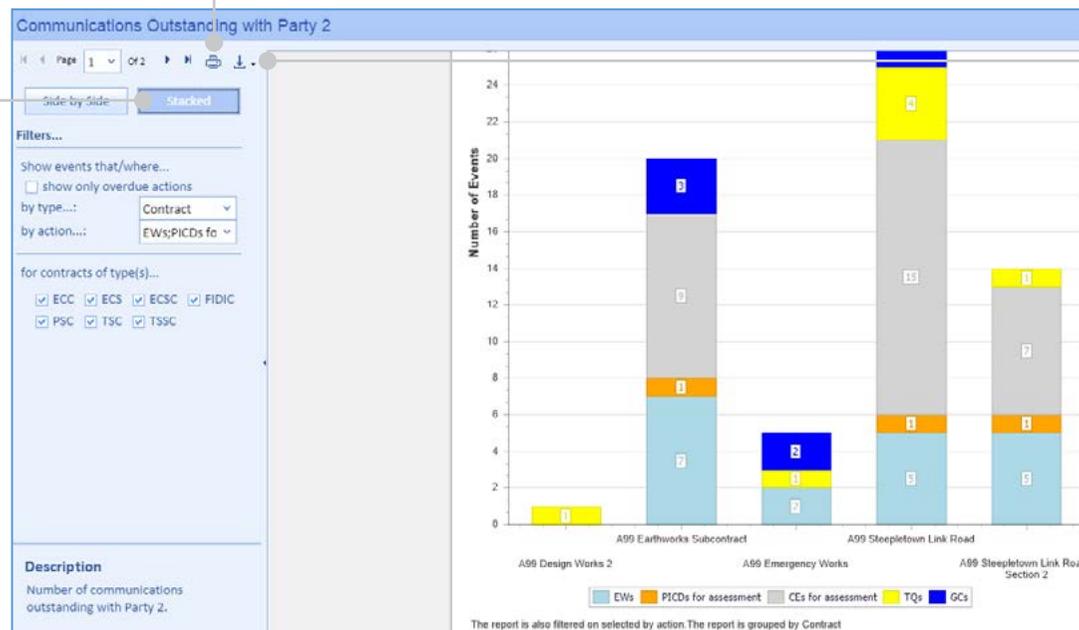
Selecting **Side by Side** will break up each Contract and show them independent of each other on the same report. This may be useful when there are not many Contracts selected.

**Print**

Any report or chart can be printed by clicking the **print** icon.

**Stacked**

Selecting **Stacked** will stack all events from one Contract in one column. This may be useful where there are many Contracts selected.

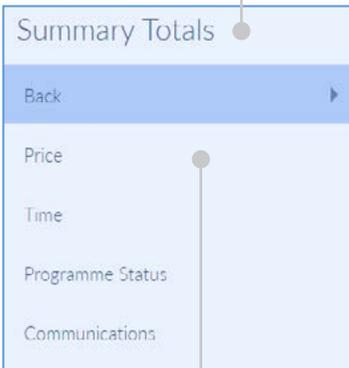
**Export**

Any report or chart can be exported by clicking the **export** icon.

# Registers - summary totals

### Summary totals

To view the summary totals sections, hover over the left hand side menu, click on **Registers** then **Summary Totals** and select an option from the list below.



### Price summary totals

This registers shows the pricing summary totals across all selected Contracts.

### Check the filters

Click the **filter** icon to select an option. This register allows for filtering by Contract type. It is important to check which filters are offered on each report / chart.

### Contract price

The original Contract Price is shown in this column.

### Change to the prices

The change to the Prices due to implemented compensation events is shown in this column.

### Current Total of the Prices

This column totals the Contract Price and adds the change to the prices due to implemented compensation events.

### Latest quotations

This column totals current quotations.

Price (Summary Totals) 🔍 🏠 🔄 ⚙️ 🖨️

Showing events for selected contracts.

Contract	Contract Price	Change to the Prices	Current Total of the Prices	Latest Quotations	Proposed Total of the Prices	Forecast to Completion	Difference
<b>Contract Type: ECC</b>							
A99 Steepleton Link Road	13,842,576	2,702,397	16,544,973	11,500	16,556,473	1,289,600	-15,266,873
A99 Steepleton Link Road - Section 2	13,842,574	195,100	14,035,674	15,700	14,051,374	13,374,442	-676,932
<b>Contract Type: ECS</b>							
A99 Earthworks Subcontract	13,842,574	149,631	13,992,205	68,520	14,060,725		
<b>Contract Type: ECSC</b>							
A99 Emergency Works	1,000,000	27,611	1,027,611	18,920	1,046,531	258,300	-788,231
<b>Contract Type: FIDIC</b>							
A99 Upgrade Works	1,000,000	45,000	1,045,000	58,500	1,103,500	16,799	-1,086,701
<b>Contract Type: PSC</b>							
A99 Design Works 2	0	100	100	10,000	10,100		
<b>Contract Type: TSC</b>							
Steeplethire Community Housing Association	6,600,000	246,041	6,846,041	7,424	6,853,465		
<b>Summary Totals</b>							
	50,127,724	3,363,880	53,491,604	190,564	53,682,168	14,999,141	-17,818,737

Page 1 of 1 (7 items) ⏪ 1 ⏩ Page size: 50

### Proposed Total of the Prices

This column totals current quotations and the current Total of the Prices.

### Forecast to Completion

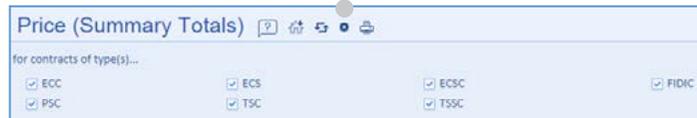
This column totals the latest forecast to Completion.

### Difference

The difference column is the difference between the proposed Total of the Prices and the forecast to Completion totals.

### Totals row

The bottom row of this page totals all of the above columns to show the **summary totals** across all Contracts.



# Registers - aggregated events

## Aggregated events

To view aggregated events, hover over the left hand side menu, click on **Registers** then **Aggregated Events** and select an option from the list below.

## Aggregated early warnings

This register shows all the early warnings across all selected Contracts.

## Expand rows

To expand and contract rows, click the **plus** and **minus** icons.

**Aggregated Early Warnings** ? ↕ ↶ ↷ ⊞ 🖨

Showing events for selected contracts. Showing events for both parties. The report is also filtered on showing events that/where are current

Ref	Notified	Cross Ref	From	Author	Title	Status	Score	Reply Due	Reply Date
Contract Type: ECC									
Contract: A99 Steepletown Link Road									
EW-233	26-Oct-2015		Contractor	Sam Hale	Possible Delays	CURRENT	16	09/11/2015	26-Oct-2015
EW-224	19-Aug-2015		Contractor	Sam Hale	Internet Access	CURRENT	20	02/09/2015	15-Sep-2015
EW-222	10-Aug-2015		Employer	Morgan Lamb	Internet	CURRENT	25	24/08/2015	09-Nov-2015
EW-209	02-Jul-2015		Employer	Bruce Wayne	Embankment Design	CURRENT	20	26/09/2015	
EW-167	04-Mar-2015		Employer	Morgan Lamb	Delay of Delivery	CURRENT	20	19/05/2015	
EW-148	01-Dec-2014		Employer	Morgan Lamb	High Winds	CURRENT	25	25/06/2015	
EW-118	24-Jun-2014		Contractor	Sam Hale	Utility Diversions	CURRENT	16	08/07/2014	01-Jul-2014
Contract: A99 Steepletown Link Road - Section 2									
EW-15	29-Oct-2015		Employer	Andy Mudrok	Autumn leaves block site entrance	CURRENT	16	12/11/2015	29-Oct-2015
EW-12	27-Oct-2015		Contractor	Reece Summers	Potential shortage of appropriately skilled operatives	CURRENT	20	04/12/2015	25-Nov-2015
EW-11	26-Oct-2015		Contractor	Heather Mudrok	Bad weather forecast	CURRENT	16	09/11/2015	26-Oct-2015
Contract Type: ECS									
Contract: A99 Earthworks Subcontract									

Page 1 of 1 (14 Items) [1] Page size: 50

## Filters

The filters change dependant on the report / chart / register type. These are the filters available in the aggregated early warning register.

**Aggregated Early Warnings** ? ↕ ↶ ↷ ⊞ 🖨

Show by party...  Party 1  Party 2

Show events that/where...  await a reply  are current  are passed / avoided

Filter by Risk  greater than 15.00 and

by date of Notification for contracts of type(s)...  ECC  ECS  ECSC  FIDIC  PSC  TSC  TSSC

by date 17 Mar 20 to 21 Dec 20

by period from Jan 15 to Dec 15 (12 period(s))

title contains... Not filtered by titl

author contains... Not filtered by au

cross ref contains... Not filtered by crc

# Groups - creating and opening

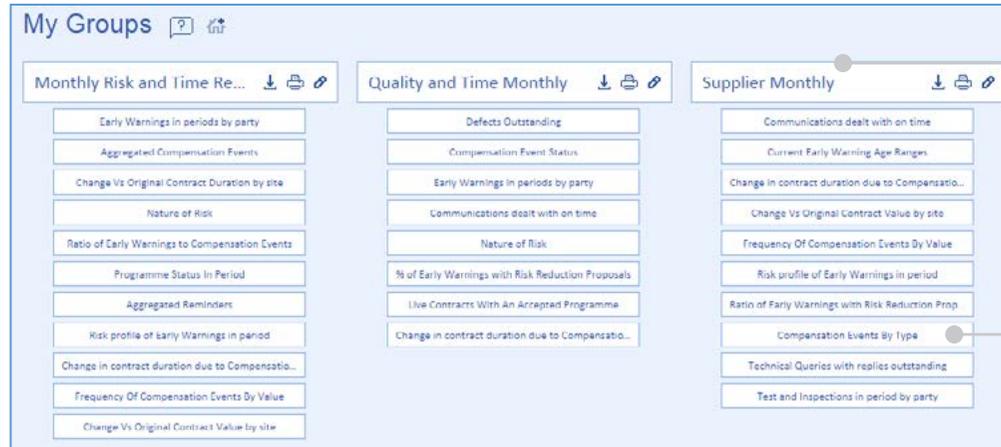
## Groups

To view groups, hover over the left hand side menu, click on **Groups** then select an option from the list below.



## What are groups?

Groups allow each user to build a bespoke selection of reports in order to save time when needing to provide standard, regular reporting over a consistent set of metrics.



## Open group

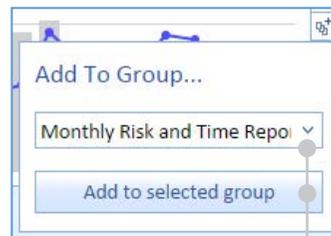
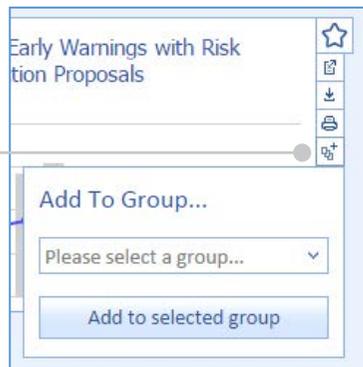
To open a group, click the title of the group and view the reports / charts on the page that follows.

## Open report / chart

To open any individual report or chart within the group click on the report / chart.

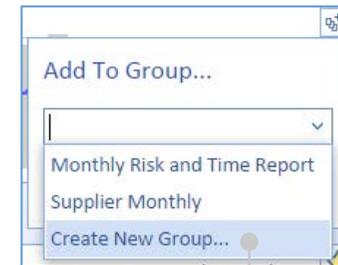
## Add to group...

To add to a group or create a group, click the **group** icon next to any report or chart.



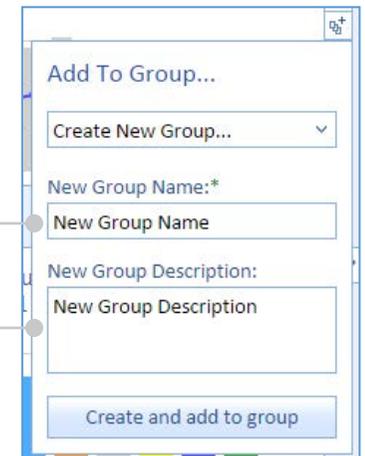
## Select a group

To add to an existing group, click the title of the group from the drop-down list then click **Add to selected group**.



## Create new group

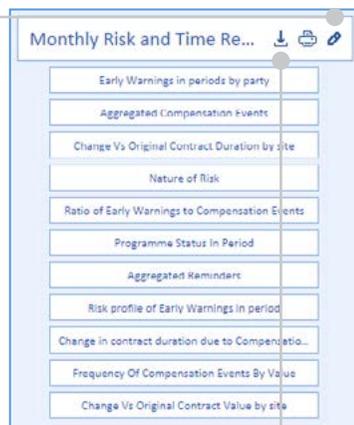
To add to a new group, click on **Create New Group** then fill out the form detailing a new group name and description then click **Create and add to group**.



# Groups - editing and exporting

### Edit group

To edit a group, click the **edit** icon.



### Delete group

To delete a group, click the **delete** icon.



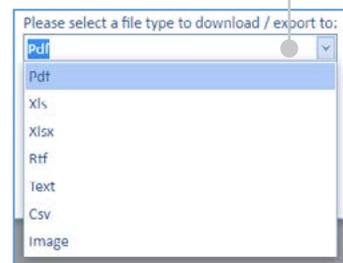
### Remove report / chart

To remove a report / chart from the group, click the **X** to the right of the title.



### Download / export

To download and export a group, click the **download / export** icon. Then select a file type from the drop-down list and click **Download / Export**.



### Exported group

The exported group will have the company logo, title and description on page 1, followed by a contents page detailing what is in the group on page 2.

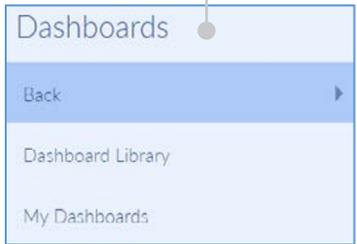


### Contents Page

Chart / Report Name	Page
Early Warnings in periods by party	3
Aggregated Compensation Events	4
Change Vs Original Contract Duration by site	6
Nature of Risk	7
Ratio of Early Warnings to Compensation Events	8
Programme Status In Period	9
Aggregated Reminders	10
Risk profile of Early Warnings in period	16
Change in contract duration due to Compensation Events in period	17
Frequency Of Compensation Events By Value	18
Change Vs Original Contract Value by site	19

# Dashboards - create and open

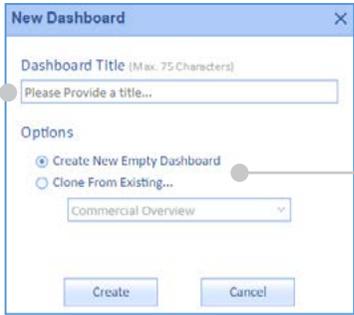
**Dashboards**  
Click on **Dashboards** then select from the options below.



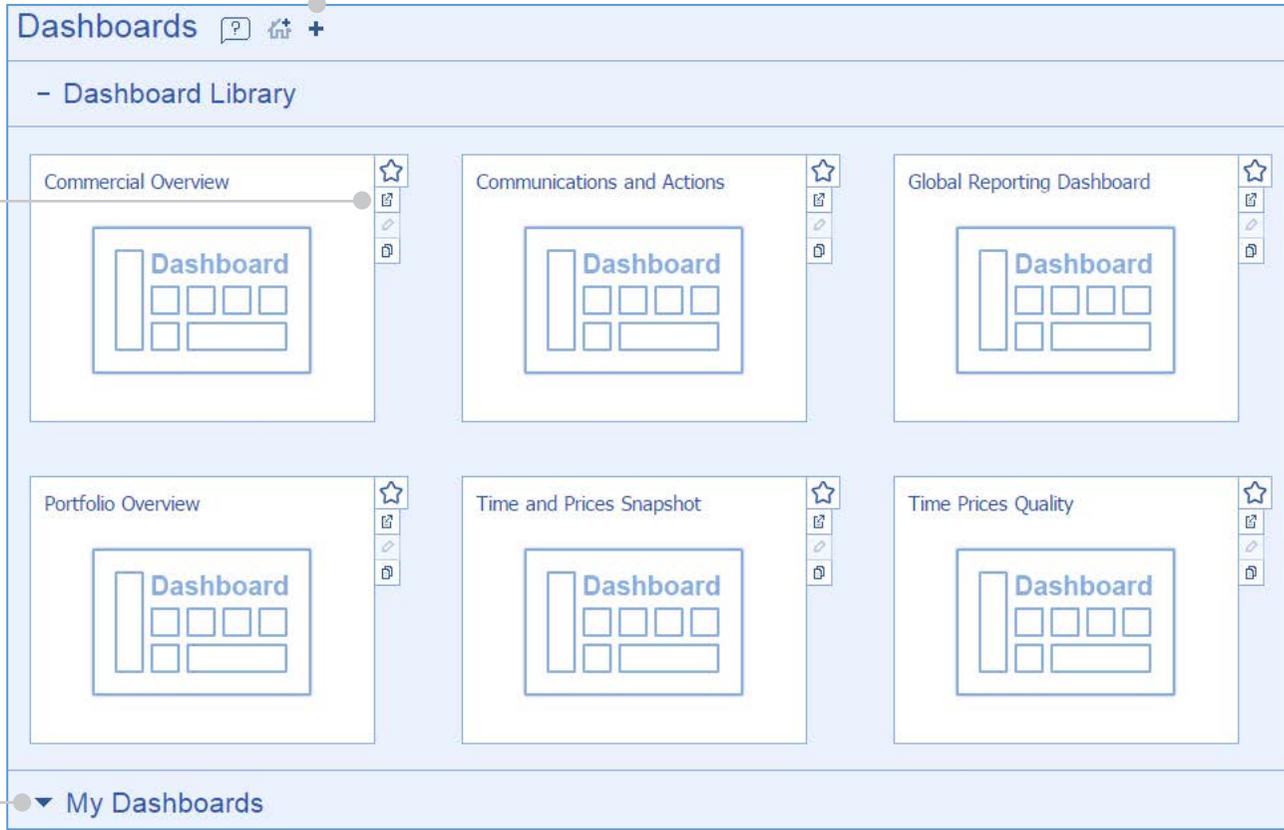
**Open a dashboard**  
To open a dashboard, click the **open** icon or anywhere within the white box of the dashboard.

**My dashboard**  
To view the dashboard library or my dashboards, click the arrow next to the title. This will expand the row to show the dashboards.

**Create new dashboard**  
To create a new dashboard, click the **plus** icon then type a title into the pop-up window.



**Create new or clone**  
When creating a new dashboard, the user has the option to create a **New Empty Dashboard** or to **Clone From Existing...**



## Dashboards - edit

**Edit dashboards**

To edit a dashboard, select the **pencil** icon.

**Save dashboard**

To save a dashboard, click the **save** icon.

**Delete dashboard**

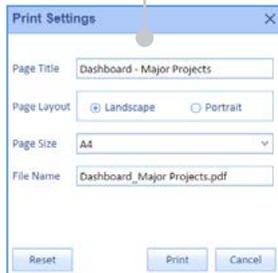
To delete a dashboard, click the **delete** icon.

**Close editing of dashboard**

After the dashboard has been edited and saved, click the **X** icon to leave the editing function.

**Print dashboards**

To print the dashboard, click the **print** icon and select from the options shown.



A screenshot of the "Dashboard Edit" interface. The dashboard contains several widgets: "Dashboard Criteria" (Active Profile: Default, Showing: a selection of 7 Contracts from only Contracts I am attached to, With: data from the last 12 completed Calendar months), "Weather Feed London" (from 12:00 to 15:00, Heavy rain, 8°C), "Number of Defects Outstanding by Party", "EWs to CEs In Current Period" (Bar chart showing 13 Early Warnings and 10 Compensation Events), "Live Contracts With Accepted Programmes In Current Period" (Large number 16.7), "Live Contracts Programme Status In Current Period" (Pie chart showing 3 segments), and "Price Change for Selected". A "Widgets" menu is open, listing various widget options like "Compensation Event Value...", "Total of the Prices vs Forec...", "Change In Contract Duration", "Live Contracts With a Progr...", "Live Contracts With Subm...", "Change In Price Over The L...", "Compensation Event Party...", "Compensation Event Party...", "Early Warning status", and "Early Warning status by Co...".

**Widgets**

**Drag and drop widgets** from the selection to the dashboard.

**Resize widgets**

To resize the widgets, click and drag the bottom right corner of the widget and move it to the location of your choice.

## Notes

A series of horizontal dotted lines for writing notes.



# Support Services

We offer a range of support services to help our users progress their NEC skills and to assist the delivery of projects on time and on budget.



## Training

We offer classroom, in-house and online training. Whether you are a newcomer to NEC or an expert, we have training courses to suit your needs.



## Consultancy

Our consultancy services provide guidance and assistance to the project management teams who are using the contracts.



## Events and webinars

Our programme of events includes conferences, workshops, briefings and site visits. The free NEC webinars provide insight into different topics directly from your desk.



## Contracts and Guidance

NEC Contracts can be used in a wide variety of commercial situations. Each contract is supported by associated guidance notes and flow charts.



## Users' Group

The NEC Users' Group is an international community of NEC users, with more than 450 members, representing and connecting organisations from cross the supply chain.

## Available training courses:

NEC3: Introduction to the Engineering and Construction Contract (ECC)



NEC3: Preparing and Managing the ECC



NEC3: Practical Application of the Engineering & Construction Contract (ECC)



NEC3: Disallowed Cost under the ECC



NEC3: ECC Programming Workshop



NEC3: Role of the ECC Supervisor



NEC3: ECC Project Manager Accreditation



NEC3: ECC Supervisor Accreditation



### NEC story: Network Rail's Dover Sea Wall emergency reconstruction project, UK

Network Rail had to shut its coastal railway between Dover and Folkestone in December 2015 after a violent storm damaged a supporting sea wall, causing 250 m of track to collapse. A £36 million, NEC-procured project enabled the line to re-open on 5 September 2016, three months ahead of a challenging fast-track schedule.

CEMAR software was used to support the administration of the contract.

Read full story  
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# NEC3 ENGINEERING AND CONSTRUCTION SHORT CONTRACT

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