





Quick Reference Guide

This QRG aligns with the Project Management Framework

# **QRG Process Tasks Work Flow**

### Accessing the contract

Expand the Contracts menu and select Contracts List

Select the contract from the list or search by the contract Name or Number via the search text field. Once selected the contract will be highlighted blue.

# Contracts Contracts List Panel Contract List QuickContract™

× Filters			
Contract List			
CONTRACT LIST			
Search Text: 21592785	Search Clear		
50 🗸 📢 Page: 1 🗸	of 1 🕨 🕨 🗿 💷 🗟	Sh	nowing 1 to 1 of 1 item
50 V 44 4 Page: 1 V Contract Number 🔺	of 1 > >> @ III & Contract Title	Sh Contract Supplier	nowing 1 to 1 of 1 item Status

## Accessing a process via the Contract Dashboard

Navigate to the Contract > Dashboard screen and go to the Linked Processes Widget



Select your Process from the list of Active Processes displayed.

Linked Processes		i 🔺			
lick <u>here</u> to add a new proc	ESS.				
10 V 44 4 Page: 1 V	0 ♥ 《 ← ← Page: 1 ♥ of 1 → → → Showing 1 to 2 of 2 it				
Name	Description	Date Commenced			
PBA 4.3.12 21592785 Adj ust V001 Quality Builders - 15295 - Package 1 and 3 - FINW015992 Transportabl e 2022 Program	Supers Rep loads Contractors Adjustment claim in PACMan and gives pr eliminary approval to the variat	24/08/2022	0%		
PBA EFT 4.3.13 21592785 FIRST PClaim 01 Quality B uilders - 15295 - Package 1 and 3 - FINW015992 Tra nsportable 2022 Program Project #	Project Bank Account Construction Contract - Claim for First Payment - EFT Payment Payment can be m	25/08/2022	0%		

Note: Only active processes will appear in the Contract Dashboard.

### **Contract Managers** can also access all processes via CONTRACTS >DETAILES > Associations

V C DETAILS	Name 🔺	Status	Go To
Stakeholders	4.3.11a Wandi Primary School Construction Works 978	Complete	4
UNSPSC Items Lease/Property	4.3.12 21588978 Adjust 001 Wandi Primary School - Construction Works	Complete	=>
	4.3.12 21588978 Adjust V013 Wandi Primary School - Construction Works	Active	⇒
Partners	4.3.13 21588978 Claim 01 Wandi Primary School - Construction Works Project #	Complete	⇒

# **Process Tasks Features**

### Information on Task Status.

Once you have created the process you will see a task list which needs to be completed. Some tasks require you to gain approval and are blocked until this is received.

### **Key Features:**

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Help screen	With search function and also shows information relevant to individual screens.
0	By hovering your mouse over this icon you can see instructions on what needs to be completed.
<b>₽</b>	When you see this arrow, you can click on it to go to the task.
Blocked	Tasks that are dependent on another task or they may be tasks assigned to another role i.e. Project Director.
Incomplete	This indicates the task has not been completed.
Complete	A task will be marked as complete once the box has been checked.
Bold Tasks	These tasks are sub-processes which contain sets of tasks, to view the tasks click on the <b>Bold Task Name</b> .
Not Applicable	Tasks not required should have this box ticked to ensure that a process does not remain active.
Dependent Task	A task that is required to be completed before further processes can be completed.

### Process Task List = Select a Task to view. ||| ||| ||| ||| ||| ||| |||Attachments Additional Not Go Task Name Status Info Applicable To Complete Link Process to Contract - search in ENTITY field @ Top of Screen Complete Supers Rep Enters Adjustment ⇒ Incomplete Supers Rep Approves Assessed Adjustment ⇒ Blocked CM Obtains Agency Endorsement (if required) and Approves Adjustment 0 Blocked CM Attaches signed Variation Valuation copies (from SRep) $\blacksquare$ $\blacksquare$ Page 1 of 1 $\triangleright$ $\triangleright$