Government of **Western Australia**
Department of **Finance**
**Building Management and Works**

PACMan

Quick Reference Guide
This QRG aligns with the Project Management Framework
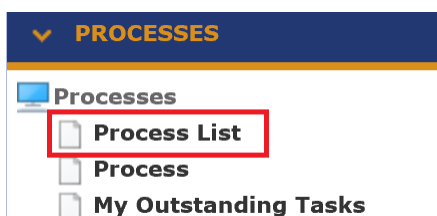
# 4.4.11 Construction Contract - Practical Completion

**Completion of this process** (4.4.11) will trigger the creation of the 5.1.1 Construction Contract Final Payment Claim process and will be ready for use.

**This process will be created manually by the contract manager. Completion of the tasks within this process are jointly undertaken by the Superintendent's Representative and the BMW Contract Manager.**

## Contract Manager Instructions

To create the process;

1. Expand the **Processes** menu
2. Select **Process List** from the menu



3. Click the hyperlink **Click here to add a new process**
4. Select process from the process template dropdown [in this case select **4.4.11 Construction Contract – Claim for Subsequent Payment**]



5. Name the process using the following naming convention

   **4.4.11 < Contract No >< Contractors Name > < Practical Completion**

   http://iportal.bmw.local/documents/doc/829/Mandatory_Naming_Conventions_Final_29_May_2012.docx

   Note: Business Level (on the process) MUST be left as **Default>Default>Default**
6. Click **Add**

## Supers Rep Instructions

Once this process is available you will receive an email notification to alert you the process has been created. Within the email there will be a link to access the Payment Claim process via PACMan.

Alternatively; the process can also be accessed via the Contracts Module; to do this:

1. Expand the **Contracts** menu and select **Contracts List**
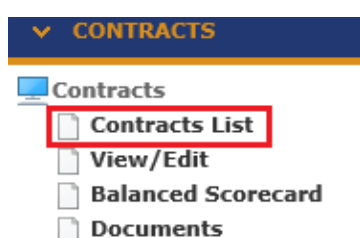
2. Enter the contract number or name in the **Search Text** field. Click **Search.** Click on your contract to select it.

**Contract List**

Search Text: 21588467    [Search]  [Clear]

10 ⌄  ◄◄ ◄ Page: 1 ⌄ of 1 ► ►► 🔄 ⊞ 📊

| Contract Number ▲ | Contract Title | Contract Supplier |
|---|---|---|
| 21588467 | Construction contract | BGC Construction |

3. There are two ways to access the process (via the Balanced Scorecard screen OR Associations screen)

∨ **CONTRACTS**

🖥 Contracts
  📄 Contracts List
  📄 View/Edit
  📄 Balanced Scorecard
  📄 Documents
  📄 Financial Summary
  📄 Financial Settings
 ∨ 📁 DETAILS
   📄 Associations
   📄 Stakeholder Management

4. Navigate to the **CONTRACTS > Balanced Scorecard** screen and go to the **Linked Processes** Widget. Select your Process from the list of Active Processes displayed.

🖼 **Linked Processes**          [i][▲][✕]

Click here to add a new process.

| Name | Description | Date Commenced | |
|---|---|---|---|
| 4.3.12 Construction Contract Adjustment | Supers Rep loads Contractors Adjustment cl... | 07/04/2016 | 0% |
| 4.3.11b SR Setup Tasks Contract No: 215884... | Tasks required to be completed, by the Sup... | 07/04/2016 | 0% |
| 4.3.11b (SR) Reviews Contract Details: 215... | Tasks required to be completed, by the Sup... | 07/04/2016 | 0% |
| 4.3.14 21588467 Claim 02 Construction cont... | Construction Contract - Claim for Subseque... | 15/04/2016 | 0% |

Alternatively, you could also navigate to the **CONTRACTS > Details > Associations** Screen. From this screen you will see a list of the associated Processes, you can access a process by clicking on the ➡ for the required Payment Claim process.

**Processes**

Search Text: 4.4.11|                    [×]  [Search]  [Clear]

Process Status: --ALL-- ⌄

10 ⌄  ◄◄ ◄ Page: 1 ⌄ of 1 ► ►► 🔄 ⊞ 📊          Showing 1 to 2 of 2 items.

| Name ▲ | Status | Go To |
|---|---|---|
| ! 4.4.11 Construction Contract Practical Completion | Active | ➡ |

# Process Task List

## Process Task List

Select a Task to view or [Click here to add a new Task](#), or [Click here to add a new sub process.](#)

| | Status | Task Name | Attachments | Additional Info | Not Applicable | Go To |
|---|---|---|---|---|---|---|
| ☐ | Incomplete | Link Process to Contract - search in ENTITY field @ Top of Screen | | ⓘ | ☐ | |
| ☐ | Blocked | Amend Contract Description to include Tender NO # | | ⓘ | ☐ | |
| ☐ | Blocked | [SR] Attach Contractor's Notification of "Anticipated Practical Completion" (within 14 or more days) | | ⓘ | ☐ | |
| ☐ | Blocked | [CM] Attach Certificate of Occupancy | | ⓘ | ☐ | |
| ☐ | Incomplete | *[SR] Attach/Confirm Practical Completion Documents provided by Contractor* | | | ☐ | |
| ☐ | Blocked | Super's Rep Undertakes Pre-Inspection for defects | | ⓘ | ☐ | |
| ☐ | Blocked | CM Provides Agency with List of Final Defects | | ⓘ | ☐ | |
| ☐ | Blocked | Contractor advises Super's Rep Date for Practical Completion | | ⓘ | ☐ | |
| ☐ | Blocked | Contract Manager updates Key Dates re Practical Completion Date | | ⓘ | ☐ | |
| ☐ | Blocked | CM notifies Agency of potential practical completion & need for insurances | | ⓘ | ☐ | |
| ☐ | Incomplete | *Issue Practical Completion Certificate with Defect & Omissions details* | | | ☐ | |
| ☐ | Blocked | CM Confirms Security (PC Bank Guarantee) to be released | | ⓘ | ☐ | |
| ☐ | Blocked | Confirm Security (Bank Guarantee) Released | | ⓘ | ☐ | |
| ☐ | Incomplete | *Set Reminders for Defect Expiry Period(s)* | | | ☐ | |
| ☐ | Blocked | For each Separable Portion, undertake Practical Completion (conditions precedent) | | ⓘ | ☐ | |
| ☐ | Blocked | Update Contract Status to DEFECTS Liability Period | | ⓘ | ☐ | |

## [CM] Link Process to Contract – Search in ENTITY field @ TOP of Screen

1. Search for your Contract in the Entity Field under the Process Details Box, you will need to type in your contract number or part of the contract name and search using the magnifying glass.



2. Select the correct contract from the selection displayed.
3. Click **Update**.
4. Mark this task as **complete.**
5. Completion of this task sends an email notification to the Superintendent's Representative.

## Amend Contract Description to include Tender NO #

1. Click the ➡ to enter the task
2. Ament the **Contract Title** to include the **Tender No#**



3. Click **Apply** to save.
4. Use the *Return to* link to navigate back to the task list and mark this task **complete.**

## [SR] Attach Contractor's Notification of "Anticipanted Practical Completion (within 14 days or more)

1. **Attach a copy of the Anticipated Practical Completetion:**
   a) Click the ➡ to enter the Document Storage screen.
   b) Click the link **Click here to add a new Storage Item**.
   c) Enter the following details:
      - **Title:** Document Title
      - **Document Type:** Select an applicable type or leave as **Not Set**

- **Date:** This will default to today's date
d) Use the **Browse** button to locate your document.
e) Click **Upload** to save.
f) Click **Add** to record your Storage Item Entry.



2. **Complete the task:**
a) Use the *Return to* link to navigate back to the Process Task List.
b) Mark this task as **complete.**

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*[CM] Attach Certificate of Occupancy*

1. **Attach a copy of the Certificate of Occupancy:**

*This should have been received electronically*

a) Click the ➡ to enter the **Document Storage** screen.
b) Click the link **Click here to add a new Storage Item.**
c) Enter the following details:
- **Title:** Document Title
- **Document Type:** Select an applicable type or leave as **Not Set**
- **Date:** This will default to today's date
d) Use the **Browse** button to locate your document
e) Click **Upload** to save.
f) Click **Add** to record your Storage Item Entry.

2. **Complete the task:**
a) Use the *Return to* link to navigate back to the Process Task List.
b) Mark this task as **complete.**

## [SR] Attach/Confirm Practical Completion Documents provided by Contractor

Click on the **bold task name** to view the sub-process task list, complete each of these tasks.



## Attach Testing and Commissioning Regime Plans and Documentation

1. **Attach a copy of the required documentation:**
   a) Click the ➡ to enter the **Document Storage** screen.
   b) Click the link **Click here to add a new Storage Item.**
   c) Enter the following details:
      - **Title:** Document Title
      - **Document Type:** Select an applicable type or leave as **Not Set**
      - **Date:** This will default to today's date
   d) Use the **Browse** button to locate your document.
   e) Click **Upload** to save.
   f) Click **Add** to record your Storage Item Entry.
2. **Complete the task:**
   a) Use the *Return to* link to navigate back to the Process Task List.
   b) Mark this task as **complete.**

## Confirm Contractor has completed Testing & Commissioning

This is an off-system task, mark as **complete** to acknowledge and confirm has completed Testing & Commissioning.

## Confirm "As Constructed" Drawings have been received

This is an off-system task, mark as **complete** to acknowledge and confirm "As Constructed" Drawings have been received.

## Confirm "As Constructed" Drawings sent to BMW

This is an off-system task, mark as **complete** to acknowledge and confirm "As Constructed" Drawings sent to BMW.

## Attach Maintenance Plan and Schedule (if applicable)

If this task is not required for the contract mark as **Not Applicable.** If this task is required complete the following;

1. **Attach a copy of the required documentation:**
   a) Click the ➡ to enter the **Document Storage** screen.
   b) Click the link **Click here to add a new Storage Item.**
   c) Enter the following details:
      - **Title:** Document Title
      - **Document Type:** Select an applicable type or leave as **Not Set**
      - **Date:** This will default to today's date
   d) Use the **Browse** button to locate your document.

e) Click **Upload** to save.

f) Click **Add** to record your Storage Item Entry.

2. **Complete the task:**

a) Use the *Return to* link to navigate back to the Process Task List.

b) Mark this task as **complete.**

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*Attach Operational and Equipment Maintenance Manuals*

1. **Attach a copy of the required documentation:**

a) Click the ➡ to enter the **Document Storage** screen.

b) Click the link **Click here to add a new Storage Item.**

c) Enter the following details:
   - **Title:** Document Title
   - **Document Type:** Select an applicable type or leave as **Not Set**
   - **Date:** This will default to today's date

a) Use the **Browse** button to locate your document.

b) Click **Upload** to save.

c) Click **Add** to record your Storage Item Entry.

2. **Complete the task:**

a) Use the *Return to* link to navigate back to the Process Task List.

b) Mark this task as **complete.**

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*Confirm training provided to Occupants*

This is an off-system task, mark as **complete** to aknowledge and confirm training has been provided to occupants.

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*Attach Manuals & Warranty Documents*

1. **Attach a copy of the required documentation:**

a) Click the ➡ to enter the **Document Storage** screen.

b) Click the link **Click here to add a new Storage Item.**

c) Enter the following details:
   - **Title:** Document Title
   - **Document Type:** Select an applicable type or leave as **Not Set**
   - **Date:** This will default to today's date

d) Use the **Browse** button to locate your document.

e) Click **Upload** to save.

f) Click **Add** to record your Storage Item Entry.

2. **Complete the task:**

Use the *Return to* link to navigate back to the Process Task List.

Mark this task as **complete.**

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*Super's Rep Undertakes Pre-Inspection for defects*

Discuss any defects with the contractor and attach relevant documentation in this task.

1. **Attach a copy of relevant documentation:**

g) Click the ➡ to enter the **Document Storage** screen.

h) Click the link **Click here to add a new Storage Item.**

i) Enter the following details:
   - **Title:** Document Title
   - **Document Type:** Select an applicable type or leave as **Not Set**
   - **Date:** This will default to today's date

j) Use the **Browse** button to locate your document.

k) Click **Upload** to save.

l) Click **Add** to record your Storage Item Entry.

2. **Complete the task:**

Use the *Return to* link to navigate back to the Process Task List.

Mark this task as **complete.**

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*CM Provides Agency with List of Final Defects*

1. Attach a copy of the Defect List provided to the Agency using the following instructions:

   m) Click the ➡ to enter the **Document Storage** screen.

   n) Click the link **Click here to add a new Storage Item.**

   o) Enter the following details:

   - **Title:** Document Title
   - **Document Type:** Select an applicable type
   - **Date:** This will default to today's date

   p) Use the **Browse** button to locate your document.

   q) Click **Upload** to save.

   r) Click **Add** to record your Storage Item Entry.

2. **Complete the task:**

Use the *Return to* link to navigate back to the Process Task List.

Mark this task as **complete.**

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*Contractor advises Super's Rep Date for Practical Completion*

This is an off-system task, mark as **complete** to acknowledge that the contractor has advised the date for Practical Completion.

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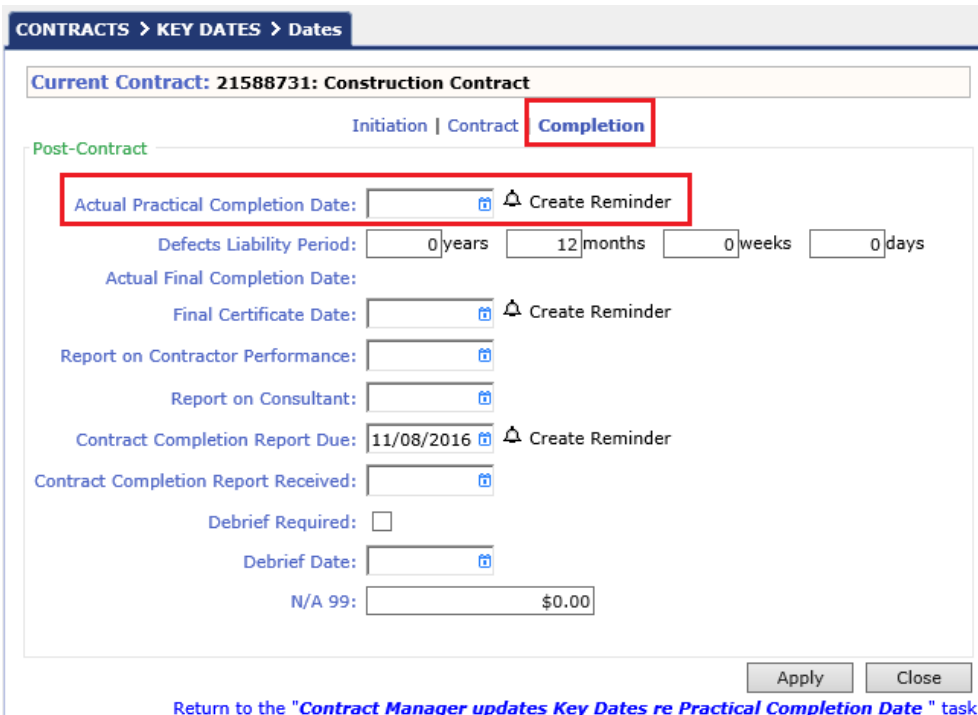
*Contract Manager updates Key Dates re Practical Completion Date*

1. Click the ➡ to enter the **Key Dates** screen.
2. Review the dates on the **Contract** [tab].
3. Select the **Completion** [tab] and add the **Actual Practical Completion Date**, check the **Defects Liability Period** is correct.
4. Click **Apply** to save the changes.



5. Use the *Return to* link to navigate back to the Process Task List.
6. Mark this task as **complete.**

| |
|---|
| *CM notifies Agency of potential practical completion & need for insurances*<br><br>This is an off-system task, mark as **complete** to aknowledge that you have notified the Agency of potential practical completion and the need for insurances. |
| *Issue Practical Completion Certificate with Defect & Omissions details*<br><br>Click on the **bold task name** to view the sub-process task list, complete each of these tasks.<br><br> |
| *[SR] Confirm Practical Completion Date is correct*<br><br>1. Click the ➡ to enter the **Key Dates** screen, ensure you are looking at the **Completion tab.**<br>2. Check the **Actual Practical Completion Date** is correct.<br><br><br><br>3. Use the ***Return to*** link to navigate back to the process.<br>4. Mark this task as **complete.** |
| *[SR] Create Practical Completion Certificate*<br><br>1. Click the ➡ to enter the **Document Creation** screen.<br>2. Select the **AS2124 Certificate of Practical Completion**<br><br><br><br>3. A file download popup will appear, click Open or Save and follow the prompts to view the certificate<br><br> |

4. Save a copy of the certificate.



5. Use the *Return to* link to navigate back to process task.
6. Mark this task **complete.**

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**[SR] Attach Practical Completion Certificate – must be unconditional**

If this task is not required for the contract mark as **Not Applicable.** If this task is required complete the following;

1. **Attach a copy of the required documentation:**

   a) Click the ➡ to enter the **Document Storage** screen.

   b) Click the link **Click here to add a new Storage Item**

   c) Enter the following details:
   - **Title:** Document Title
   - **Document Type:** Select an applicable type or leave as **Not Set**
   - **Date:** This will default to today's date

   d) Use the **Browse** button to locate the certificate you generated and saved in the last task.

   e) Click **Upload** to save.

   f) Click **Add** to record your Storage Item Entry.

2. **Complete the task:**

   a) Use the *Return to* link to navigate back to the Process Task List.

   b) Mark this task as **complete.**

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**[SR] Adds Practical Completion (Milestone) Report**

1. **Attach a copy of the required documentation:**

   a) Click the ➡ to enter the **Document Storage** screen.

   b) Click the link **Click here to add a new Storage Item**

   c) Enter the following details:
   - **Title:** Document Title
   - **Document Type:** Select an applicable type or leave as **Not Set**
   - **Date:** This will default to today's date

   d) Use the **Browse** button to locate your document

   e) Click **Upload** to save.

   f) Click **Add** to record your Storage Item Entry.

2. **Complete the task:**

   a) Use the *Return to* link to navigate back to the Process Task List

   b) Mark this task as **complete**

---

**[SR] Manage any Defects**

1. **Attach a copy of the required documentation:**

   a) Click the ➡ to enter the **Document Storage** screen

   b) Click the link **Click here to add a new Storage Item**

   c) Enter the following details:

- **Title:** Document Title
- **Document Type:** Select an applicable type or leave as **Not Set**
- **Date:** This will default to today's date

   d) Use the **Browse** button to locate your document

   e) Click **Upload** to save.

   f) Click **Add** to record your Storage Item Entry

2. **Complete the task:**

   a) Use the *Return to* link to navigate back to the Process Task List

   b) Mark this task as **complete**

---

## *[CM] Advise Agency Practical Completion & Occupancy Date*

1. **Attach a copy of the required documentation:**

   a) Click the  to enter the **Document Storage** screen

   b) Click the link **Click here to add a new Storage Item**

   c) Enter the following details:

- **Title:** Document Title
- **Document Type:** Select an applicable type or leave as **Not Set**
- **Date:** This will default to today's date

   d) Use the **Browse** button to locate your document

   e) Click **Upload** to save.

   f) Click **Add** to record your Storage Item Entry.

2. **Complete the task:**

   a) Use the *Return to* link to navigate back to the Process Task List

   b) Mark this task as **complete**

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## *CM Confirms Security (PC Bank Guarantee) to be released*

To confirm security to be released, mark this task as **complete.** This will trigger a notification to the Contract Manager and Contract Insurances/Securities officer notifying them to complete this action.

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## *Confirm Security  (Bank Guarantee) Released*

1. Click the  to enter the **Securities** screen.
2. Select the security to open more detail.
3. Record the **Actual Date Released.**

4. Click **Update** to save.
5. Use the *Return to* link to navigate back to the process task list.
6. Mark this task as **complete.** This will trigger a notification to Contract Manager and Supers rep confirming the release of the security.

___

### *Set Reminder for 2 months prior to expiry of Defects Liability Period(s)*

This task can be completed by either the Contract Manager or the Superintendent's Representative.

1. Click the ➡ to enter the **Contract Dates Screen.**
2. Go to the **Completion tab.**
3. To set a reminder 2 months prior to the expiry of defects liability click the **Create Reminder** button on the **Final Completion** date field.

4. Adjust the reminder title to reflect "[Contract No] End of Defects Liability Period and ensure the start date is set to two months' prior the end of this period.



5. You may also wish to adjust the message to include a statement about the end of the Defects Liability Period.



6. Click **Apply**
7. Use the *Return to* link to navigate back to the Process Task List.
8. Mark the task as **complete.**

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***For each Seperable Portion, undertake Practical Completion (conditions present)***

This is an off-system task, mark as **complete** to aknowledge that you have undertaken practical completion for each seperable portion.

*Update Contract Status to DEFECTS Liability Period*

1. Click the ➡ to enter the **Contract** screen.
2. Update the **Status** field to reflect **10-Defects.**



3. Click **Apply**
4. Use the *Return to* link to navigate back to the process task list
5. Mark this task as **complete**

## Additional Information

Check Defects Liabilities has been completed and that payment claim is made within the 28-day period or is instigated by the Superintendent's Representative.

*Process Auto Creation*

Upon completion of this process PACMan will auto-create the 5.1.1 Construction Contract Final Payment Claim Process.