NEC3 ENGINEERING AND CONSTRUCTION SHORT CONTRACT

CEMAR®

a thinkproject! company

QUICK START GUIDE

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
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

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Logging on

CEMAR

Website address
To login, go to this web address.

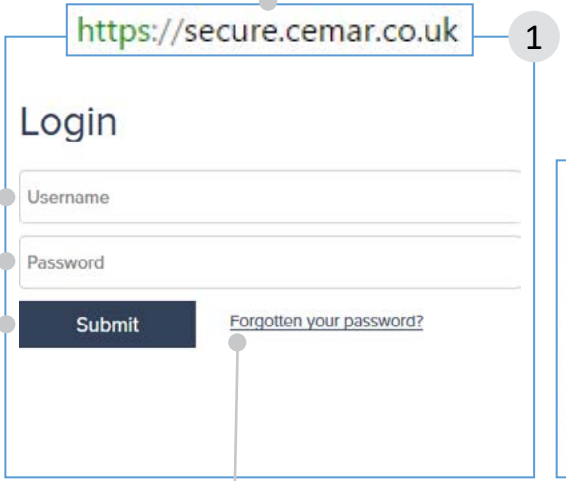
My Contracts
Click on **My Contracts** to view a list of all contracts.

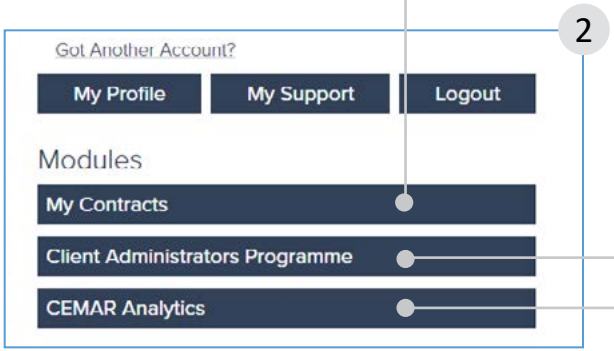
User Name
Enter your unique Username.

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.



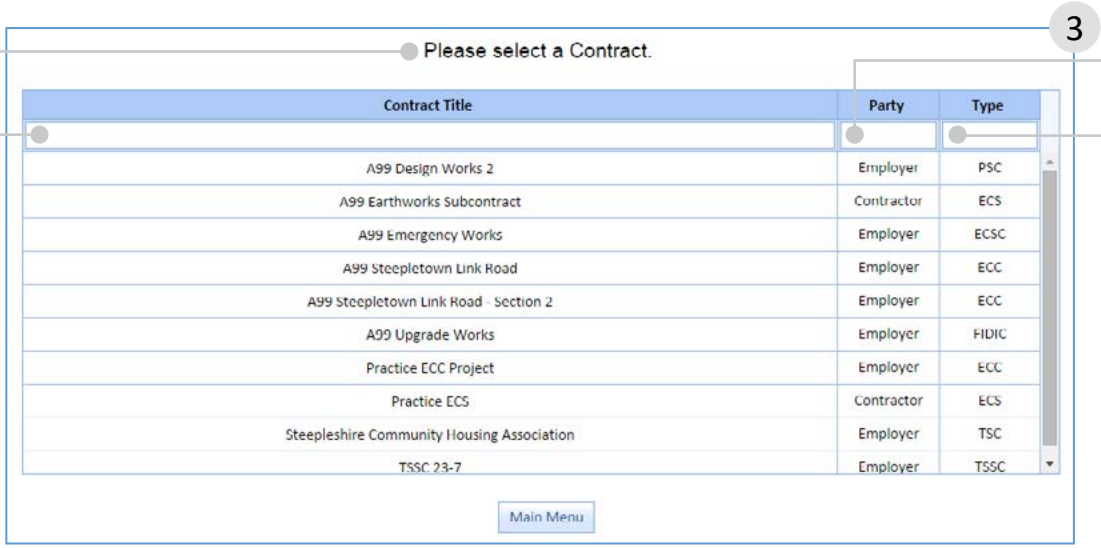


Client Administrators Programme
This is a function for Superusers only and may not appear. It is used for adding and removing users amongst other contract administration tasks.

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.



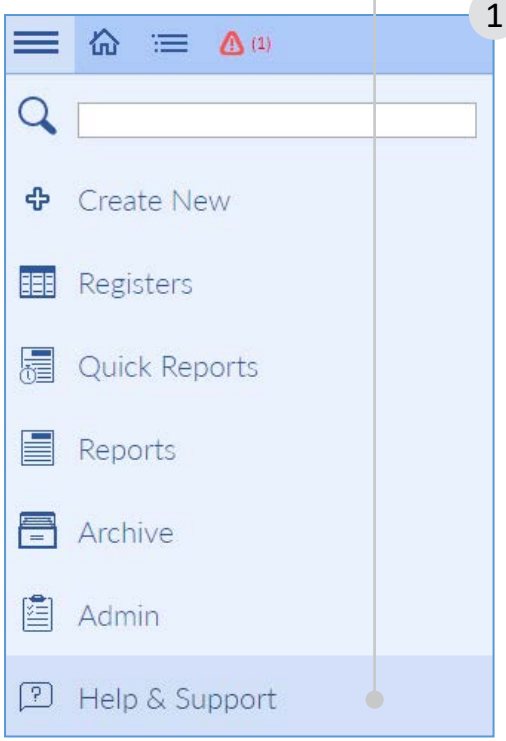
Filter by Party
Type into this box to filter the Contract list by Party.

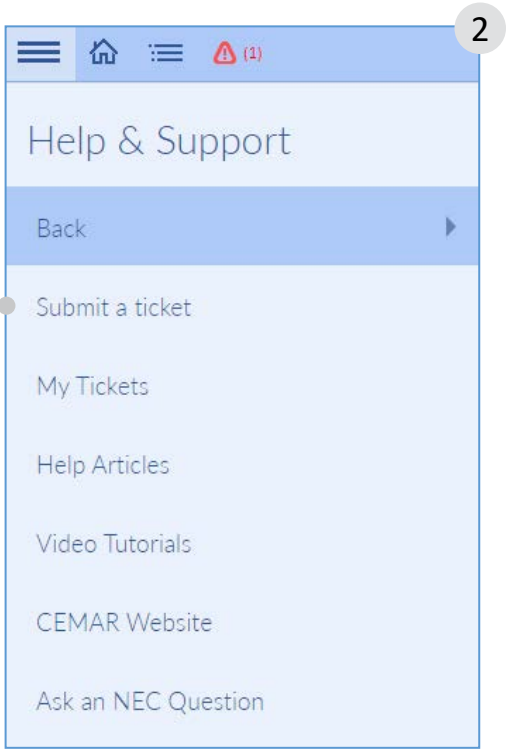
Filter by Type
Type into this box to filter the Contract list by type.

Sending a support ticket

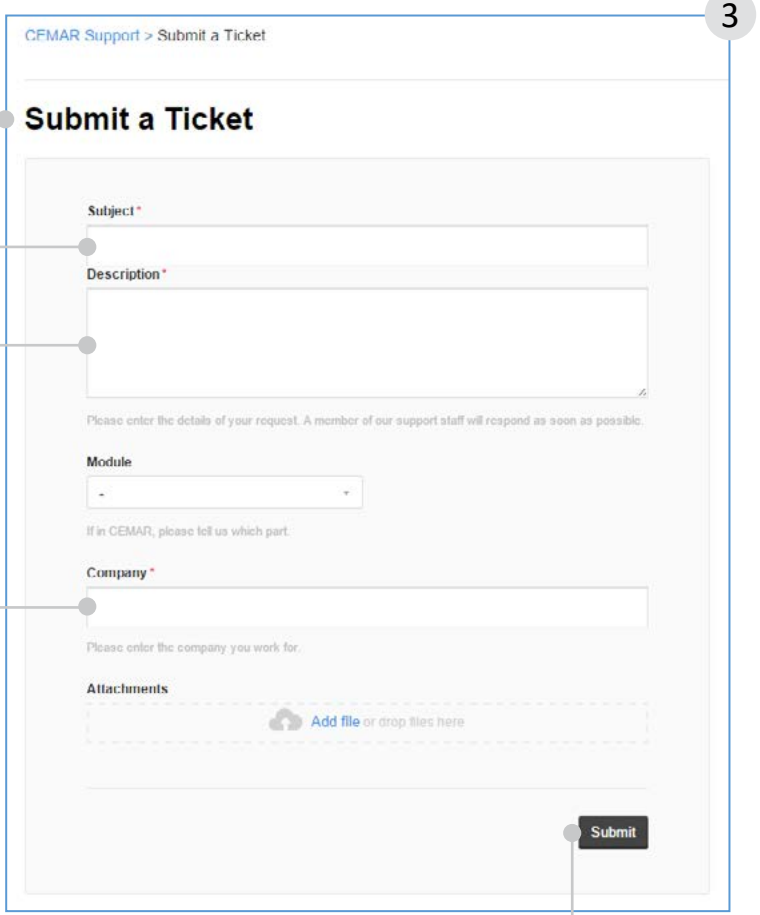
CEMAR

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

CEMAR

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.

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.

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.

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

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.

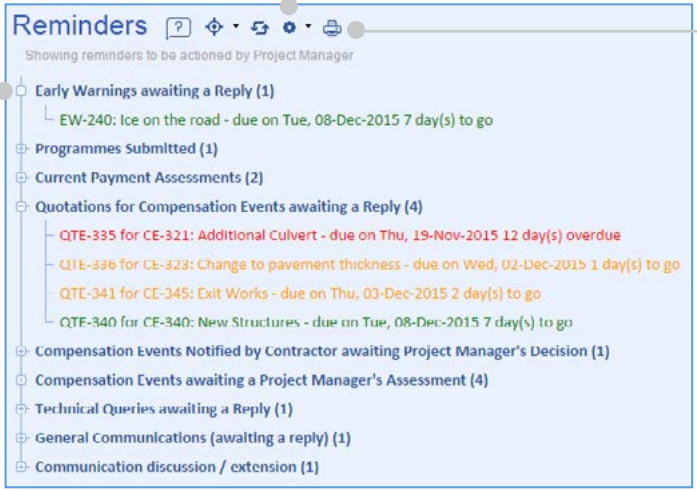
Reminders, extensions and discussions

CEMAR

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:

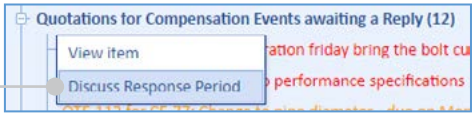
- **Green** – more than half the time remaining
- **Amber** – less than half the time remaining
- **Red** – no time remaining or overdue



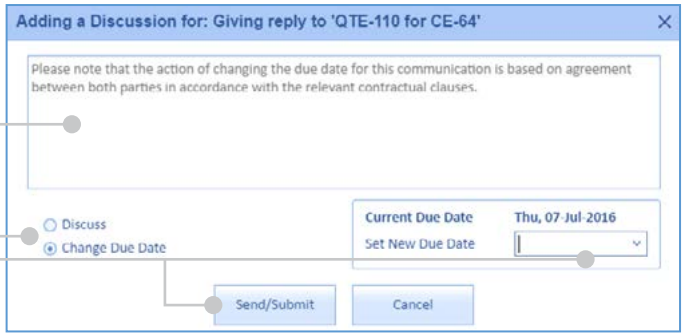
View other reminders
To view the other Party's reminders, or all reminders, click the **cog** icon then select an option from the drop-down list.

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.

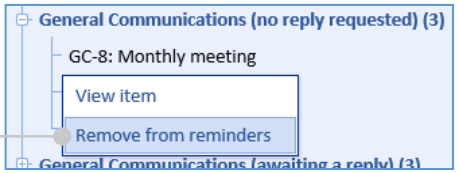
Extensions and discussions
To discuss the response period for an event, right click on the event from the reminders page and select **Discuss Response Period**.



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.



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



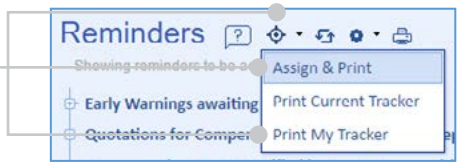
Quick Start Guide

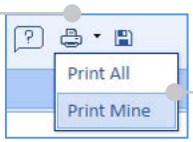
Action tracker and everything about events

CEMAR

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**.



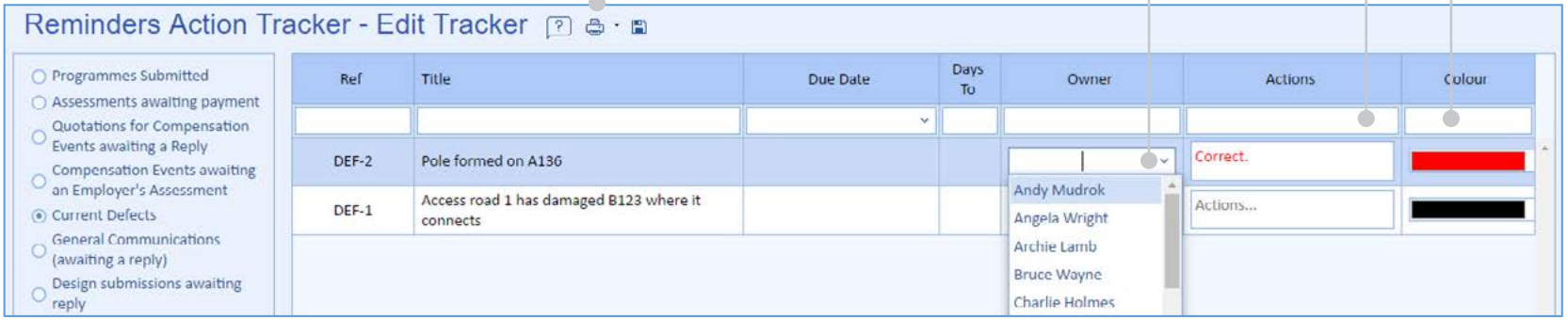


Print action tracker

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

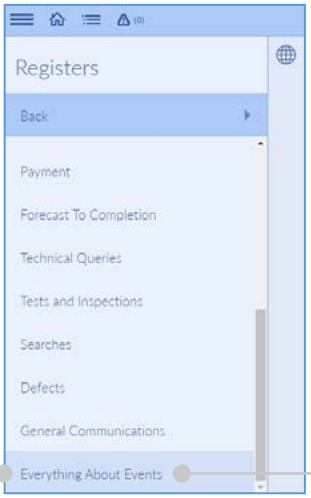
Assign actions

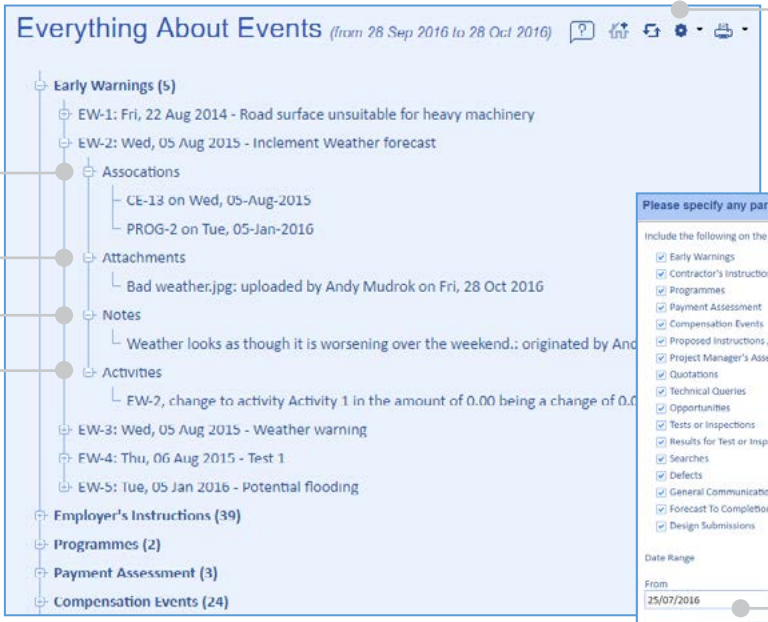
To assign actions, select an owner from the drop-down list of **users**, type the detail into the **action** box and choose optional **colour** coding.

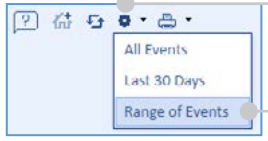


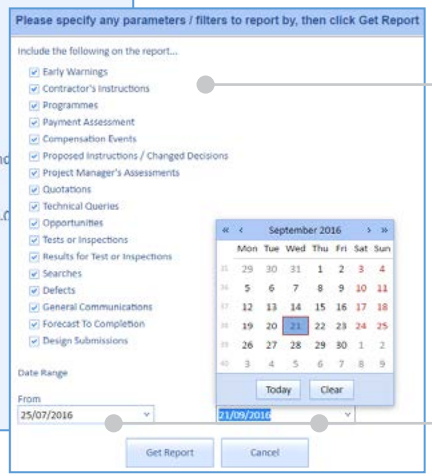
Everything about events

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.









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

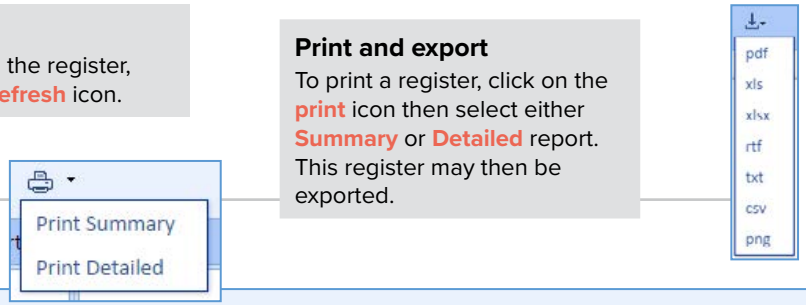
CEMAR

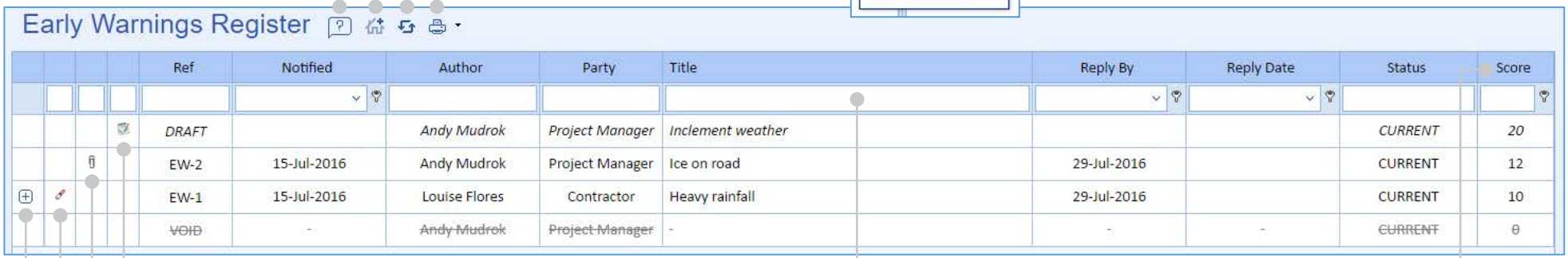
iBalloon
To view the help article for each register, click the **iBalloon**.

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.

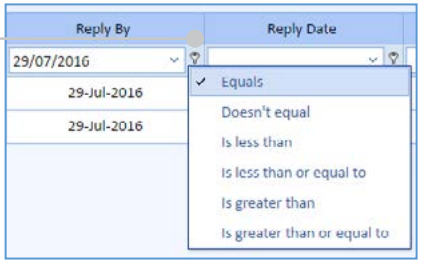
Print and export
To print a register, click on the **print** icon then select either **Summary** or **Detailed** report. This register may then be exported.





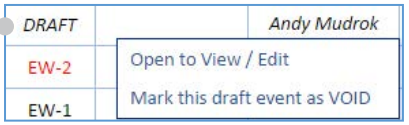
Icons
The **plus** icon will show more information on the specific event, in this case a risk reduction proposal could be viewed. The other icons represent an **association**, an **attachment** and a **note**.

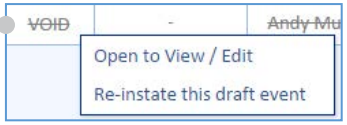
Filter the register
The register is filtered by typing in this row. Where there are drop-down boxes, more options can be selected.

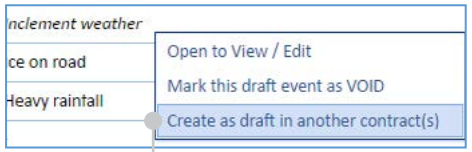


Sorting the register
The register can be sorted in ascending or descending order by clicking on the **column title**.

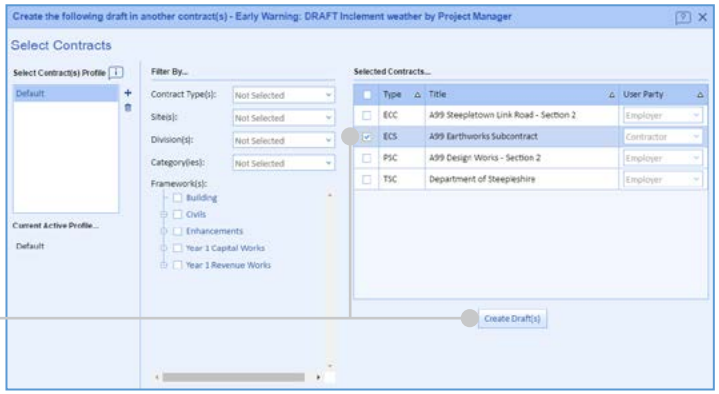
Draft and void events
To make a draft event void, right click on the event and click **Mark this draft event as VOID**. To re-instate a void event, right click on the event and click **Re-instate this draft event**. A communicated event cannot be marked as void.







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)**.



Quick Start Guide

Event form common features

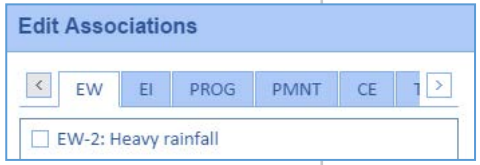
CEMAR

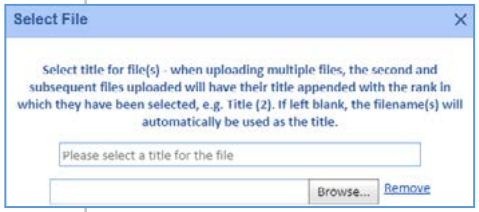
Associations (see also next page)
Associations allow you to link events within CEMAR. Click the **Associations** tab, then click **Edit** and select which events to associate. Select related events and click **Add**, then **Save and Close**. The associations tab is only available once the event has been 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**.

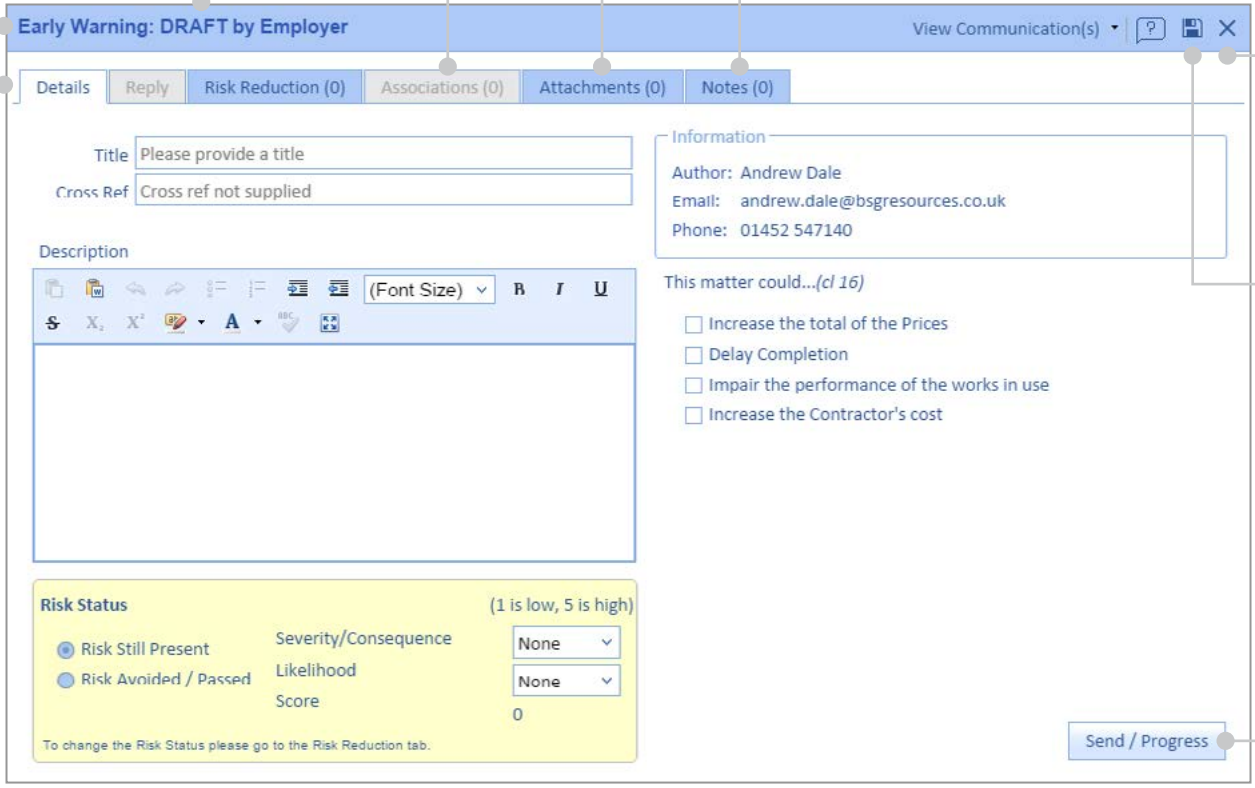
Notes
To add a note click the **Notes** tab then click **New**. Enter text into the box and click **Done**. To make the note private to your Party select the checkbox on the pop-up.

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



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

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

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

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.

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

Associations, attachments and notes

CEMAR

Associations (0) | Attachments (0) | Notes (0)

Edit | New | New

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.

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.

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

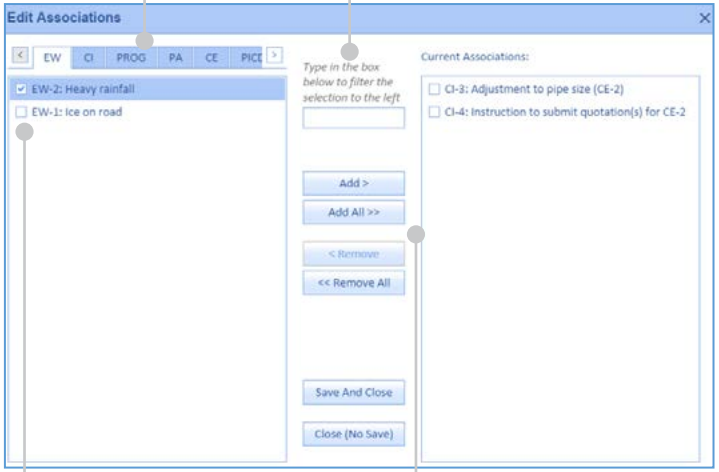
Event type
Each event type has been grouped into tabs. To select a specific event, select the correct tab then choose from the list.

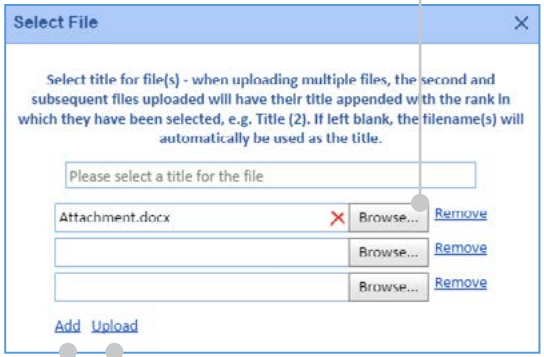
Filter
To filter the selection of events on the left, type into the filter box.

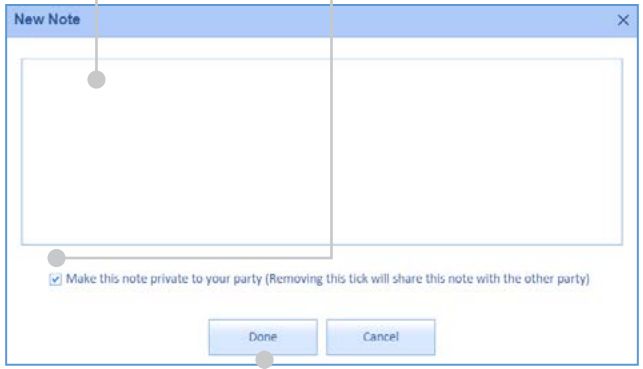
Browse
To attach a file, click on **Browse** and select the file from your computer.

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.

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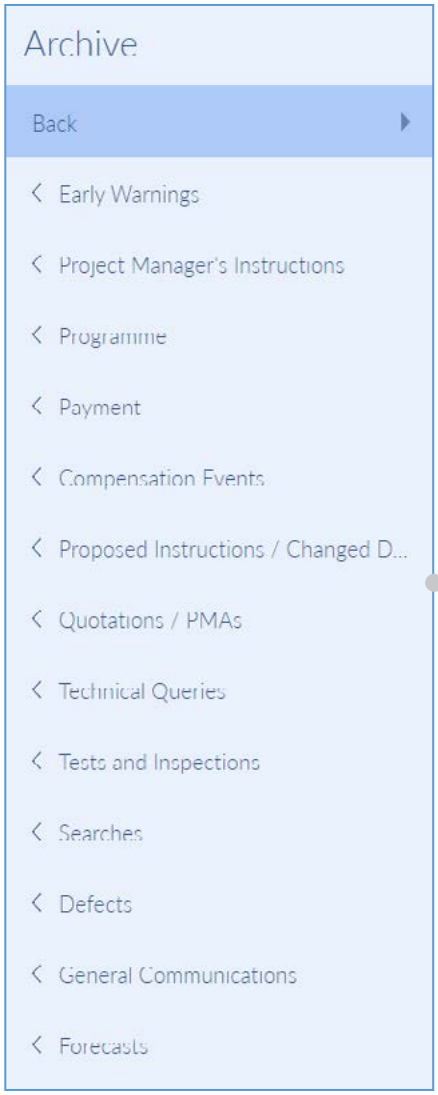
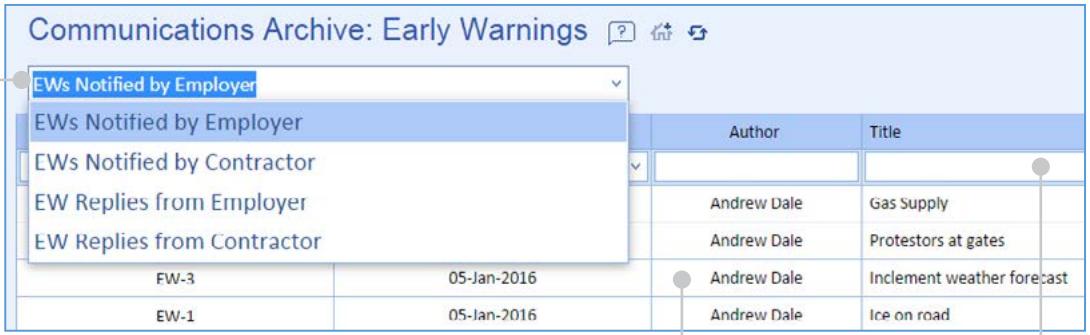
Archive and document log

CEMAR



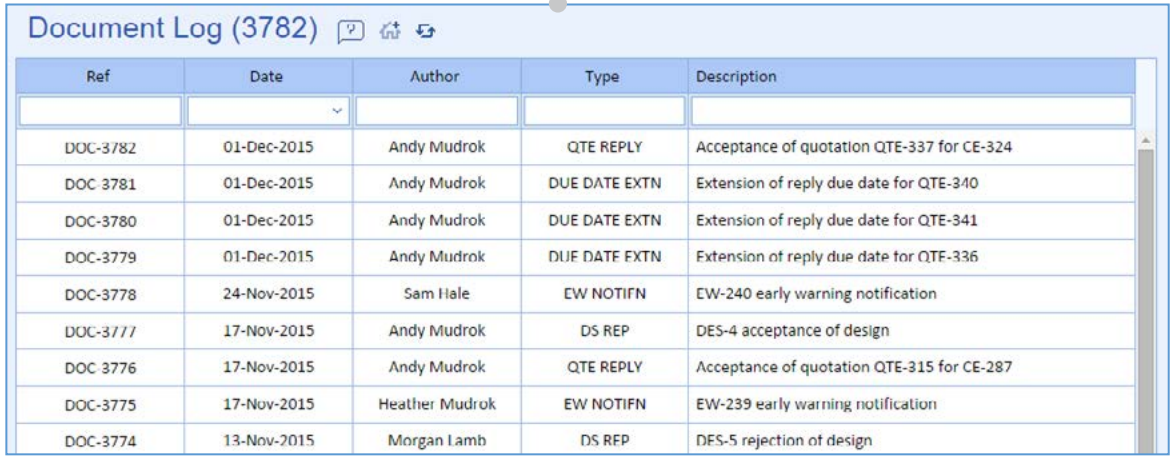


Archive
In addition to the events themselves, all communications made in CEMAR are stored in two places; the archive and the document log. Each communication is filed by event type then segregated further by simple drop-down menus. To access the communications archive, select **Archive** from the left 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**.



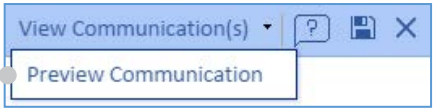
Ref	Date	Author	Type	Description
DOC-3782	01-Dec-2015	Andy Mudrok	QTE REPLY	Acceptance of quotation QTE-337 for CE-324
DOC-3781	01-Dec-2015	Andy Mudrok	DUE DATE EXTN	Extension of reply due date for QTE-340
DOC-3780	01-Dec-2015	Andy Mudrok	DUE DATE EXTN	Extension of reply due date for QTE-341
DOC-3779	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

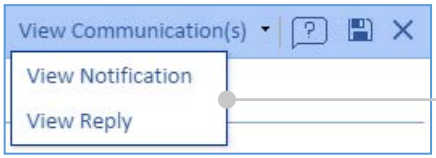
Communications

CEMAR

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.





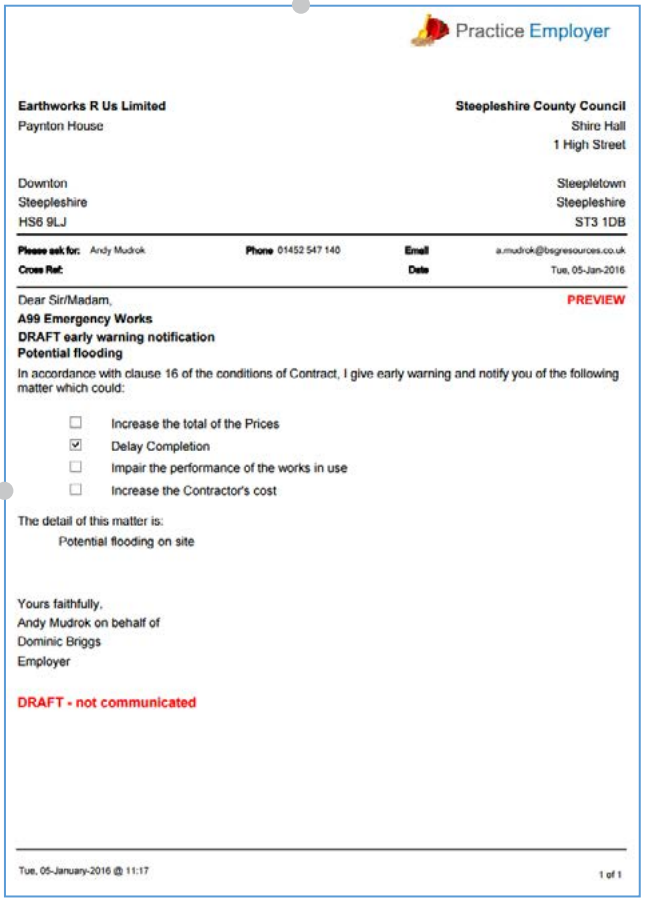
View communicated communication

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



Practice Employer

Earthworks R Us Limited
Paynton House

Downton
Steepleshire
HS6 9LJ

Steepleshire County Council
Shire Hall
1 High Street

Steepletown
Steepleshire
ST3 1DB

Please ask for: Andy Mudrok **Phone** 01452 547 140 **Email** a.mudrok@bsgresources.co.uk
Cross Ref: **Date** Tue, 05-Jan-2016

Dear Sir/Madam, PREVIEW

A99 Emergency Works
DRAFT early warning notification
Potential flooding

In accordance with clause 16 of the conditions of Contract, I give early warning and notify you of the following matter which could:

- ☐ Increase the total of the Prices
- ☑ Delay Completion
- ☐ Impair the performance of the works in use
- ☐ Increase the Contractor's cost

The detail of this matter is:
Potential flooding on site

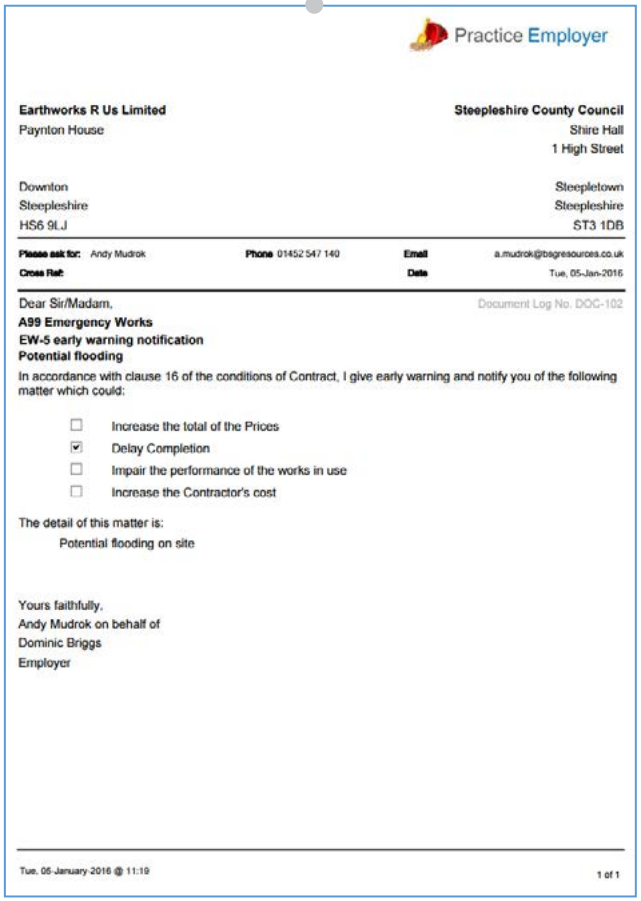
Yours faithfully,
Andy Mudrok on behalf of
Dominic Briggs
Employer

DRAFT - not communicated

Tue, 05-January-2016 @ 11:17 1 of 1

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.



Practice Employer

Earthworks R Us Limited
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Steepleshire
HS6 9LJ

Steepleshire County Council
Shire Hall
1 High Street

Steepletown
Steepleshire
ST3 1DB

Please ask for: Andy Mudrok **Phone** 01452 547 140 **Email** a.mudrok@bsgresources.co.uk
Cross Ref: **Date** Tue, 05-Jan-2016

Dear Sir/Madam, Document Log No. DOC-102

A99 Emergency Works
EW-5 early warning notification
Potential flooding

In accordance with clause 16 of the conditions of Contract, I give early warning and notify you of the following matter which could:

- ☐ Increase the total of the Prices
- ☑ Delay Completion
- ☐ Impair the performance of the works in use
- ☐ Increase the Contractor's cost

The detail of this matter is:
Potential flooding on site

Yours faithfully,
Andy Mudrok on behalf of
Dominic Briggs
Employer

Tue, 05-January-2016 @ 11:19 1 of 1

Quick Start Guide

Communicate an early warning

CEMAR

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

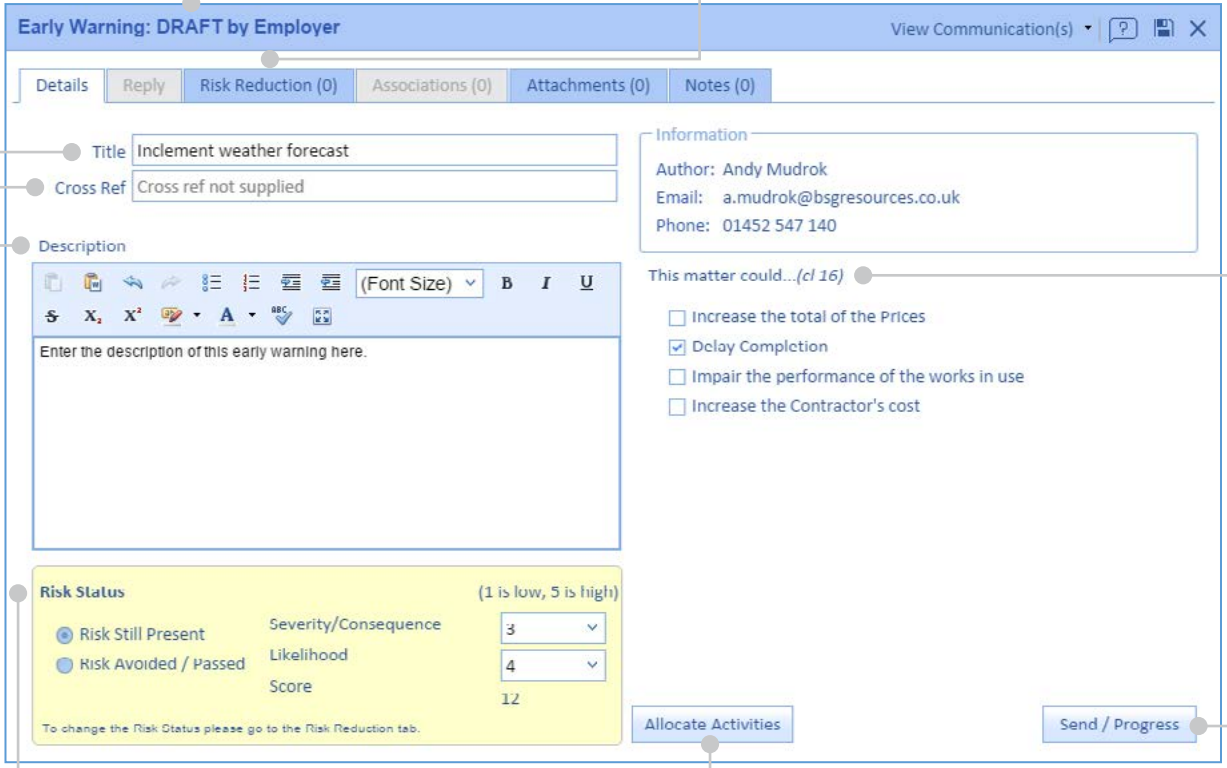
Draft event
This event is in draft; it is Party private until communicated. This event can be closed at any point and all the information will remain saved within the register.

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.



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.

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.

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

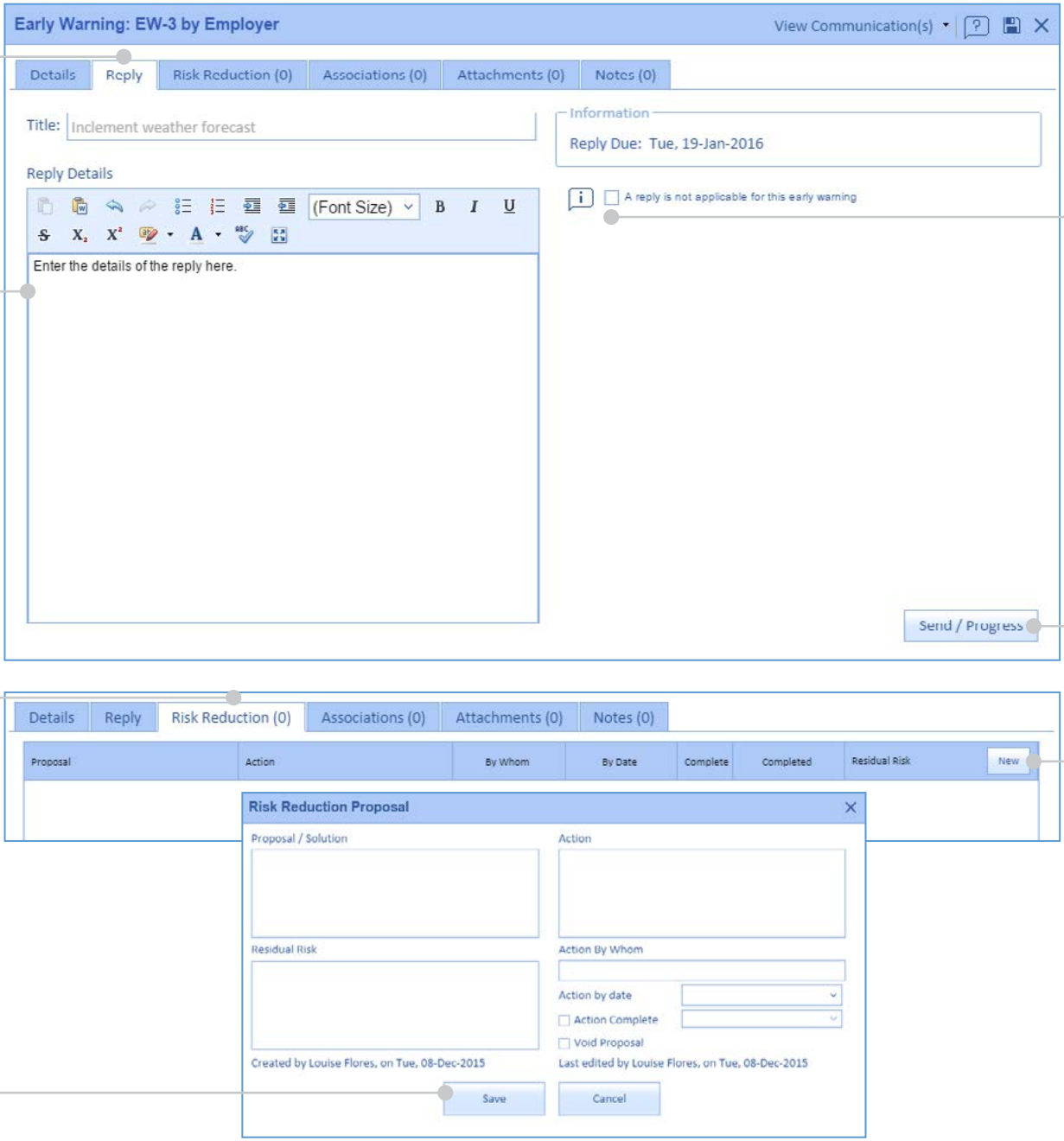
CEMAR

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)

CEMAR

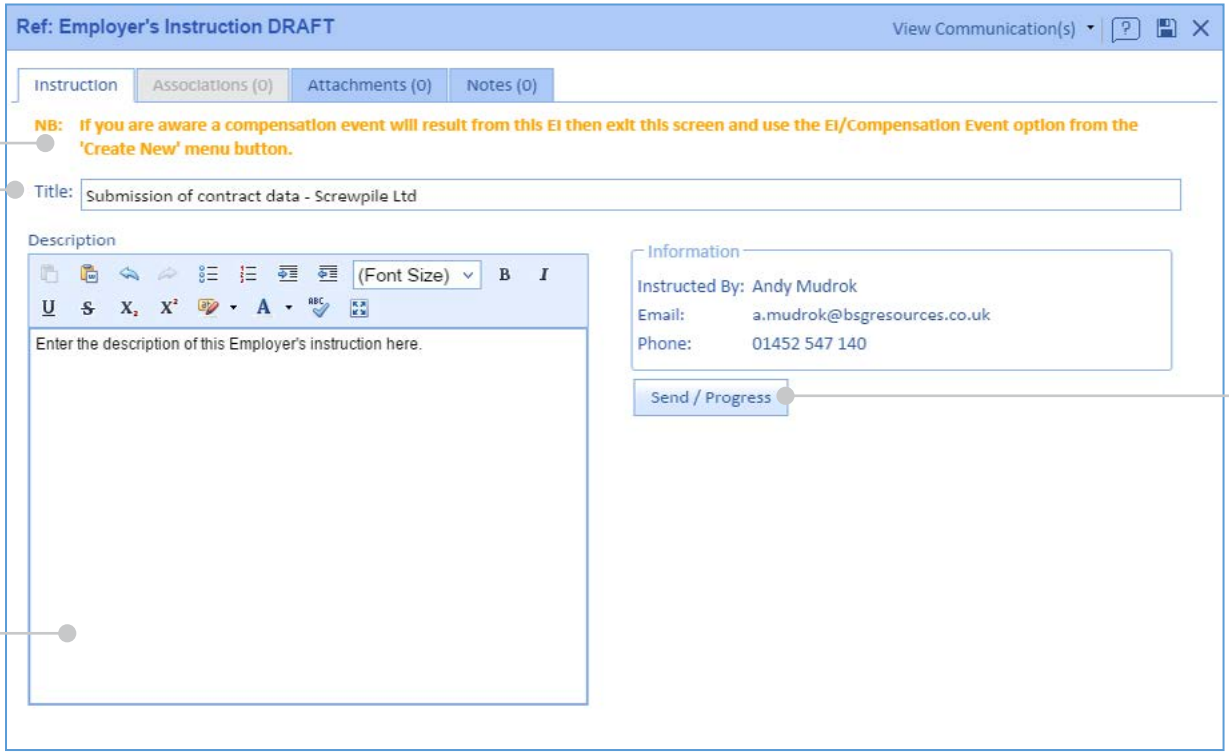
Create new EI (general)
To create a new EI (general), click on **Create New** from the left hand side menu, then select **EI (general)**.

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.



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

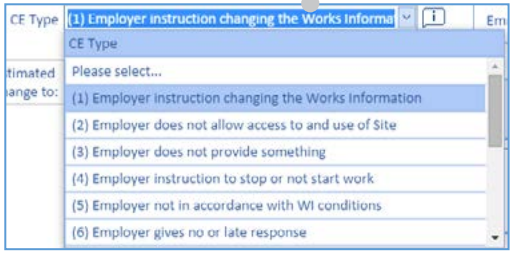
Communicate a compensation event

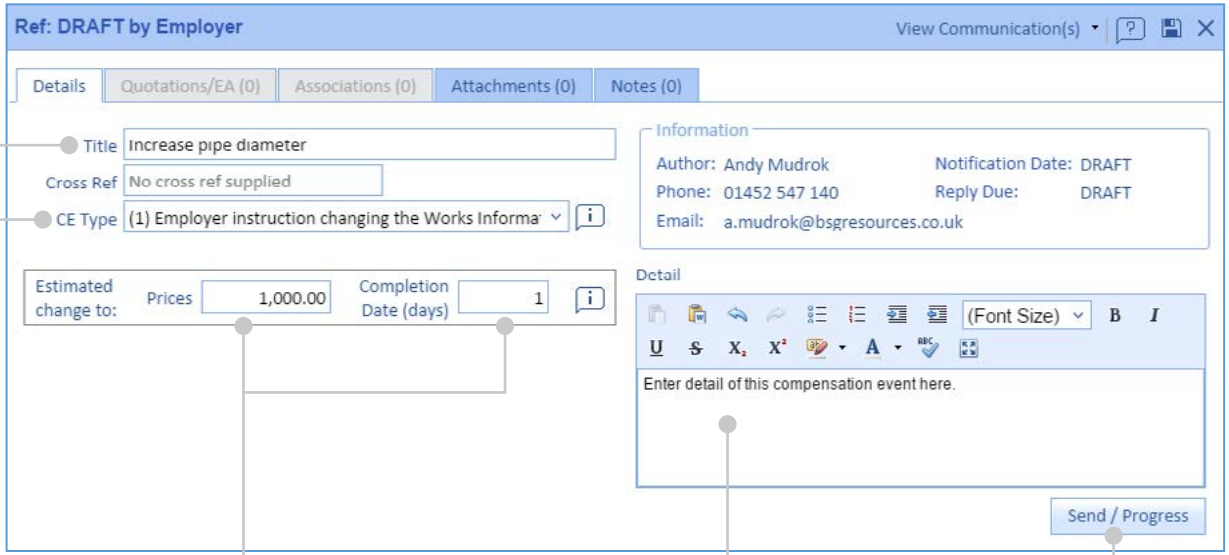
CEMAR

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*.

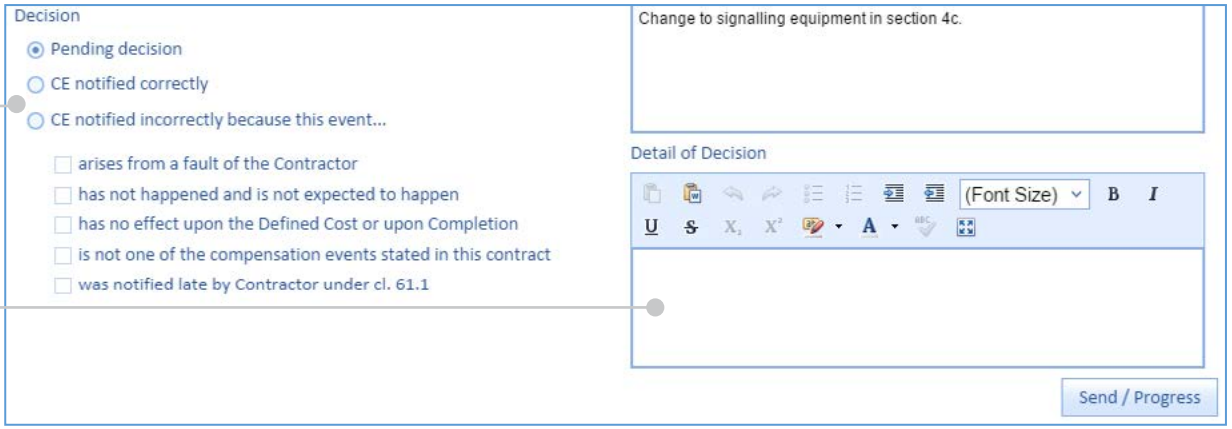
Detail
A compensation event requires some detail.

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

CEMAR

Create new quotation

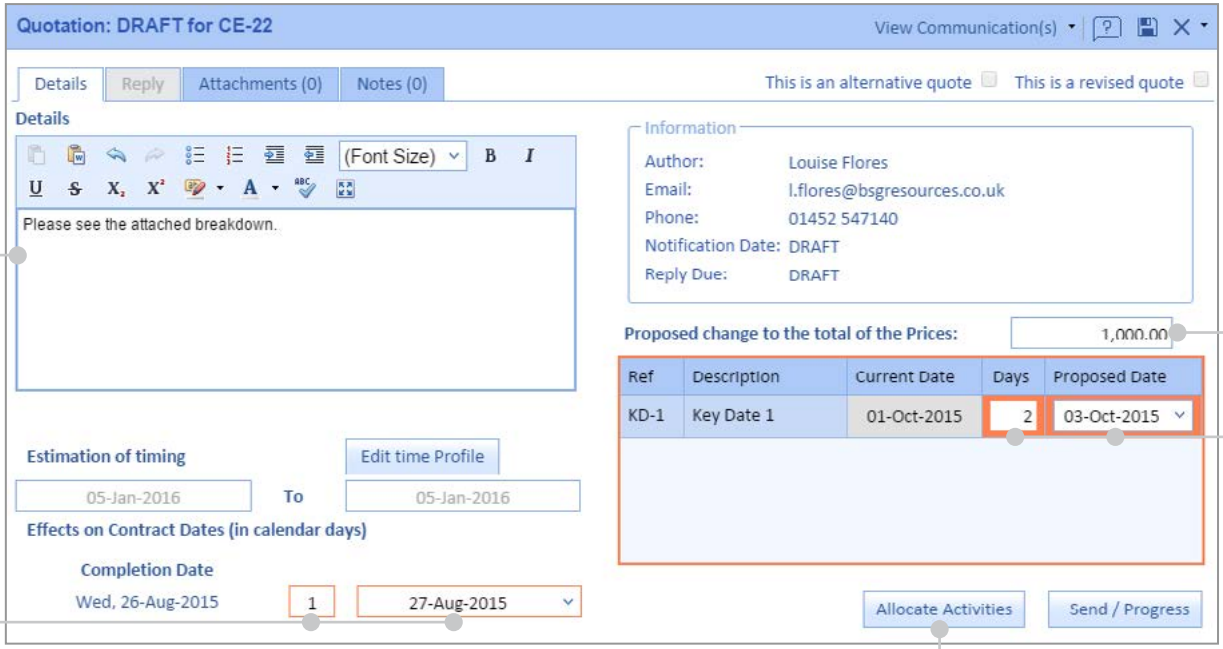
A quotation may be submitted against a compensation event. To create a new quotation, select the event from the **reminders page** or select the event from its respective **register**.

Details

A quotation requires some detail, type into this box.

Completion date

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



Price

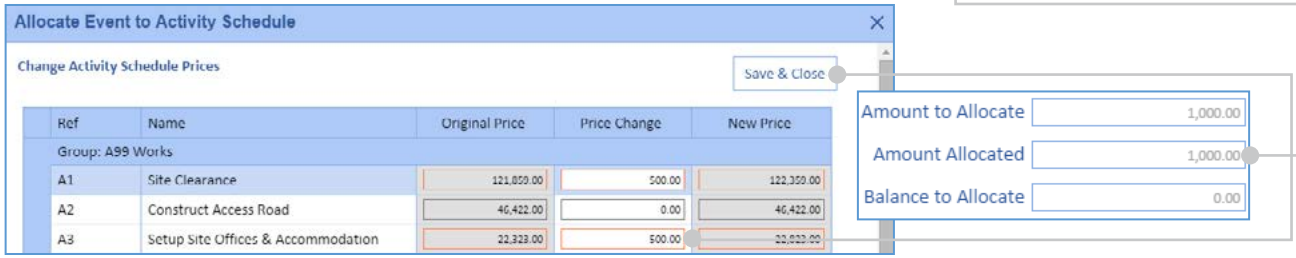
Type the **Proposed change to the total of the Prices** into this box.

Key dates and sectional completion dates

Select the days change or select from the date picker to the right.

Allocate 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

CEMAR

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.

Accept this quotation

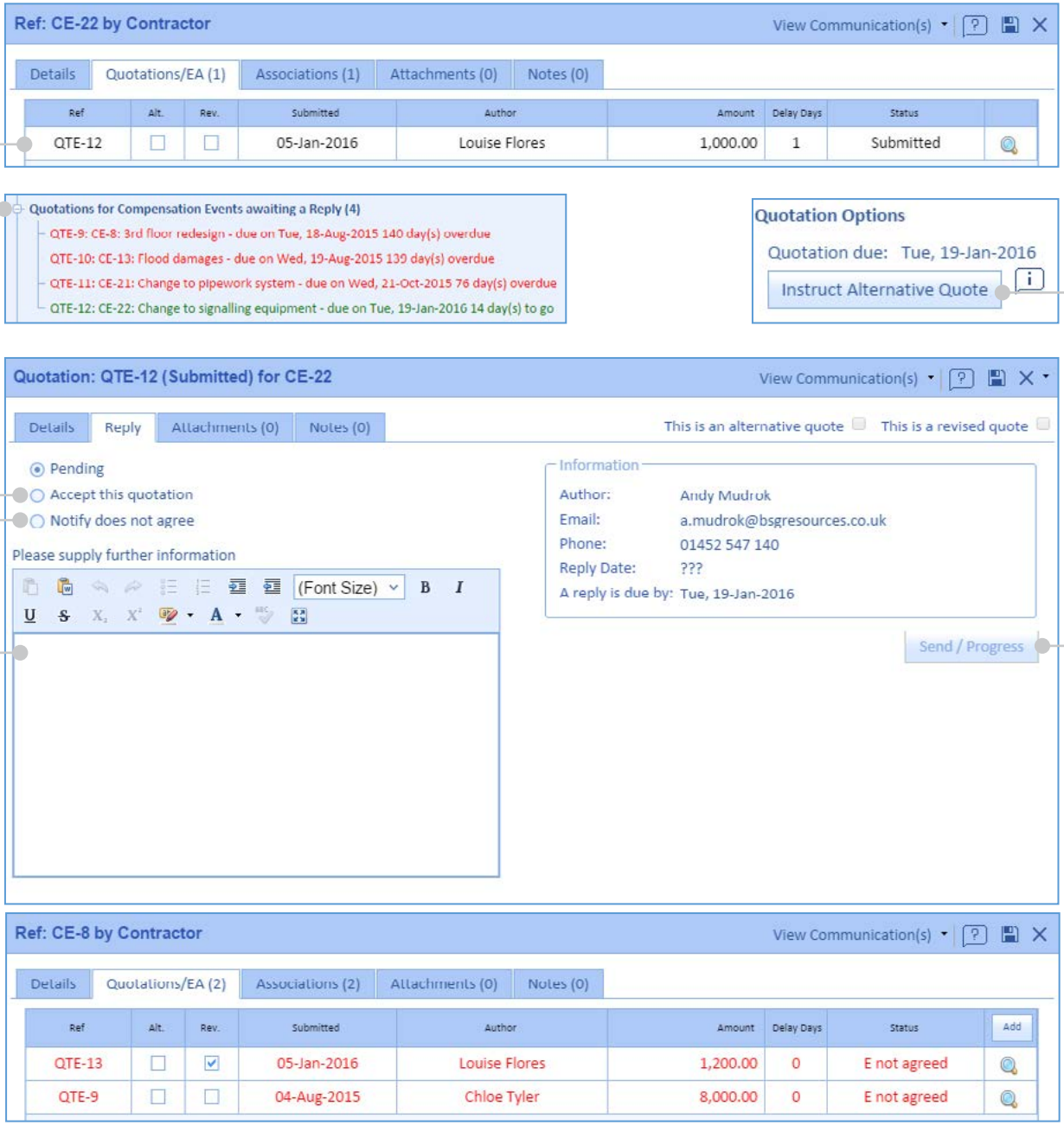
To accept this quotation, select the **Accept this quotation** checkbox.

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.



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.

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.

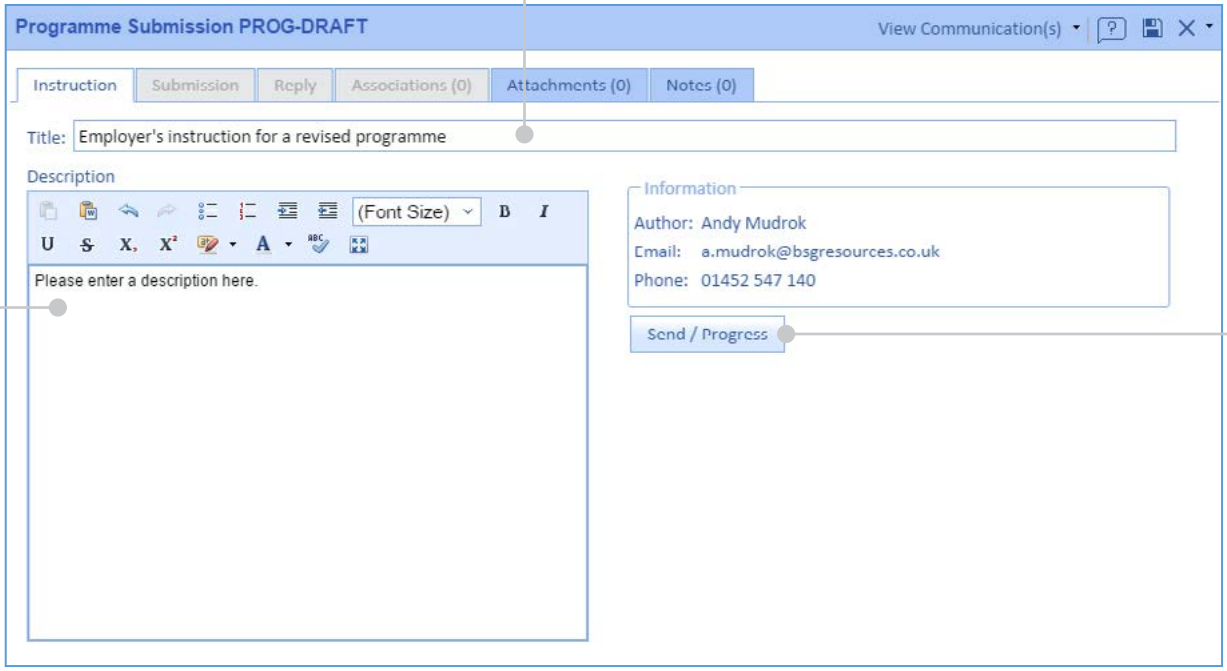
Quick Start Guide

Instruct a programme submission

CEMAR

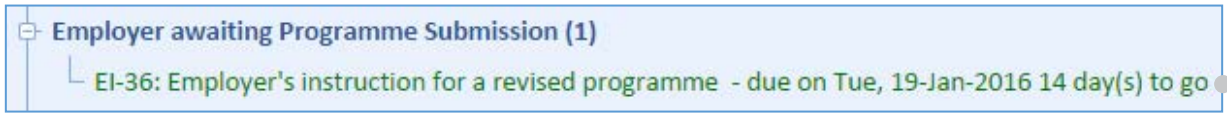
Instruct a programme submission (*Employer* only)
To instruct a programme submission, click **Create New** from the left hand side menu, then select **EI to submit a revised programme**.

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

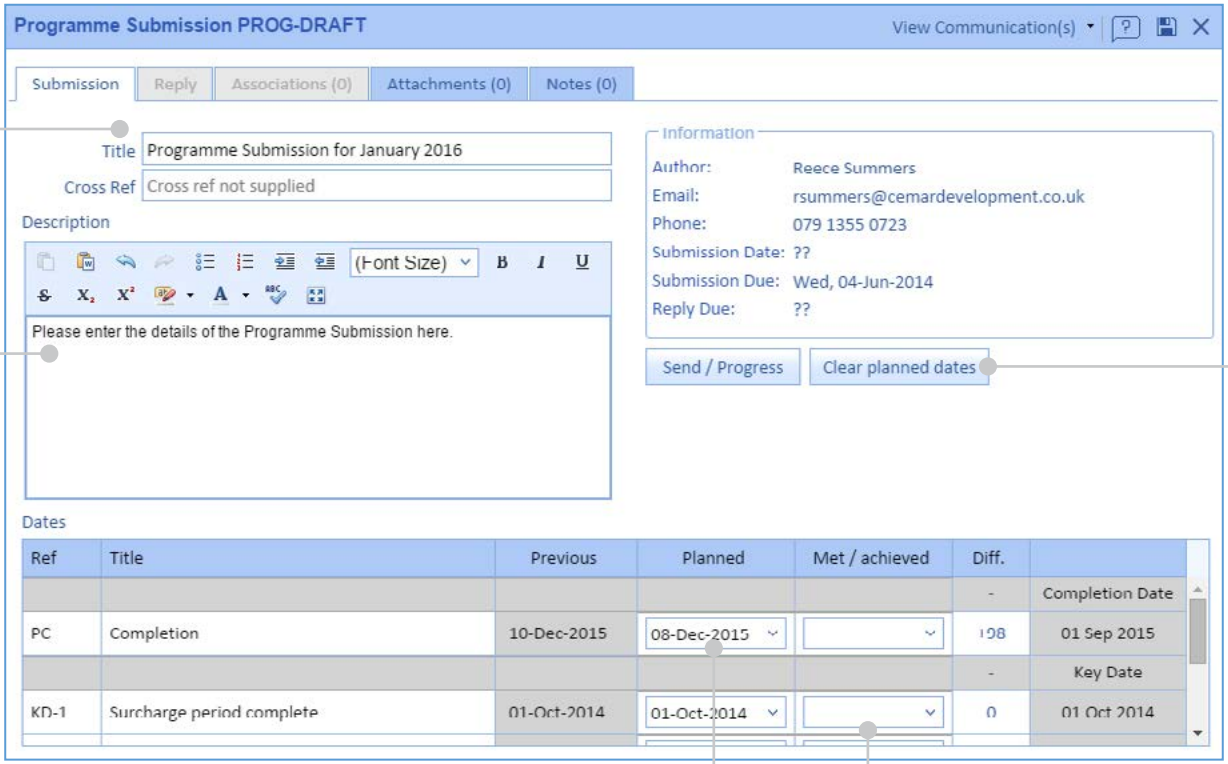
CEMAR

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.

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

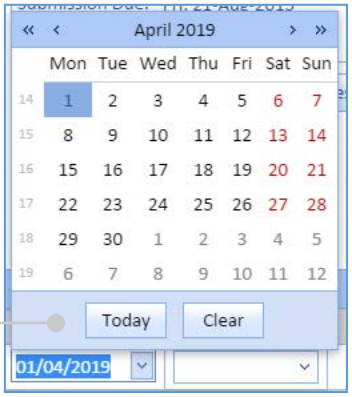
Title
A programme requires a title. Type this into the text box.

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



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

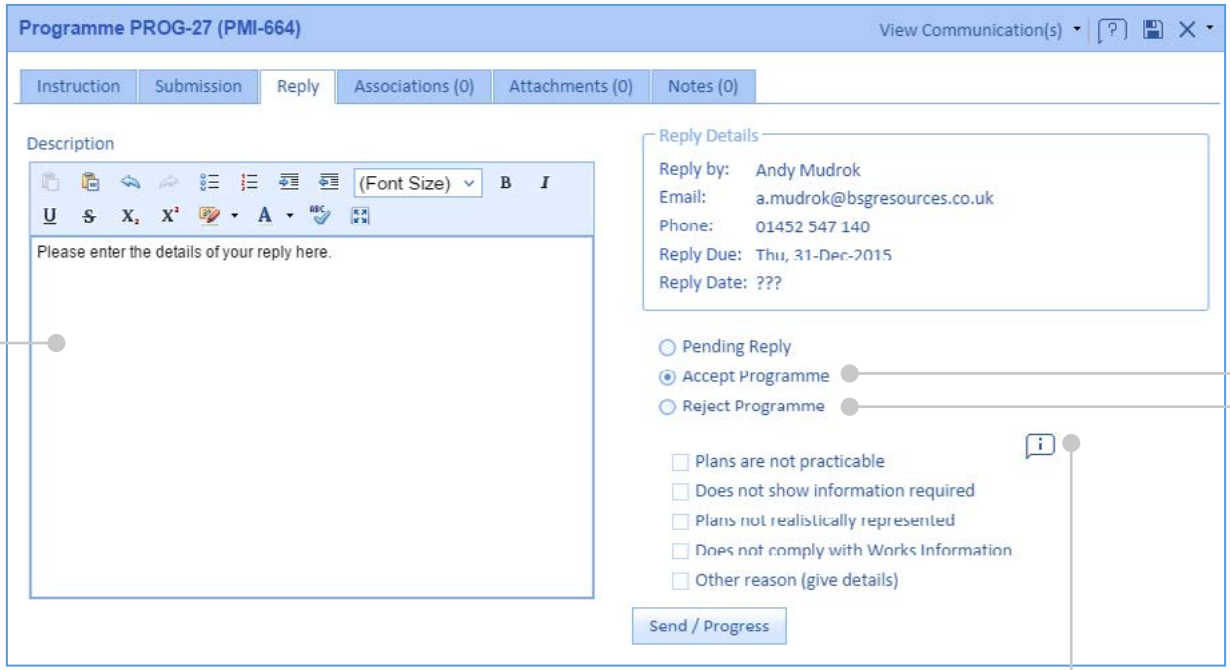
Dates
Enter important programme dates, either planned or met / achieved by typing in the date or selecting from the date picker.



Reply to a submitted programme

CEMAR

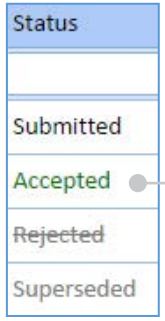
Reply to a programme submitted for acceptance (*Employer* only)
To reply to a submitted programme, click on it from the programme register or click on the **reminder** from your reminders page.



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.



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.

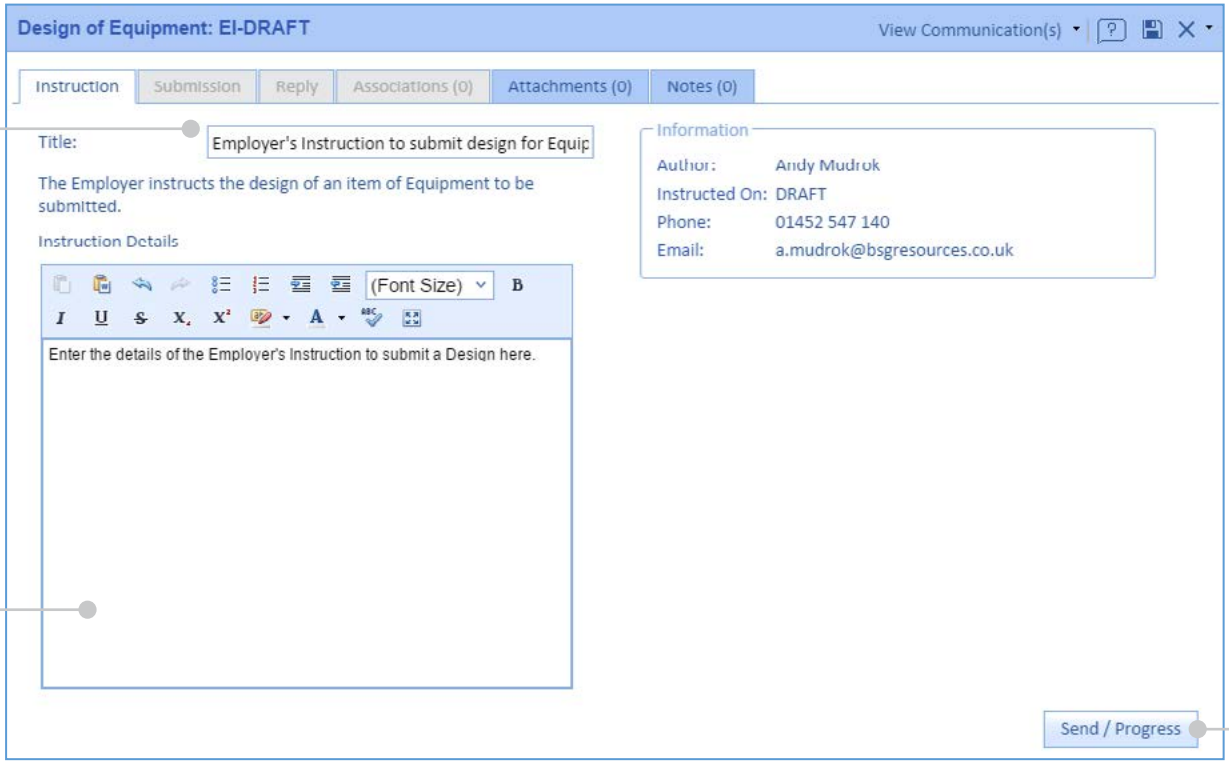
iBalloons
There are iBalloons across CEMAR. Click these for hints and tips referencing the area you are using.

Instruct a design submission

CEMAR

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.

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

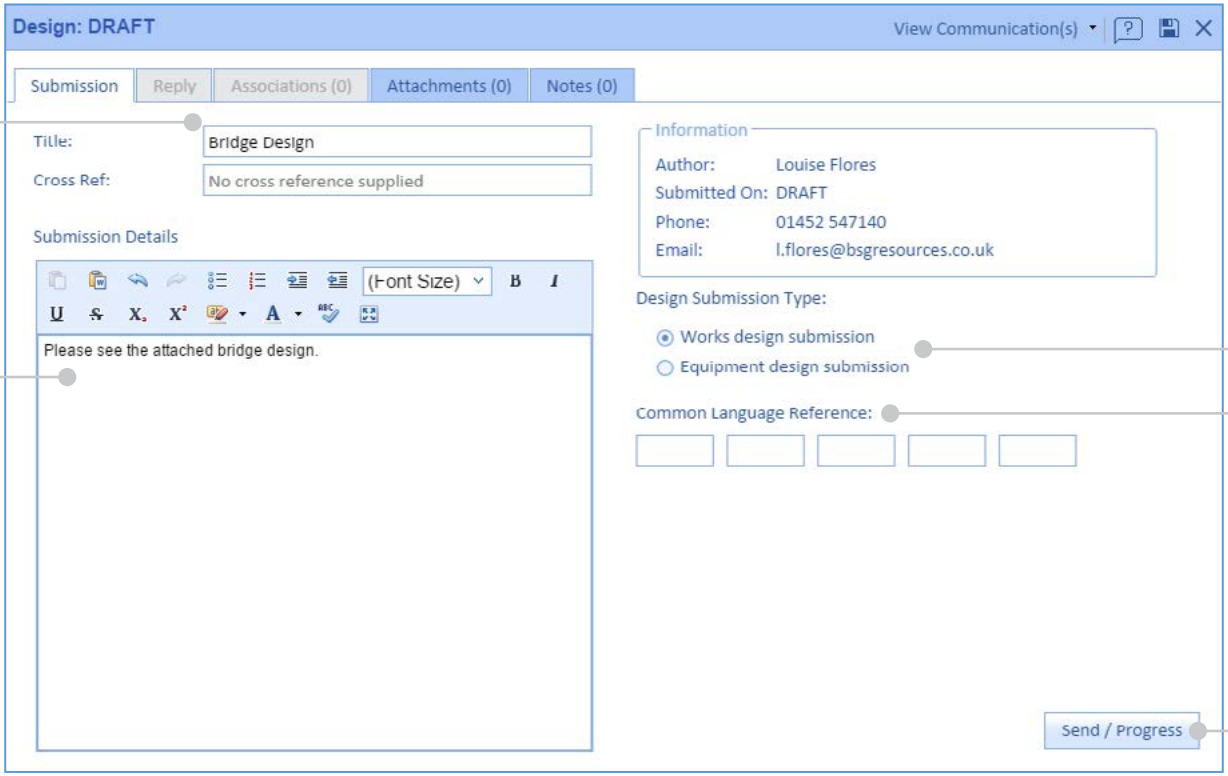
Submit a design submission

CEMAR

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.



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

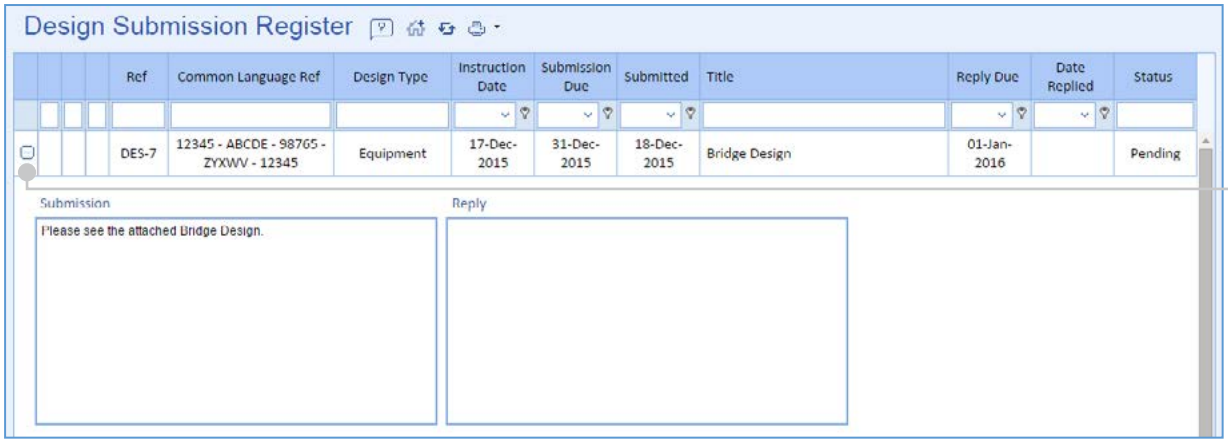
Common language reference
The common language reference field is not required, but can be used by typing into the text boxes.

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

Reply to a design submission

CEMAR

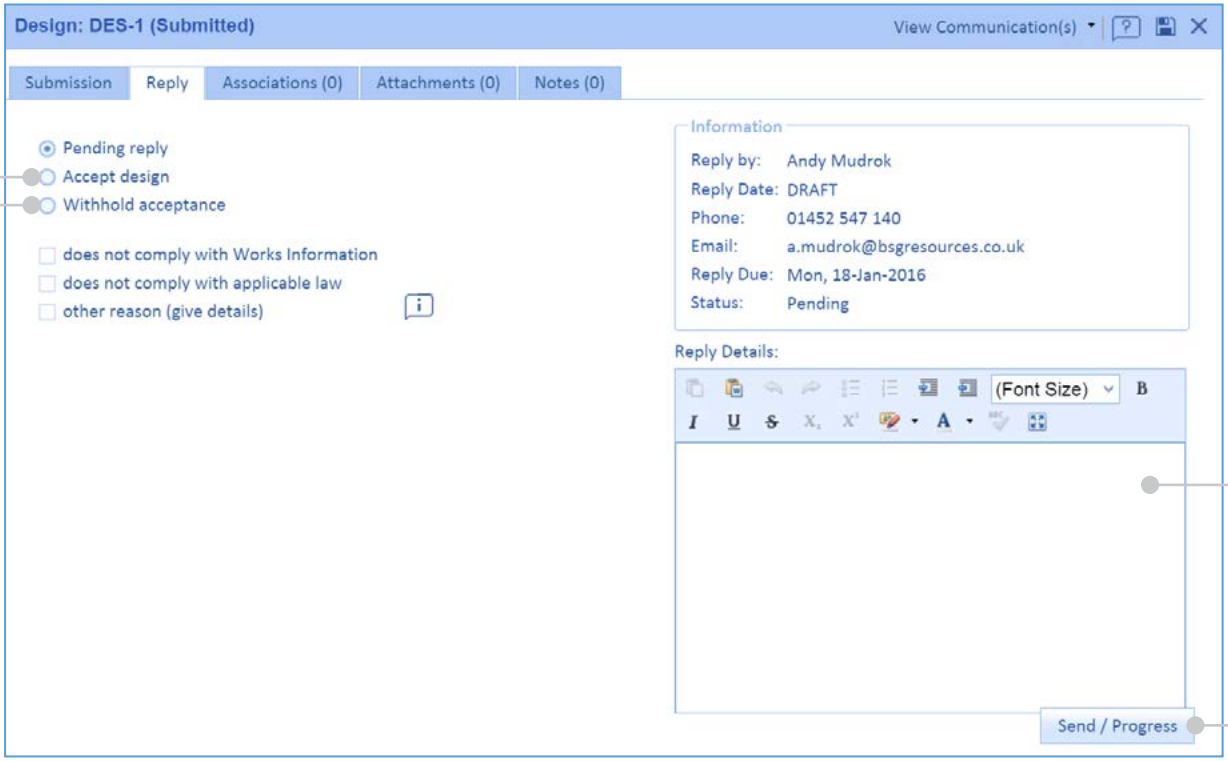
Reply to a design submission (*Employer* only)
To reply to a design submission, click on the event from the design register or click on the **reminder** from your reminders page.



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.



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

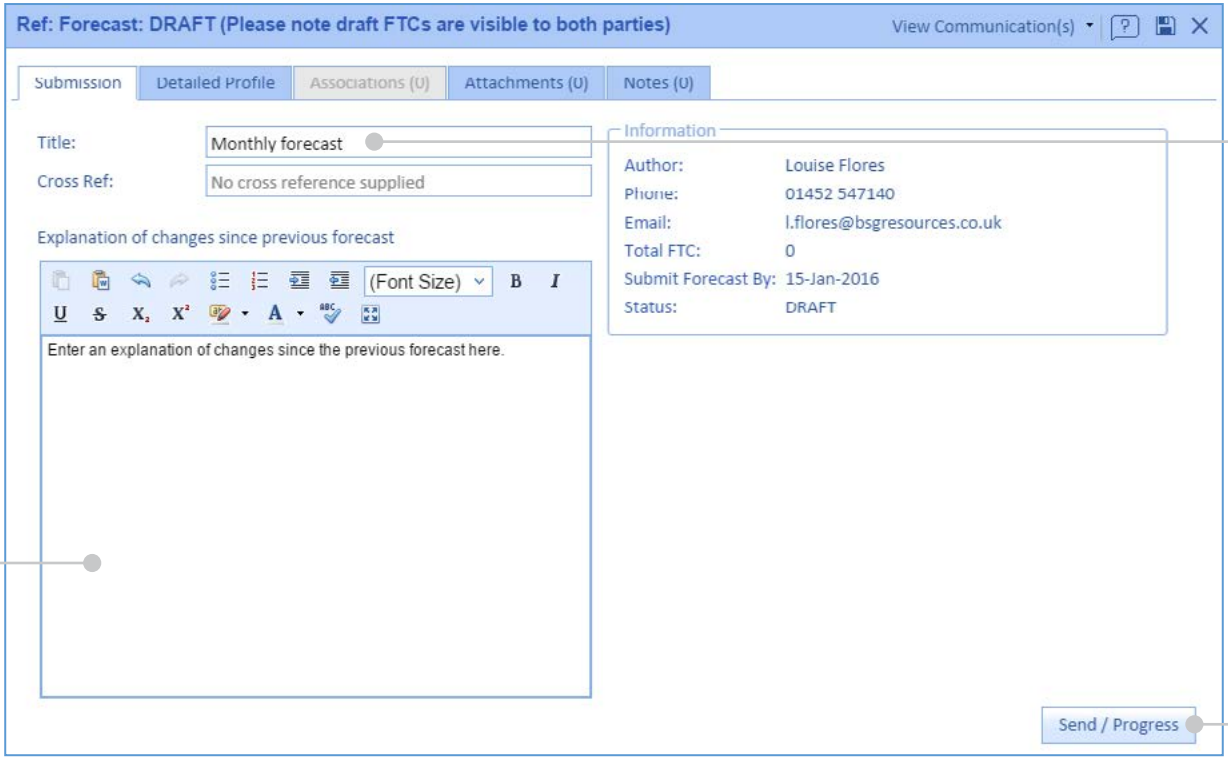
Send / Progress
When complete, click **Send / Progress** to communicate.

Submit a forecast to Completion

CEMAR

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.



Title

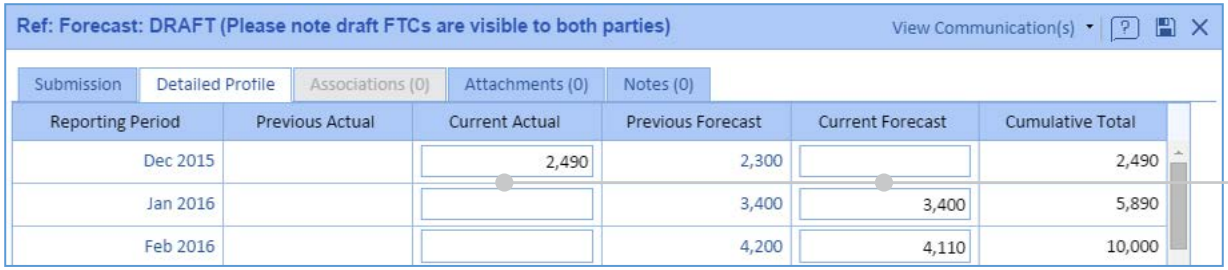
A forecast to Completion requires a title. Type this in the text box.

Detail

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

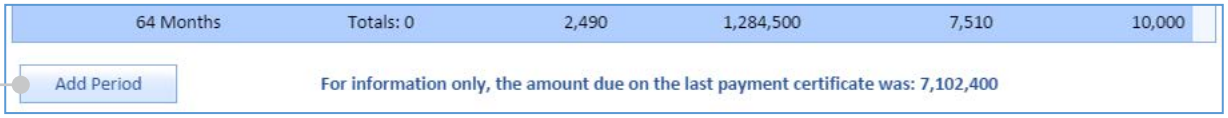
Send / Progress

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



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.



Add period

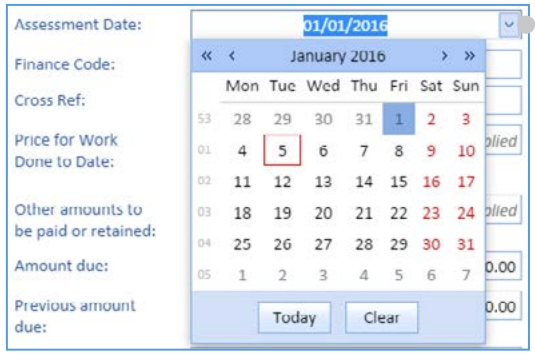
If an extra period (month) is required in the **Detailed Profile** tab to complete the forecast to Completion, click **Add Period**.

Submit an application for payment

CEMAR

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**.



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

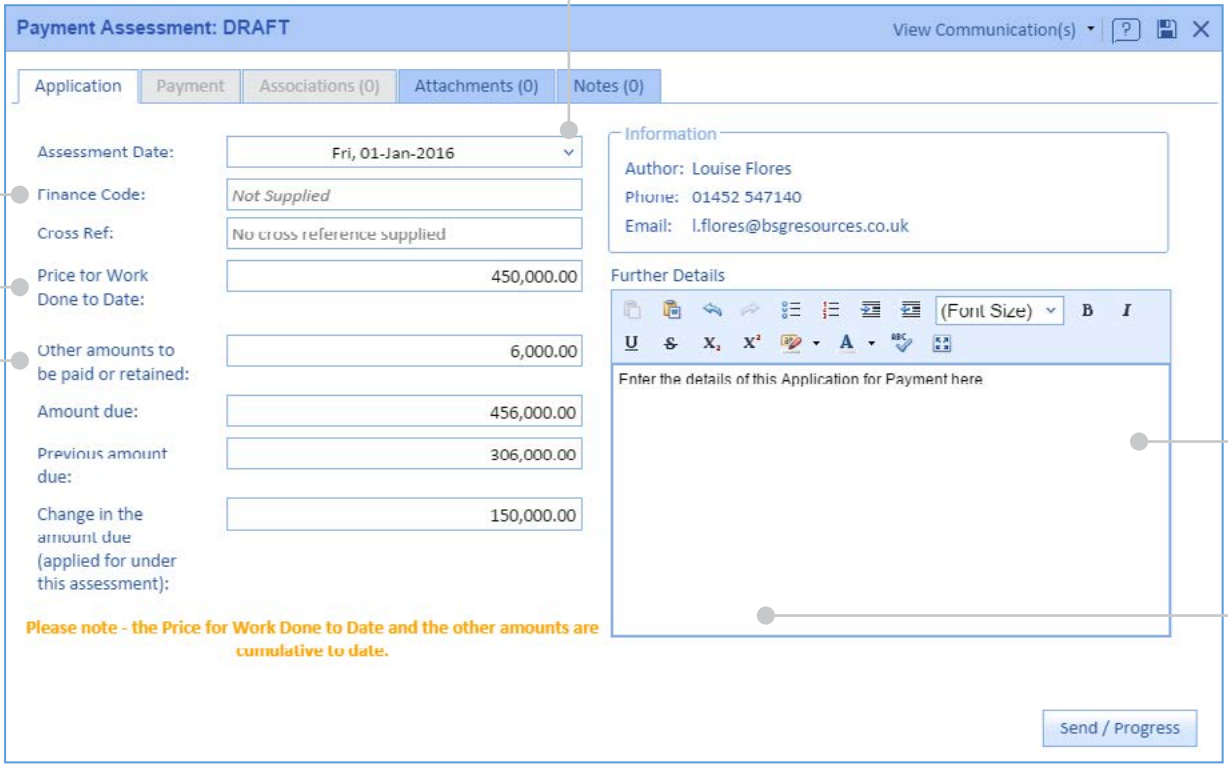
Similar to the Cross Ref field, the Finance Code is an area where other systems outside of CEMAR can be referenced. Enter a **Finance Code** here.

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.



Details

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

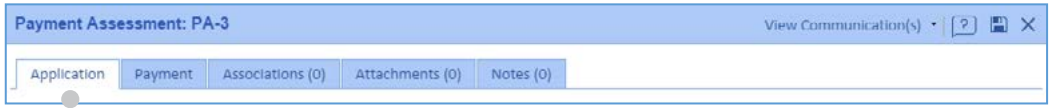
Send / Progress

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

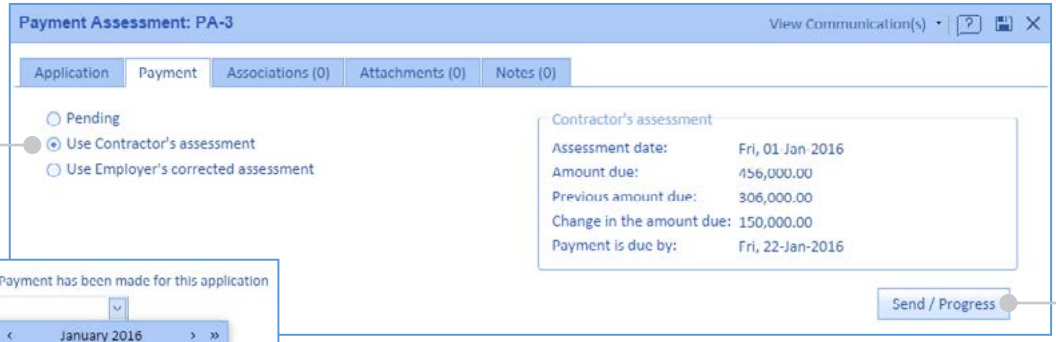
Certify a payment assessment

CEMAR

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**.

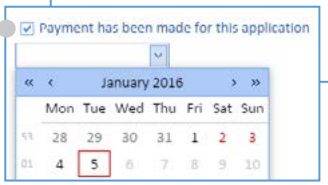


View application for payment
To view an application for payment, click the **Application** tab.

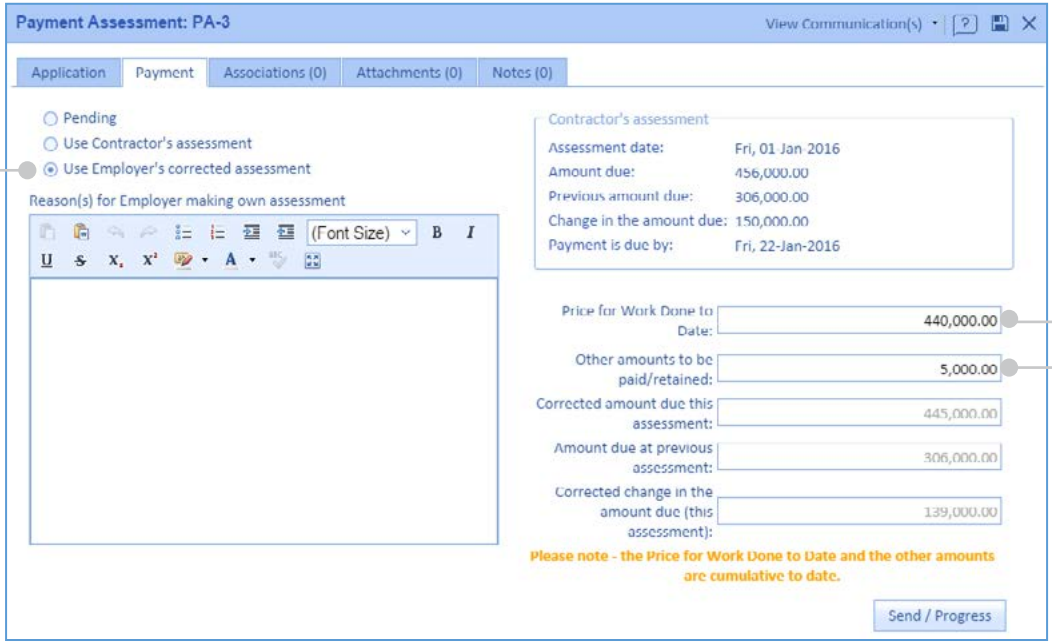


Use *Contractor*'s assessment
If the *Contractor*'s assessment is satisfactory, select **Use *Contractor*'s assessment**.

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



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.



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.

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.

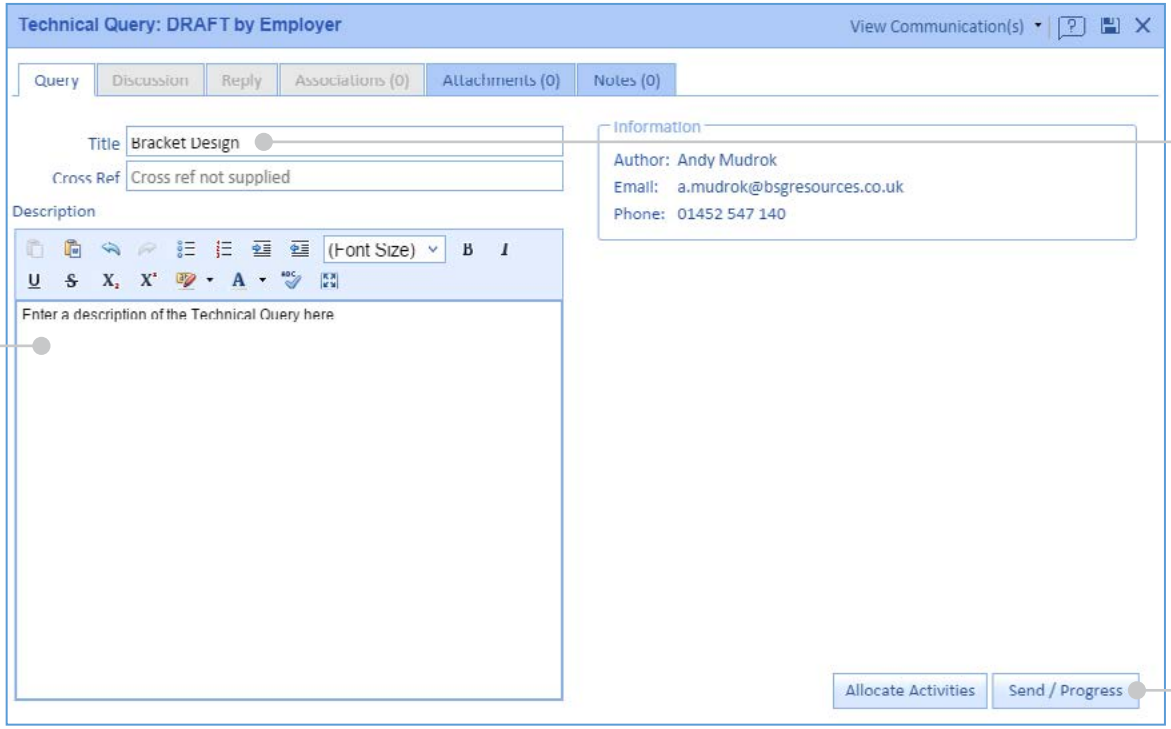
Other amounts to be paid / retained
Type any other amount to be paid / retained into this text box. Please note that this is a cumulative amount to date.

Raise a technical query

CEMAR

Raise a technical query

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



Title

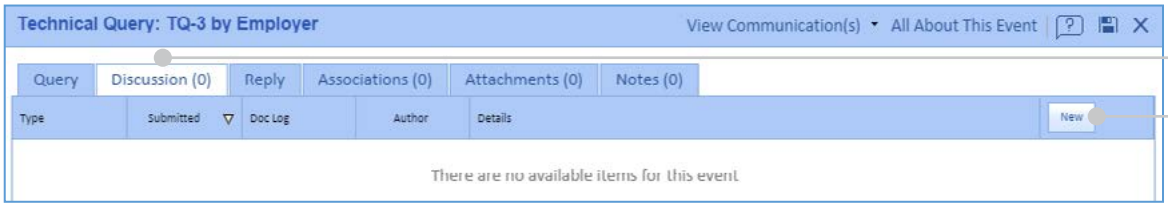
A technical query requires a title. Type this in the text box.

Description

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

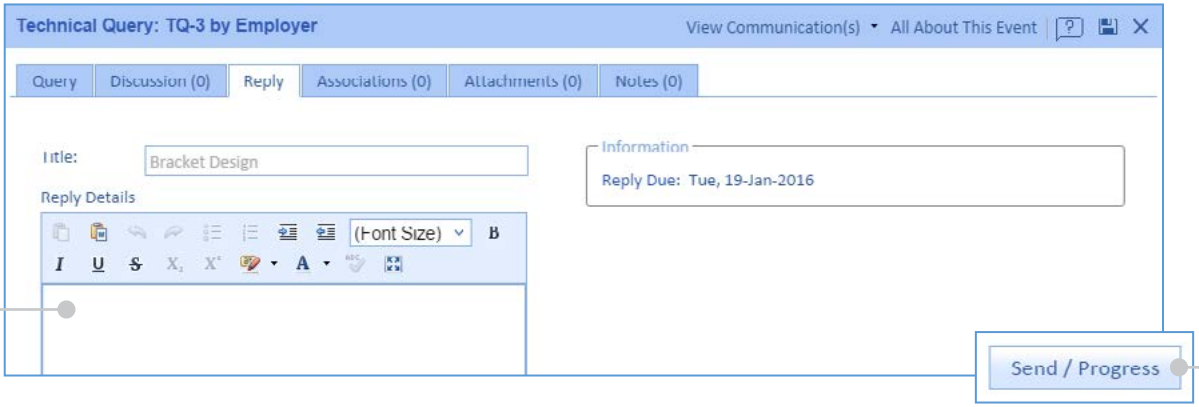
Send / Progress

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

CEMAR

Notify a test / inspection

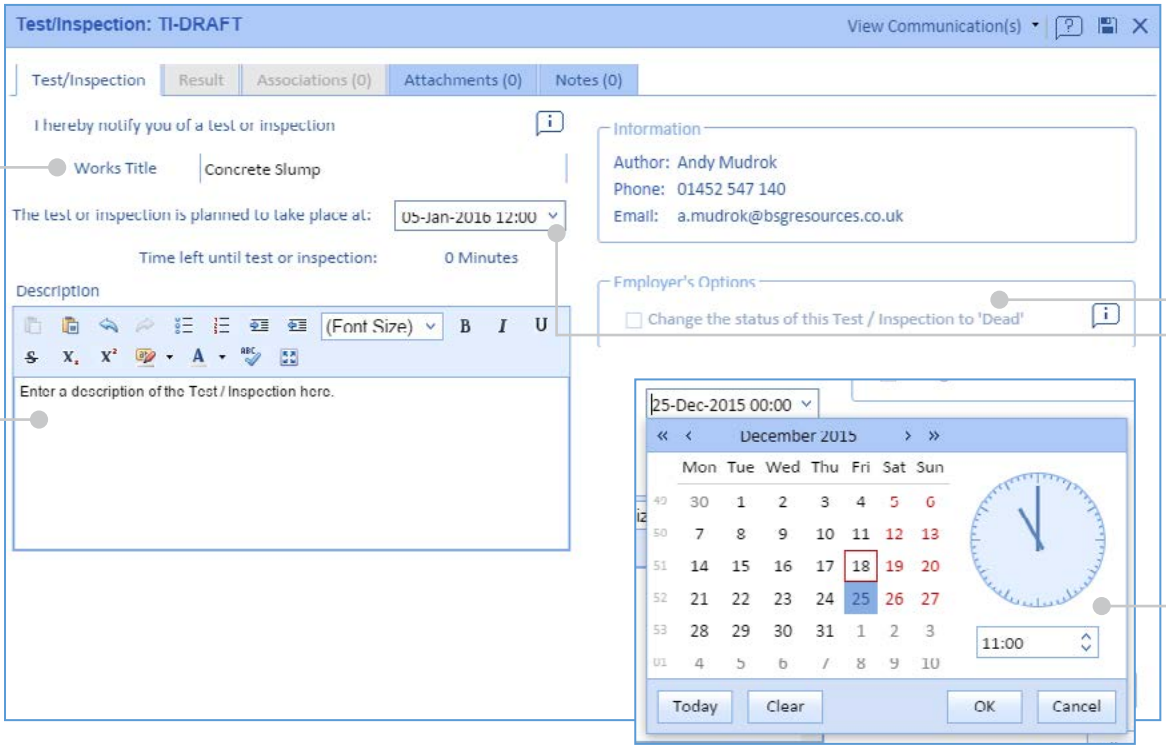
To create a new test / inspection, select **Create New** from the left hand side menu then click **Test / Inspection**. Both Parties can create a test / inspection, however only the *Employer's* team can notify the results.

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

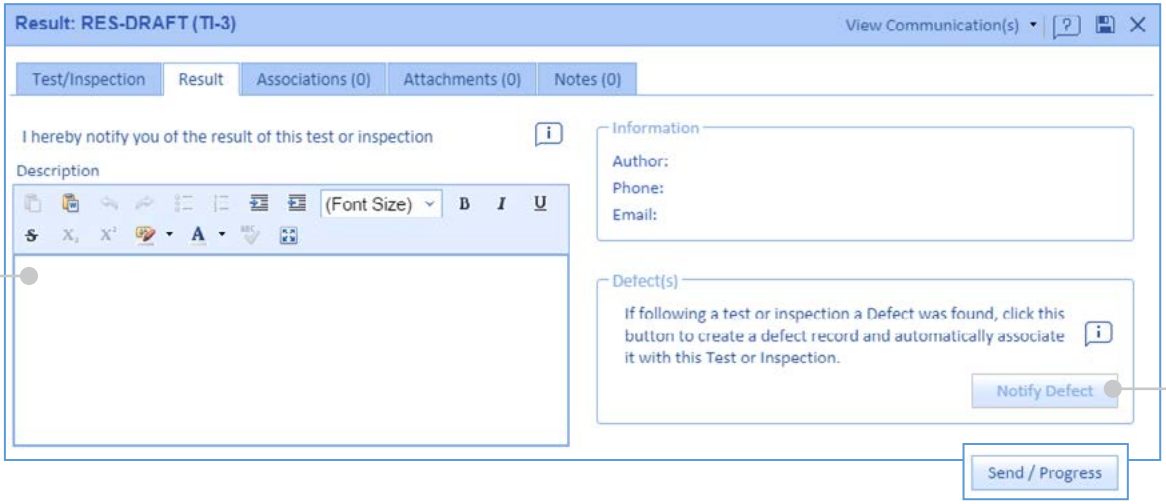
To change the status of this test / inspection to **Dead** click this checkbox.

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.



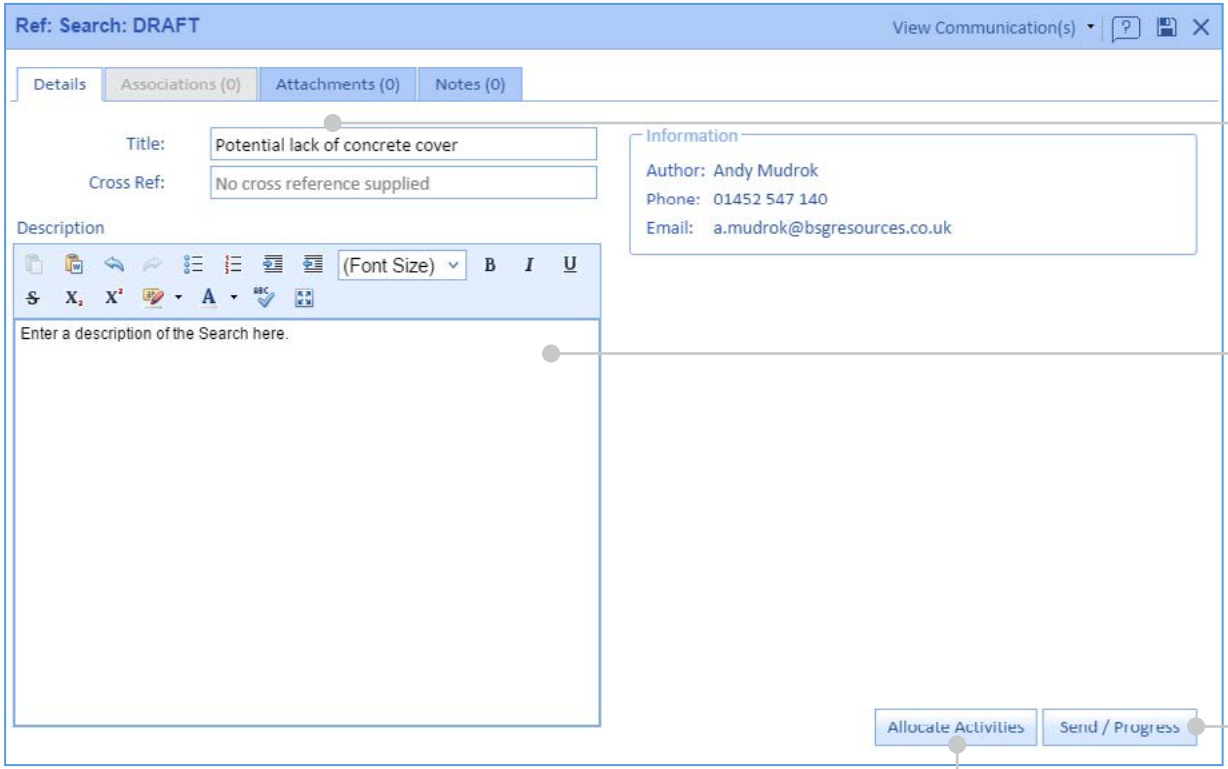
Notify a Defect

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

CEMAR

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

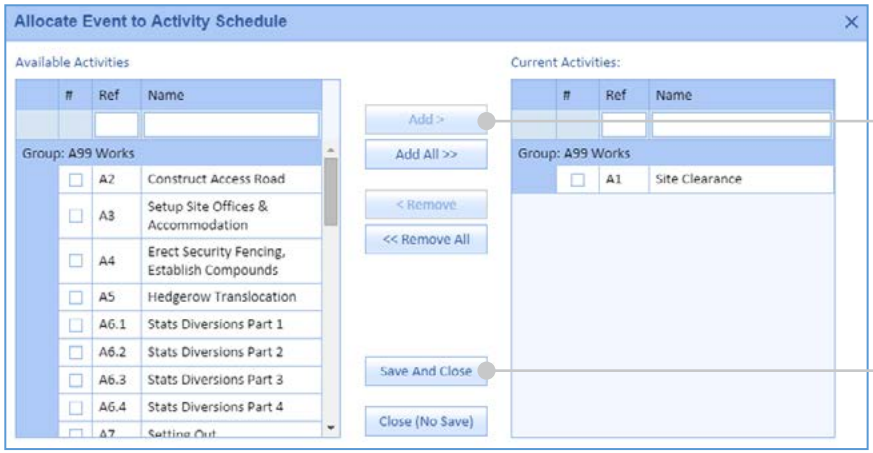


Title
An search requires a title. Type in the text box.

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.



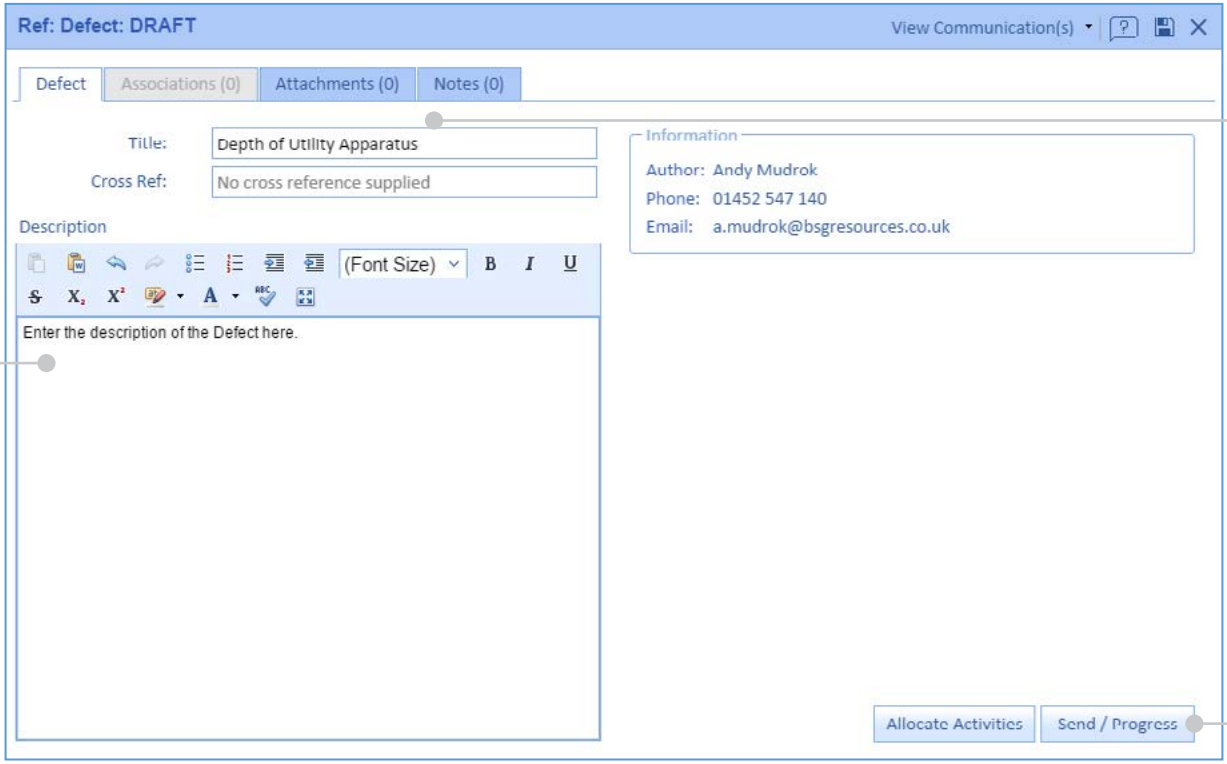
Allocate activities
To allocate activities from the Activity Schedule to this search, click **Allocate Activities**.

Notify a Defect

CEMAR

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

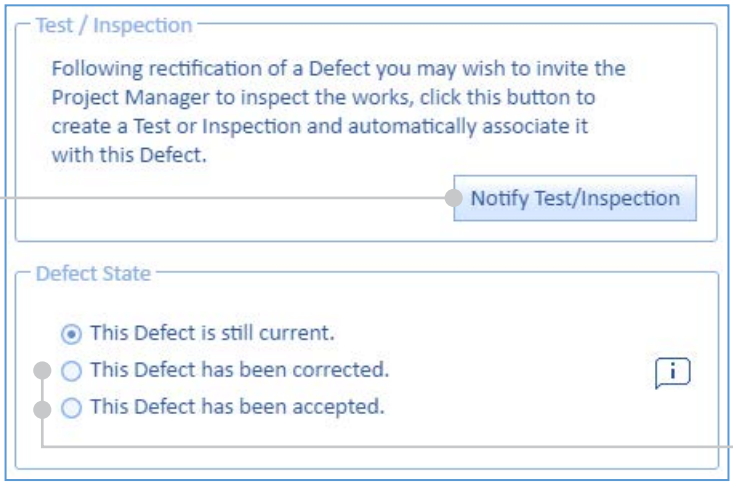
Description
A Defect requires a description. Type in the text box.

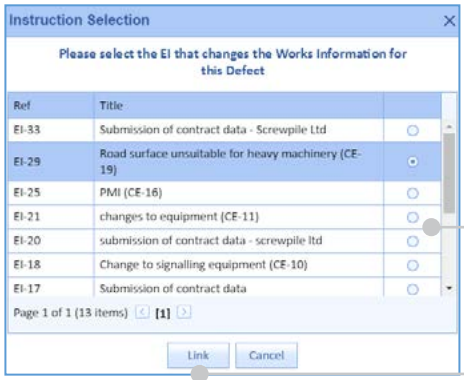


Title
A Defect requires a title. Type in the text box.

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**.





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

CEMAR

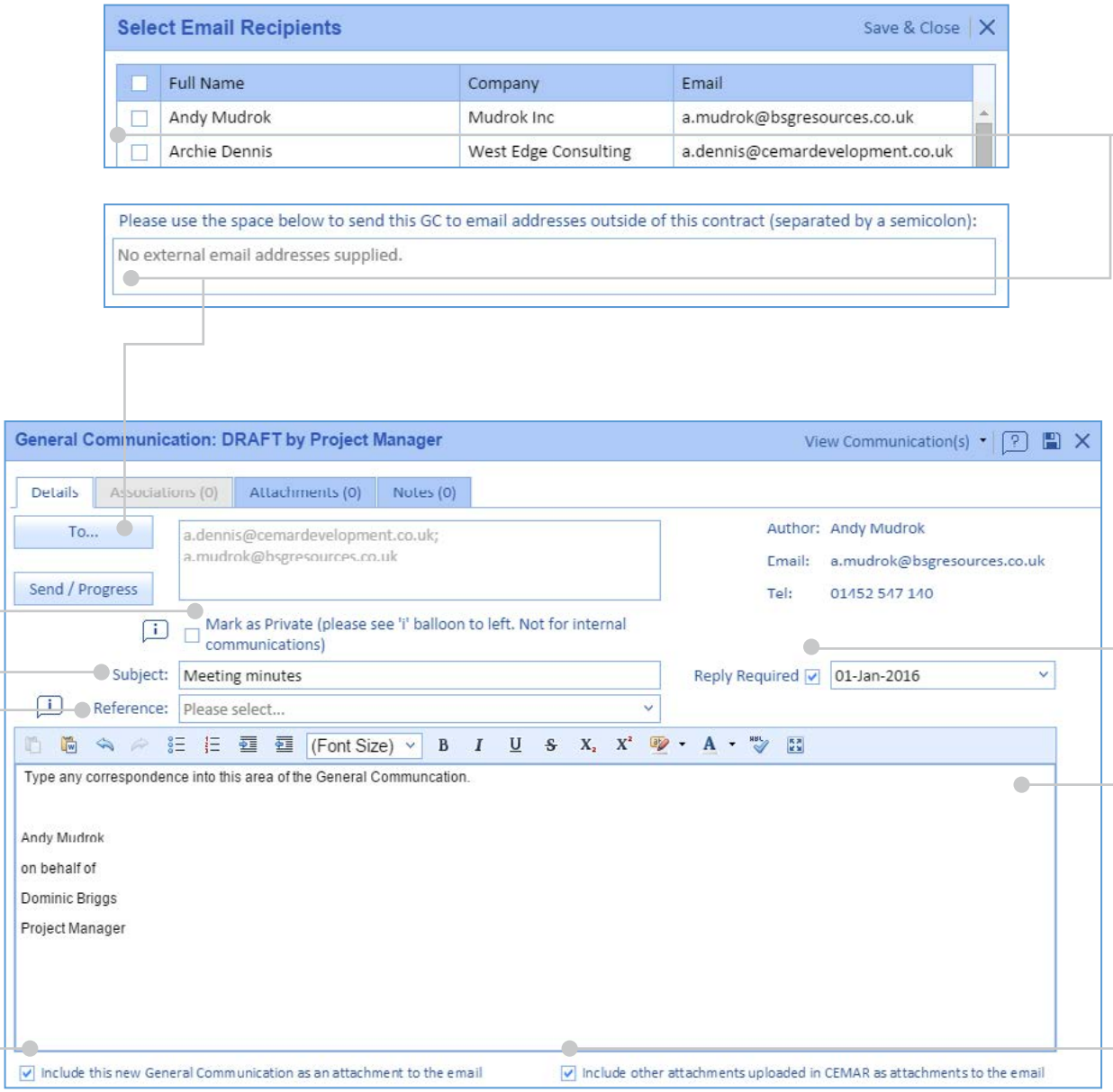
Communicate a general communication
To create a new general communication, select **Create New** from the left hand side menu then click **General Communication**.

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.



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

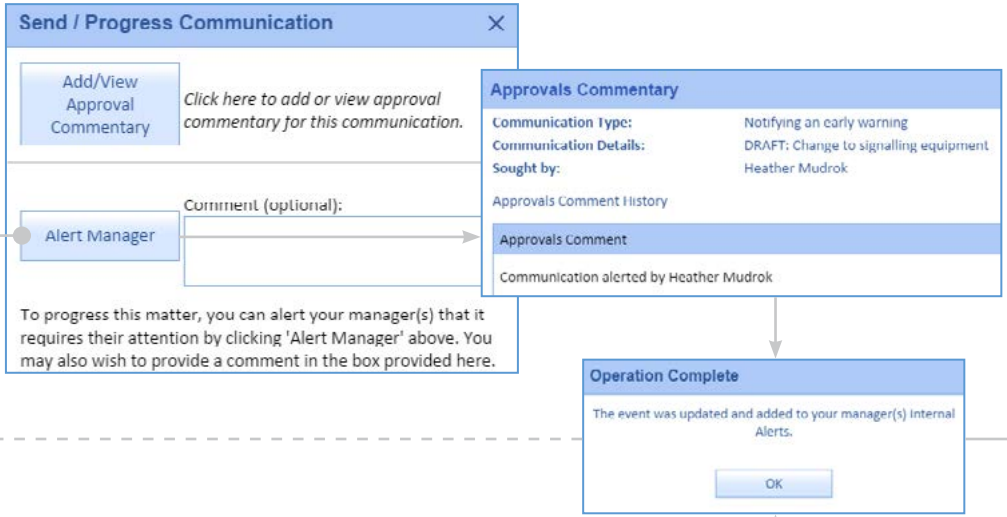
CEMAR

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.



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.

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**.

Multiple approvals

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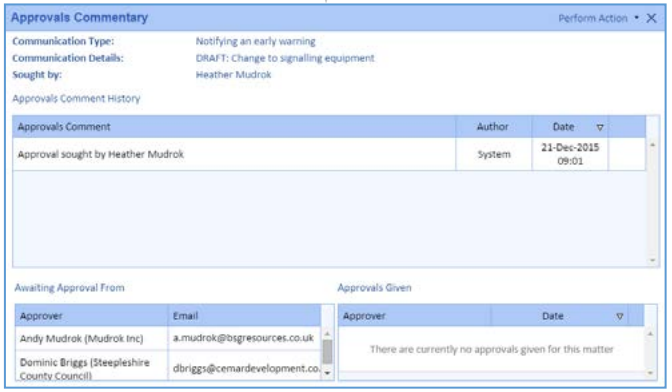
Multiple approvals

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.

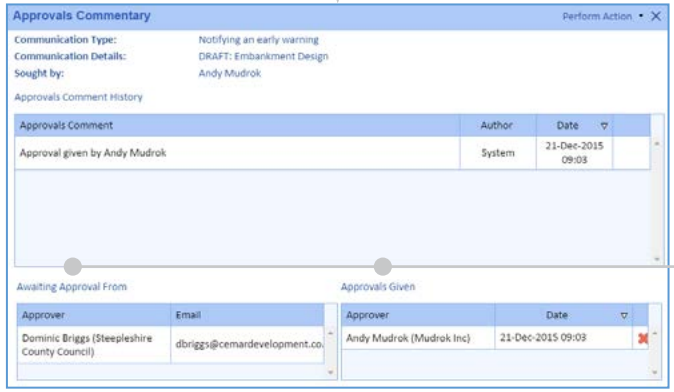
Non-approver

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.



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.



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

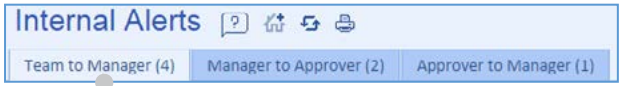
The Approvals Commentary states who has given their approval and who is required to give their approval before the event can be communicated.

Global approvals

CEMAR

Global approvals

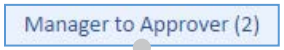
This approval type sends the communication to a group of approvers. Unlike multiple approvals, only one approver must give approval before the communication can be communicated.



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.

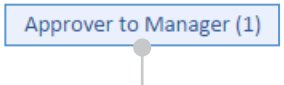
What a Draft user will see.



Internal alerts - Manager to Approver tab

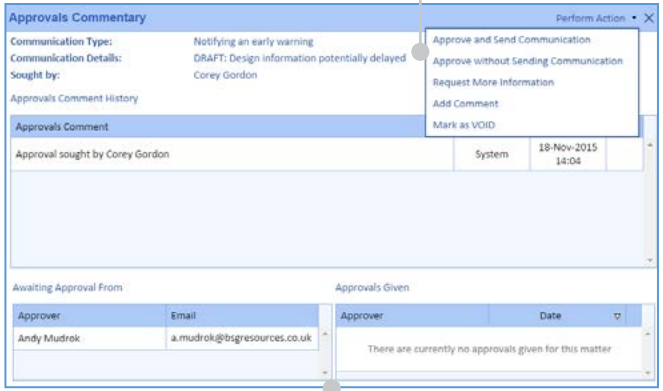
The Manager to Approver tab shows all events which require approval from an approver. Alerted managers and users with full permission will see the window below after they have clicked **Send / Progress**. They will have the option to **Seek Approval**, the communication will then be sent to all approvers.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

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



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 an Approver will see.

Navigating Analytics

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Navigating the menu

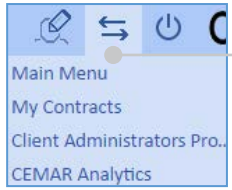
Clicking on an icon in the left hand side menu will offer more options to view favourites, dashboards, groups, aggregated registers, charts, reports or help and support.

Select Contracts icon

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

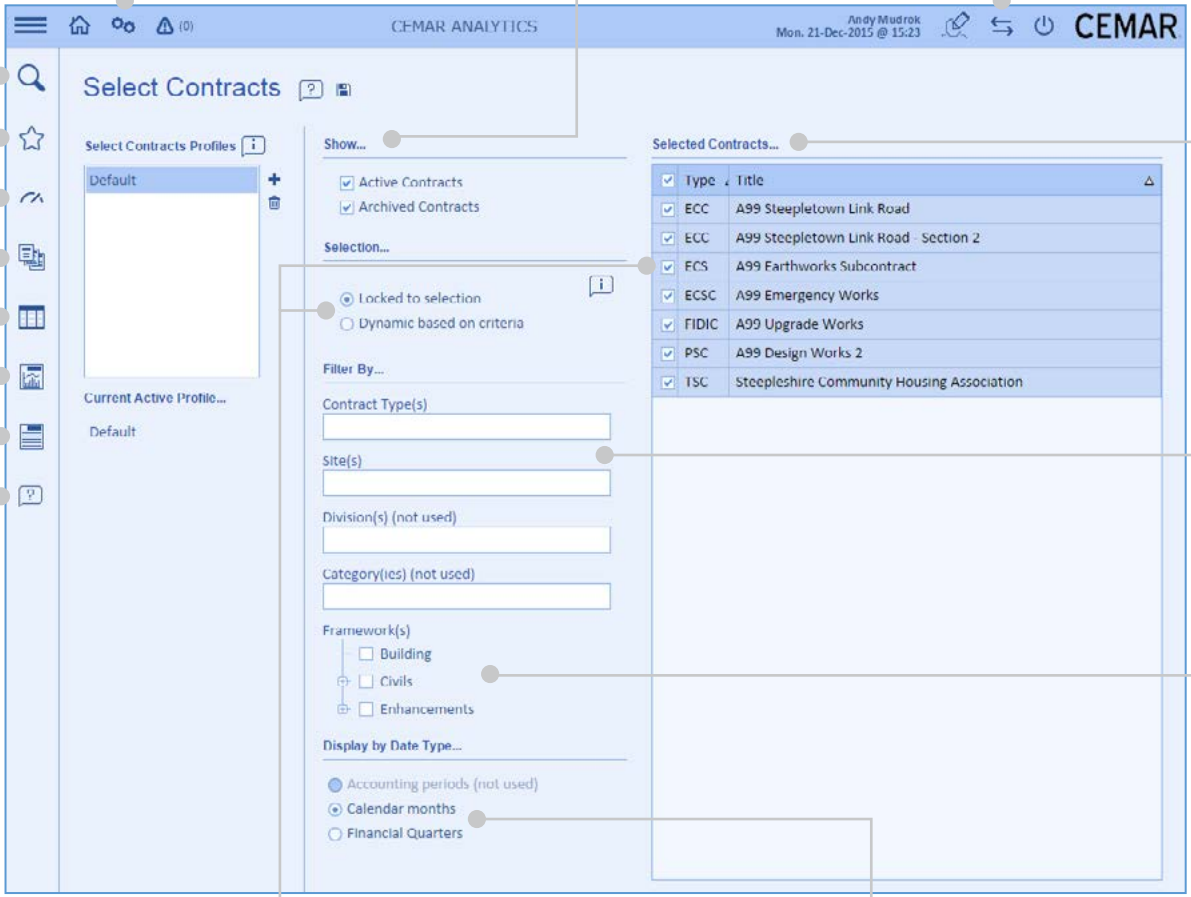
Show...

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

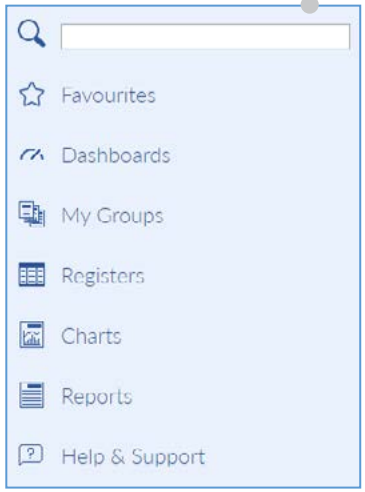
Analytics will only report on the Contracts that have been selected. To select a Contract, click on the checkbox next to the Contract title.

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...

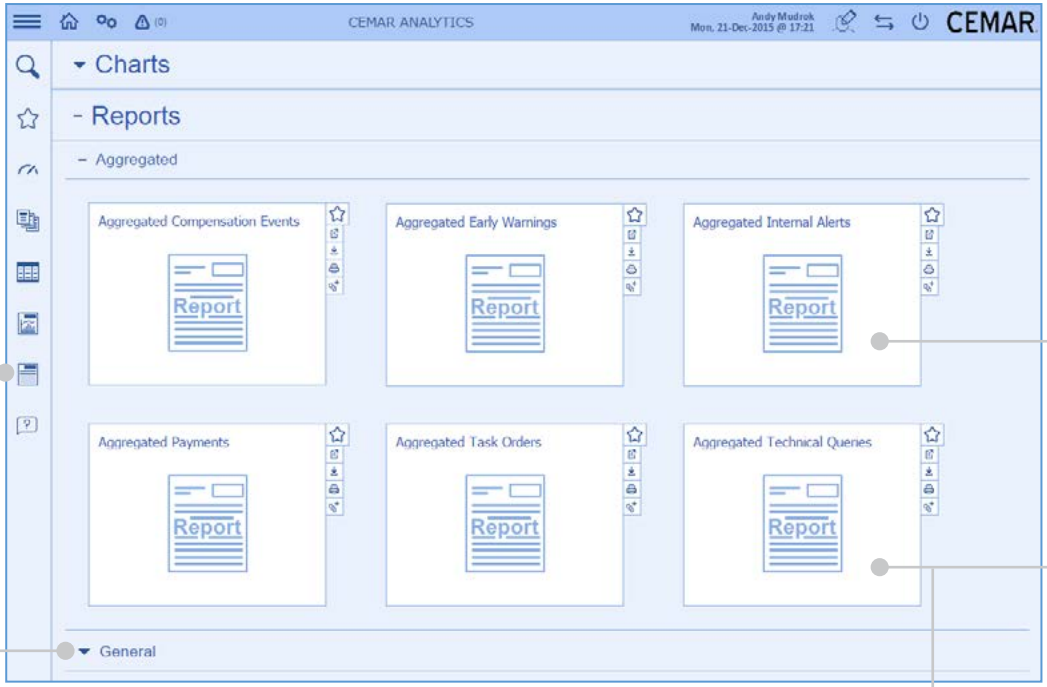
Click **Locked to selection** then the checkbox next each Contract to report on its contract events. If you would like the Contract selection to adjust depending on the criteria selected, click **Dynamic based on criteria** and continue to select from the filter options below.

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

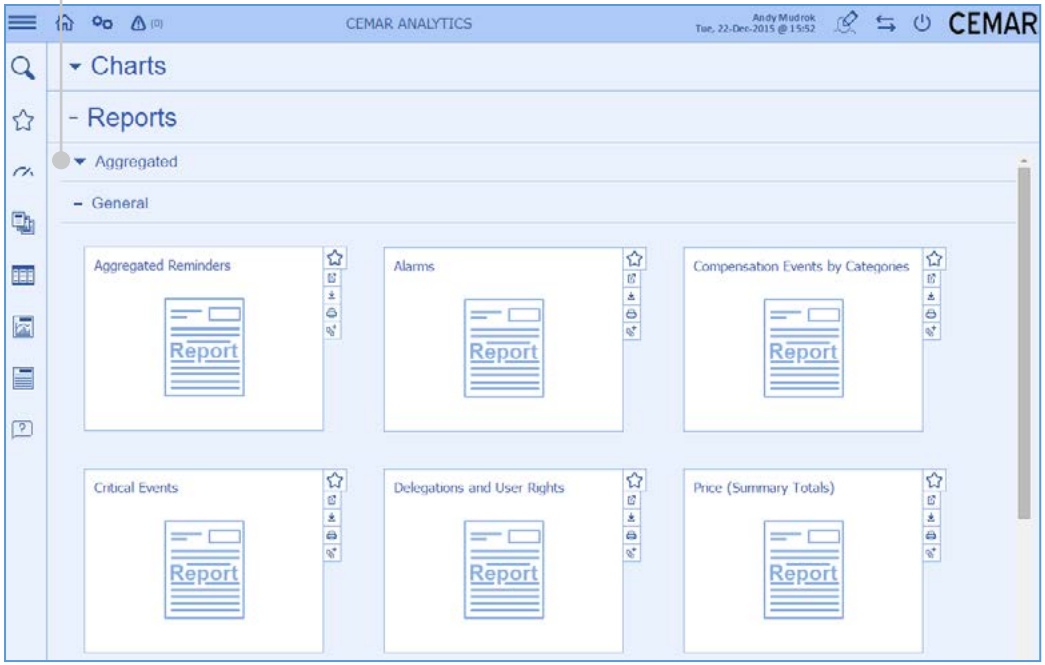
CEMAR

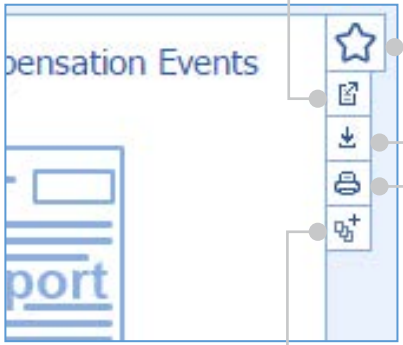


View reports
To view the list of reports, hover over the left hand side menu and select **Reports** then either **Aggregated** or **General**.

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.

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





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

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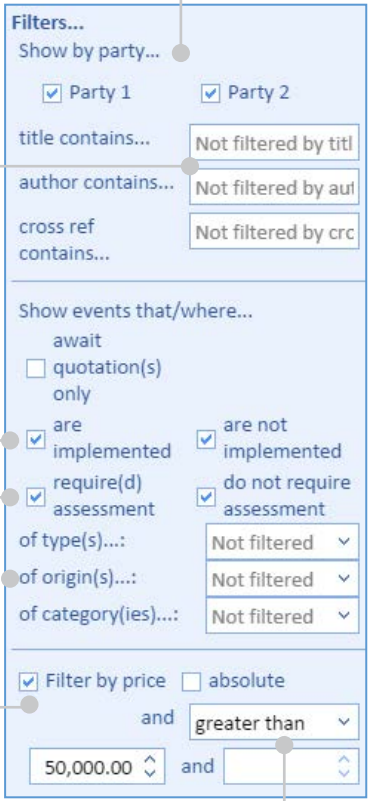
Filters
The filters shown are taken directly from the aggregated compensation event report. Many of these filters are available across Analytics.

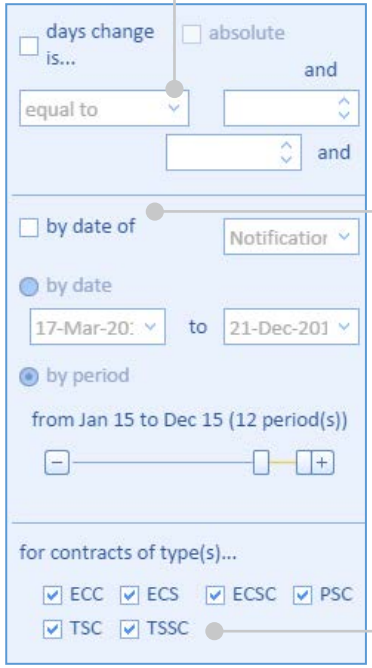
Show by Party...
To filter the report by Party select either Party 1 (*Employer / Project Manager*) or Party 2 (*Contractor / Consultant*). In a subcontract Party 1 = *Contractor* and Party 2 = *Subcontractor*.

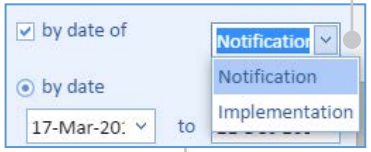
Days change is...
Click the **days change is...** checkbox then choose an option from the drop-down list and type the number of days to filter by days change.

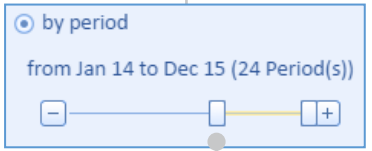
By date of
Select by date of **notification** or **implementation** from the drop-down list then select from the dates.

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





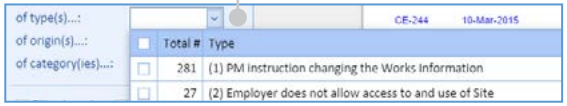




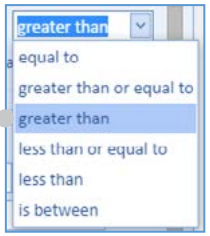
Show events that / where...
These filters will change depending on which report is being viewed, in this case the filters are compensation event specific. Click the checkbox to show the events that (for example) are implemented.

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.

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



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

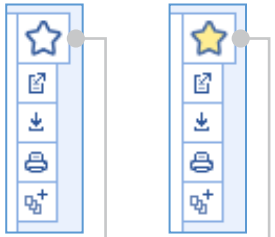


Filter by Contract type
Click the checkbox next to the Contract type to show the relevant Contracts.

Favourites

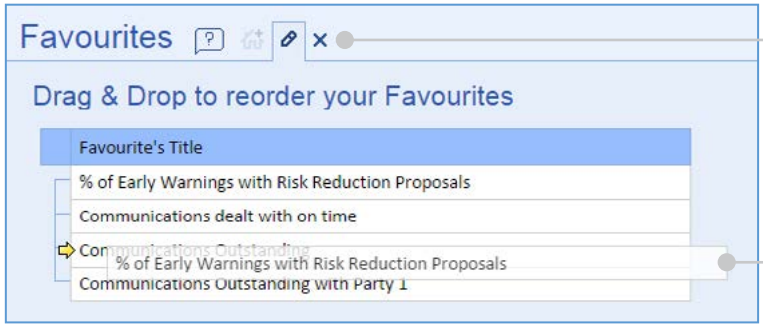
Favourites
To view favourites, hover over the left hand side menu and click on **Favourites** then select an option from the list.

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



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.

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

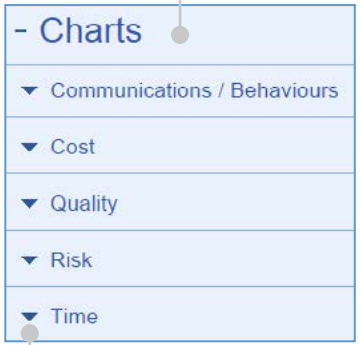


Re-order favourites
After clicking the **edit** icon, the drag & drop reordering page will be shown. To reorder the reports / charts, simply click and drag the report to where it should show on the favourites page. When complete, click the **close** icon.

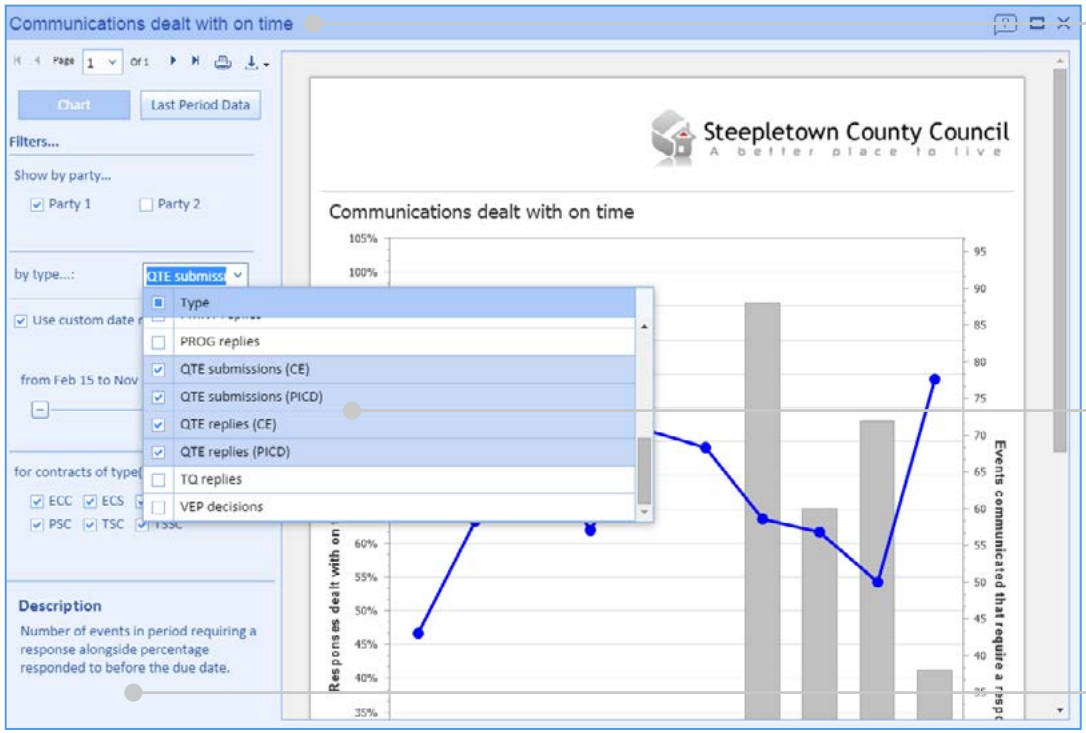
Charts - last period data

CEMAR

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.

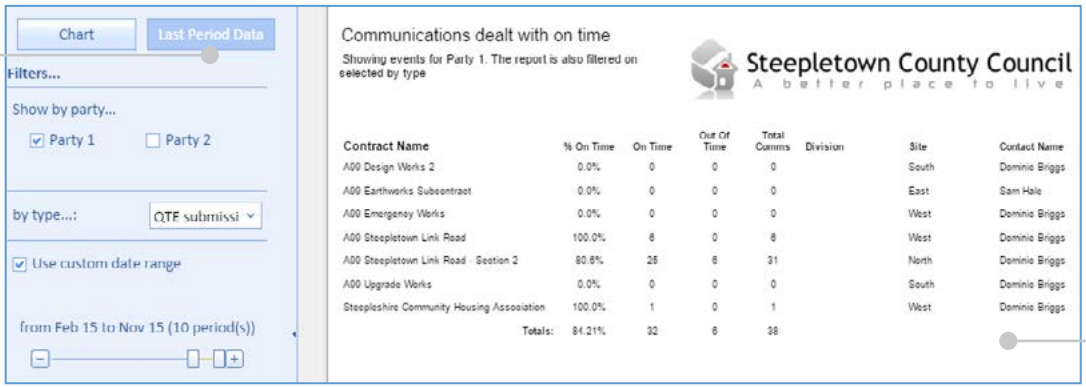


This chart
This example is from the Communications / Behaviours section of charts and is called Communications dealt with on time.

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.

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.



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

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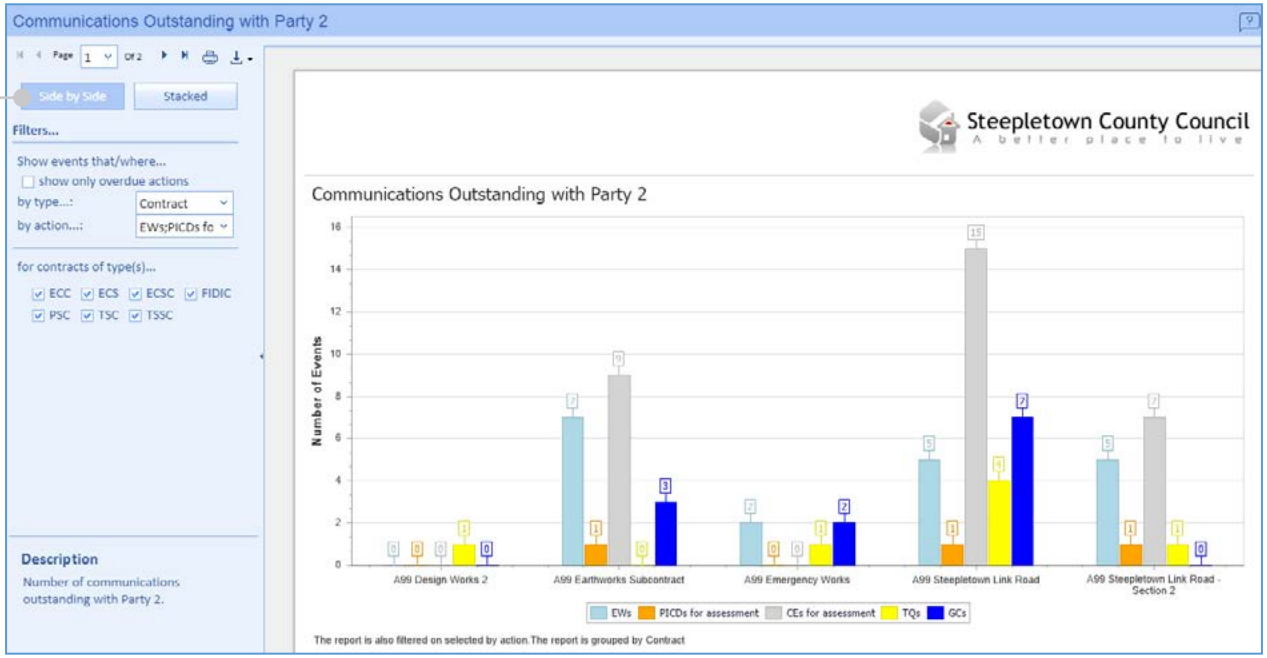
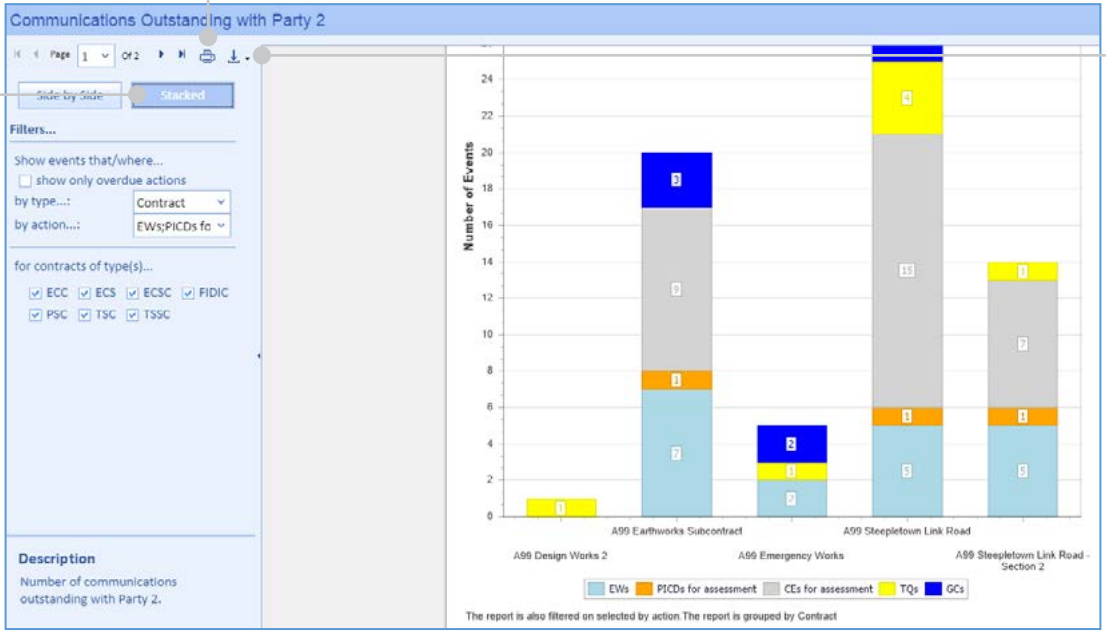
Charts - side by side and stacked

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

CEMAR

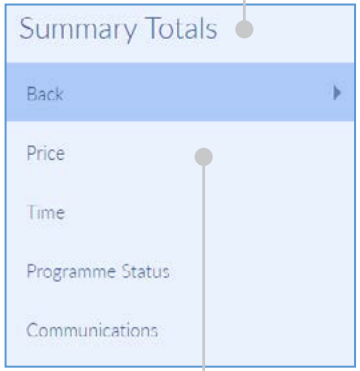
Summary totals
To view the summary totals sections, hover over the left hand side menu, click on **Registers** then **Summary Totals** and select an option from the list below.

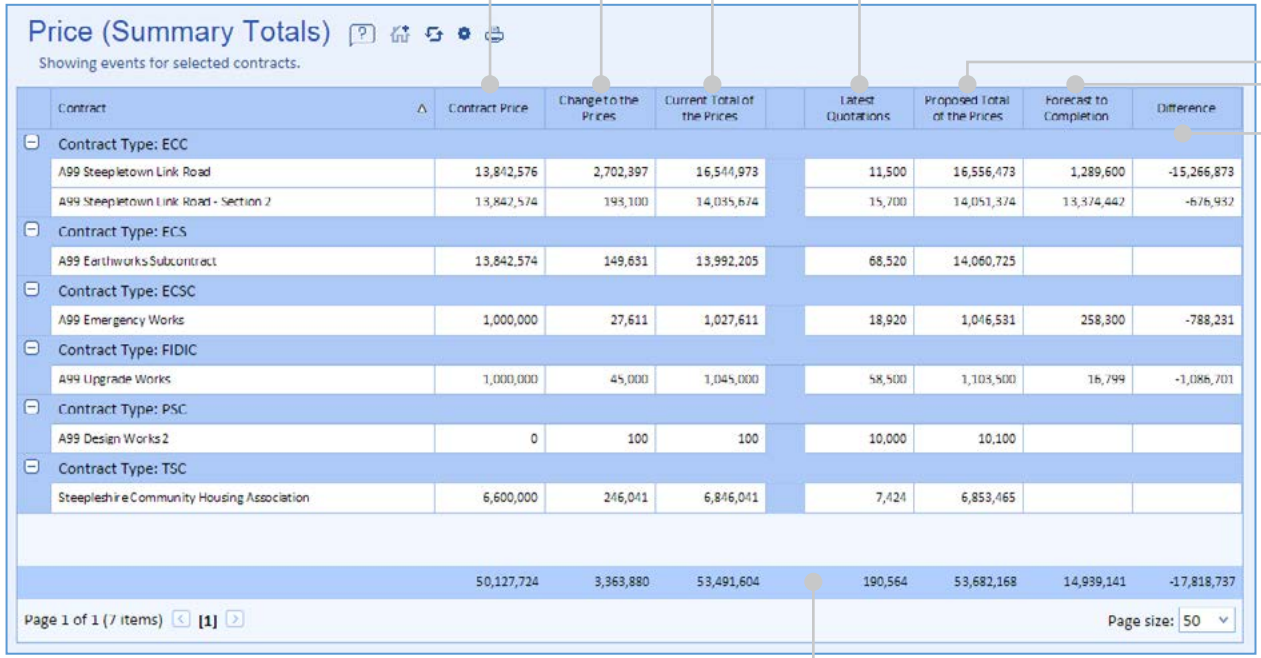
Contract price
The original Contract Price is shown in this column.

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
Contract Type: ECC							
A99 Steepletown Link Road	13,842,576	2,702,397	16,544,973	11,500	16,556,473	1,289,600	-15,266,873
A99 Steepletown Link Road - Section 2	13,842,574	193,100	14,035,674	15,700	14,051,374	13,374,442	-676,932
Contract Type: ECS							
A99 Earthworks Subcontract	13,842,574	149,631	13,992,205	68,520	14,060,725		
Contract Type: ECSC							
A99 Emergency Works	1,000,000	27,611	1,027,611	18,920	1,046,531	258,300	-788,231
Contract Type: FIDIC							
A99 Upgrade Works	1,000,000	45,000	1,045,000	58,500	1,103,500	16,799	-1,086,701
Contract Type: PSC							
A99 Design Works 2	0	100	100	10,000	10,100		
Contract Type: TSC							
Steepleshire Community Housing Association	6,600,000	246,041	6,846,041	7,424	6,853,465		
	50,127,724	3,363,880	53,491,604	190,564	53,682,168	14,939,141	-17,818,737

Page 1 of 1 (7 items) [1] Page size: 50

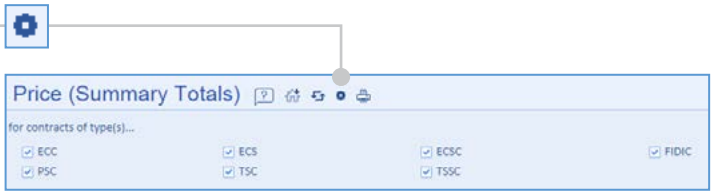
Proposed Total of the Prices
This column totals current quotations and the current Total of the Prices.

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.

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.

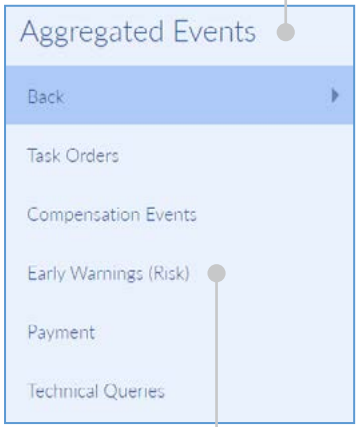


Totals row
The bottom row of this page totals all of the above columns to show the **summary totals** across all Contracts.

Registers - aggregated events

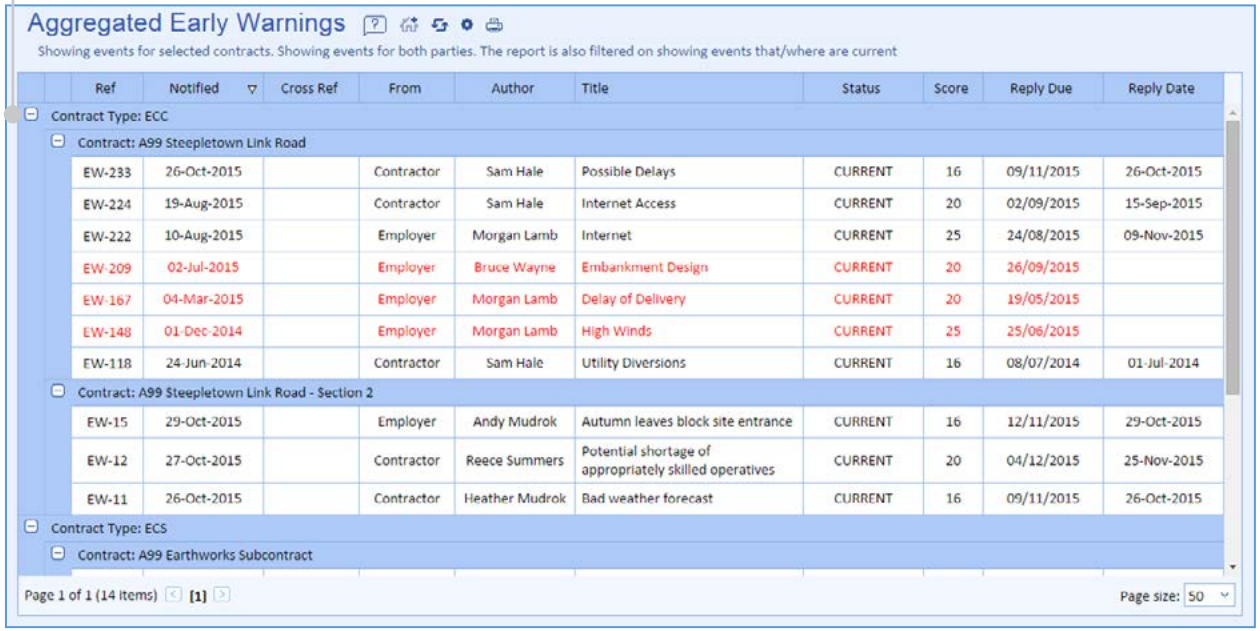
CEMAR

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.



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									

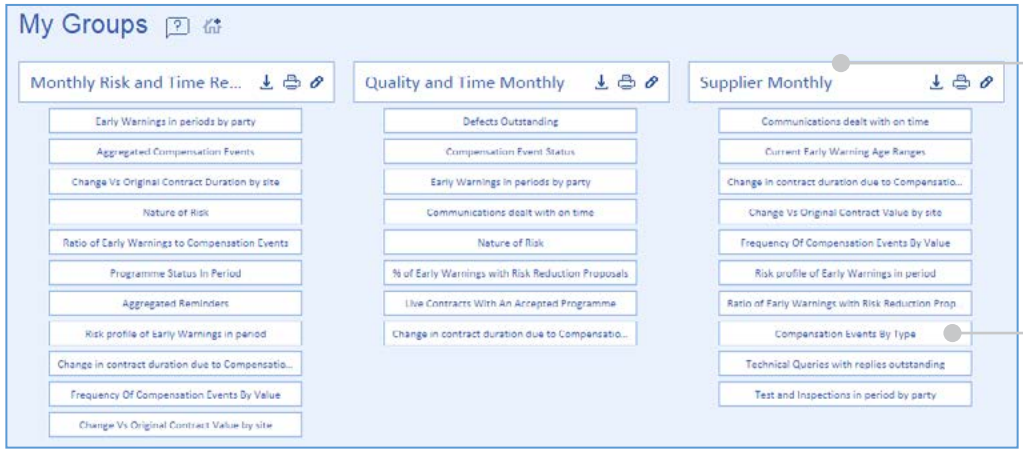
Filters
The filters change dependant on the report / chart / register type. These are the filters available in the aggregated early warning register.

Groups - creating and opening

CEMAR

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

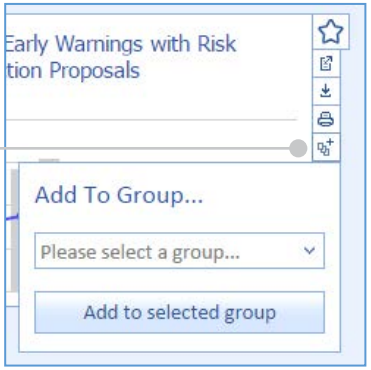
What are groups?
Groups allow each user to build a bespoke selection of reports in order to save time when needing to provide standard, regular reporting over a consistent set of metrics.

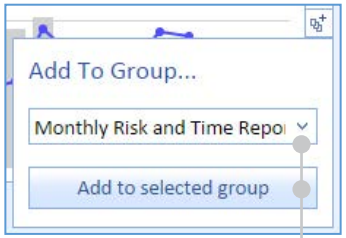


Open group
To open a group, click the title of the group and view the reports / charts on the page that follows.

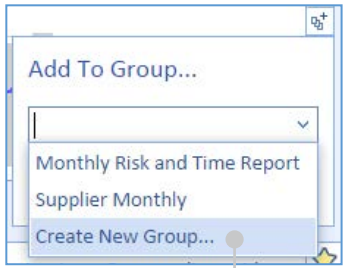
Open report / chart
To open any individual report or chart within the group click on the report / chart.

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

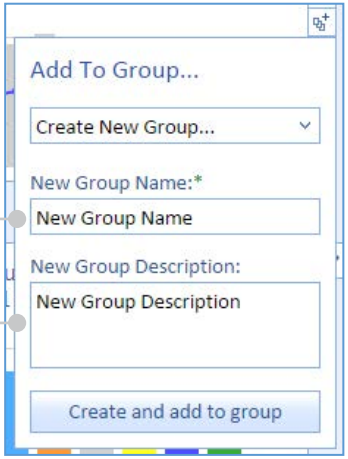




Select a group
To add to an existing group, click the title of the group from the drop-down list then click **Add to selected group**.



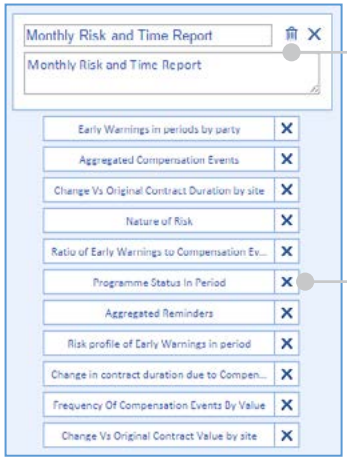
Create new group
To add to a new group, click on **Create New Group** then fill out the form detailing a new group name and description then click **Create and add to group**.



Groups - editing and exporting

CEMAR

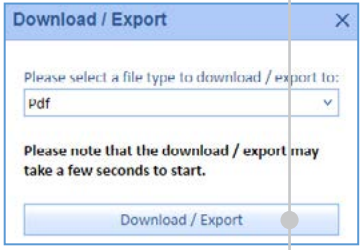
Edit group
To edit a group, click the **edit** icon.

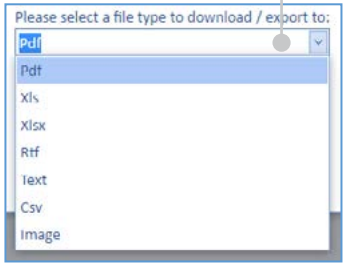


Delete group
To delete a group, click the **delete** icon.

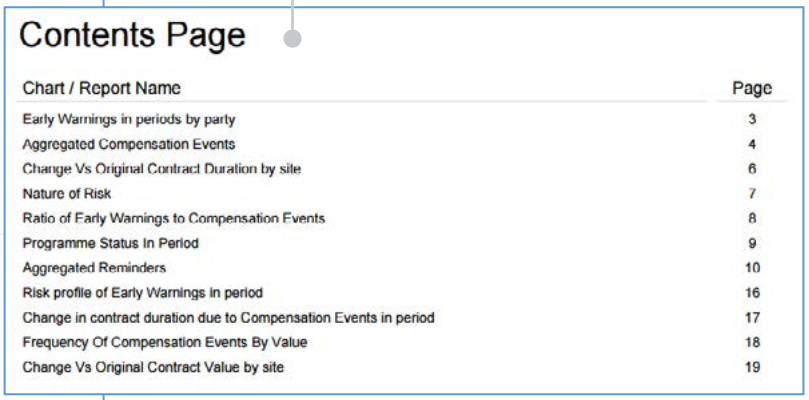
Remove report / chart
To remove a report / chart from the group, click the **X** to the right of the title.

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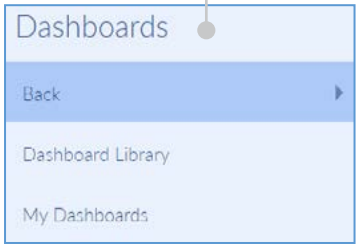
Aggregated Compensation Events	4
Change Vs Original Contract Duration by site	6
Nature of Risk	7
Ratio of Early Warnings to Compensation Events	8
Programme Status In Period	9
Aggregated Reminders	10
Risk profile of Early Warnings in period	16
Change in contract duration due to Compensation Events in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

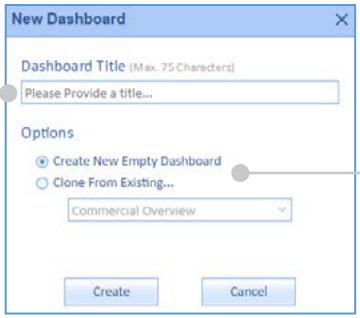
Dashboards - create and open

CEMAR

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



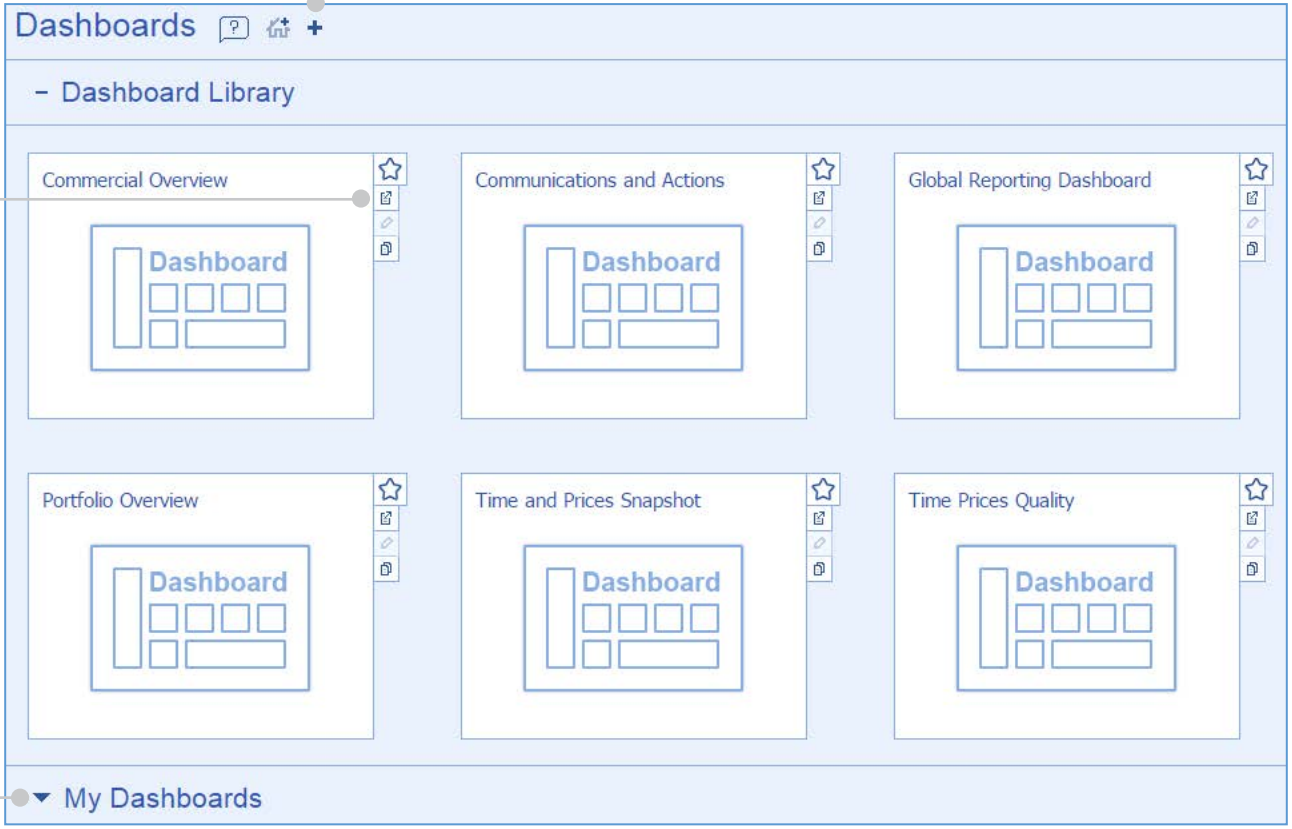
Create new dashboard
To create a new dashboard, click the **plus** icon then type a title into the pop-up window.



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...**

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.



Quick Start Guide

Dashboards - edit

CEMAR

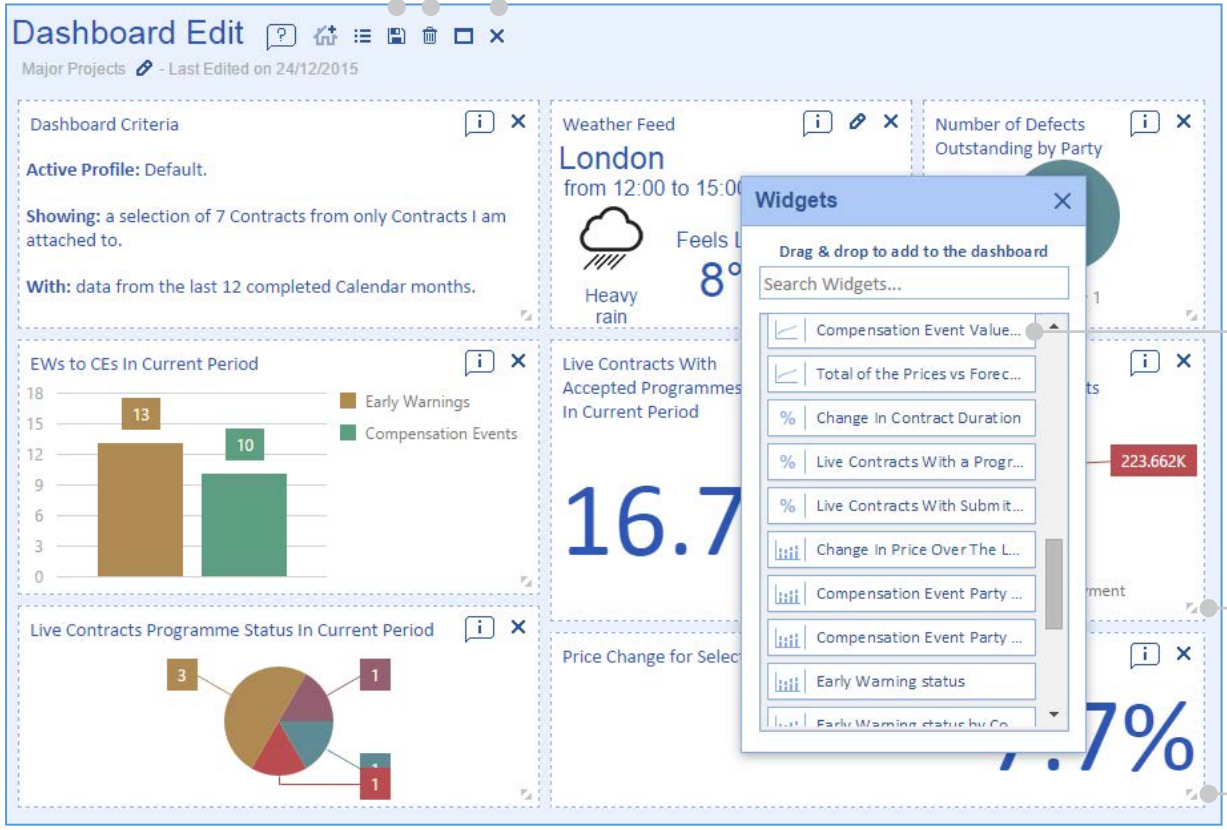
Edit dashboards
To edit a dashboard, select the pencil icon.

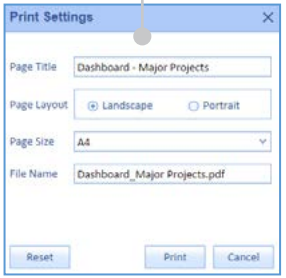
Save dashboard
To save a dashboard, click the save icon.

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.





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

Notes

works | services | supply

nec®

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 storn 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
neccontract.com/casestudies

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