

An aerial night view of a city, likely London, with a large bundle of fiber optic cables running through the center. The city lights are visible in the background, and the cables are illuminated from below, creating a glowing path through the urban landscape.

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



• **Built by experts**
Developed by construction industry practitioners with extensive NEC expertise

• **Alerts & reminders**
Countdowns and email alerts keep teams up-to-date



• **Compliant**
Easy, intuitive workflows ensure contractual compliance

• **Audit & archive**
Automatically archives correspondence to build an audit log



• **Real-time reporting**
CEMAR Analytics generates charts and dashboards for real-time reporting

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



• **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.

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Logging on

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

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

Website Address
To login, go to this web address.

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

Login

Username

Password

Submit

Forgotten 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 Type

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

Filter by Party

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

1

2

My Profile My Support Logout

Modules

My Contracts

Client Administrators Programme

CEMAR Admin Panel (BETA)

CEMAR Analytics

Lead & Learn

3

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
A09 Upgrade Works	Employer	FIDIC
Practice ECC Project	Employer	ECC
Practice ECS	Contractor	ECS
Steepleshire Community Housing Association	Employer	TSC
TSSC 23-7	Employer	TSSC

Main Menu

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.

Status	Full Name	Company Name	Username	Primary Tel
	Alice Contractor	CEMAR Contractor	alice.test.contractor	0
	Alice Employer	CEMAR	alice.test.employer	0
	Hamah Employer	CEMAR	hamah.employer	0
	Jake P2	CEMAR	JakeBish	0

CEMAR Demonstration Environment
MAIN CONTACT: CEMAR

- Basic Details
- Associations
- Change Control Categories
- Audit

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

Basic Details

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

Company Name
CEMAR Demonstration Environment
Max 200 characters 31 / 200

Main Contact
CEMAR
Max 200 characters 5 / 200

Contact Phone
01452 547140
Max 50 characters 12 / 50

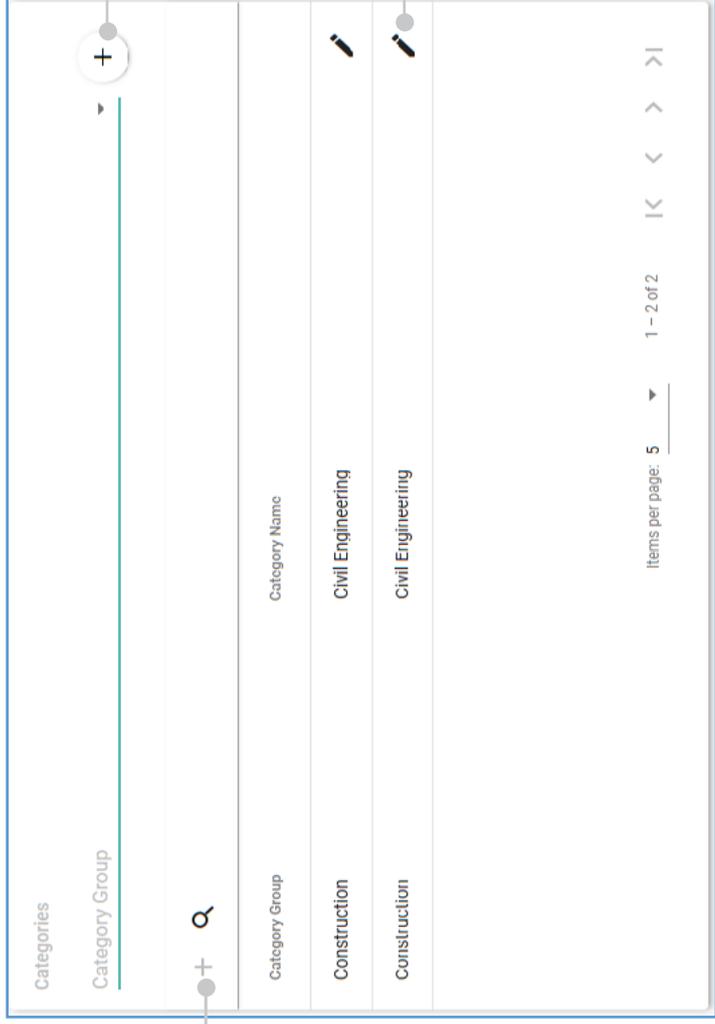
Updating Client information
All fields are editable. Here you can edit any Company details.



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
Select this plus icon to add a new Category.

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

Rename Category
Select the pencil icon to rename a Category.

Add Child Framework

Select this plus icon to add a new Child Framework.

The screenshot shows a list of Frameworks under the heading 'Frameworks'. Below the heading is a search icon and a plus icon. A dropdown menu is open, showing 'Asset Management Programme (AMP)' and a sub-item '+ ADD CHILD FRAMEWORK'. Below this are several AMP categories (AMP4, AMP5, AMP6, AMP7) and 'Control Period (CP)' and 'Telecoms'.

Add Framework

Select this plus icon to add a new Framework.

The 'Add Framework' modal form contains the following fields and options:

- Framework Name *
- Framework Name (input field)
- Max 200 characters
- 14 / 200
- Is Active
-
-

Edit Framework name

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

The 'Add Division' modal form contains the following fields and options:

- Division Name *
- Division Name (input field)
- Max 200 characters
- 13 / 200
-
-

Add Division

Select this plus icon to add a new Division.

The screenshot shows a list of Divisions under the heading 'Divisions'. Below the heading is a search icon and a plus icon. A dropdown menu is open, showing 'Highways' and 'North West & Central'. A pencil icon is visible next to 'North West & Central'.

Rename Division

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

Add Site

Site Name *

Site Name (input field)

Max 200 characters

9 / 200

Add New Site

Select this plus icon to add a new Site.

The screenshot shows a list of Sites under the heading 'Sites'. Below the heading is a search icon and a plus icon. A dropdown menu is open, showing 'East' and 'North'. A pencil icon is visible next to 'North'.

Rename Site

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

Change Control Categories

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

Change Control Categories

+ Q

Name	
Capital Grant	
Emergency Labour Charges	
Identified Saving	
Internal Contingency	
Provisional Item	

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.

Add Control Category

Control Category Name *

Control Category

Max.200 characters 16 / 200

CANCEL

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

Audit

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

Q

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.

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

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

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

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.

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

Search for Full Analytics Users only.

These symbols indicate 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.

Status	Full Name	Company Name	Username	Primary Tel
	Alice Contractor	CEMAR Contractor	alice.test.contractor	0
	Alice Employer	CEMAR	alice.test.employer	0
	Hannah Employer	CEMAR	hannah.employer	0
	Jake P2	CEMAR	JakeBish	0
	Jess P1	CEMAR	JessBish	0
	Joe Bloggs	CEMAR	123Joe.Bloggs	0
	Melissa Contractor	CEMAR	MktestC	0

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.

First Name Last Name
 Example:Name
 Super User
 Last logged in on
 Wed, 10 Jun 2020, 21:44

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

The date and time the User last logged into CEMAR.

Basic Details

1.

Associations

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

Status

Active

Unlocked

DEACTIVATE

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.

Contact

First Name

Last Name

Email

Phone

Mobile

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

2.

Select associations

Search associations

Frameworks

EXPAND ALL

> Control Period (CP)

> Asset Management Programme (AMP)

Telecoms

Framework A

Framework B

NW&C

Lot

Categories

Sites

REMOVE ALL

UPDATE

CANCEL

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

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.

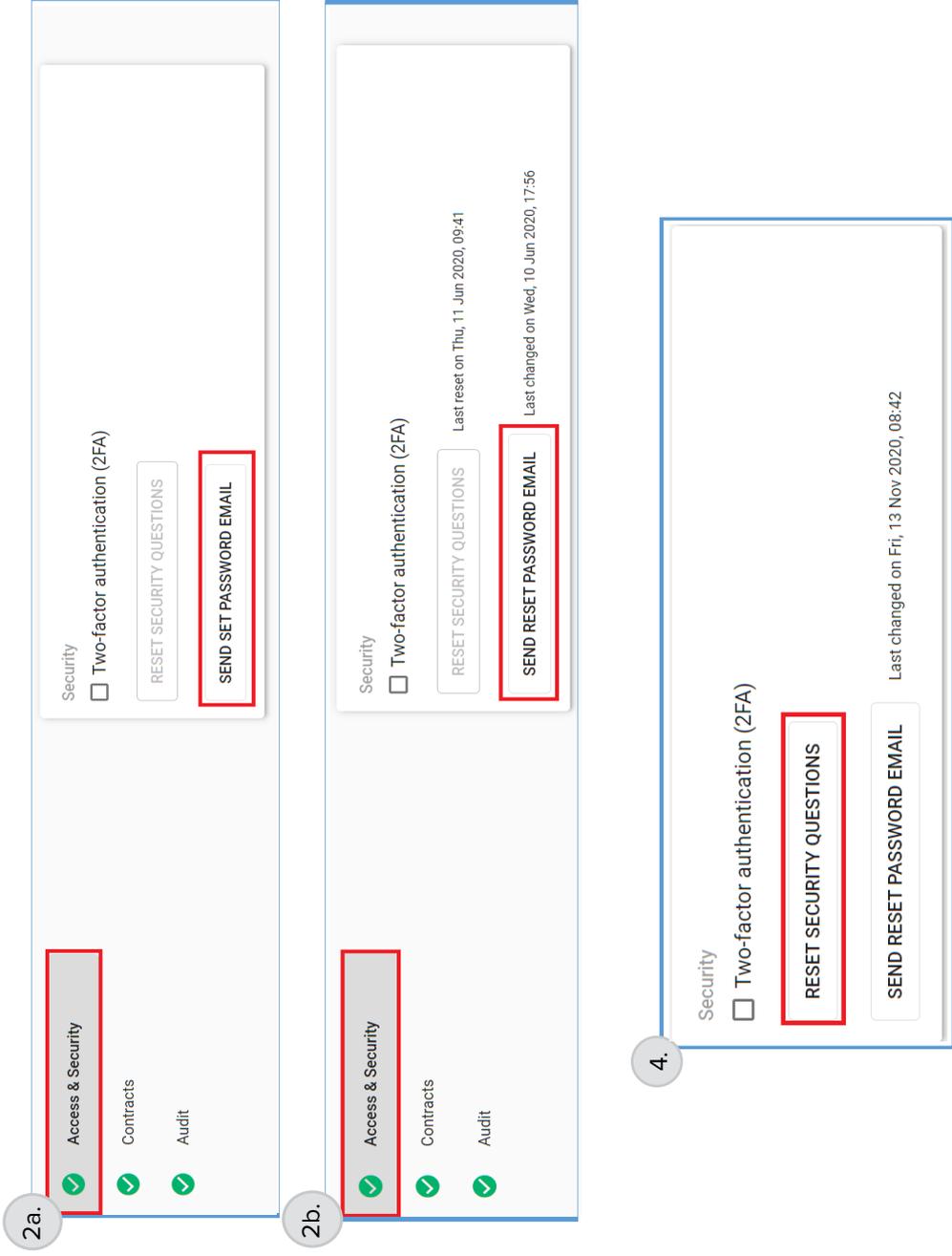
- a) If the User has not accessed their account before, select **Set Password** followed by **Email User**.
- b) If they are an existing User, but need some assistance with resetting their password, select **Reset Password** followed by **Email User**.

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.

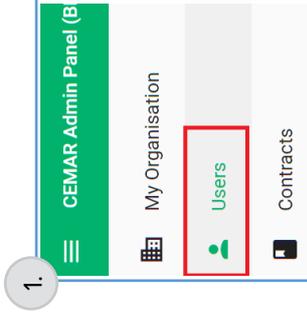


The screenshot shows the 'Access & Security' tab in a user profile. It is divided into two parts, 2a and 2b, and a final step 4.

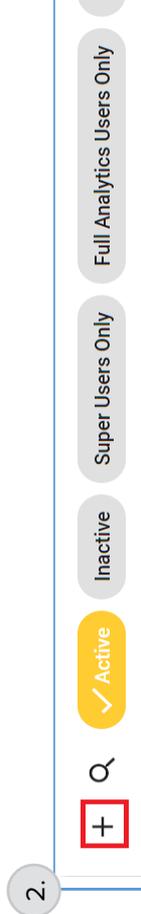
- 2a.** Shows the 'Access & Security' tab selected. Below it are three status indicators: 'Access & Security' (checked), 'Contracts' (checked), and 'Audit' (checked). A red box highlights the 'Access & Security' tab. To the right, under the 'Security' heading, there is a checkbox for 'Two-factor authentication (2FA)' which is unchecked. Below this is a button labeled 'RESET SECURITY QUESTIONS'. A second red box highlights a button labeled 'SEND SET PASSWORD EMAIL'.
- 2b.** Shows the same 'Access & Security' tab. The 'Two-factor authentication (2FA)' checkbox is now checked. Below it is a button labeled 'RESET SECURITY QUESTIONS'. A red box highlights a button labeled 'SEND RESET PASSWORD EMAIL'. To the right of this button, it says 'Last reset on Thu, 11 Jun 2020, 09:41'. Below that, it says 'Last changed on Wed, 10 Jun 2020, 17:56'.
- 4.** Shows the 'Access & Security' tab. The 'Two-factor authentication (2FA)' checkbox is unchecked. A red box highlights a button labeled 'RESET SECURITY QUESTIONS'. Below it is a button labeled 'SEND RESET PASSWORD EMAIL'. To the right of this button, it says 'Last changed on Fri, 13 Nov 2020, 08:42'.

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.



The screenshot shows the 'Create User' form. A red circle with the number '3.' is positioned at the top left of the form area. The form contains the following fields and options:

- Username ***: Text input field, Max 50 characters, 0 / 50.
- First Name ***: Text input field, Max 75 characters, 0 / 75.
- Last Name ***: Text input field, Max 75 characters, 0 / 75.
- Email ***: Text input field, Max 256 characters, 0 / 256.
- Phone ***: Text input field, Max 50 characters, 0 / 50.
- Mobile**: Text input field, Max 50 characters, 0 / 50.
- Company ***: Text input field, Max 150 characters, 0 / 150.
- Analytics Access**: Radio buttons for 'None' (selected), 'Restricted', and 'Full'.
- Enable Two-Factor Authentication (2FA)**

Buttons for 'CREATE' and 'CANCEL' are located at the bottom right of the form.

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.

Contract Name	Active
A99 Design Works (Option G) Practice Consultant	No

6.

Contract Name	Party	Role	QTE Money	QTE Days	CE Money	CE Days	TO Money	TO Days
Practice contract title Practice Contractor	Not Set	Not Set	N/A	N/A	N/A	N/A	N/A	N/A
Practice contract title 2 Practice Contractor	Not Set	Not Set	N/A	N/A	N/A	N/A	N/A	N/A

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).

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.

Restricted	▼
Select	
Restricted	
Unlimited	
Enter Value	

+ X practice

CANCEL 2 selected | 3 edits have errors

practice

Active

Practice

Contract Type

Association

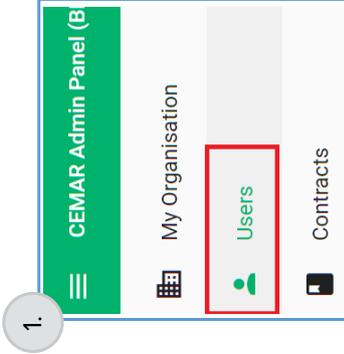
PUSH TO SELECTION(S)
Employer
Full Permissions
Unlimited
Unlimited
Unlimited
Unlimited
Unlimited

Contract Name	Party	Role	QTE Money	QTE Days	CE Money	CE Days	TO Money	TO Days
Practice contract title Practice Contractor	Not Set		N/A	N/A	N/A	N/A	N/A	N/A
Practice contract title 2 Practice Contractor	Not Set		N/A	N/A	N/A	N/A	N/A	N/A

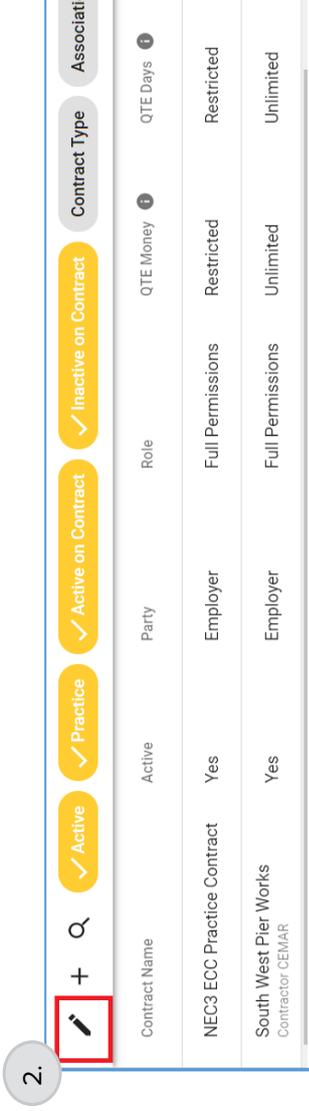
COLUMN OPTIONS

Managing a User's Roles and Thresholds

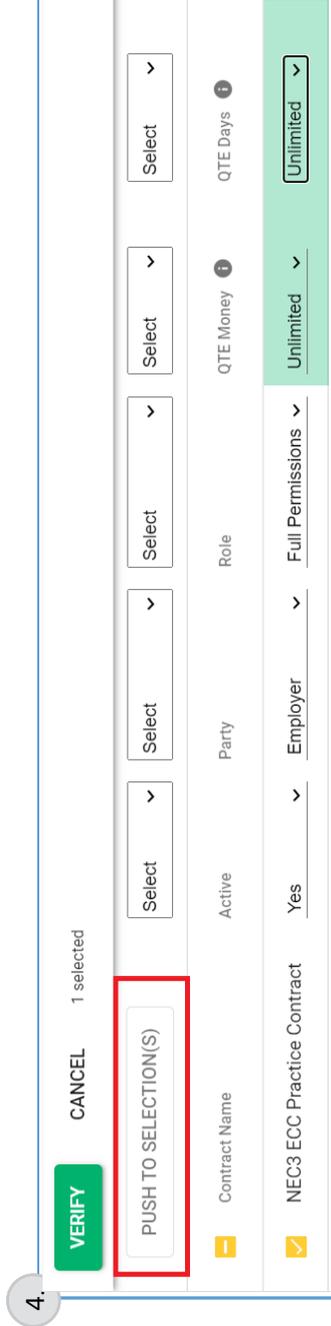
1. Access the required User's contract area by selecting them from the User list and selecting the pencil icon, followed by the Contracts tab.



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**.

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**.

-
- | Contract Name | Active | Party | Role | OTE Money | OTE Date | Associate |
|---|--------|------------|---------------------|-----------|----------|-----------|
| A99 Design Works (Option 6) Practice Contract | No | Employer | Inactive Users Role | N/A | N/A | |
| A99 Estimators Subcontract Practice Subcontract | No | Contractor | Inactive Users Role | N/A | N/A | |

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.

CEMAR Admin Panel (BETA)

My Organisation
Users
Contracts

Search: + [Search Bar] [Active] [Archived] [Practice] [Contract Type] [Association] [Sort by Framework]

Type	Name	P2 Company Name	Price	Start Date	End Date	P1 Approval Type	P2 Approval Type
NEC3 FSC	A99 Design Works (Option G)	Practice Consultant	2,000,000.00	20-10-2017	20-10-2017	Alerts Only	Alerts Only
NEC3 ECS	A99 Earthworks Subcontract	Practice Subcontractor	1,000,000.00	01-08-2018	06-12-2022	Alerts Only	Alerts Only
NEC4 PSC	A99 Steepletown Design Works	Consultant	8,000,000.00	07-01-2019	26-05-2021	Alerts Only	Alerts Only
NEC3 ECC	A99 Steepletown Link Road - Section 1 (General Events + Invoicing)	Practice Contractor	1,840,000.00	22-12-2017	07-03-2030	Alerts Only	Alerts Only
NEC3 ECC	A99 Steepletown Link Road - Section 2 (Multiple Streams for Compensation Events)	Practice Contractor	13,283,299.00	04-01-2018	01-06-2025	Alerts Only	Alerts Only
NEC3 ECC	A99 Steepletown Link Road - Section 3 (Detailed breakdown, single)	Practice Contractor	1,234,567.00	02-01-2018	16-12-2023	Alerts Only	Alerts Only
NEC3 ECC	A99 Steepletown Link Road - Section 3 (Tagging + Detailed breakdown, multiple)	Practice Contractor	13,852,574.00	02-01-2018	17-04-2024	Alerts Only	Alerts Only
NEC3 ECS	A99 Tarmac Subcontract	Practice Subcontractor	2,000,000.00	22-02-2018	19-01-2023	Alerts Only	Alerts Only
NEC4 ECC	Airport Upgrade Project	Practice Contractor	25,000,000.00	01-08-2018	31-03-2027	Alerts Only	Alerts Only
NEC3 ECC	DEMO CONTRACT 1	Practice Contractor	0.00	01-07-2021	25-06-2025	Alerts Only	Alerts Only

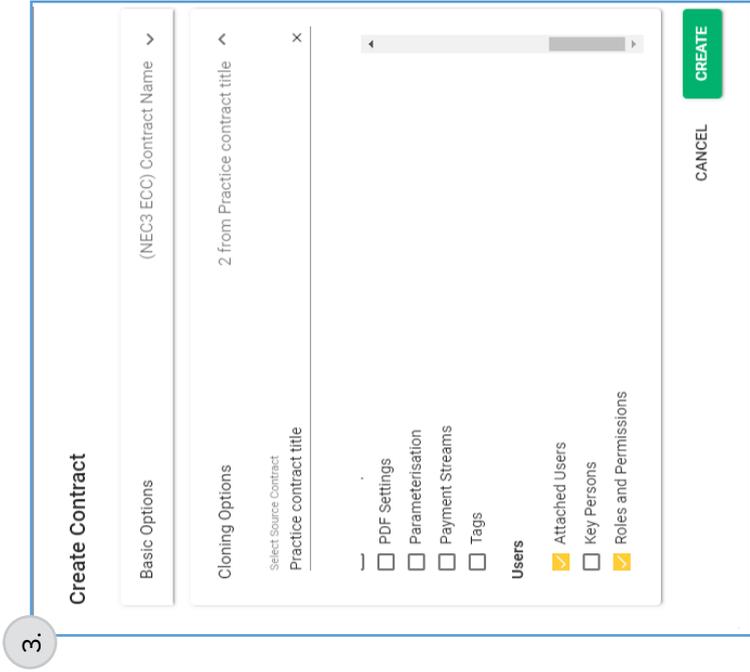
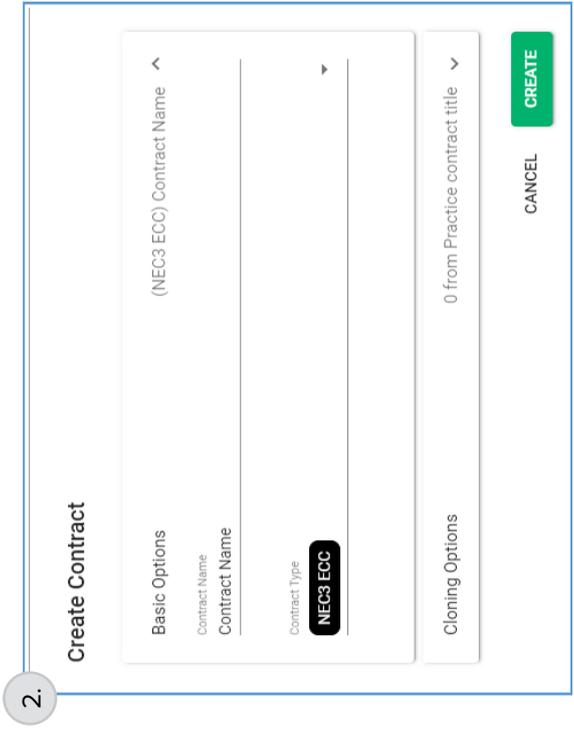
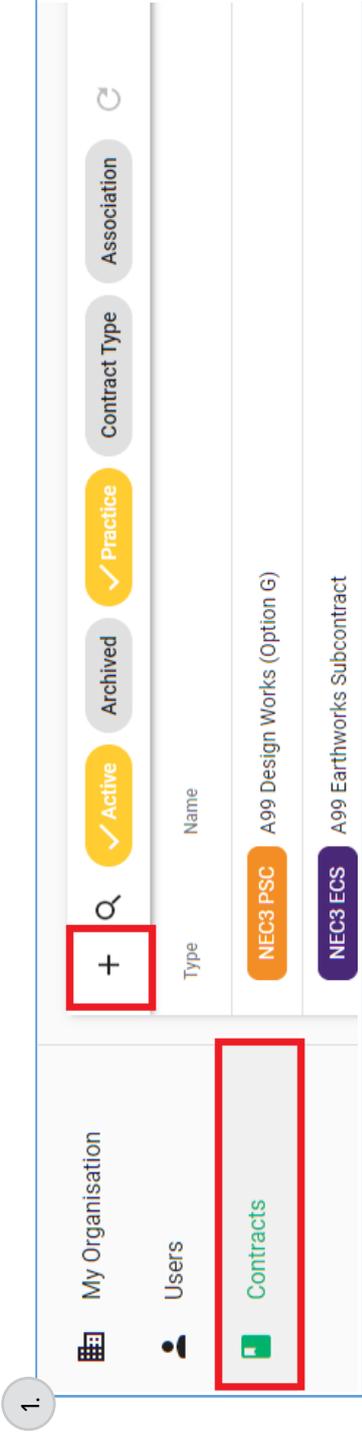
Hannah Holmes

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**, 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.



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.

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

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.

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.

Version 2.0

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Amending Contract Details



Click the Parties tab to enter Party information.

Key Personnel
Project Manager
A M

Contractor's manager
Adam Deeks

Supervisor not used

Employer
Organisation
Practice Employer

Address Line 1
Address

Address Line 2

Address Line 3

Town
Town

County
County

Postcode
Postcode

Phone

Contractor
Organisation
Practice Contractor

Address Line 1
Address

Address Line 2

Address Line 3

Town
Town

County
County

Postcode
Postcode

Phone

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.

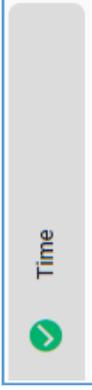
Party 2 information
Input Party 2 client information here.

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.

Employer Letterhead

Contractor Letterhead

Amending Contract Details



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

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.

Contract Dates

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

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.

Name	Total of the Prices	Conversion Rate	Converted Amount
GBP	0.00	1.00	0.00

Converted Total: 0.00

Items per page: 5 | 1 - 1 of 1

Detailed Breakdown

Currently no Detailed Breakdown.

START USING DETAILED BREAKDOWN

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.

START USING DETAILED BREAKDOWN

Once this option is selected it will open the below.

Detailed Breakdown

Payment Stream

Other Amounts

Payment Stream	PO Number	Service Line Item	PO Item	Item Type	Price	Other Amount
GBP	DefaultText1	DefaultText3	DefaultText2	DefaultText3	Price	Other Amount
GBP	DefaultText1	DefaultText3	DefaultText2	DefaultText3	Price	Other Amount

Items per page: 5 | 1 - 2 of 2

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 then select add.

Activity Schedule ▶

Activity Category ▶

Activity Group ▶

+ Q

Category	Group	Ref.	Name	Original Price
The Main Works	A99 Works	A345	Clearance	23,561.09
The Main Works	A99 Works	A2	Construct Access Ro...	46,422.00
The Main Works	A99 Works	A9.1	Drainage Rock Blank...	655,822.00
The Main Works	A99 Works	A9.2	Drainage Rock Blank...	567,819.00
The Main Works	A99 Works	A4	Erect Security Fencin...	17,995.00

Items per page: 5 1 – 5 of 17 < >

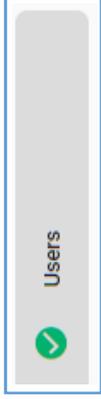
Rename / Delete Activity Category
 Select a parent from the drop-down list then select the plus symbol to create a new activity item. Fill out the box then select add.

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.

Edit Users

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

Melissa Employer

cemar@cemarsupport.com | CEMAR

Username

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

Column Options

- QTE Money
- QTE Days
- CE Money
- CE Days
- TO Money
- TO Days
- Emails Received

SELECT ALL

CLOSE

Column Options

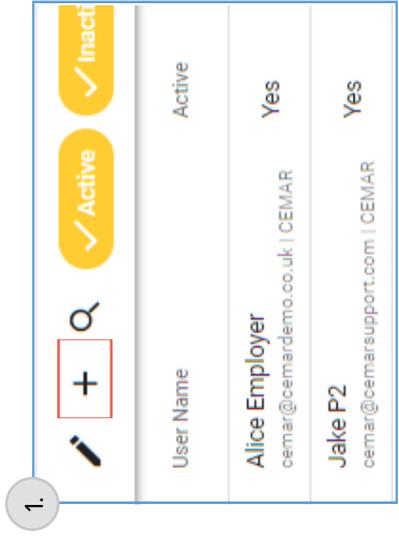
Select this option to filter which columns you would like visible for the Users.

User Name	Active	Party	Role	QTE Money	QTE Days	CE Money	CE Days	TO Money	TO Days
Alice Employer cemar@cemar-demo.co.uk CEMAR	Yes	Employer	Full Permissions	Restricted	Restricted	Restricted	Restricted	N/A	N/A
Jake P2 cemar@cemarsupport.com CEMAR	Yes	Contractor	Full Permissions	Restricted	Restricted	N/A	N/A	N/A	N/A
Melissa Employer cemar@cemarsupport.com CEMAR	Yes	Employer	CEMAR Administr...	Restricted	Restricted	Restricted	Restricted	N/A	N/A

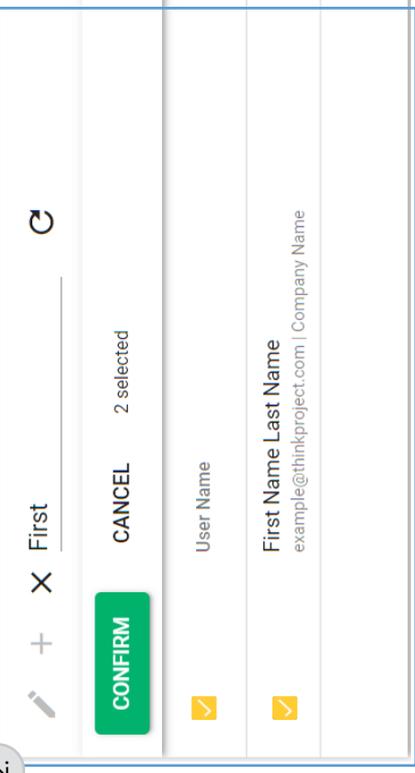
Adding Users to a Contract

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.

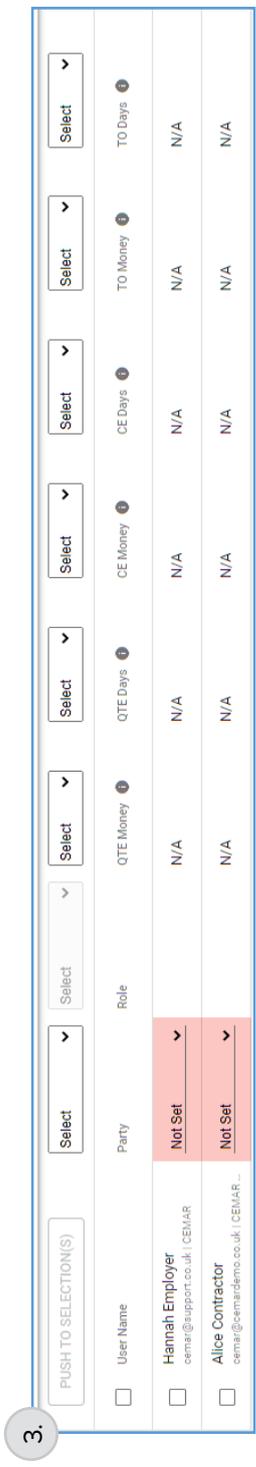


2.

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

3.

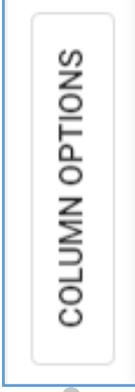
You will be prompted to input each User's Party which will then unlock the selection of the Role, Thresholds and if they would like Alerts (email alerts) on. You may need to scroll across to view all of these selections. If using the multi-contract tool, once you have input the desired data, select **Push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

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.

	User Name	Active	Party	Role	QTE Money	CE Money	CE Days	TO Money	Sell
<input checked="" type="checkbox"/>	Alice Employer cema@gemardemo.co.uk CEMAR	Yes	Employer	Full Permissions	Restricted	Restricted	Restricted	N/A	N/A
<input type="checkbox"/>	Jake P2 cema@gemarsupport.com CEMAR	No	Contractor	Full Permissions	Restricted	N/A	N/A	N/A	N/A
<input type="checkbox"/>	Melissa Employer cema@gemarsupport.com CEMAR	Yes	Employer	CEMAR Administ	Restricted	Restricted	Restricted	N/A	N/A

Managing a User's Role and Thresholds within a Contract

Roles and Permissions

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.

The screenshot shows the 'Roles and Permissions' interface. At the top, there is a search bar with a magnifying glass icon. Below it, the 'Full Permissions' section is visible, with a 'Search allowed activities' input field. A list of permissions is shown, including 'Compensation Events' with a checked checkbox, 'Create a draft CE', 'Notify a CE / give an instruction (party allowing)', 'Notify decision on CE', 'Using CE categories', 'View CE edit screen', and 'View the CEs register'. A 'Defects' permission is also visible with a checked checkbox. A three-dot menu icon is located at the top right of the permissions list.

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**.

The screenshot shows the 'Edit Role Name' interface. It features a search bar, a dropdown menu with 'Spare Role' selected, and a 'Search allowed activities' input field. A list of permissions is shown, including 'CL64 Assessments', 'Communications Archive', 'Compensation Events', 'Defects', 'Design Submissions', 'Early Warnings', 'Forecasts', and 'General Communications'. A three-dot menu icon is located at the top right of the permissions list.

Spare Role

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



Save

After changes are made, click the Save button.

Cloning a Role

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

The screenshot shows the 'Cloning a Role' interface. It features a search bar, a dropdown menu with 'Full Permissions' selected, and a 'Search allowed activities' input field. A list of permissions is shown, including 'CL64 Assessments', 'Communications Archive', 'Compensation Events', 'Defects', 'Design Submissions', 'Early Warnings', 'Forecasts', and 'General Communications'. A three-dot menu icon is located at the top right of the permissions list.

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.

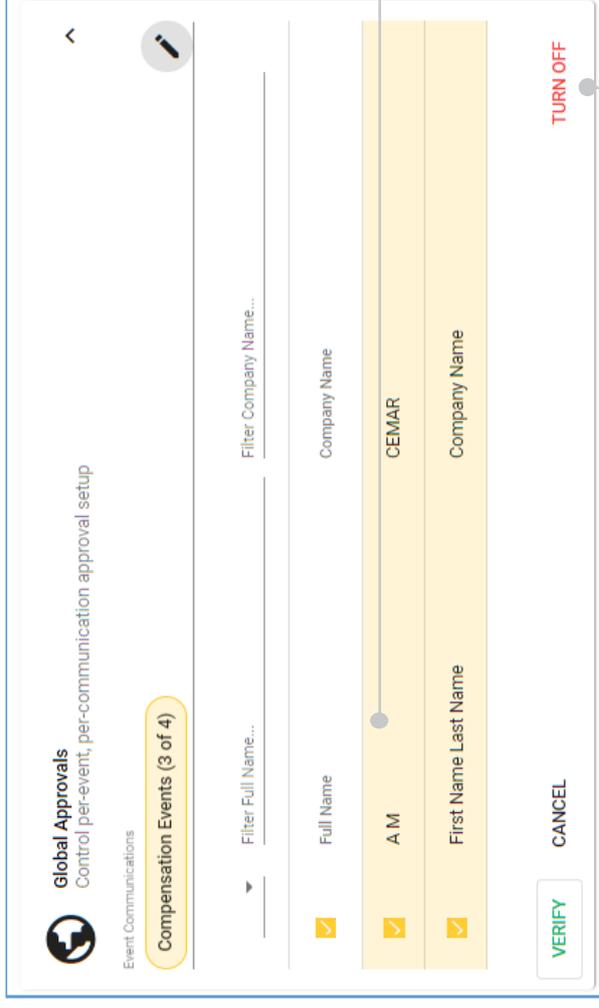
Select the Alert Managers

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**.



The screenshot shows the 'Global Approvals' interface. At the top, there's a header with a globe icon and the text 'Global Approvals' and 'Control per-event, per-communication approval setup'. Below this, there's a section for 'Event Communications' with a 'Compensation Events (3 of 4)' button. A search bar is present with 'Filter Full Name...' and 'Filter Company Name...' options. A table lists three communication types, each with a checked checkbox:

Full Name	Company Name
A M	CEMAR
First Name Last Name	Company Name

At the bottom of the table, there are 'VERIFY' and 'CANCEL' buttons. A red 'TURN OFF' button is located at the bottom right of the interface.

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.

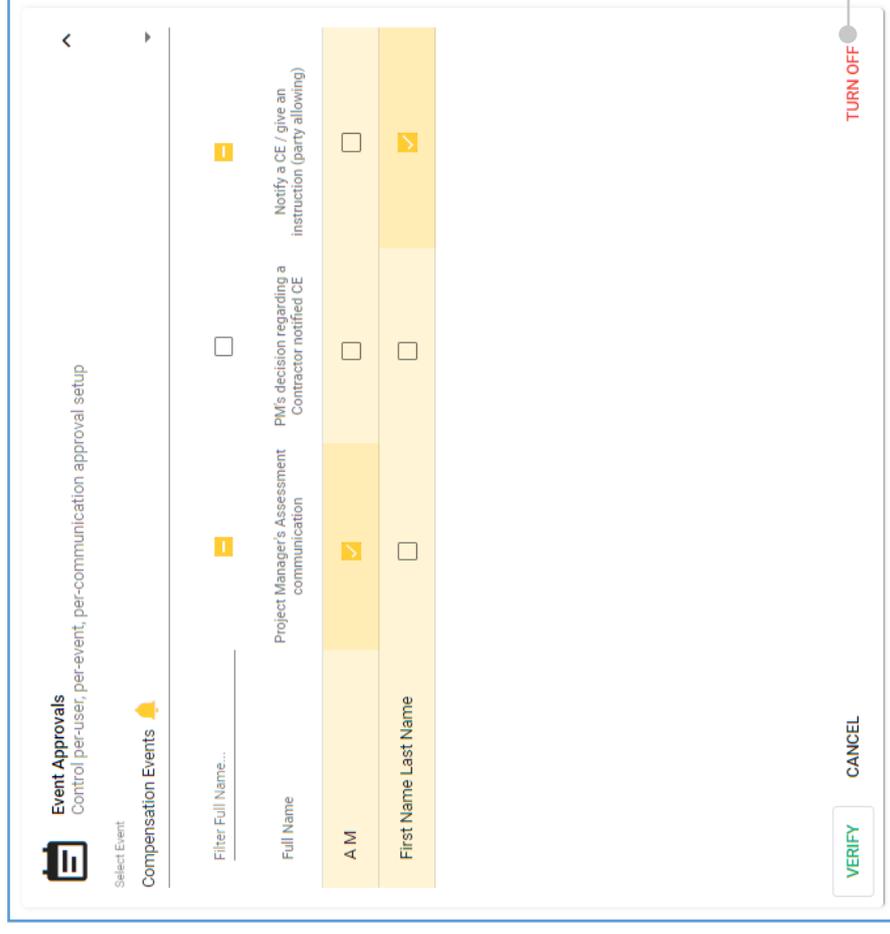
Select the relevant communication(s) and Users type

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.



The screenshot shows the 'Event Approvals' interface. At the top, there is a title 'Event Approvals' and a subtitle 'Control per-user, per-event, per-communication approval setup'. Below this is a 'Select Event' section with a 'Compensation Events' notification icon. A 'Filter Full Name...' input field is present. The main area is a table with columns: 'Full Name', 'Project Manager's Assessment communication', 'PM's decision regarding a Contractor notified CE', and 'Notify a CE / give an instruction (party allowing)'. The table has two rows: 'A M' and 'First Name Last Name'. The 'A M' row has a checked checkbox under 'Project Manager's Assessment communication' and an unchecked checkbox under 'Notify a CE / give an instruction (party allowing)'. The 'First Name Last Name' row has an unchecked checkbox under 'Project Manager's Assessment communication' and a checked checkbox under 'Notify a CE / give an instruction (party allowing)'. At the bottom right, there are 'VERIFY' and 'CANCEL' buttons. A red 'TURN OFF' button is located at the bottom right of the interface.

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.

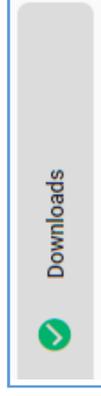
Date	Edited by	Log Entry
21-07-2021 @ 15:31	hannah.holmes96	1 user(s) were added
21-07-2021 @ 15:10	hannah.holmes96	Time detail changed
21-07-2021 @ 15:10	hannah.holmes96	2 user(s) were added
21-07-2021 @ 15:09	hannah.holmes96	Contract created by Hannah Holmes

Items per page: 5 (highlighted), 10, 100

1 - 4 of 4

< > >> <<

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.

Create Zip Archive

+ Create a downloadable zip archive file of this contract.

CREATE ZIP ARCHIVE

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 separated and have event specific preferences listed within each.

- Basic Detail
- Event Preferences
- Compensation Events
- Early Warnings
- Quotations/Assessments
- General Communications
- Payment Assessments
- Programming Module
- Design Submission
- Technical Queries
- Forecast

Period for Reply (calendar days) *

14

Except where separately identified

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.

Types	By Instruction	For Proposed Instructions
Title	✓	✓
(1) PM instruction changing the Works Information	✓	✓
(2) Employer does not allow access to and use of Site	✓	✓
(3) Employer does not provide something	✓	✓
(4) PM instruction to stop or not start work	✓	✓
(5) Employer or Others not in accordance with times or WI conditions or SL...	✓	✓

Items per page: 5 | 1 - 5 of 22

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.

Preferences

- Allow Contractor Access to CE categories
- Display CE categories in CE edit form
- Global approvals apply when the cl.61.4 decision on a notified CE is 'NO'
- The Employer may instruct alternative quotations for CEs
- The effect of CEs must be estimated prior to notification (party allowing)

Event



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

Reply Period and Estimates Threshold

Period for Employer decision with respect to a Contractor notified

Number of Days

Implement threshold for estimated value of a, at which authorisation is required

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.

Preferences

Payment dependent on invoice

<input checked="" type="checkbox"/> Compensation Events	<input checked="" type="checkbox"/> Payment Assessments
<input checked="" type="checkbox"/> Defects	<input checked="" type="checkbox"/> Programming Module
<input checked="" type="checkbox"/> Design Submission	<input checked="" type="checkbox"/> Project Manager's Instructions
<input checked="" type="checkbox"/> Early Warnings	<input checked="" type="checkbox"/> Proposed Instructions/Changed Decisions
<input checked="" type="checkbox"/> Forecast	<input checked="" type="checkbox"/> Quotations/Assessments
<input checked="" type="checkbox"/> General Communications	<input checked="" type="checkbox"/> Searches
<input checked="" type="checkbox"/> General Event - Bond	<input checked="" type="checkbox"/> Technical Queries
<input checked="" type="checkbox"/> General Event - Subcontracting	<input checked="" type="checkbox"/> Tests/Inspections

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

A series of horizontal dotted lines for writing notes.

SUPERUSER CEMAR ADMIN PANEL

CEMAR is a thinkproject product

thinkproject is a global leader in construction intelligence. Our digital technologies unlock the potential of people and information to help construct a better world.

www.thinkproject.com

