SUPERUSER
CEMAR ADMIN PANEL

CEMAR
contract management

QUICK START GUIDE

secure.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 various NEC3 and NEC4 contract forms as well as FIDIC.

NEED HELP?

Contact our support centre on +44 (0)1452 260 266

Introduction

This guide will help you get started with the basics of using CEMAR's Superuser Client Administration Programme. It gives a brief overview of the tasks a Superuser is likely to undertake. Further information is available from our integrated help and support centre including video tutorials at: support.cemar.co.uk.

Contents

Logging on

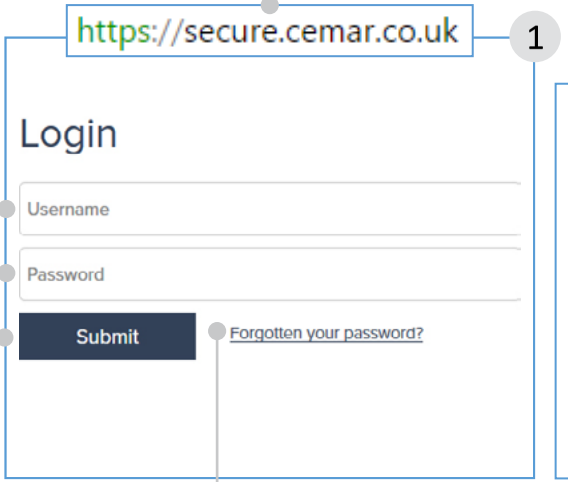
Website Address
To login, go to this web address.

User Name
Enter your unique Username.

Password
Enter your unique password.

Submit
Click **submit** to login.

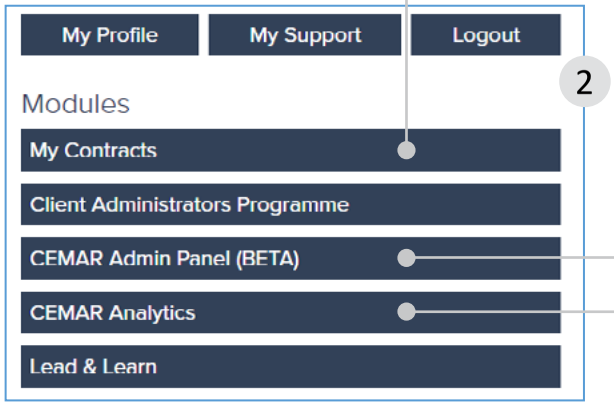
Forgotten password
Click **Forgotten your password?** then type your Username to receive an email that will allow you to reset your password.



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

New Client Administration Panel
This is a function for Superusers only and may not appear. It is used for adding and removing Users amongst other contract administration tasks.

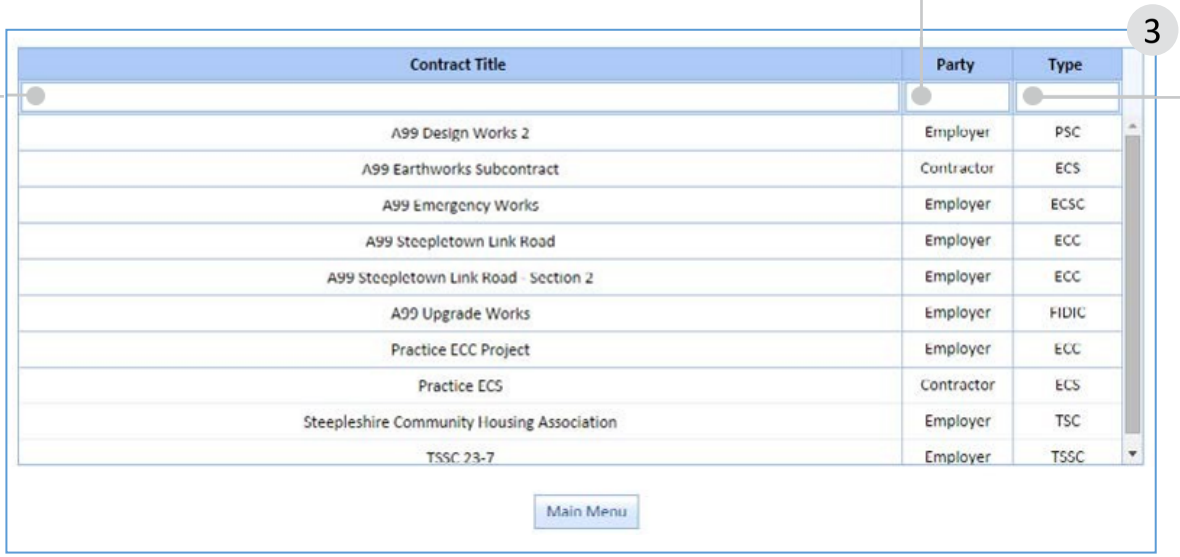
CEMAR Analytics
Analytics is a global reporting tool used to report on all contracts on a portfolio basis.



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.

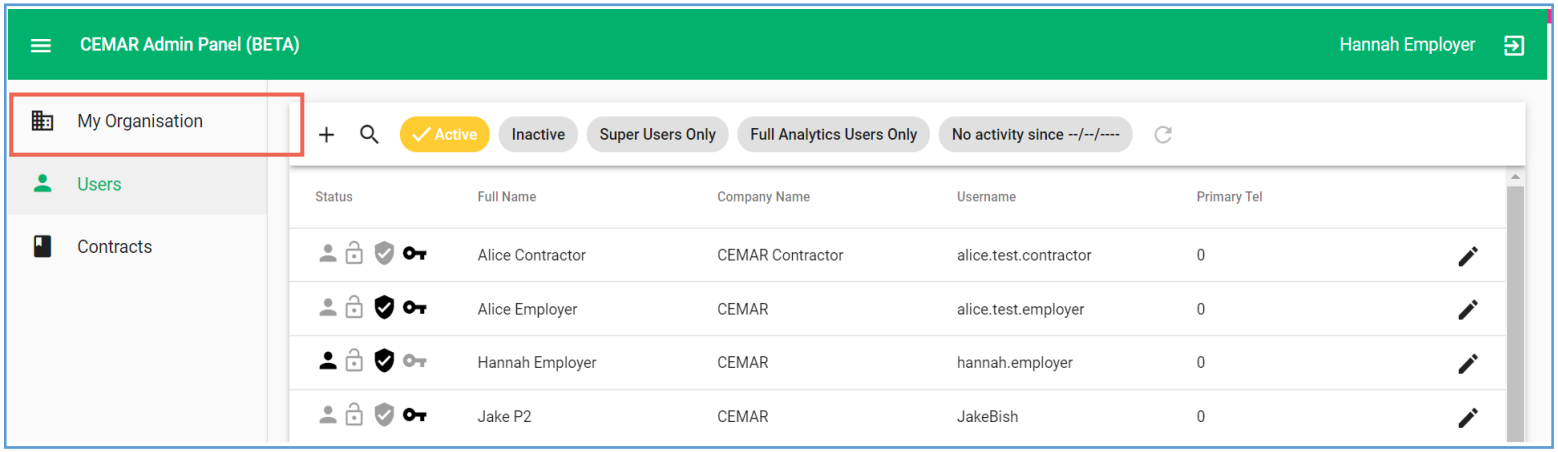
Filter by Contract Title
Type into this box to filter the Contract list by Contract Title.

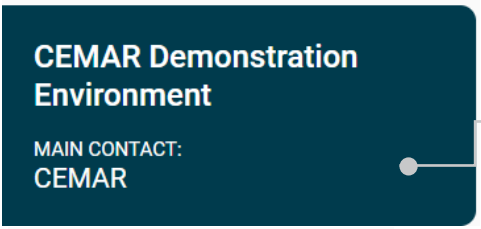


Contract Title	Party	Type
A99 Design Works 2	Employer	PSC
A99 Earthworks Subcontract	Contractor	ECS
A99 Emergency Works	Employer	ECSC
A99 Steepletown Link Road	Employer	ECC
A99 Steepletown Link Road - Section 2	Employer	ECC
A99 Upgrade Works	Employer	FIDIC
Practice ECC Project	Employer	ECC
Practice ECS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

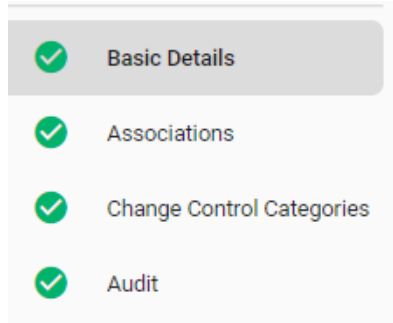
My Organisation

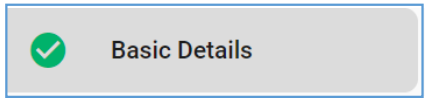
Each Client Environment has a 'My Organisation' tab which will give you an overview of your environment. You are able to amend Categories, Frameworks, Divisions and Sites within this section. As well as being able to add Change Control Categories and an overview of the audit history for this area.



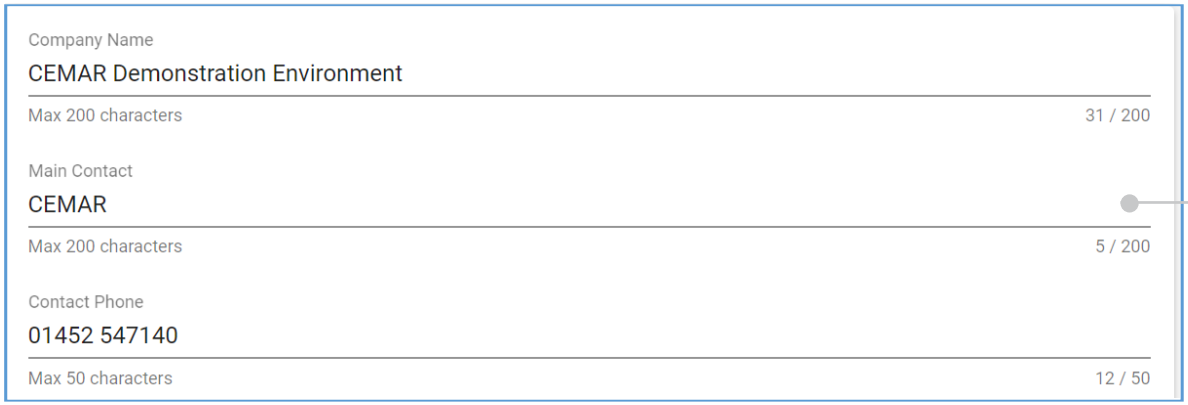


Top Left - you are displayed with your Client environment and Main Point of Contacts name.



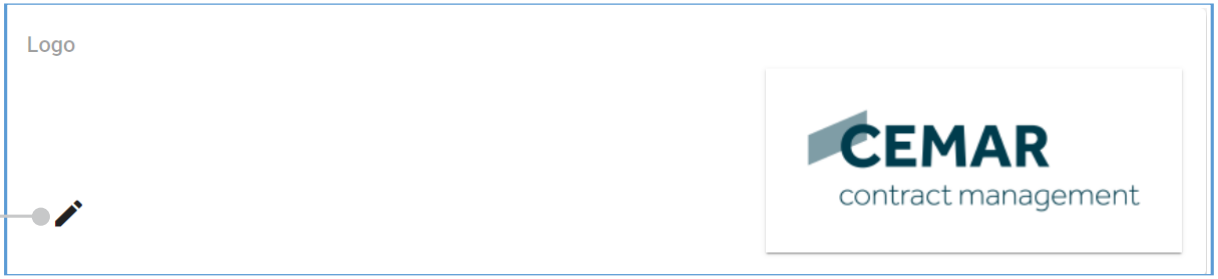


To view and edit any Client information, click the Basic Details tab.

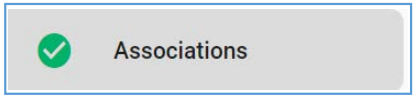


Updating Client information
All fields are editable. Here you can edit any Company details.

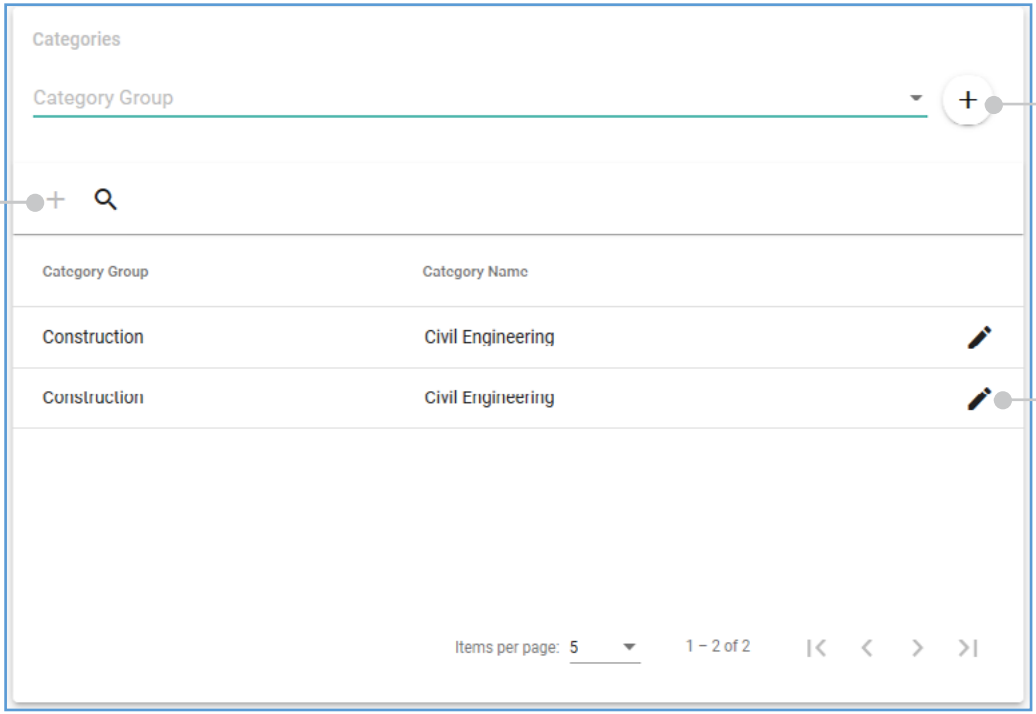
My Organisation



Update Logo
Select the pencil icon to update your Client environments logo.



To view and edit Frameworks, Categories, Divisions or Sites, click the Associations tab.



New Category Group
Select this plus icon to add a new Category Group.

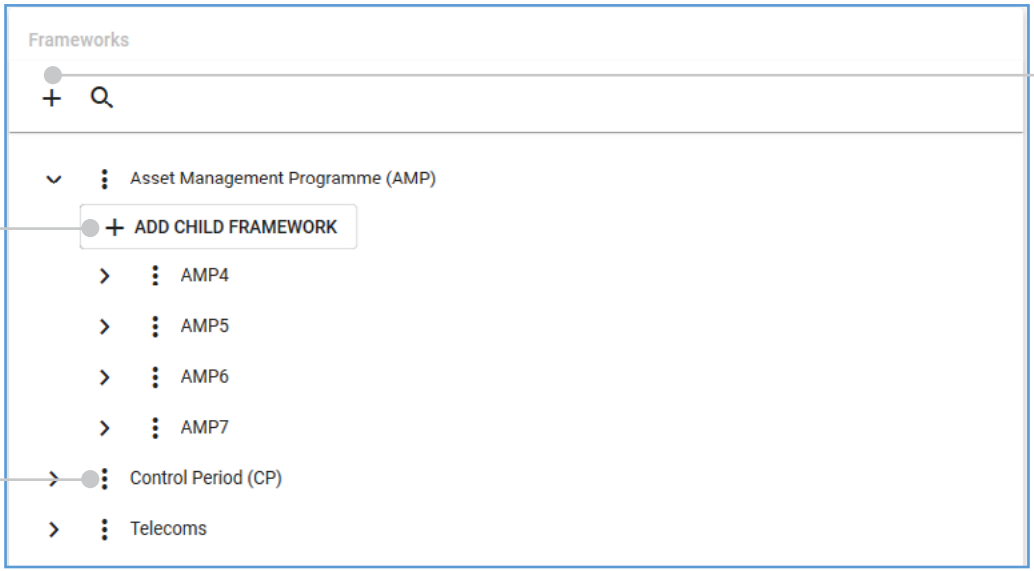
New Category
Select this plus icon to add a new Category.

Rename Category
Select the pencil icon to rename a Category.

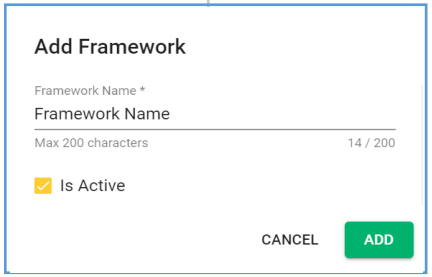
My Organisation

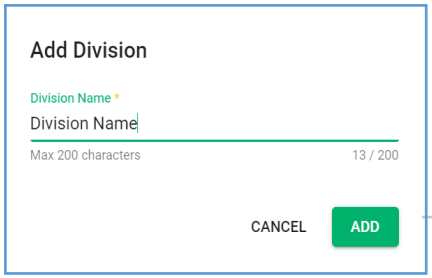
Add Child Framework
Select this plus icon to add a new Child Framework.

Edit Framework name
Select the three dots to edit the name of a Framework.

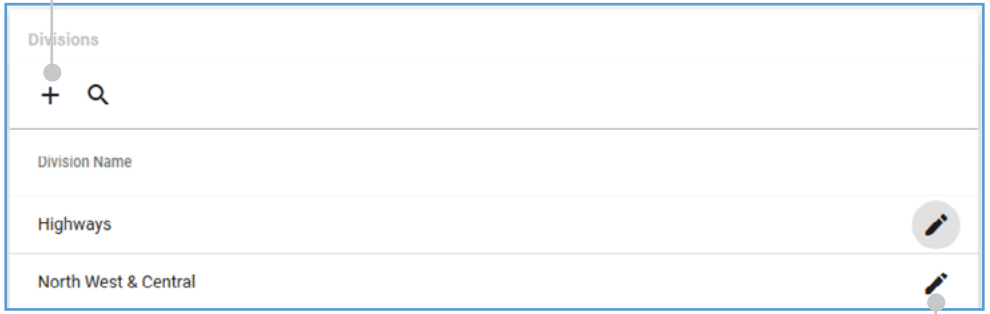


Add Framework
Select this plus icon to add a new Framework.



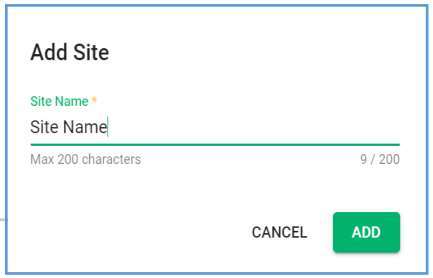


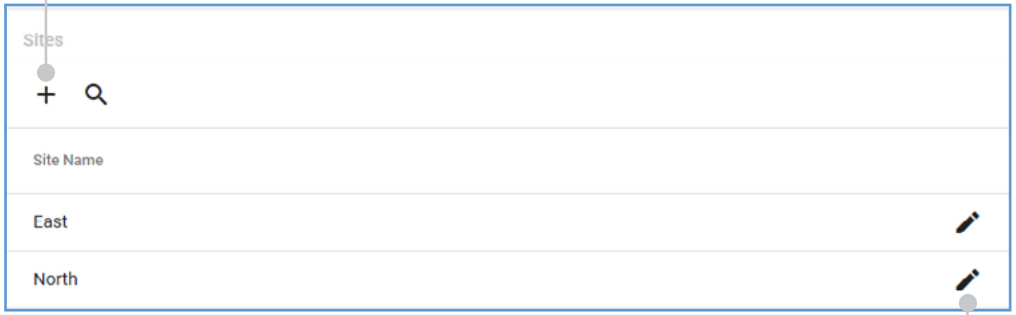
Add Division
Select this plus icon to add a new Division.



Rename Division
Select the pencil icon to edit the name of a Division.

Add New Site
Select this plus icon to add a new Site.

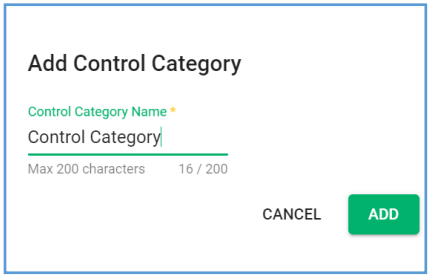


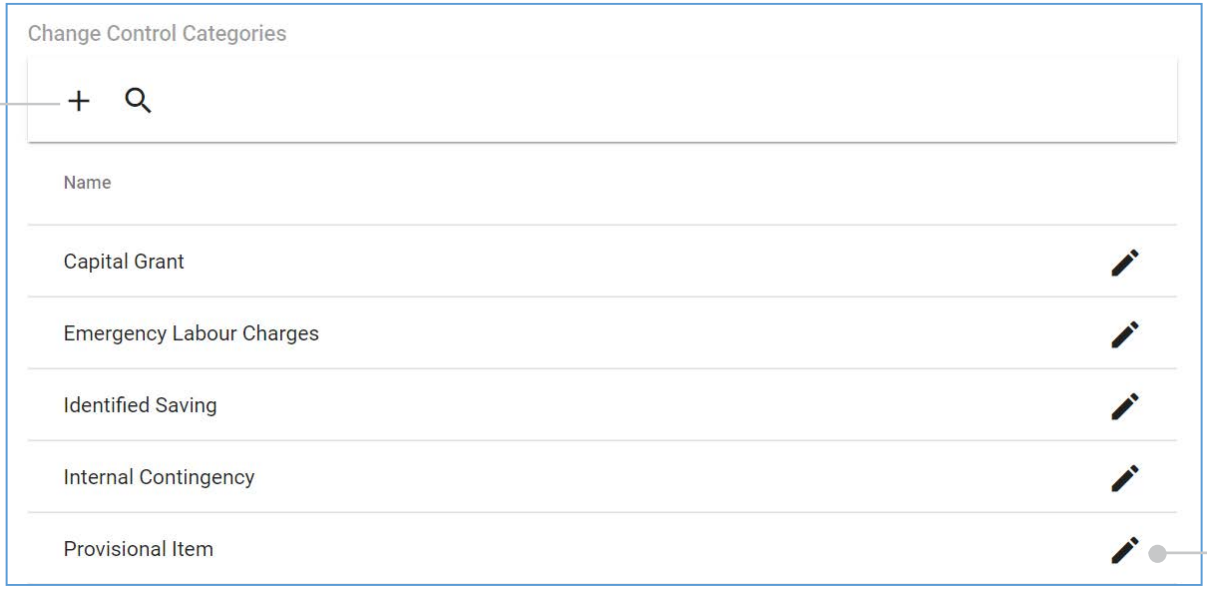


Rename Site
Select the pencil icon to edit the name of a Site.

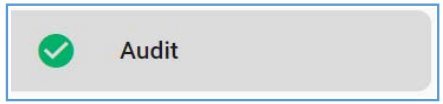
To view and edit Change Control Categories, click the Change Control Categories tab.

Add New Change Control Category
To add a new change control category (CE Type), click the plus icon and fill in the pop-up box.

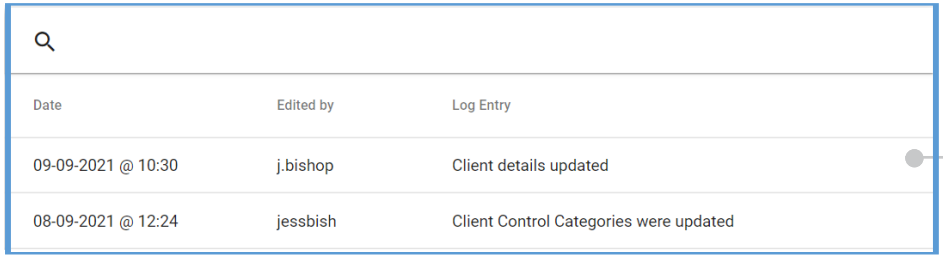




Edit Change Control Type
Select this pencil icon to edit a Change Control Category type and update the information in the pop-up box.



To view an audit history from the My Organisations area, click the Audit tab.



Date	Edited by	Log Entry
09-09-2021 @ 10:30	j.bishop	Client details updated
08-09-2021 @ 12:24	jessbish	Client Control Categories were updated

Audit Log
To see an overview of the 'My Organisations' log history then locate to the Audit tab.

UsersModule - General Overview

Use the free text search bar to search for a specific User by name.

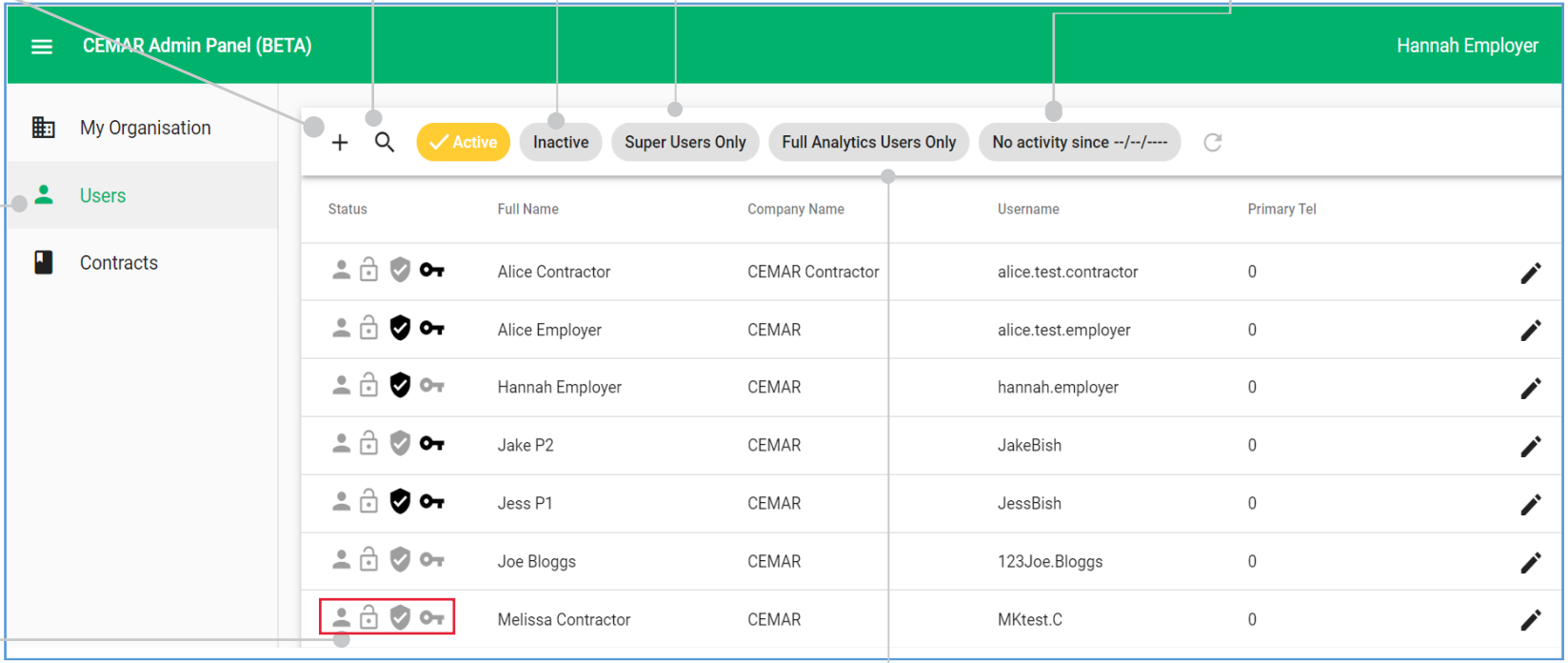
Use these radio buttons to filter your User search by active or inactive Users.

Search for Superusers only.

Search for Users who have not been active since a certain date.

Select the **Add User** button to create a new User.

The **Users** section contains all Users within your Client.



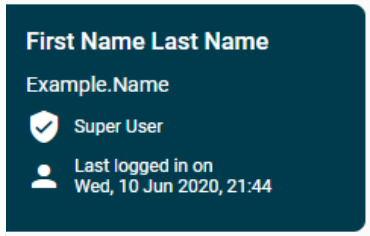
These smbols incidate that:

- The User is currently online.
- The User is locked out of their account.
- The User is a Superuser.
- The User is a key person on a contract they are attached to.

Search for Full Analytics Users only.

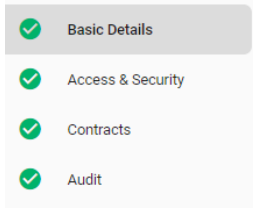
User Section Overview

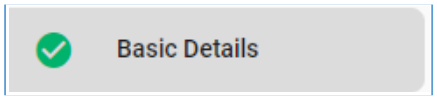
By selecting the pencil icon from the User's list you will be taken into the User's profile where you can amend the User's access and basic information.

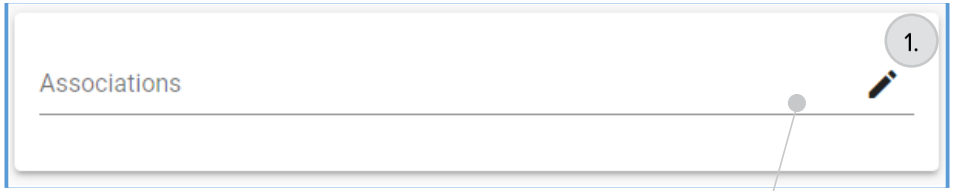


The User's full name, Client Environment and Username.

The date and time the User last logged into CEMAR.



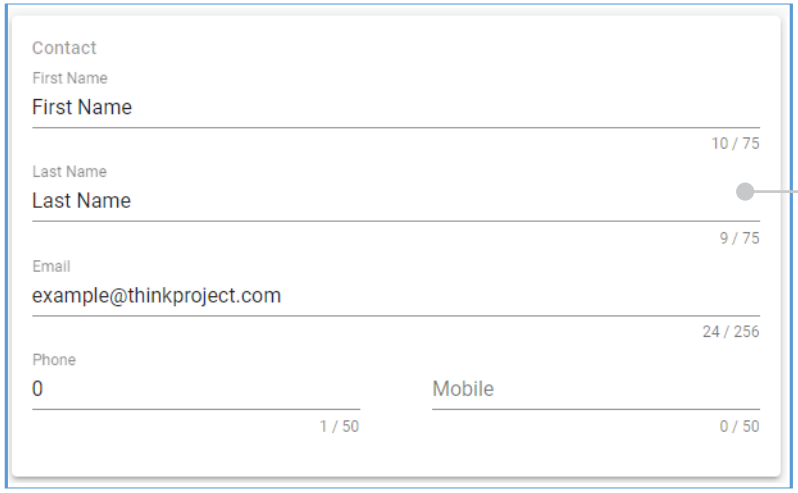




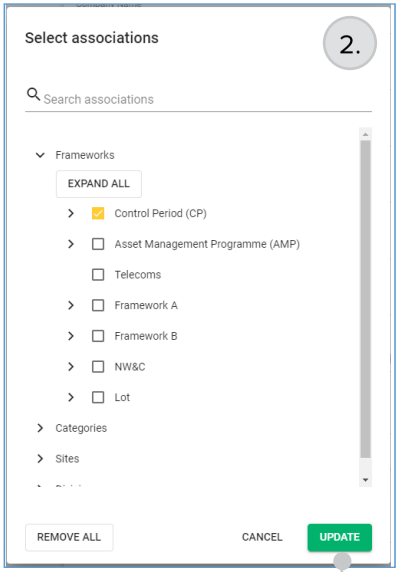
Select the pencil icon to associate the User to a Framework, Division, Category or Site.

Select to deactivate the User on all contracts they are attached to.

Lock the User out of their account or unlock the User's account.



Fill out all of the basic contact information for the User. This can be amended at any time by clicking into the text boxes.



Expand and tick your selection and then confirm by selecting update.

User Section Overview

Access & Security

Enable a Users Analytics access.

Access

Analytics: None Restricted Full

User administrator (Super User)

Contract administrator

Push Events: Show all contracts

You can turn on push events for the user if this is used by your client.

Toggle and reset 2FA if required.

Security

Two-factor authentication (2FA)

RESET SECURITY QUESTIONS — Last reset on Thu, 11 Jun 2020, 09:41

SEND RESET PASSWORD EMAIL — Last changed on Wed, 10 Jun 2020, 17:56

Reset the Users password and security questions here.

Contracts

Select **Contracts** to load the User's contracts page.

Audit

User created on Tue, 2 Jun 2020, 09:10

Updates to User | User Activity

Date	Edited by	Log Entry
27-07-2021 @ 14:55	natalie.superusertrai...	User was unlocked by natalie.superusertraining

Here you have two different types of audit history presented. *'Updates to user'* allows you to be shown all updates that have been made to the Users account, on which date and by whom. *'User activity'* allows you to see a log history of what actions the User has carried out recently.

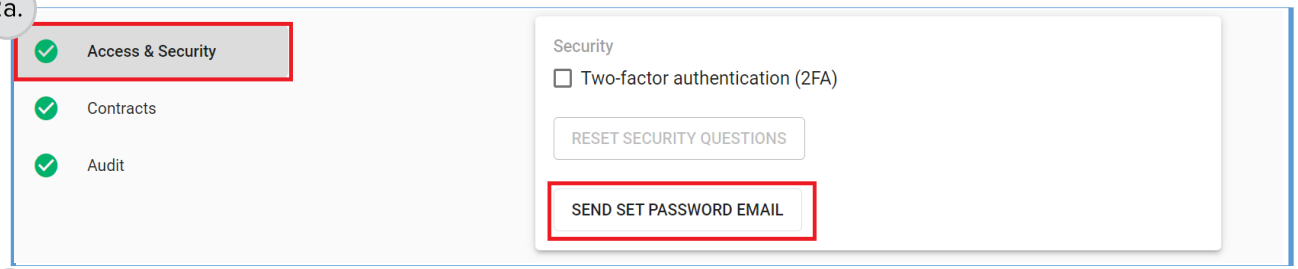
Reset/Set a User's Password

This section shows you how to reset an existing User's password and how to help a new User set up their password if they have lost their activation email.

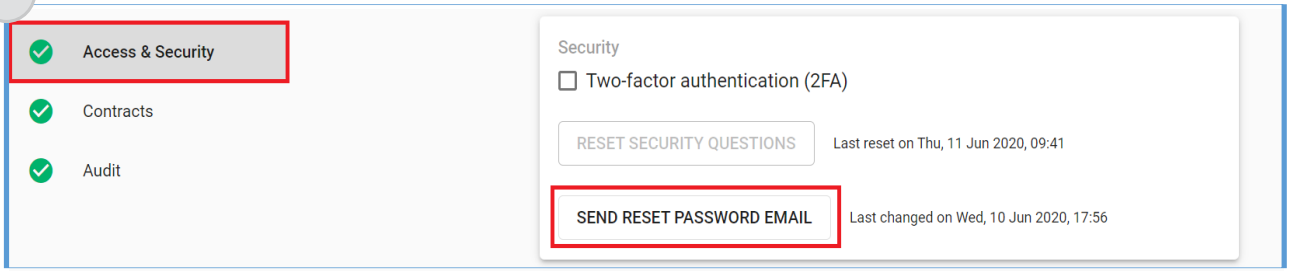
1. Open the User's information by selecting them from the User list and selecting the pencil icon. Followed by the Access and Security tab.

2. a) If the User has not accessed their account before, select **Set Password** followed by **Email User**.
b) If they are an existing User, but need some assistance with resetting their password, select **Reset Password** followed by **Email User**.

2a.



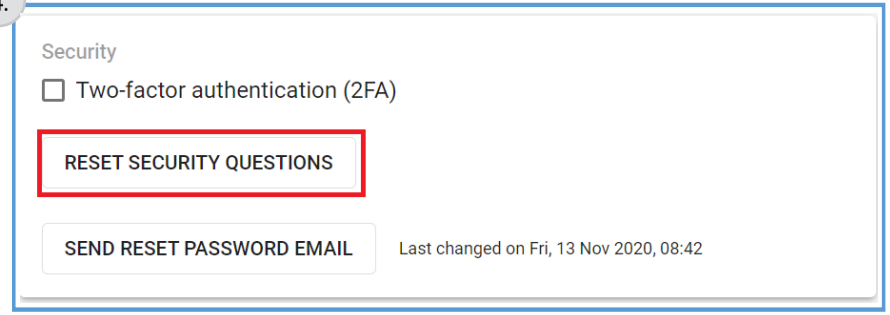
2b.



3. A link will be sent to the User containing a link to create their password.

4. If the existing User requires assistance with resetting their security questions also, this can be done via the **Reset Questions** button.

4.



Create a New User

1. Within the admin panel, use the menu on the left- hand side to select **Users**.

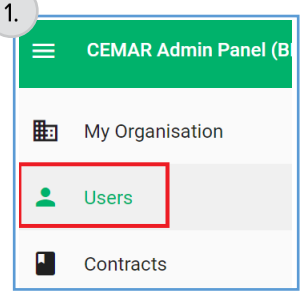
2. Select **Add new User**.

3. This will open a pop-out box where you may enter the details for the User.

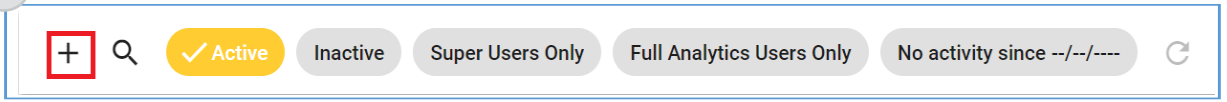
4. CEMAR holds a pool of Usernames across all our clients, which means that each Username must be unique.

5. The Analytics section allows you to control the User's access to CEMAR analytics.
   - **None** means that the User will not be able to access the Analytics module at all.
   - **Restricted** means that the User will have access to Analytics, but only to acquire data from the contracts in which they are attached to.
   - **Full** access will allow a User to view all contracts within your client environment. This can only be toggled by a support agent at CEMAR with authorisation from our main point of contact.

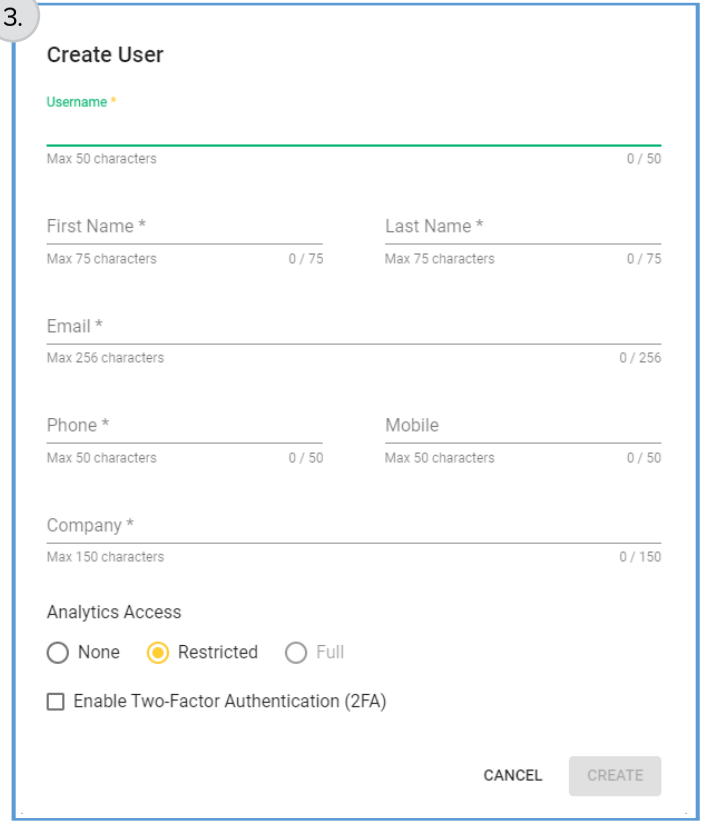
1.



2.



3.



6. The security section provides the facility to switch on two-factor authentication for this User. For more information on this, please see our 2FA help article.

7. Once you have completed this information, select **Create User**.

8. You will then be taken to the User's profile where you can add them to any contracts you wish.

9. An activation email will then be sent to the User, containing their Username and a hyperlink to set their password and security questions for their new CEMAR account.

Adding a User to Contracts

1. Start by locating the User's information by searching for them in the User section.

2. Once you have searched for the User, click the pencil icon to open the Users profile.

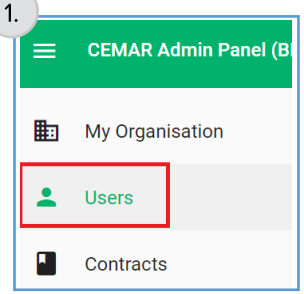
3. To view which contracts this User is already attached to, or to add the User to new contracts, select the **Contracts** tab.

4. This will open the User's contracts area. At the bottom of the page, you will be able to see any contracts that the User is attached to already, if any.

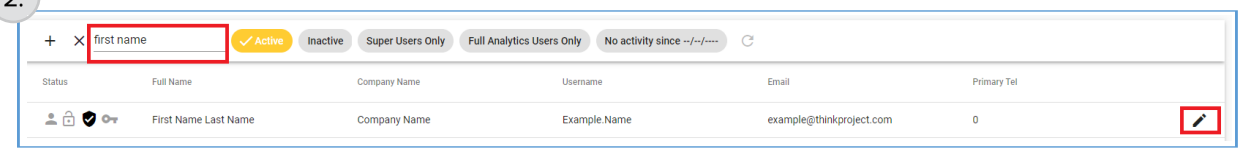
5. You can make use of the filters and search function to locate any contracts you may be looking for. Please note: Select all *'Column Options'* to be able to see all role and threshold options.

6. To add this User to new contracts, select **Add to contract(s)**. This will load a list of available contracts. Again, you can use the filter options and search bar at the top of the page to locate the desired contract(s).

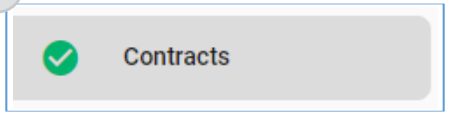
1.



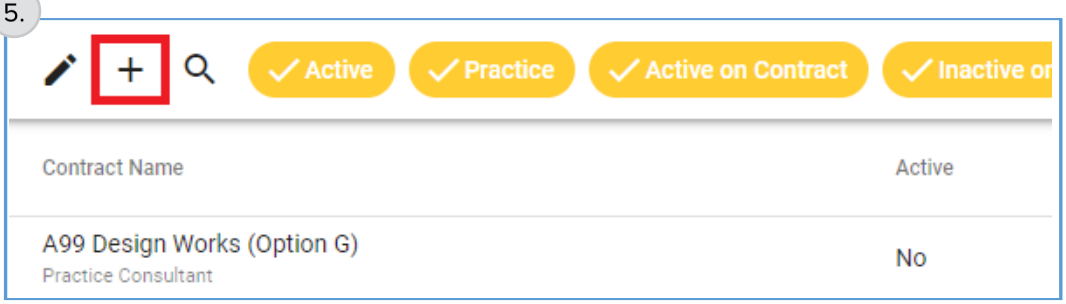
2.



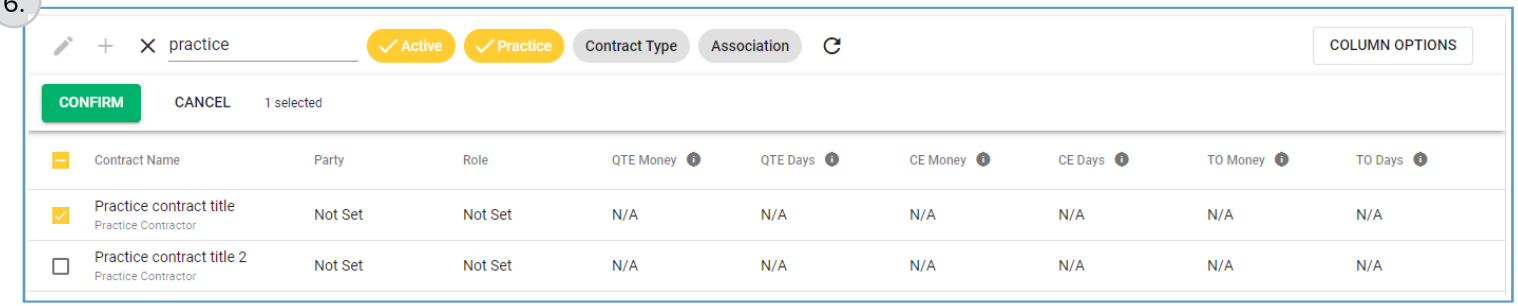
3.



5.



6.



Adding a User to Contracts

7. Use the tick boxes on the left-hand side to select which contracts you are adding this User to (clicking the tick box next to 'Contract Name' will select all loaded contracts).

8. Once you have made your selection, press **Confirm**.

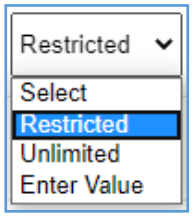
9. It is now possible to choose the User's Party and access for the selected contracts. This can be done individually, or, you may make use of the multi-contract tool bar at the top and push this to all selected contracts.

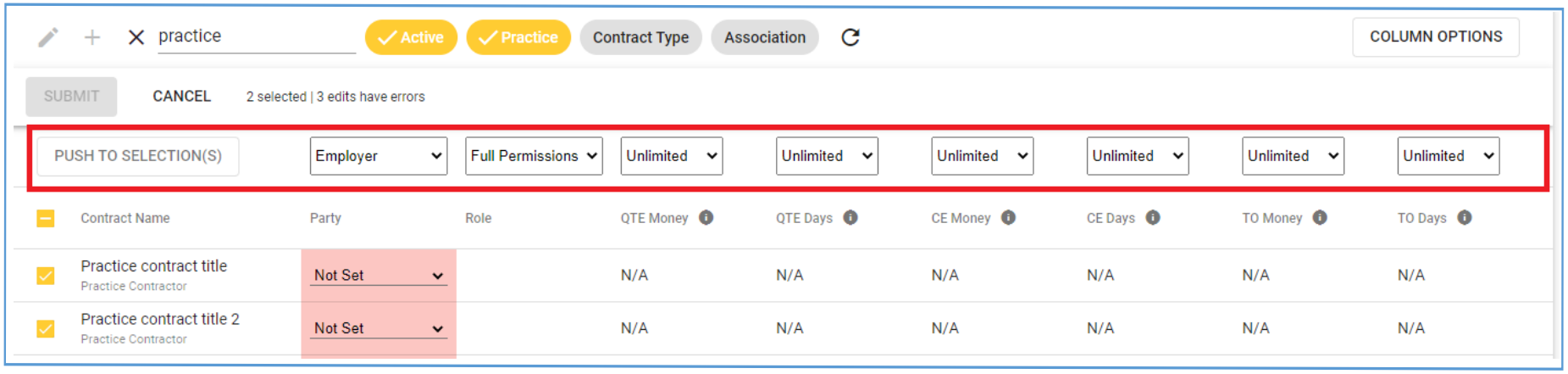
If using the multi-contract tool, once you have input the desired data, select **Push to selection(s)** to automatically fill in the required fields.

10. Once finished, select **Submit**.

The process is now complete, and the User will be able to access the contracts.

Tip: Financial Thresholds were previously inputted in the old administration area as -1 meaning unlimited and -2 meaning limited thresholds or 0 / a value of your choice. This is now known as just limited or unlimited or you can enter a value of your choice.





Managing a User's Roles and Thresholds

1. Access the required User's contract area by selecting them from the User list and selecting the pencil icon, followed by the Contracts tab.

2. Select the pencil icon.

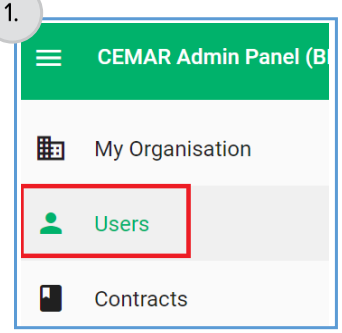
   If you are looking for a particular contract, you can use the filter options to streamline the task.

3. You can make the necessary amendments using the drop-down menus. Any changes you make will be highlighted in green. Once you have finished, select **Verify**.

4. If you are making the same change on several contracts, you can use the multi-contract tool bar. If you choose to do this, input the required changes into the multi-contract tool bar and then select the contracts you wish to push these changes to. Next, press **Push to selection(s)** followed by **Verify**.

5. The contract list will then condense to display all contracts that are being edited, highlighting the change in green. If you are happy with the changes, select **Submit**.

1.



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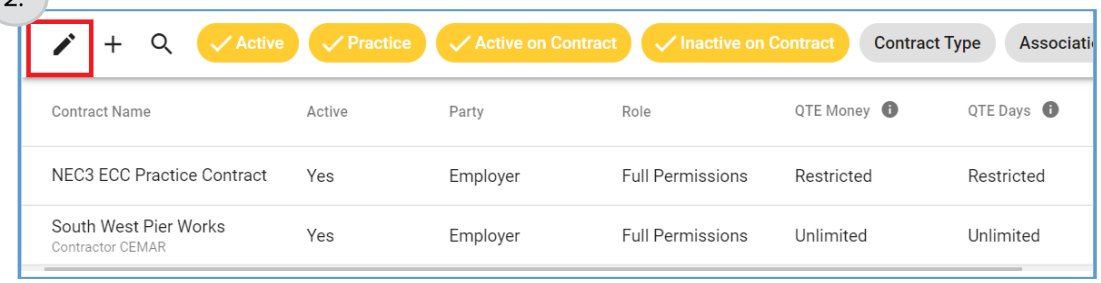

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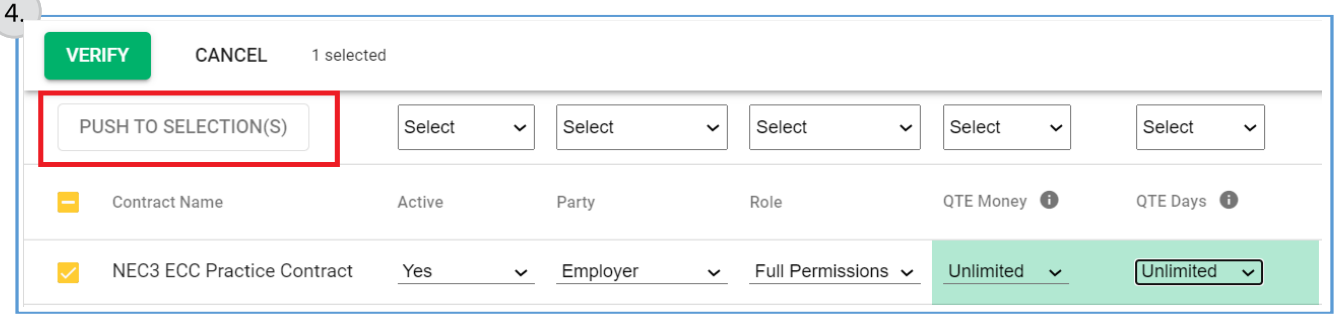
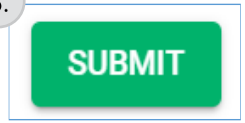


5.

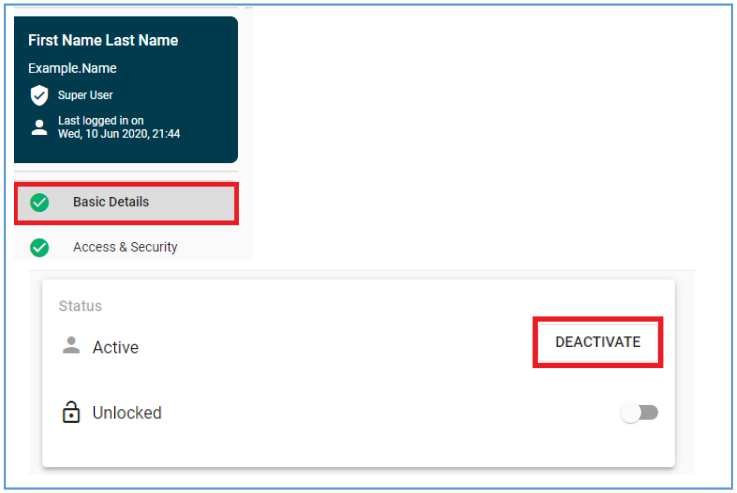


Deactivating a User

This section will detail how to deactivate a User on all contracts they are attached to and how to remove a User from one or a selection of contracts.

To deactivate a User from all contracts:

1. Start by locating the relevant User by selecting them from the User list and clicking on the pencil icon to the right. This will take you to the User's profile.



2. Select the **Deactivate** button. This will deactivate the User's account meaning they will no longer be able to access CEMAR.

3. If the **Deactivate** button is not present, this means that it is not possible to deactivate the User as they are either a named manager on a contract or are on the approvals structure.

To deactivate a User from one of a selection of contracts:

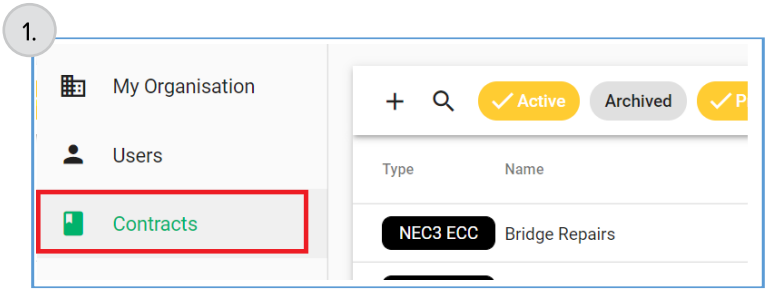
1. Within the User's profile, select the **Contracts** tab to view their contracts area.

2. Select **Edit**.

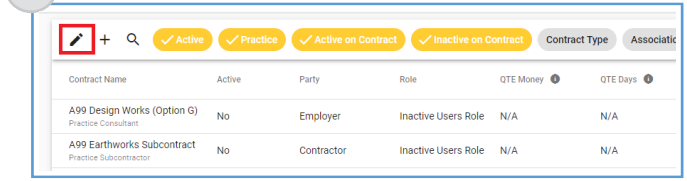
3. Use the drop-down menu in the **Active on Contract** column to remove access for these contracts. Once you have made your selection, press **Verify**.

4. After this, the list will condense to present contracts in which you are editing. If you are happy with these changes, select **Submit**.

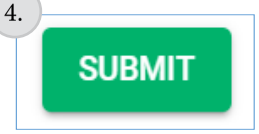
1.



2.



4.



Contracts Module - General Overview

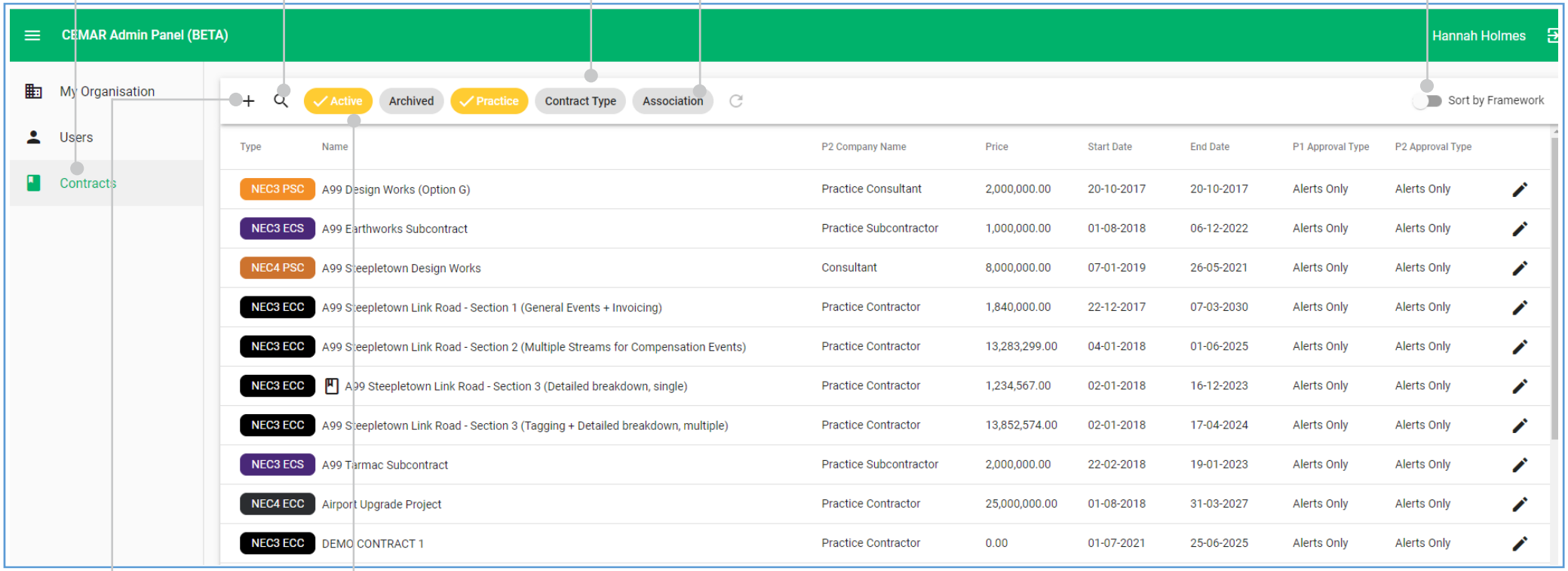
The **Contracts** section contains all Contracts within your Client Environment

Use the free text search bar to search for a specific contract.

Filter your search by Framework, Division, Category or Site.

Search by contract type.

Turn this toggle on to sort by Framework.



Select the **Create New Contract** button to create a new contract.

Use these radio buttons to filter your contract search by active or inactive.

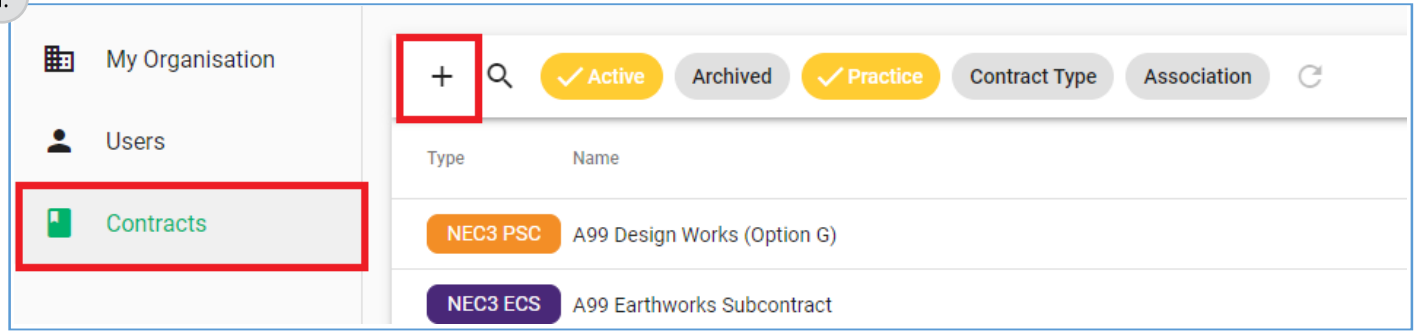
Create a New Contract

1. Select the plus symbol from within the Contracts tab.

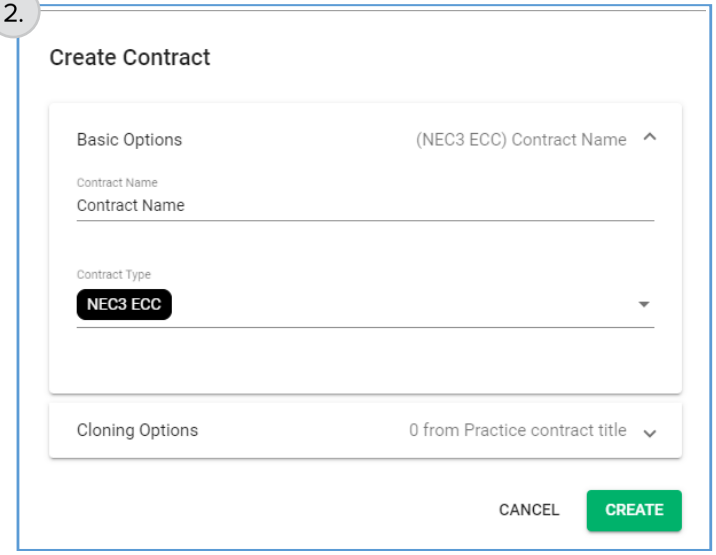
2. This will load up a pop out box where you can fill out the Contract name and pick the type.

3. If you expand the box called **Cloning Options** options, you can select which contract you would like to clone from and pick, for example, to bring all Users or Approvals across. Then select the **Create** button to confirm creation.

1.



2.



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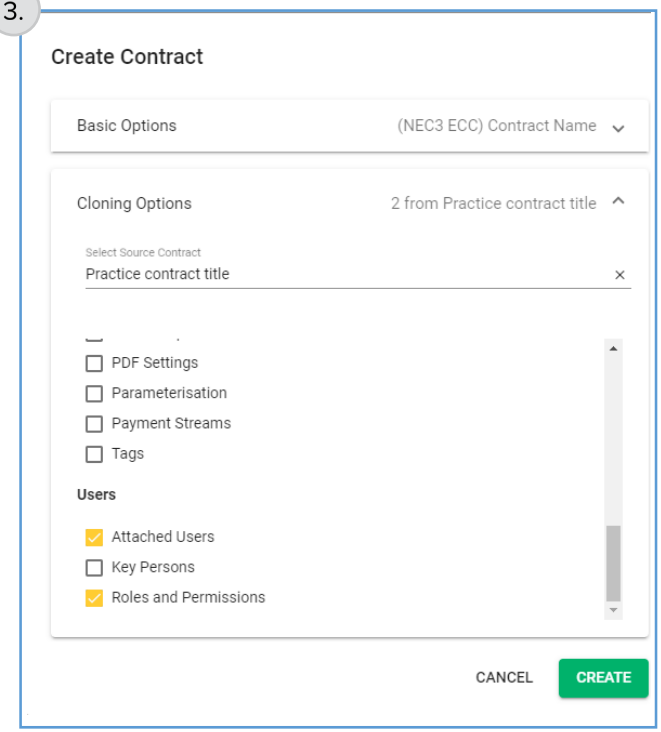
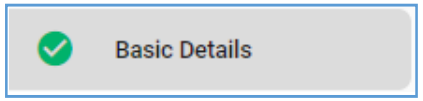


Amending Contract Details

To see more information about the contract select the name from the list within the contracts tab. Then select the pencil icon to the right, to be taken through to the contract data. This will display ten tabs to the left which hold all the contract data.



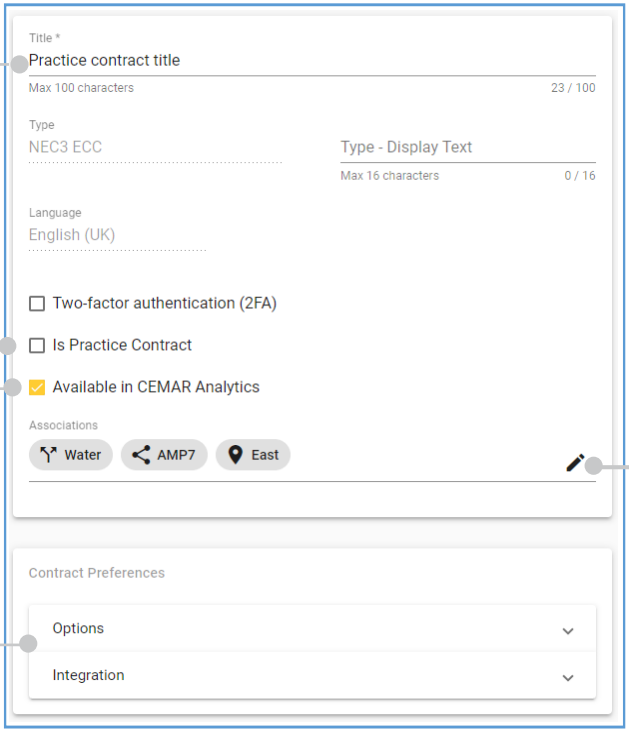
Click the Basic Details tab to view the below contract information.

Contract Title
This is where you will be able to edit the contract title, see the contract type and set any additional text you wish to be displayed alongside the contract title.

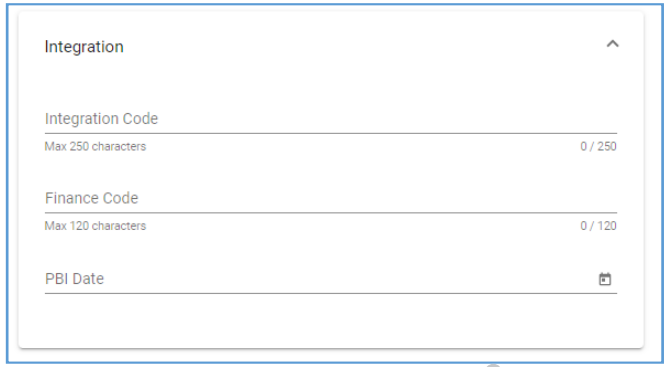
Practice Contract
To set this Contract as a Practice Contract, click the checkbox here.

Show in Analytics
To make the Contract visible in CEMAR Analytics, click **Available in CEMAR Analytics**.

Contract Preferences
There are several preferences which can be adjusted within CEMAR to help with the workflows and administration of your Contracts. These settings are found listed in the preferences tab. To adjust the setting, check and uncheck the relevant boxes.

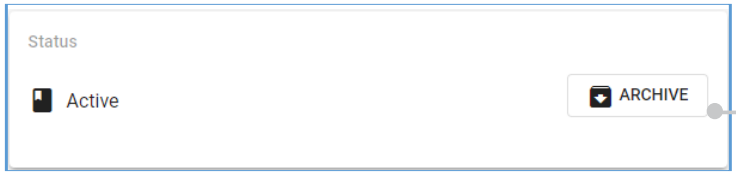


Associations
You can assign the contract to a specific framework, site, or category by clicking on the pencil icon located to the right of the associations section.



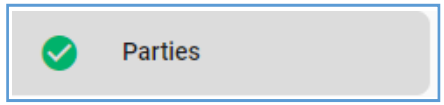
Integration
You are also able to input an integration code, finance code and PBI Date here.

Save
After changes are made, click the Save button.



Archive
You are able to archive a contract by selecting the 'Archive' button, as well as 'Reactivate' an archived contract.

Amending Contract Details



Click the Parties tab to enter Party information.

Set Project Manager

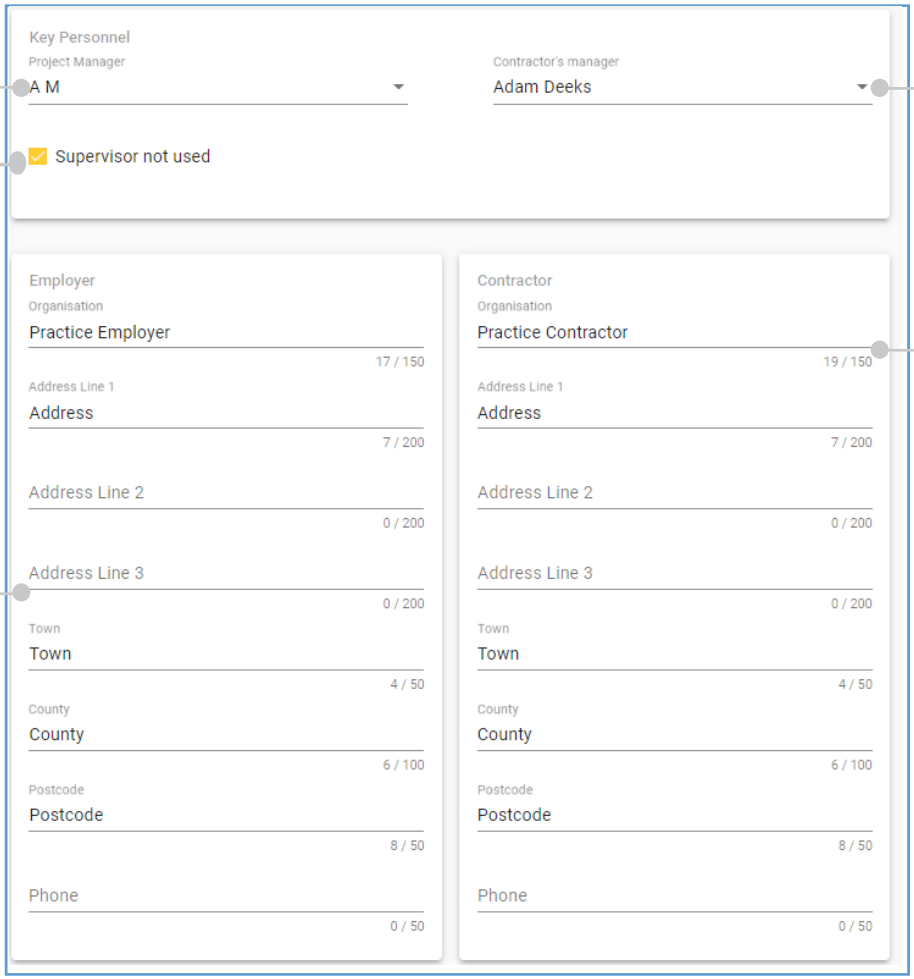
Select a Project Manager from the list of Users. This will be the User referred to on every contractual communication as the Project Manager. The language will change depending on the Contract type, for example, a TSC Contract will refer to a Service Manager not a Project Manager.

Set Supervisor

If a supervisor is used, select an option from the list. If a supervisor is not used, select the Supervisor not used checkbox.

Party 1 information

Input Party 1 client information here. In this ECC Contract, the language refers to an Employer and Contractor. If this were a different contract form, the language would reflect this.



Set Contractor's Manager

Select a Contractor's Manager from the list of Users.

Party 2 information

Input Party 2 client information here.

Letterhead images

To set a logo for the letterhead, click the pencil icon, then select a file from your computer and click OK. When complete, click the green save icon at the top right of the screen.

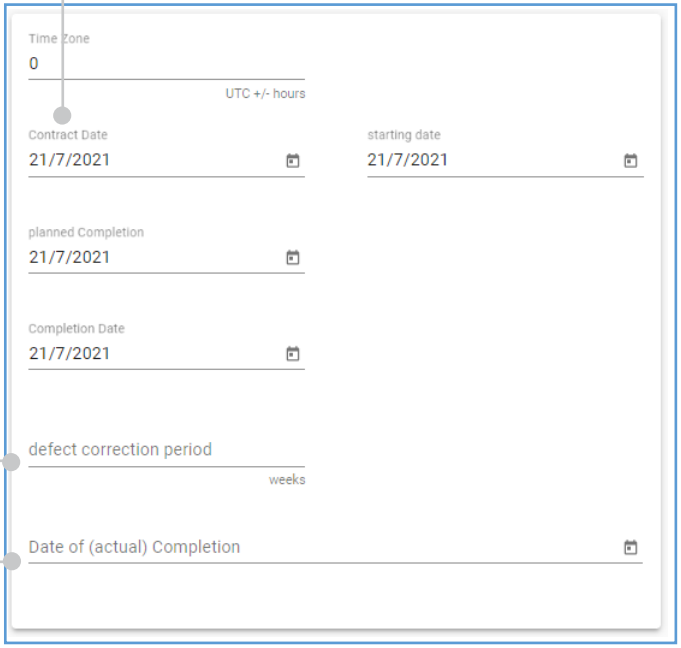
Amending Contract Details

Click on the Time tab to input any time related Contract information.

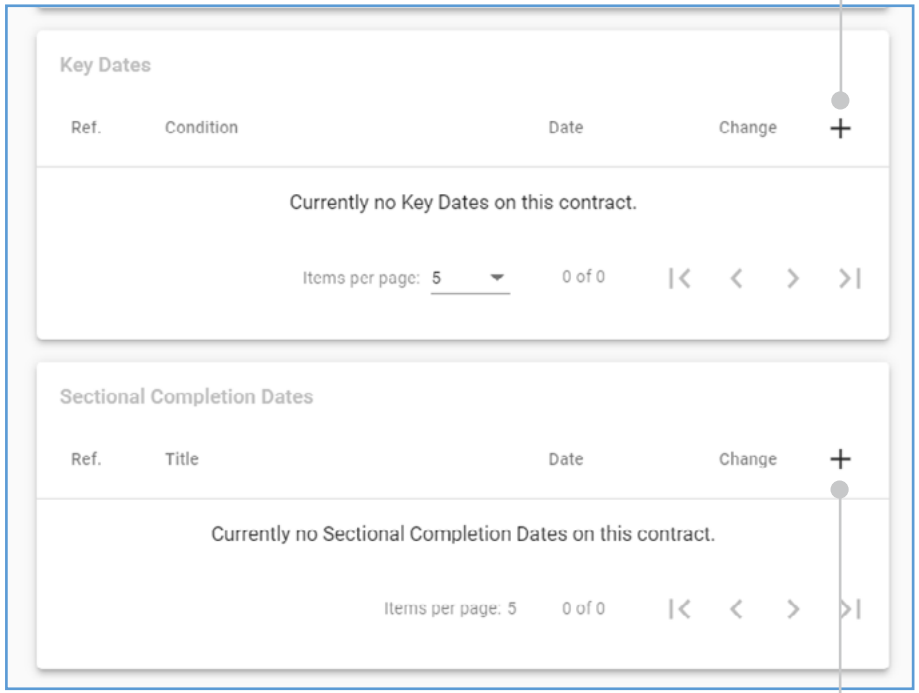
Contract Dates
To set and adjust the Contract dates, click on the calendar icon and select a date.

Defects Date
To set the defects date (in weeks) type the amount into the text box.

Actual Completion
Date Upon completion, the actual Completion Date can be set by selecting a date from the date picker.



Key Dates
To set key dates click the plus icon. This will show a pop-up window allowing you to input the Condition to be met, the current key date and a description of the key date. Select the key date by clicking on the drop-down button and selecting from the date picker.



Sectional Completion Date
To set sectional completion dates, click the plus icon and input the Title, the Current Date and a Description. Select the sectional completion date by clicking on the drop-down button and selecting from the date picker.

Amending Contract Details

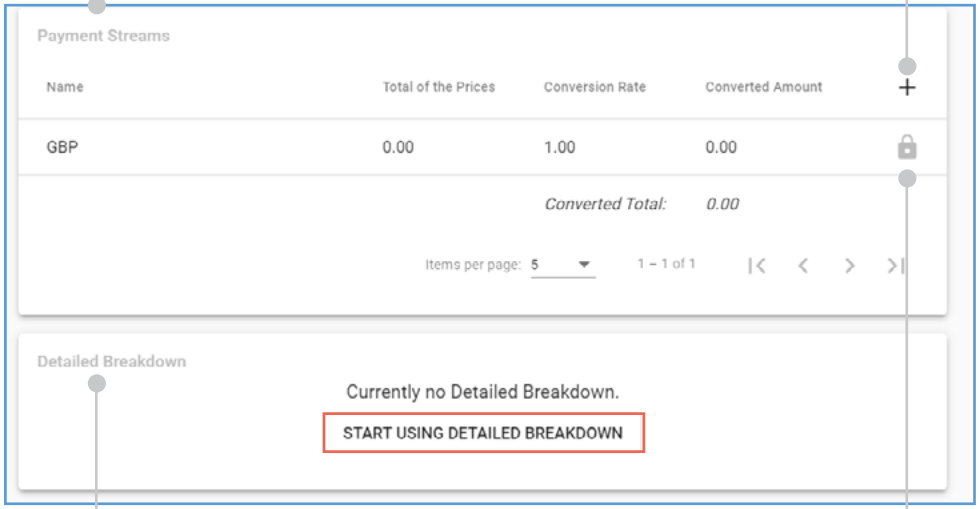
Click the Price tab to enter Price information.

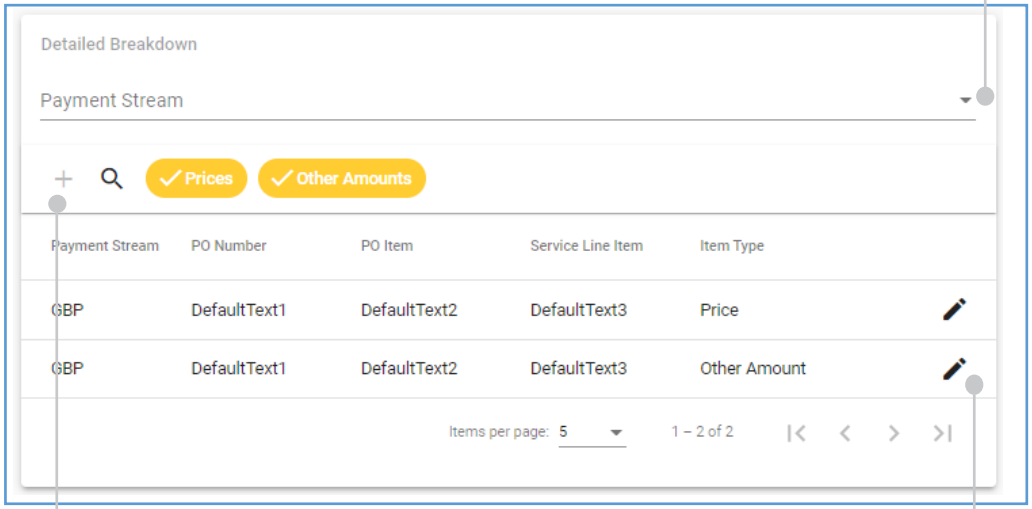
Payment stream
Each payment stream has its own 'amount due'. Multiple payment streams are used where several payment mechanisms or currencies are to be managed under a single contract and are currently utilised within payments and change control events.

Add new Payment Stream
To add a new payment stream select the plus symbol.

START USING DETAILED BREAKDOWN
Once this option is selected it will open the below.

Drop down
View the different payment streams on this contract by selecting from the drop down.





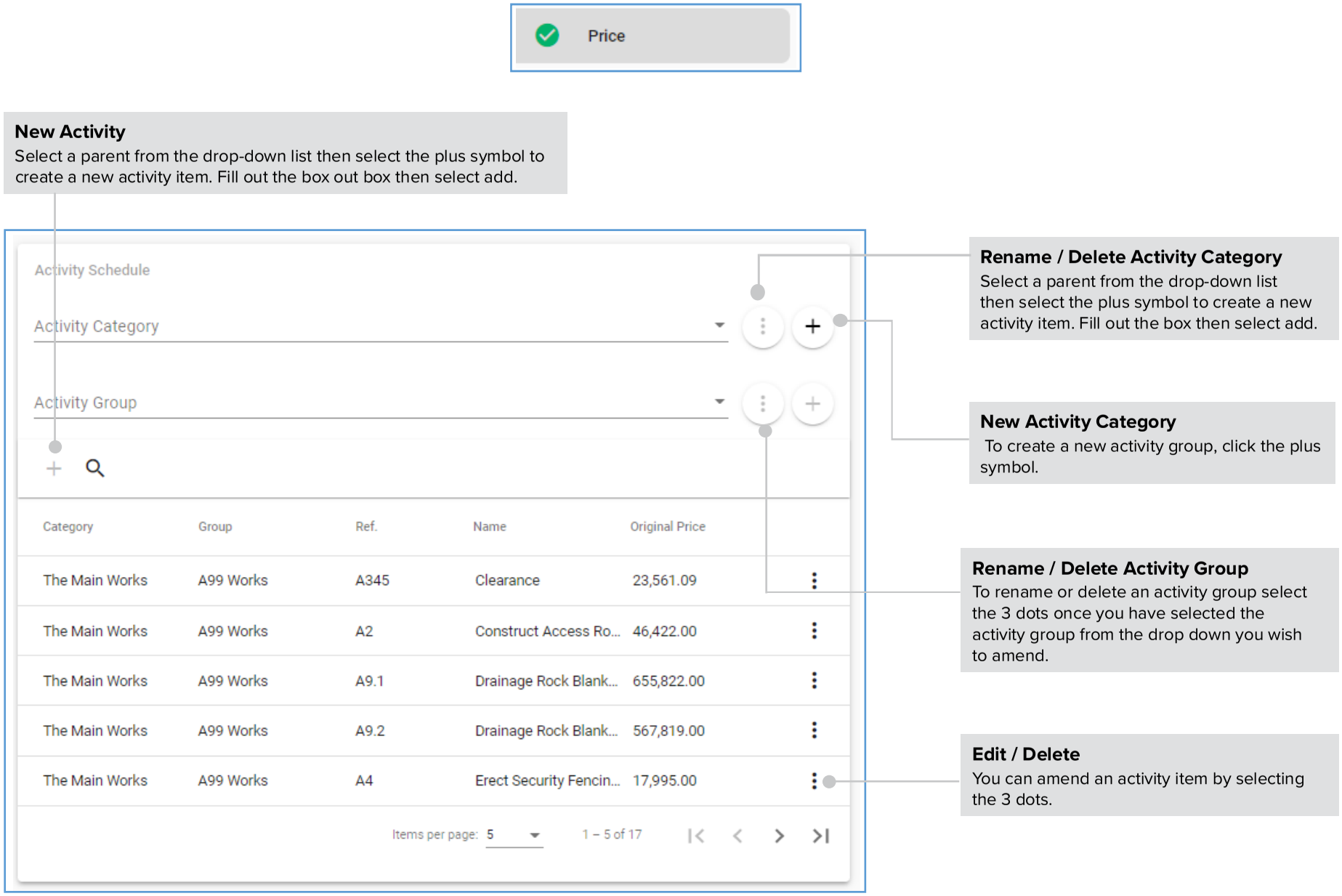
Detailed breakdown
Allows for the Price for Works Done to Date (PWDD), the Price for Services Provided to Date (PSPD), and other amounts to be built up from any number of detailed entries.

Padlock
This indicates that this cannot be edited as it is referenced in the contract.

Add Payment Stream Item
Select the plus symbol to add a payment stream item and then fill out the relevant information from the pop out box.

Edit
You can edit a payment stream item by selecting the pencil icon and then selecting update once complete.

Amending Contract Details



New Activity
Select a parent from the drop-down list then select the plus symbol to create a new activity item. Fill out the box out box then select add.

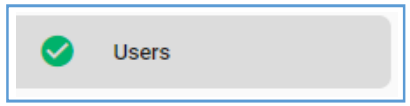
Rename / Delete Activity Category
Select a parent from the drop-down list then select the plus symbol to create a new activity item. Fill out the box then select add.

New Activity Category
To create a new activity group, click the plus symbol.

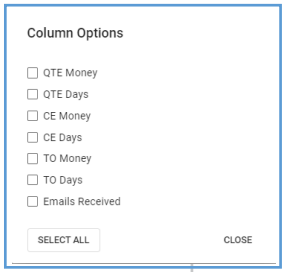
Rename / Delete Activity Group
To rename or delete an activity group select the 3 dots once you have selected the activity group from the drop down you wish to amend.

Edit / Delete
You can amend an activity item by selecting the 3 dots.

Amending Contract Details



To view user information and thresholds, click the Users tab.



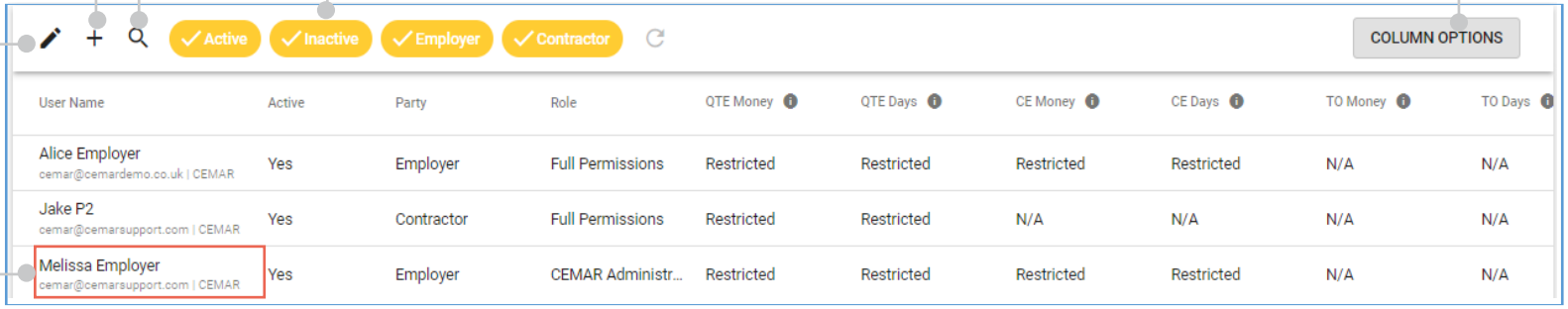
Add User
Select the plus button to create a new User to the contract.

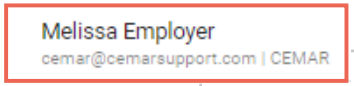
Search
Use the free text search bar to search for a specific user by their name.

Filters
Use these radio buttons to filter your User search by Active, Inactive, Employer and Contractor.

Column Options
Select this option to filter which columns you would like visible for the Users.

Edit Users
Select the pencil icon to edit the listed Users' Party, Role, Thresholds, Email Alerts and if they are active / inactive.





Username
You can view the Users Full Name, Email and Company.

Adding Users to a Contract

1. Select the plus symbol to add Users to the contract you have selected.

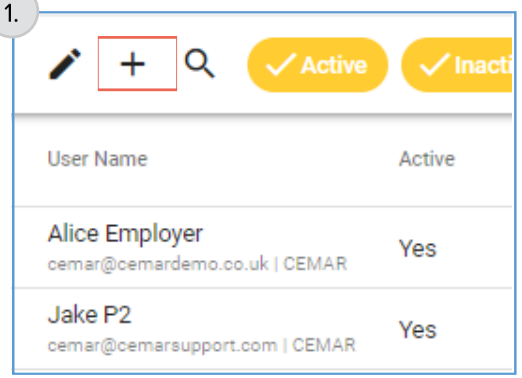
   This will load a list of Users in your environment that you can search through using the filtering arrows in the bottom right of the screen.

2. Select the tick boxes of the Users you wish to add to this contract and press **Confirm**.

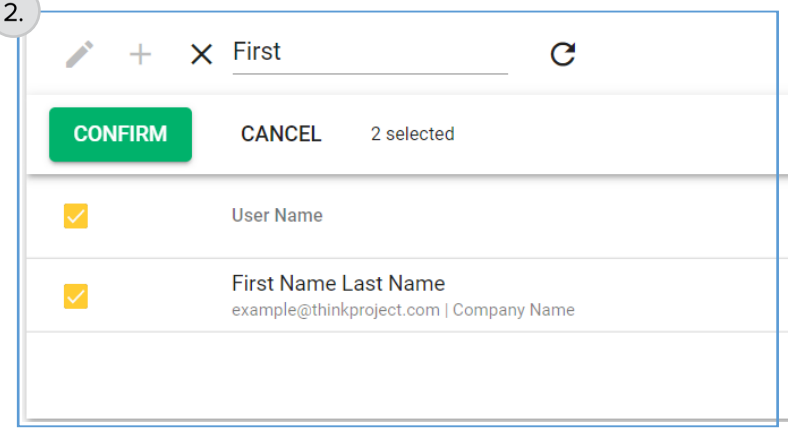
3. You will be prompted to input each User's Party which will then unlock the selection of the Role, Thresholds and if they would like Alerts (email alerts) on. You may need to scroll across to veiw all of these selections. If using the multi-contract tool, once you have input the desired data, select **Push to selection(s)** to automatically fill in the required fields.

4. Once finished, select **Submit**. The user will now be able to access the contract.

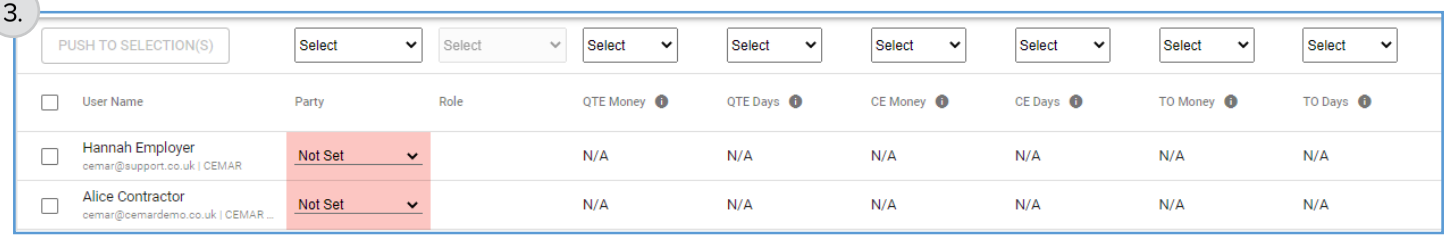
1.



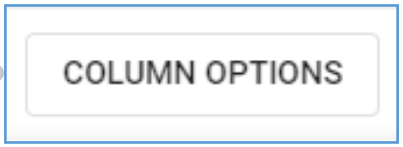
2.



3.



Tip:
Make sure you have selected all of the 'Column Options' for the User. You can do this by selecting the button located to the top right of the page.



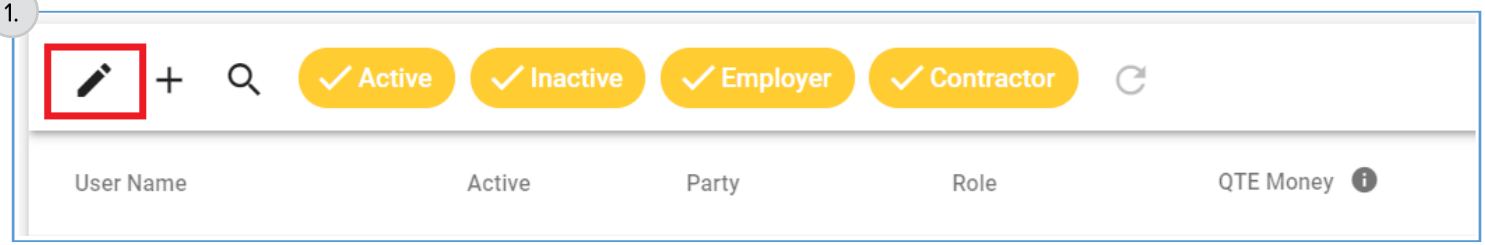
Managing a User's Role and Thresholds within a Contract

1. Select the pencil icon to amend a User's Role, Thresholds, Party and if they are active / inactive within the contract.

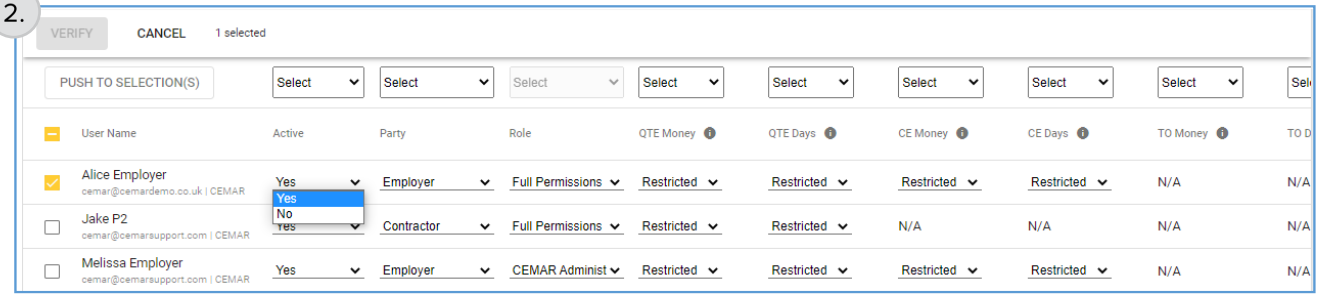
2. This will list all Users on this contract. You can then make the necessary amendments using the drop-down menus. Any changes you make will highlight in green. Once you have finished, select **Verify**.

3. If you are making the same change on several contracts, you can use the multi-contract tool bar. If you choose to do this, input the required changes into the multi-contract tool bar and then select the contracts you wish to push these changes to. Next, press **Push to selection(s)** followed by **Verify**.

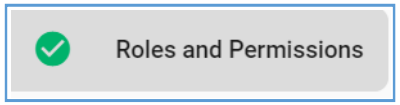
1.



2.



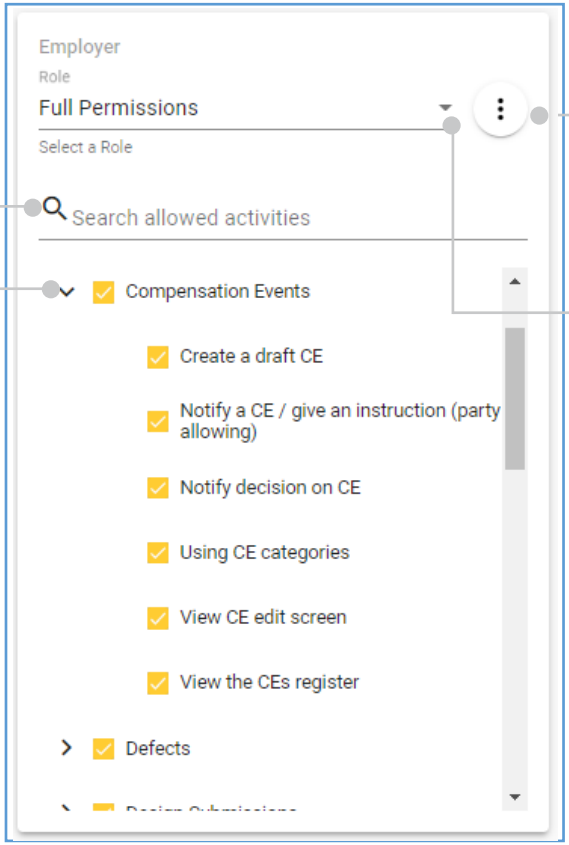
Managing a User's Role and Thresholds within a Contract



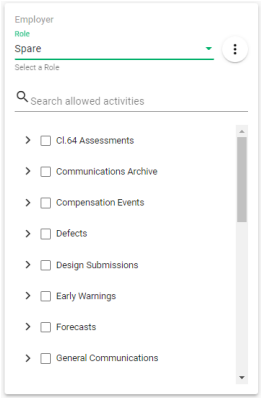
To view and adjust roles and permissions, click the Roles and Permissions tab

Search
Use the free text search bar to search for a role activity.

Adjust Permissions
To adjust the permissions for a role, first select a role from the drop down and then click the down arrow icon in the relevant section. Click on the checkbox next to the permission to turn it on and off. This will prompt you to save after each button click.

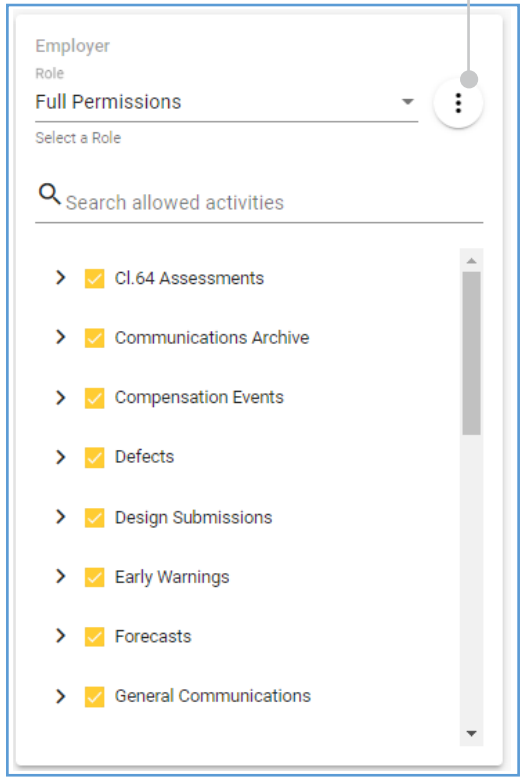


Edit Role Name
To adjust the role name, select the three dots and then click **Rename** and enter the new name into the pop-up box before clicking **Update**.



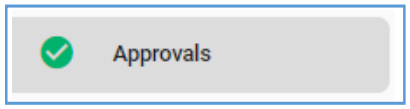
Spare Role
Each contract has numerous spare roles that you can rename and allocate the relevant activities for that role.

Cloning a Role
To clone a role name, select the three dots and then choose the option **Clone**.



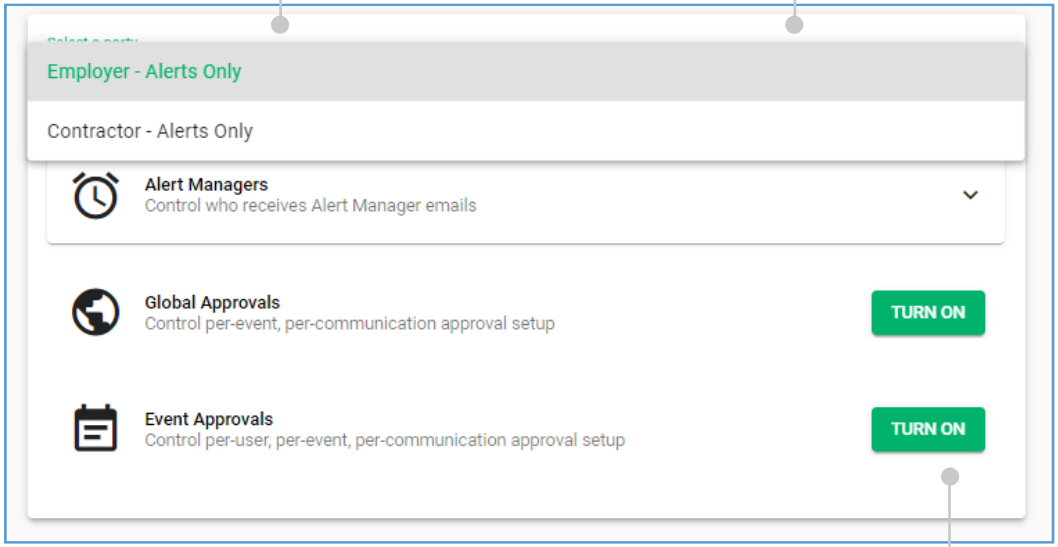
Save
After changes are made, click the Save button.

Managing a User's Role and Thresholds within a Contract



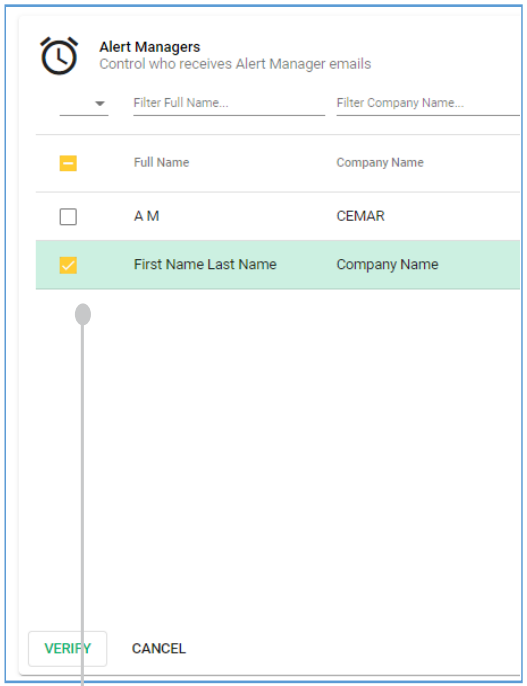
To view and adjust approvals, click the Approvals tab.

Select a Party
Select a Party from the two available options. Next to the Party it will state what Approval type they have set up on the contract.



Switching Approval Type
You are able to switch to a different Approval Type by selecting the **TURN ON** green button.

Alerts Only
This is the most basic approval structure with only one stage. Only one User is required to be assigned the role of Alerted Manager, however, it is possible to nominate multiple Users if required.



Select the Alerted Managers
Select the alerted managers from a list of Users attached to the Contract by clicking the check box next to their name. When complete, click **Submit**.

Global Approvals

This approval structure introduces an additional stage to the approvals process, creating a role for Approvers which is beyond that of the Alerted Managers.

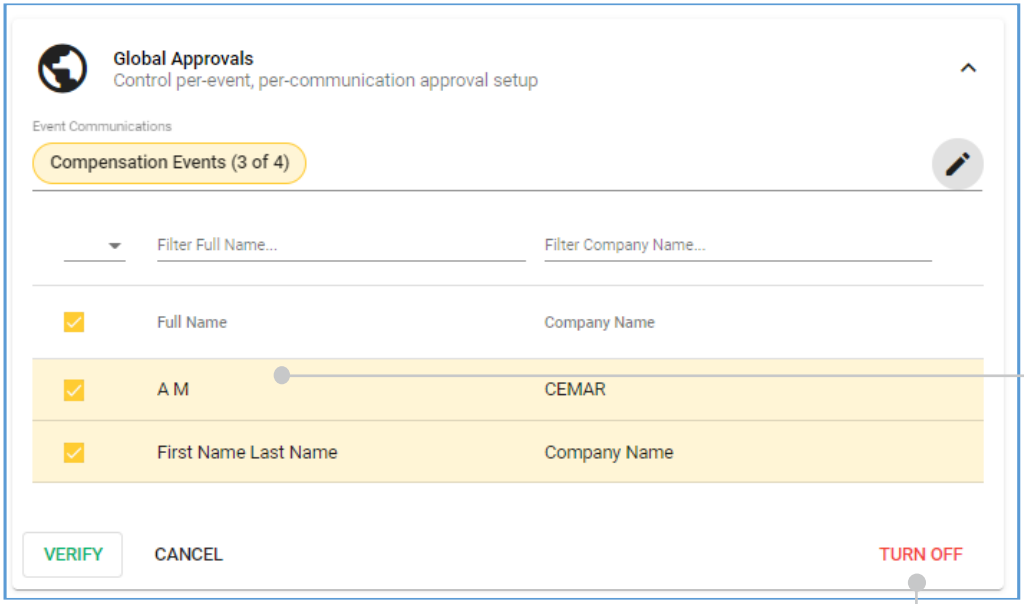
Alerted Managers may be selected and multiple Delegates. Any Approver Delegates can approve an event. This structure also allows you to nominate specific communication types that require this level of approval. Any communication types not nominated will simply be governed by roles and thresholds (see the alerts only process above).

1.

Select the Alert Managers
Expand this box and select the alerted managers from a list of Users attached to the Contract by clicking the checkbox next to their name. When complete, click **Verify**.

2.

Select the communication type
Select the pencil icon to select the communication for approval by a named approver and / or the approver delegates. In this example, notifying a compensation event has been selected so every User will require approval (from the named approver and or the approver delegates) before the event can be notified. When complete, click **Submit**.



Select the Approvers Delegates
We've simplified our global approval structure, so that you now only select the Users you want to be approvers - you no longer need to pick Named approvers. Select from the list of Users on this contract which Users you wish to be approver delegates by selecting the tick boxes and then **Verify**.

Turn Off
To turn off Global Approvals and change to just Alerts Only select this red **Turn Off** button.

Event Approvals

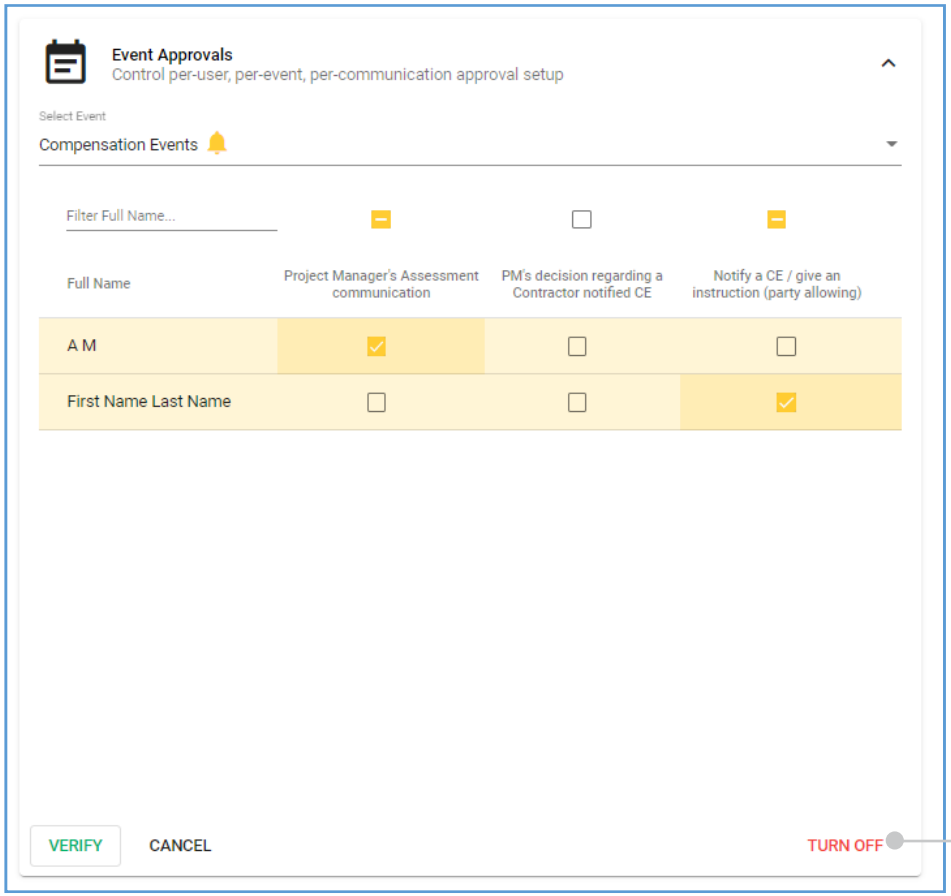
The Event Approvals structure, previously known as Contract Approvals, allows for the selection of specific Approvers for specific communication types. For example, you are able to select one Approver for sending an early warning, but a different Approver for accepting a quotation.

Note that within this approval structure, all nominated Approvers must provide approval for an event before it can be communicated (whereas global approvals requires approval from only one approver).

1. **Select the Alert Managers**
Expand this box and select the alerted managers from a list of Users attached to the Contract by clicking the checkbox next to their name. When complete, click **Verify**.

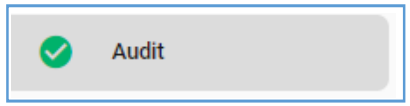
2. **Select the relevant communication(s) and Users type**
Select the pencil icon to select the communication(s) which will require approval by a specific User(s). In this example, notifying a compensation event has been selected and two Users have been ticked, multiple Users can be selected but this means every User will have to give approval before an event can be notified. Different events can have different approvers. When complete, click **update**.

3. **Verify**
Select **Submit** once complete.

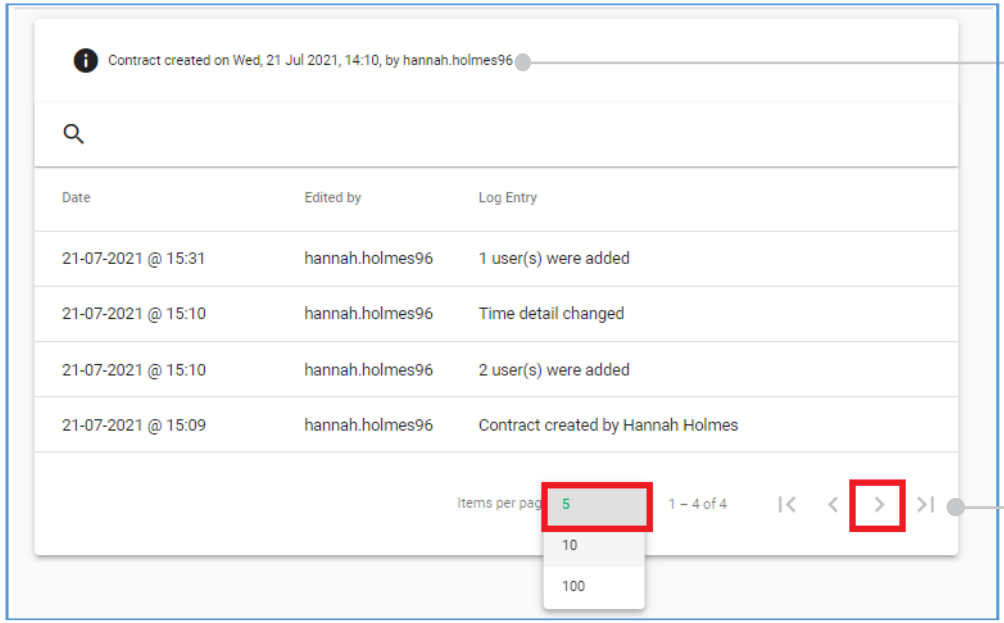


Turn Off
To turn off Event Approvals and change to just Alerts Only select this red **Turn Off** button.

Downloading the Contract Zip Archive

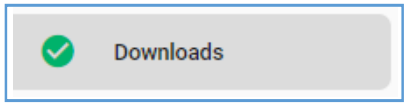


To view the Contract's audit history the select the Audit tab.

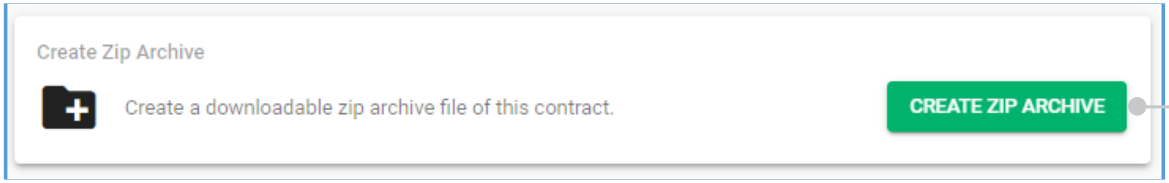


Contract Creation Date
Here you can view the date that the contract was created on and by whom.

Increasing Items Per Page
To increase the items listed on the page, select from the drop down or select the arrows to navigate to the next page.



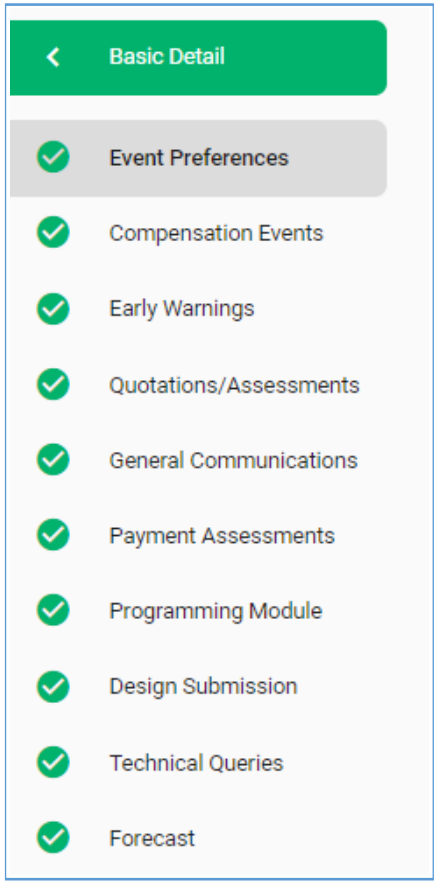
To download the Contract's Communications Archive select the Archive tab.

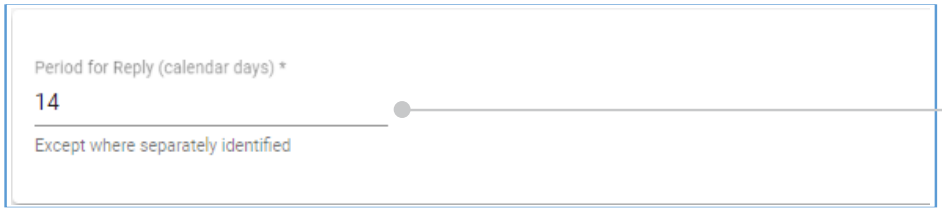


Download Comms Archive
The entire Archive can be downloaded by clicking on **Create Zip Archive.** This will download a Zip file of all contractual letters that have been written, including any attachments.

Event

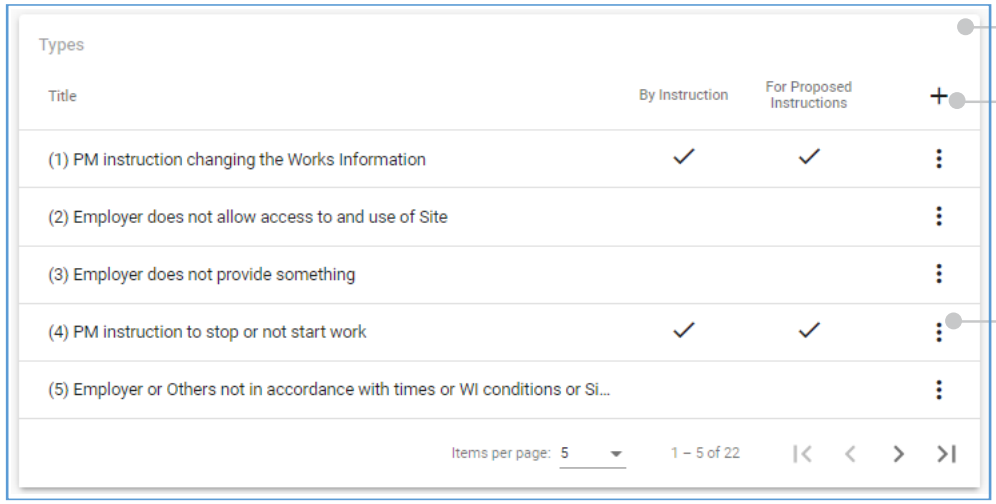
To view and edit Contract Events and preferences, click the Events tab. All of the different CEMAR modules are seperated and have event specific preferences listed within each.





Periods for Reply
This event preference is for the Period for Reply for all Events that are not specified in the modules listed below.

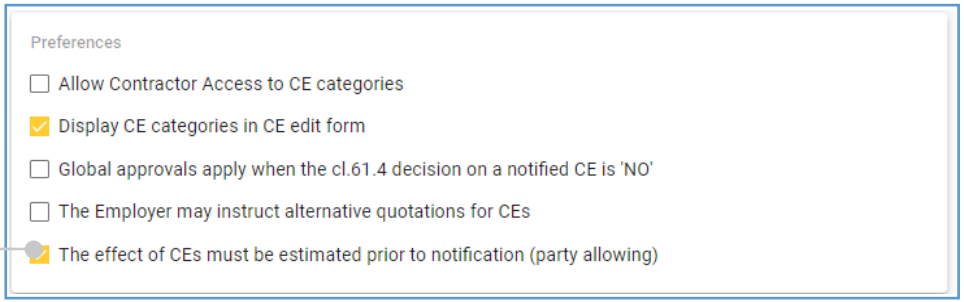
CE Types tab
Locate the Compensation Events tab to adjust the compensation event types. These may have been changed by any Z Clause amendments to the Contract.



New CE Type
To add a new compensation event type, click the plus symbol and fill in the pop-up box.

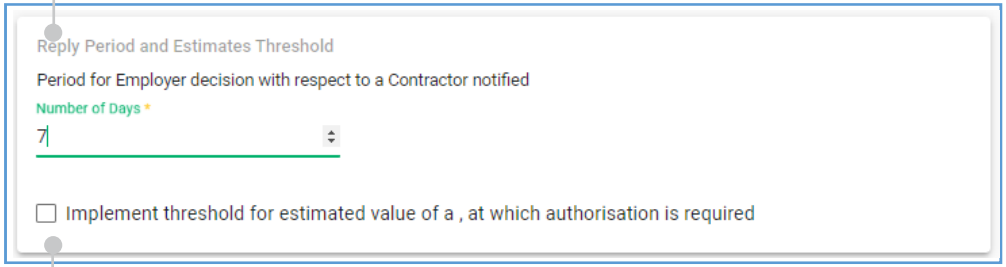
Edit / Remove CE Type
To edit a compensation event type, click the 3 dots and then select Rename or Deactivate.

Contract Preferences
There are several preferences which can be adjusted within CEMAR to help with the workflows and administration of your Contracts. Each module has its own set of preferences under each tab. To adjust the setting, check and uncheck the relevant boxes.

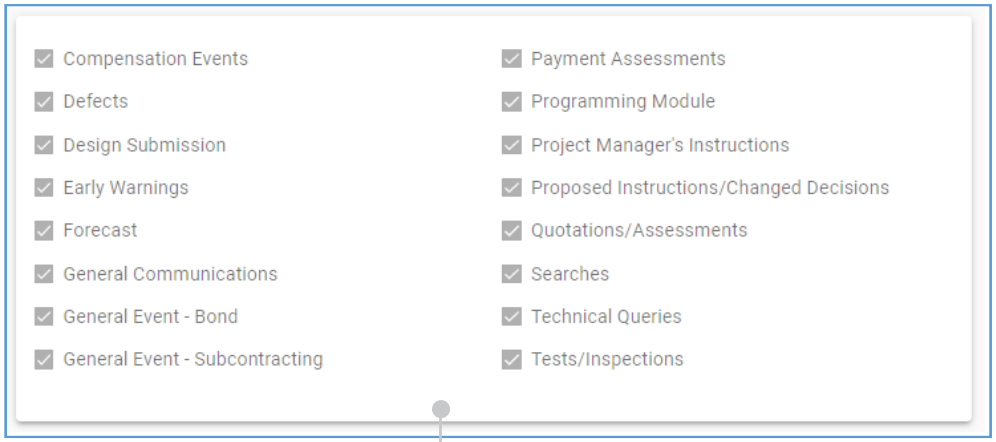


Event

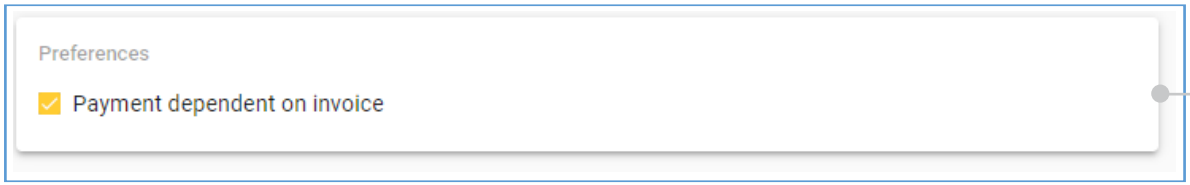
Periods for Reply
All the periods for reply can be adjusted by typing into the relevant text box and clicking save.



Thresholds
To adjust the thresholds on this entire Contract (not User by User) enter either -1 or 0 here. -1 indicates there is no threshold limit, whereas 0 will mean all compensation events and / or quotations will require authorisation.



Select from optional event types
If an event type is shown here in black it means it is optional on the Contract. To turn off and on event types, click the checkbox next to its name. If the event type is grey, it is not an option within the contract type.



Payment dependent on invoice
Select this tick box if you wish for the Payment to be dependent on invoice.

Notes

Notes

SUPERUSER
CEMAR ADMIN PANEL

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