

ProCon Quick Guide

QG - Contract Communications and Obligations

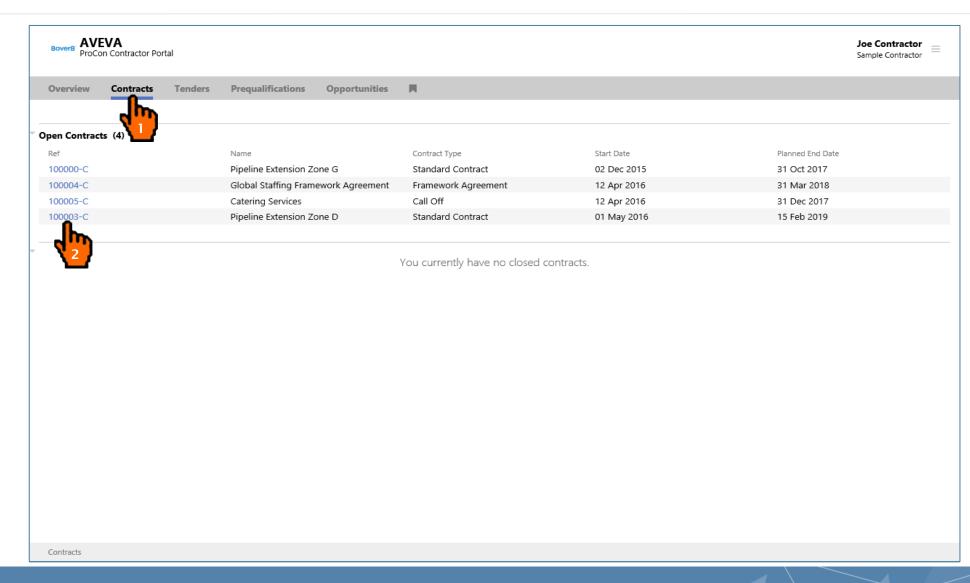
Professional Services





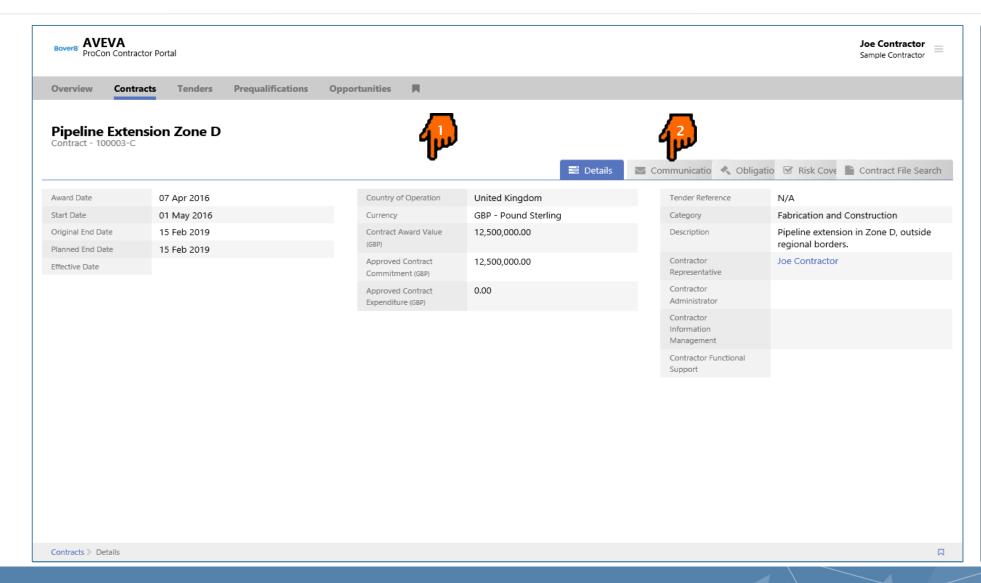
- 1. Creating and Sending Communications
- 2. Replying to a Communication
- 3. Creating a Revision to a Communication
- 4. Agreeing to a Communication
- 5. Contract Obligations





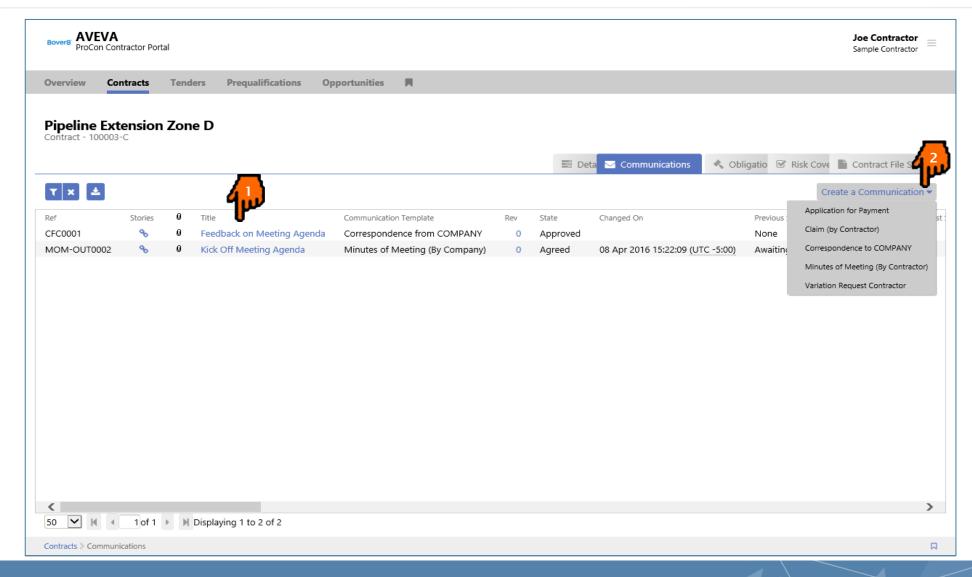
- 1. Click the Contracts tab to access open and closed Contracts.
- Select the Contract you want to view.Once selected the Contract details will be displayed.





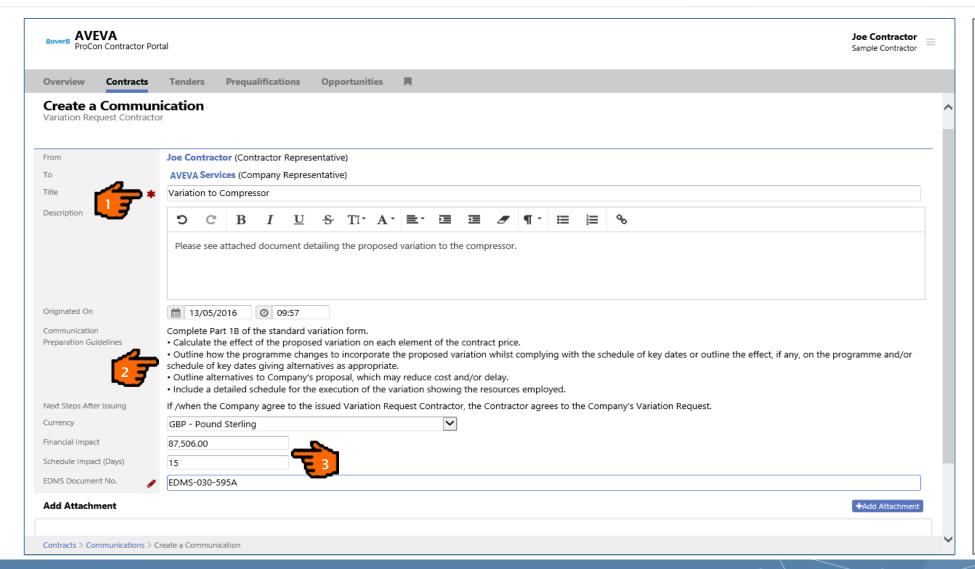
- 1. The Contract Details page displays summary information relating to the Contract.
- 2. Click on the Communications tab to navigate to the Communications page.



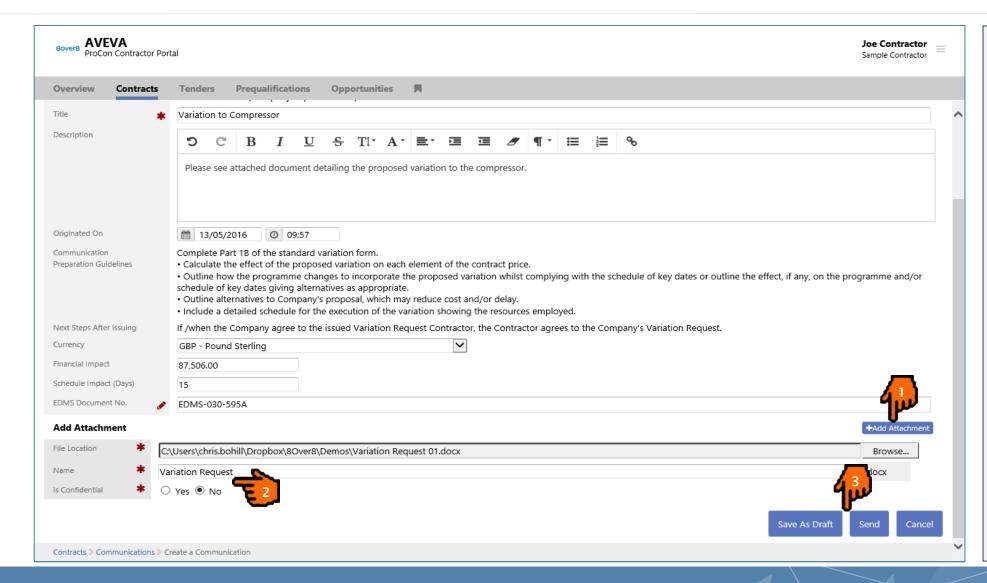


- Any existing Communications will be displayed in tabular format.
 Note: clicking the Communication title
- Note: clicking the Communication title will take you to that specific Communication.
- 2. To create a new Communication, click the "Create a Communication" button and select the Communication template you want to use from the drop-down menu.





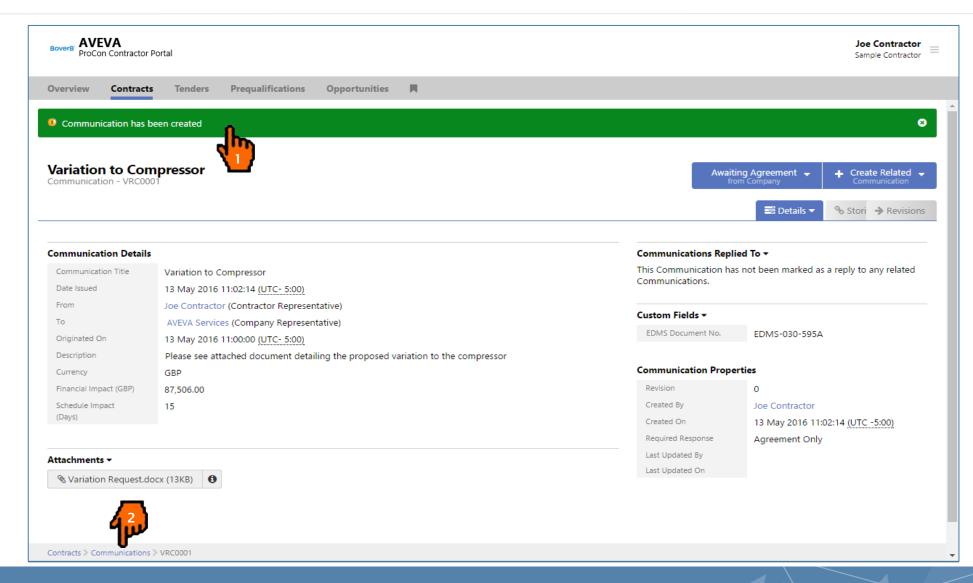
- 1. Enter the appropriate information as required.
- Additional guidance may be displayed to support the creation of the Communication.
- 3. If the Communication has enabled financial and schedule values, these will be displayed next to any additional custom fields that the Company requires completing, e.g. EDMS Document No.



- 1. To add an attachment to the Communication, click the "Add Attachment" button and select the file you wish to attach.
- 2. If required, update the document name and select if the file "Is Confidential". If yes, this will limit the visibility of the document to only those will confidentiality access.
- 3. Click "Save As Draft" if you wish to save it in draft state for completion at a later date. To immediately send the Communication to the Company, click "Send". This will publish the Communication on the Company portal.



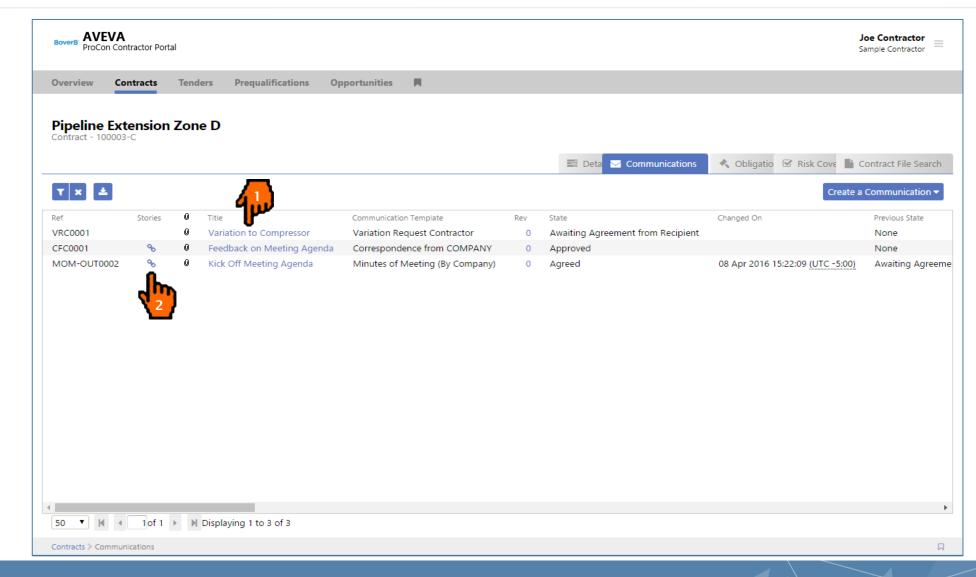
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 The Communication has been created.
 To navigate back to the Communications Register page, click on the breadcrumb link at the bottom of the

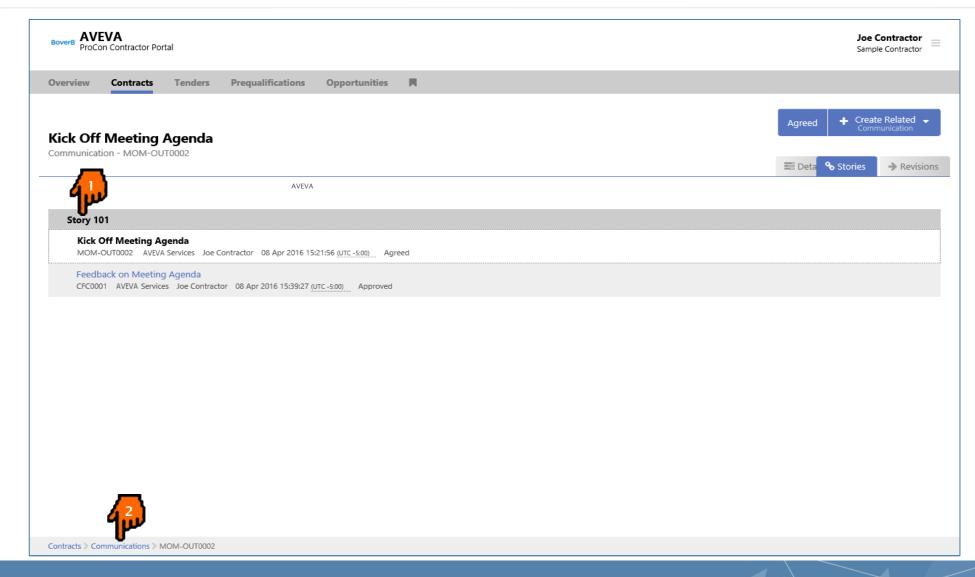
page.





- 1. The Communications Register page will display the newly created Communication.
- 2. To see all linked Communications, associated to a specific Communication, click on the 'Stories' icon next to that Communication.

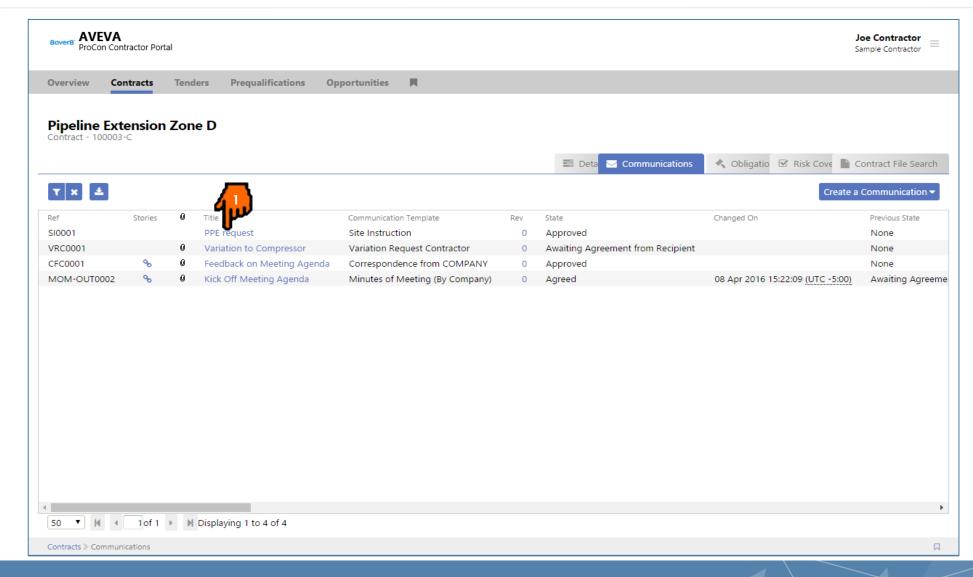




- 1. The Stories page will display all
 Communications which have been linked
 to the Communication you selected.
- 2. To navigate back to the Contract
 Details page, click on the breadcrumb
 link at the bottom of the page.



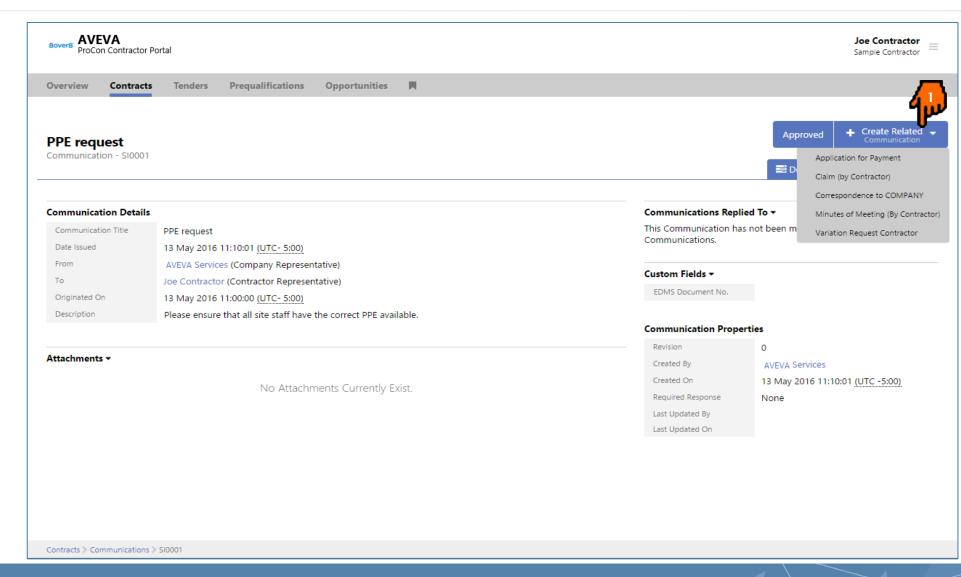
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1. From the Communications Register page, open a Communication which requires a reply.

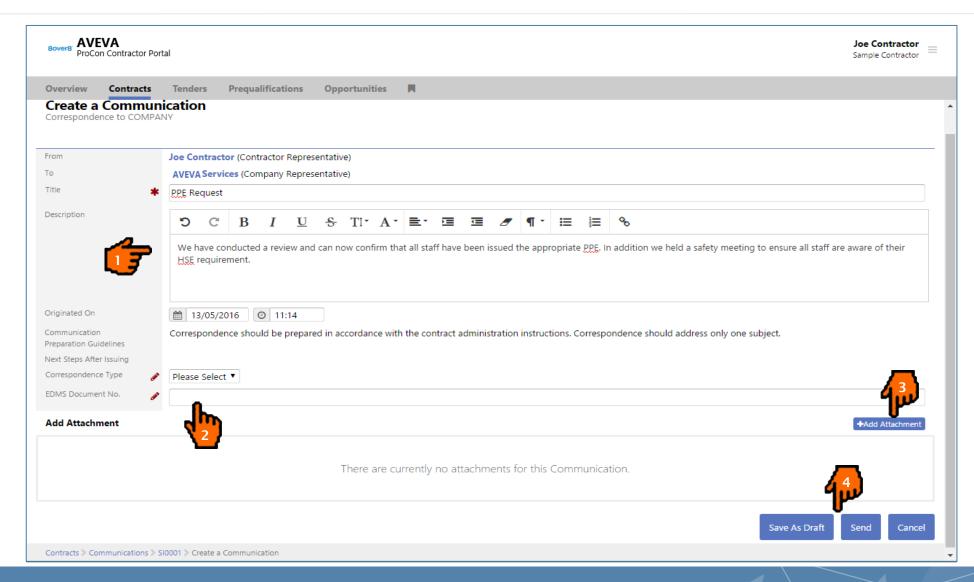


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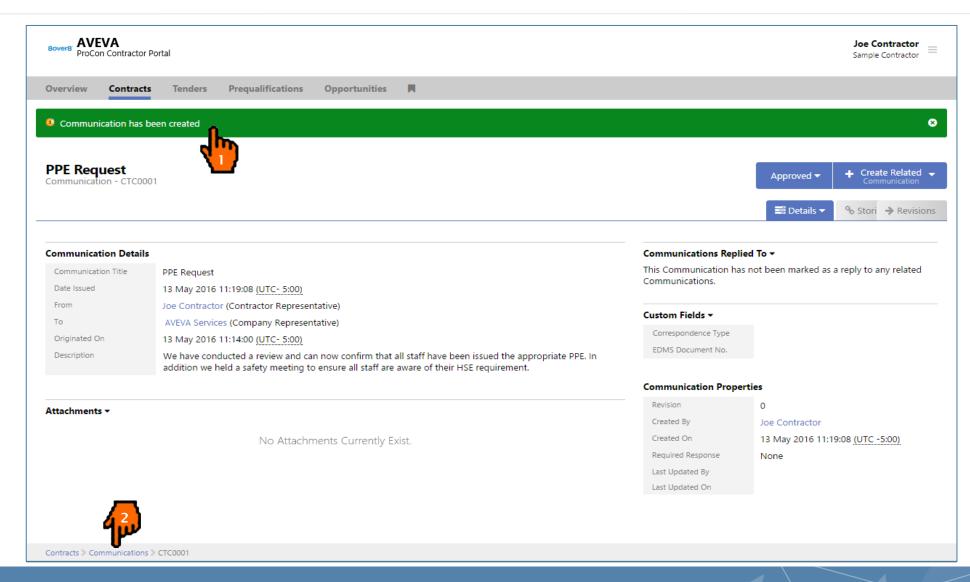
1. Click the "Create Related Communication" button and select the appropriate Communication template from the drop-down menu.





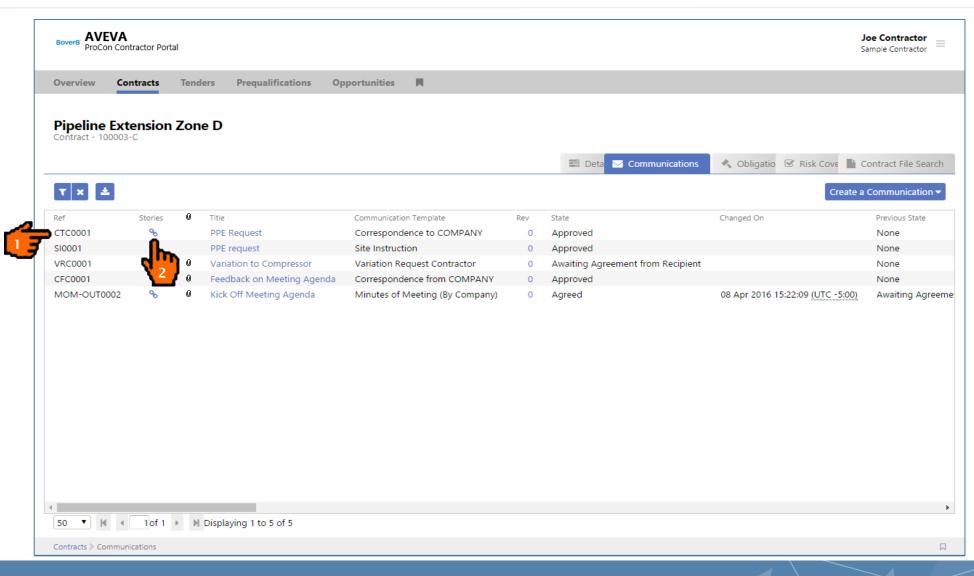
- 1. Enter the appropriate information as required.
- 2. Enter values for any custom fields associated to this Communication.
- 3. To add an attachment to the response Communication, click the "Add Attachment" button and select the file you wish to attach.
- 4. Click "Save As Draft" if you wish to save it in draft state for completion at a later date. To immediately send the Communication to the Company, click "Send". This will publish the response Communication on the Company portal.





- 1. The response Communication has been created.
- 2. To navigate back to the Communications Register page, click on the breadcrumb link at the bottom of the page.

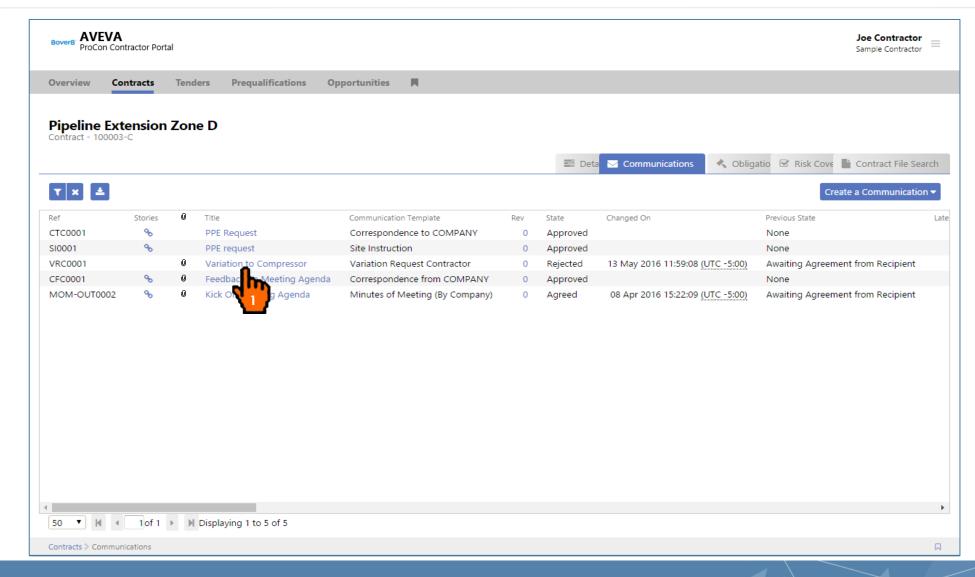




- 1. The Communications Register page will display the newly created Communication.
- 2. The response Communication is automatically linked to the previous Communication sent to you. Click on the 'Stories' icon to view all linked Communications.



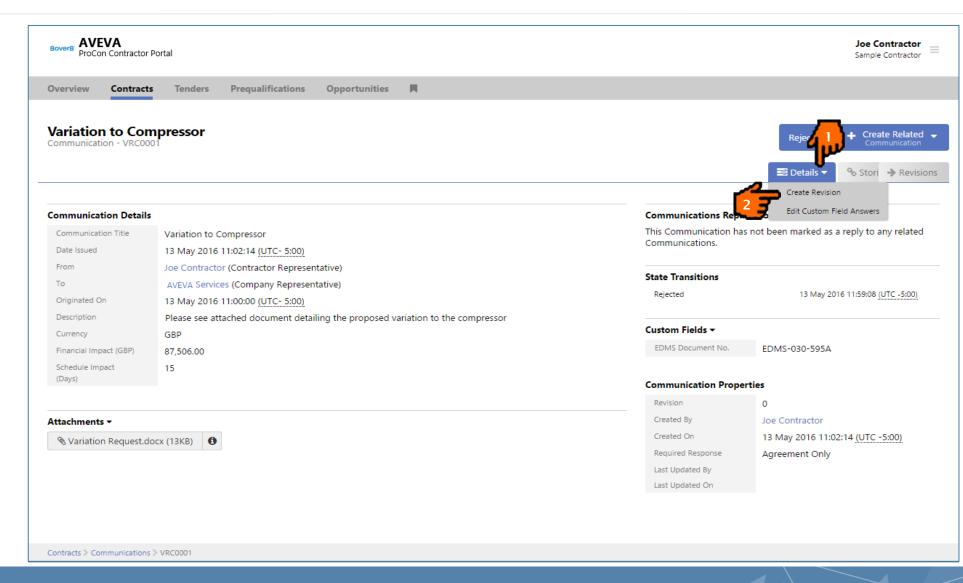
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1. From the Communications register page, select the Communication you want to revise.

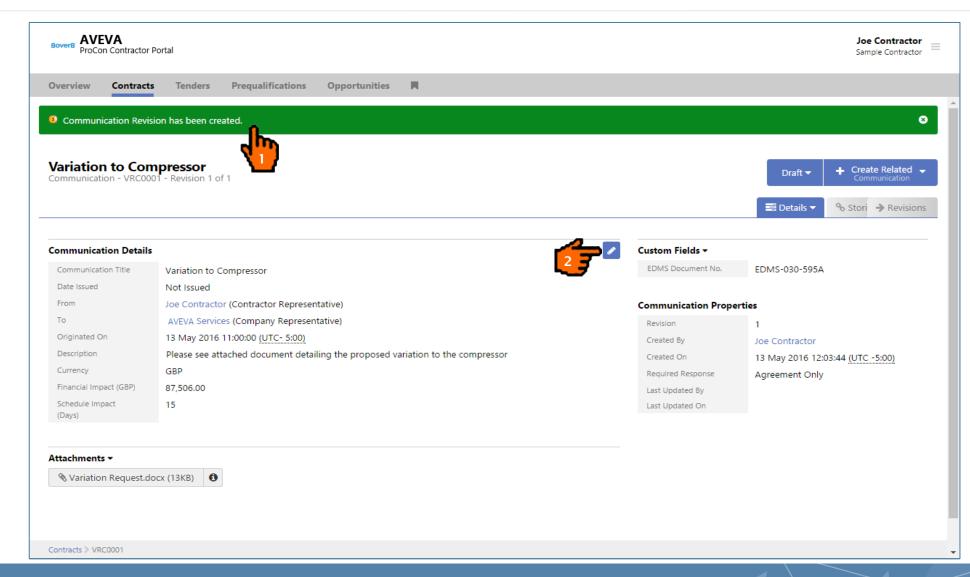
Note: revisions can only be created for Communications in the "Rejected" or "Not Agreed" states.





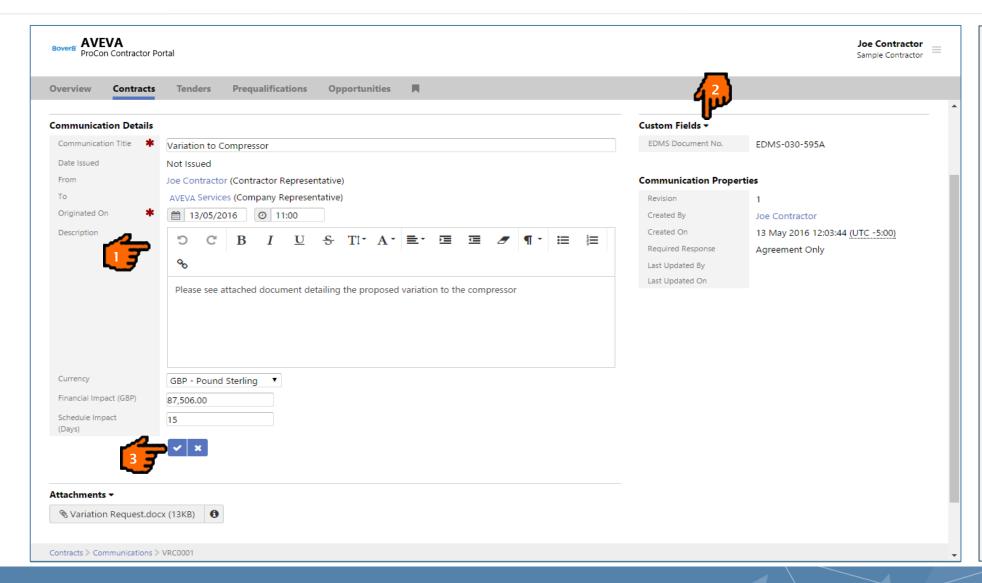
- 1. Click on the drop-down icon in the "Details" tab.
- 2. Select "Create Revision" from the dropdown list.





- 1. A separate revision of the Communication has been created.
- 2. To edit the details of the Communication click on the 'Edit' icon in the "Communication Details" section.

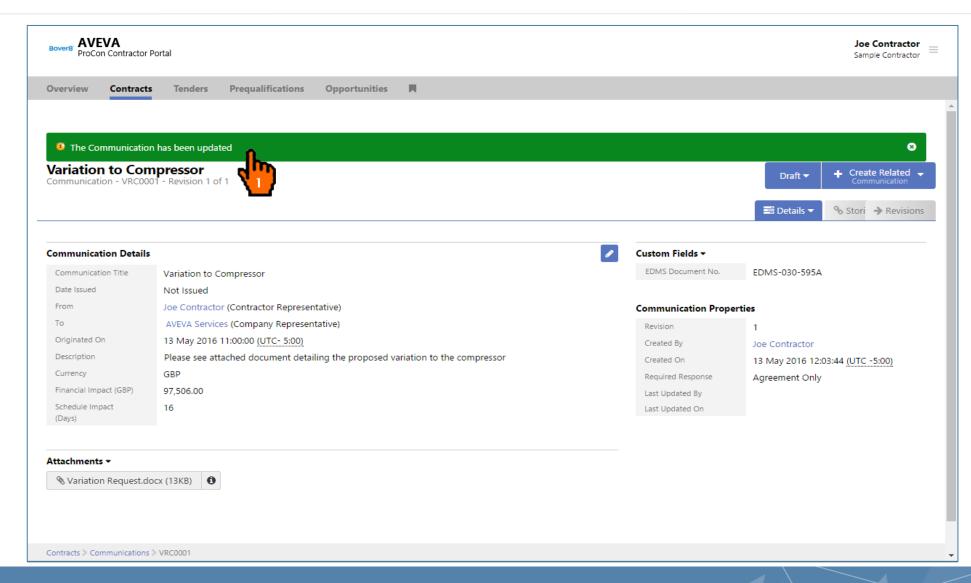




- 1. Edit the Communication details as necessary.
- 2. To edit the custom fields associated to the Communication, click on the dropdown icon next to "Custom Fields" and select "Edit Custom Field Answers" from the drop-down menu.
- 3. When all the necessary changes have been made, click the "Save" icon.



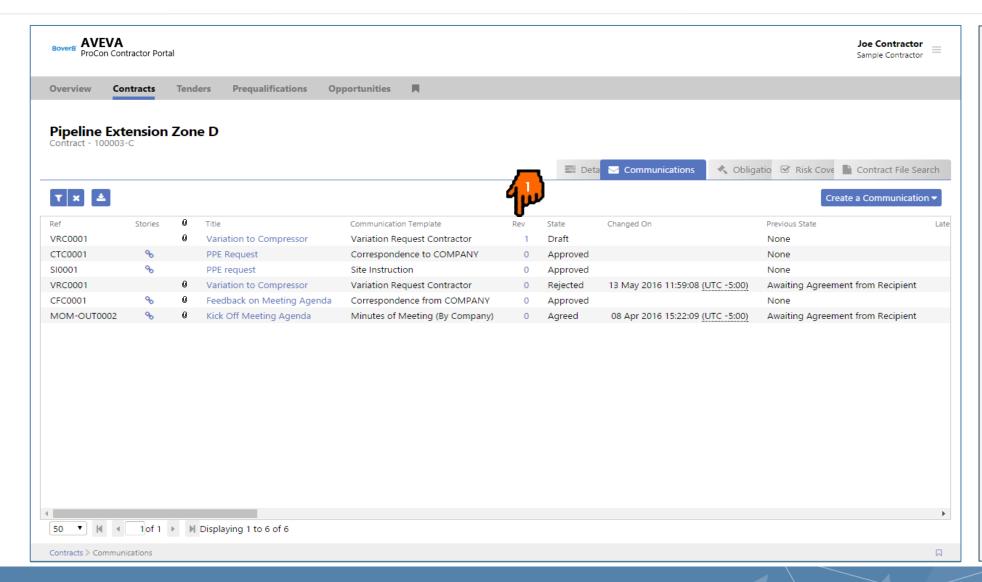
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The revision to the original
 Communication will be updated with the amendments.



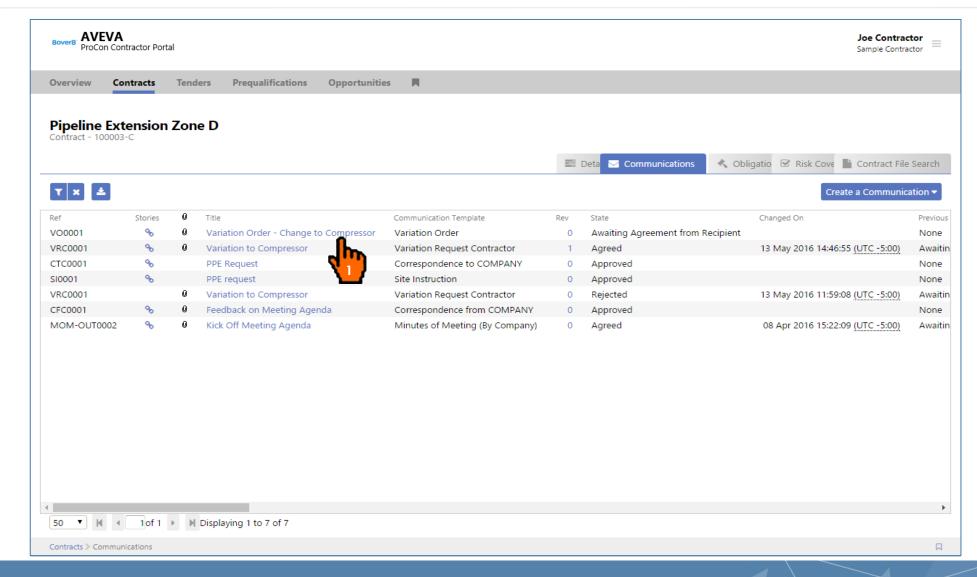
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1. The revised Communication will be displayed in the Communication register. Click on the Rev number to see a complete revision history of the Communication.

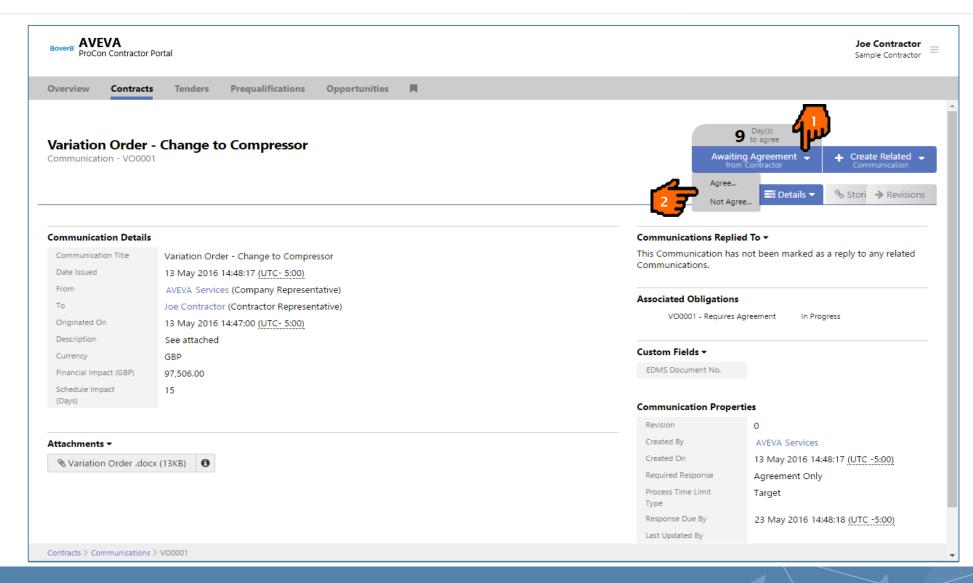


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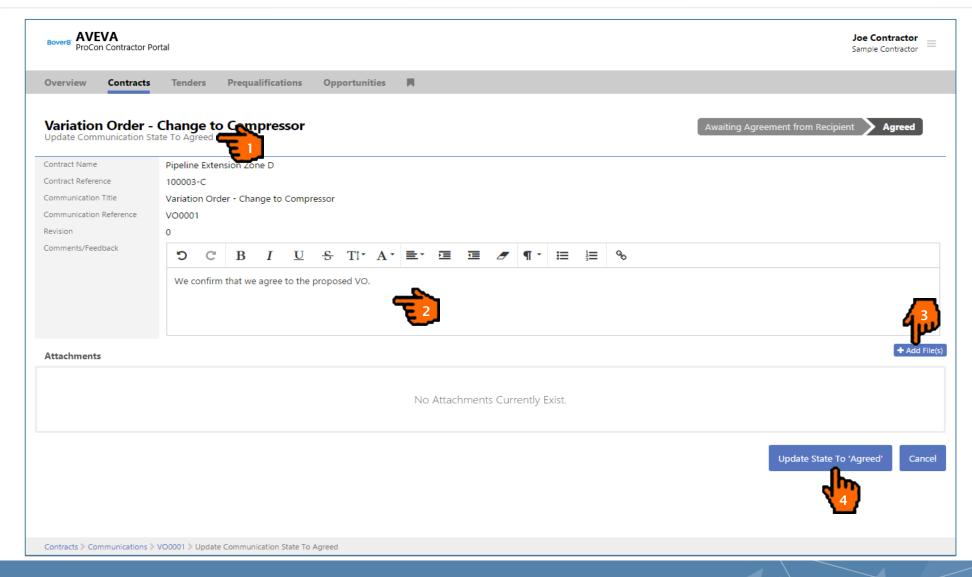
1. From the Communication register, click the title of the Communication you want to make an agreement on.





- 1. Once you have reviewed all of the information contained in the Communication, and want to make a decision, click on the "Awaiting Agreement from Contractor" button.
- 2. From the drop-down menu select "Agree" or "Not Agree" based on your final decision.

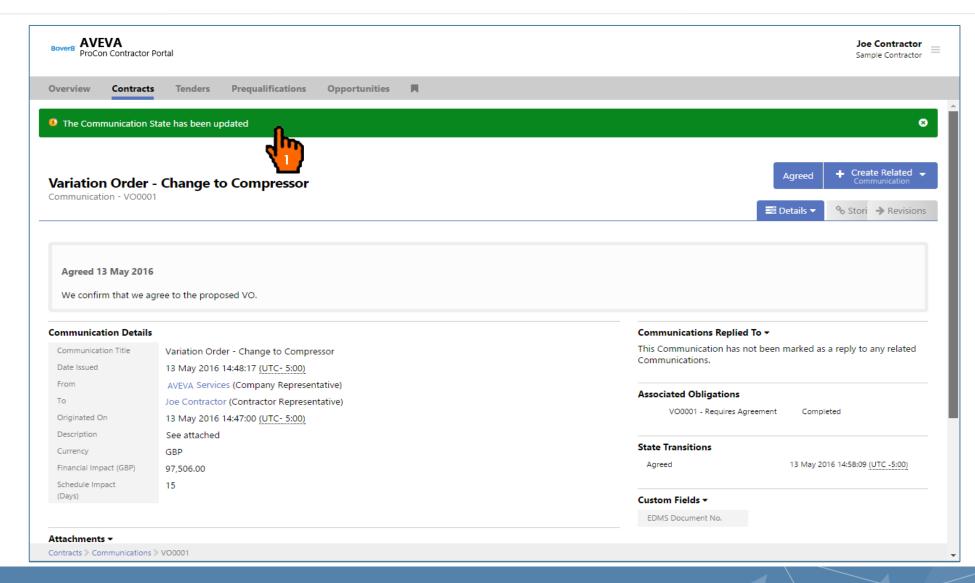




- 1. The "Update Communication State" page is displayed.
- 2. Add any relevant comments/feedback, if required.
- 3. Add any additional attachments, if applicable.
- 4. Click the "Update State To 'Agreed'" button.



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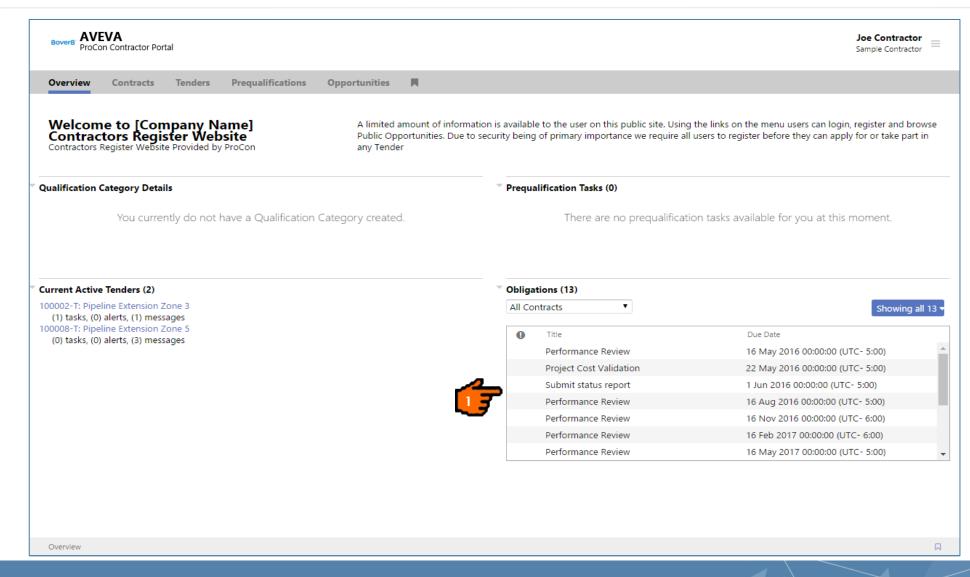


1. The Communication state has been updated to "Agreed" as shown on the Communication details page.

Note: The same steps can be followed to "Not Agree" a Communication. The resulting 'State' will be displayed as "Not Agreed" in this situation.

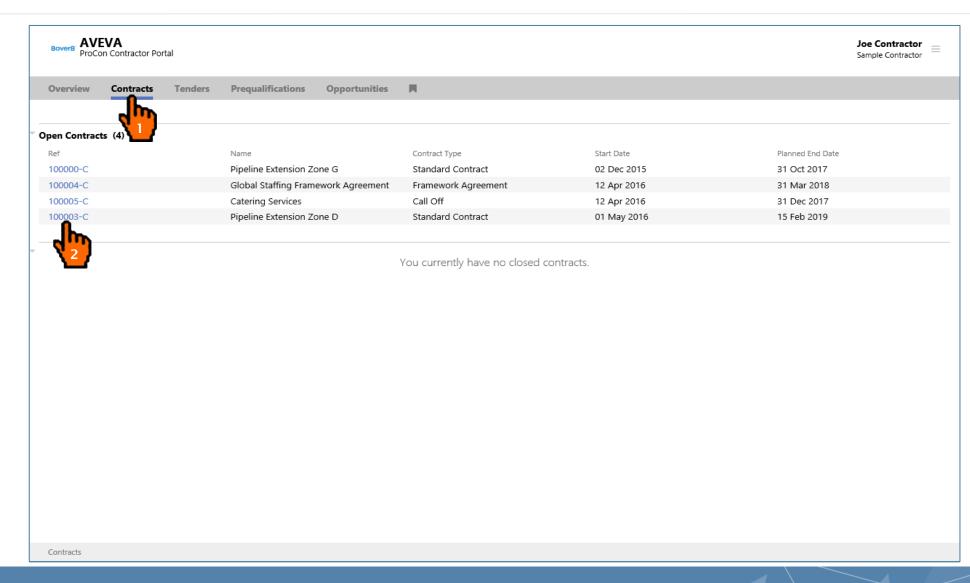


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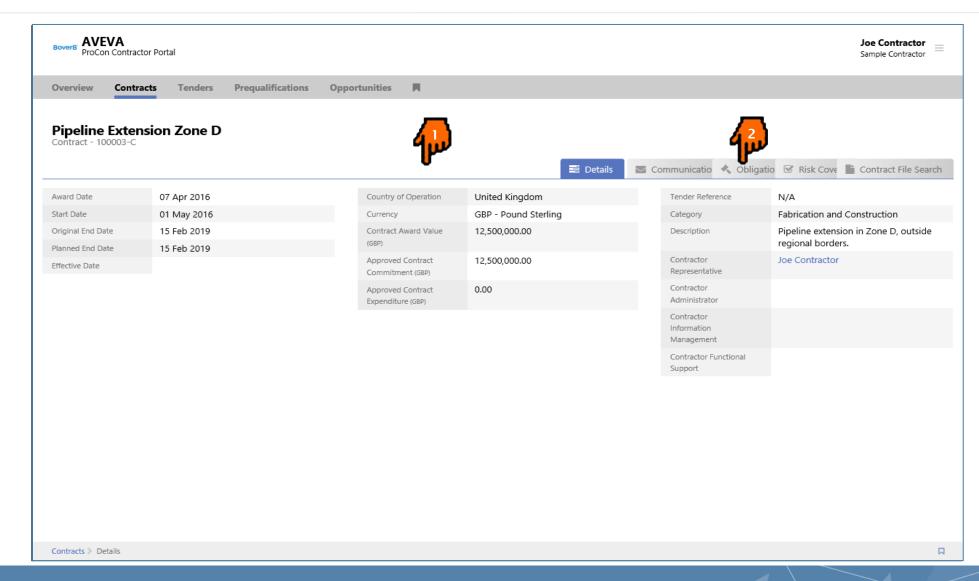
All Contract Obligations, across all
 Contracts, are visible from the Overview
 page.





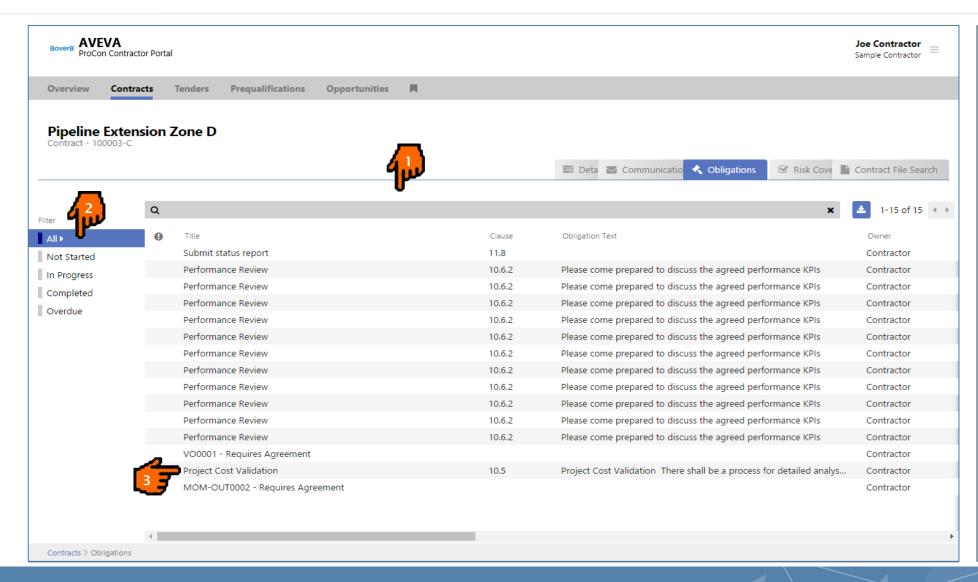
- 1. To view all Obligations associated to a specific Contract, click the Contracts tab to access open and closed Contracts.
- Select the Contract you want to view.
 Once selected the Contract details will be displayed.





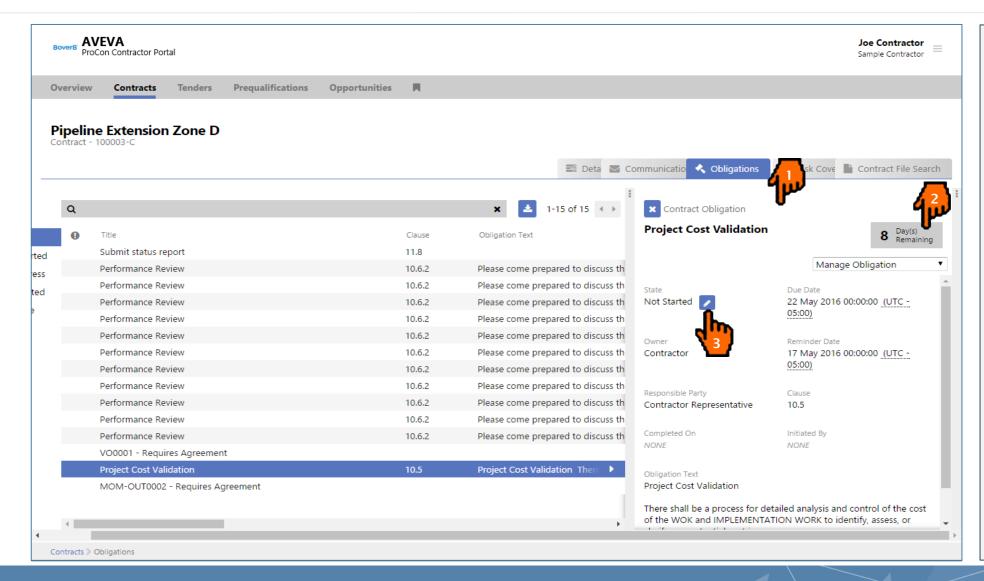
- 1. The Contract Details page displays summary information relating to the Contract.
- Click on the Obligations tab to
 navigate to the Obligations page for this
 Contract.





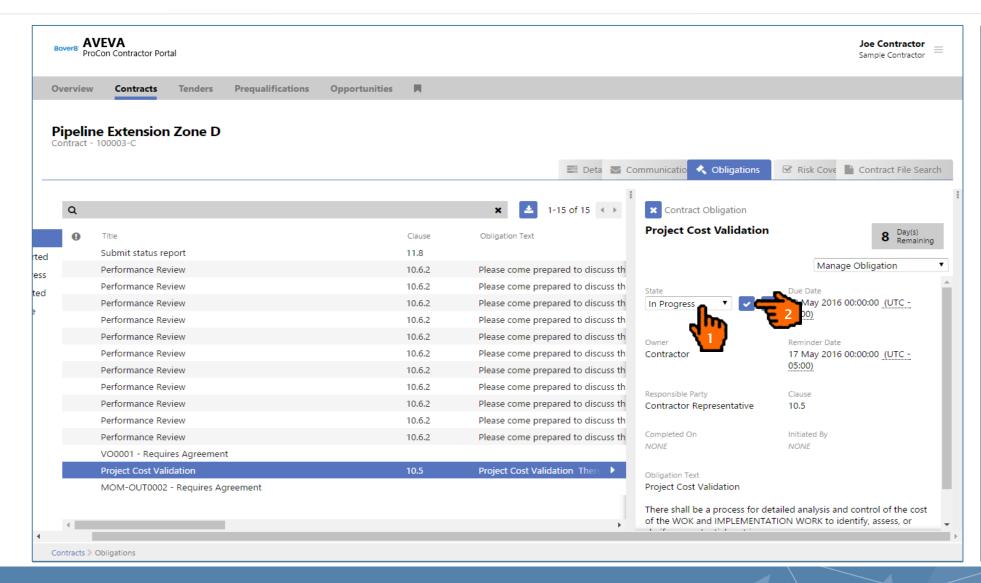
- 1. All of the associated Contract and Communication related Obligations will be displayed in tabular format.
- 2. Use the Filter option to return all (or a specific sub-set) Obligations associated to that Contract.
- 3. To view the details of a specificObligation, click on the Obligation itself.





- 1. The Obligation details will be displayed in a new window, on the right of the screen.
- 2. The number of days remaining, before the Obligation is due, is displayed prominently for the user.
- 3. To begin the process of completing this Obligation, click on the pencil icon to change the "State". This changes the status and helps other Contract Team Members know that this obligation is currently in progress.

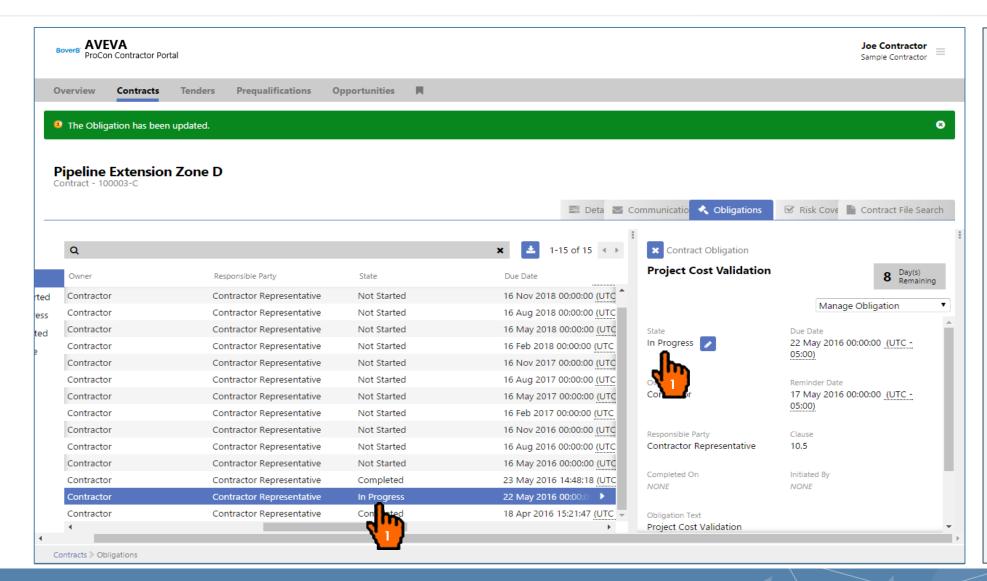




- 1. Click on the drop-down arrow and select "In Progress".
- 2. Click on the "Save" icon to confirm the change in status.

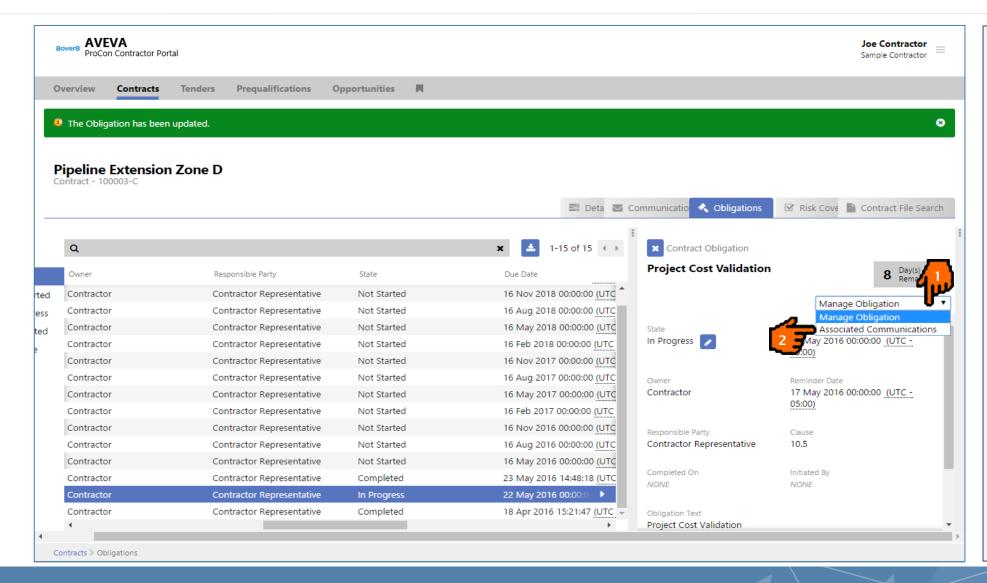


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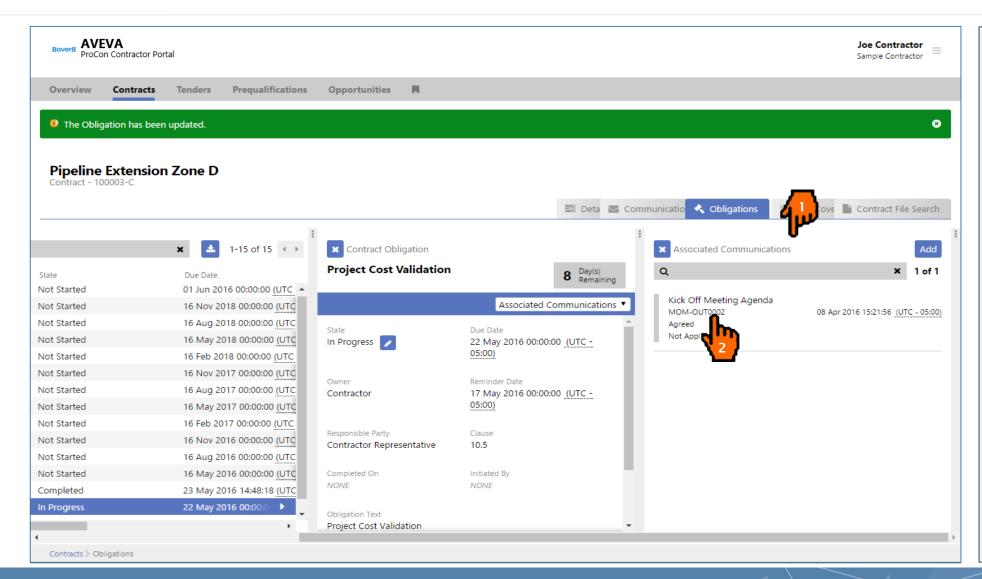
1. The change in state is immediate and visible to all Contract Team Members.
The user can now complete their task, outside of the system, and upon completion return to mark the Obligation as "Complete".





- To view all Communications related to the Obligation, click the "Manage Obligation" drop-down.
- 2. Select "Associated Communications".

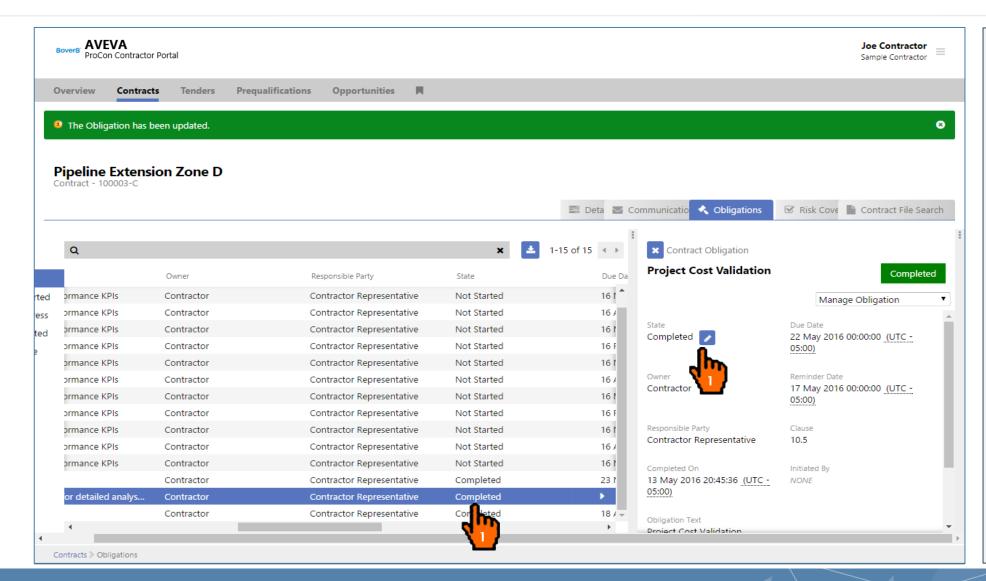




- 1. All associated Communications will be displayed in a new window, on the right of the screen.
- 2. Clicking on the Communication will take you to the Details page of that Communication.



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1. Once the Obligation has been completed, click on the pencil icon and select "Completed" from the drop-down menu. As before, the update in state will be visible immediately.



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