

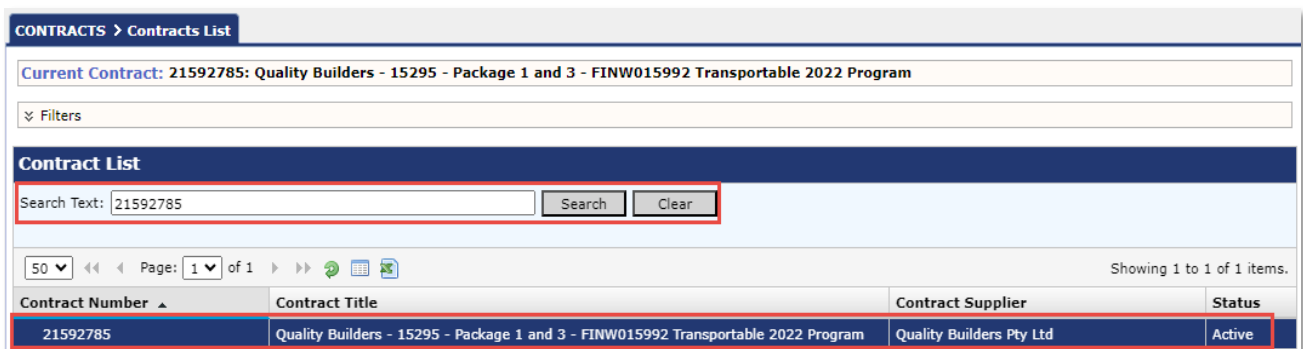


QRG Process Tasks Work Flow

Accessing the contract

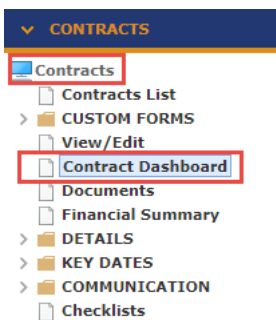
Expand the **Contracts** menu and select **Contracts List**

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.

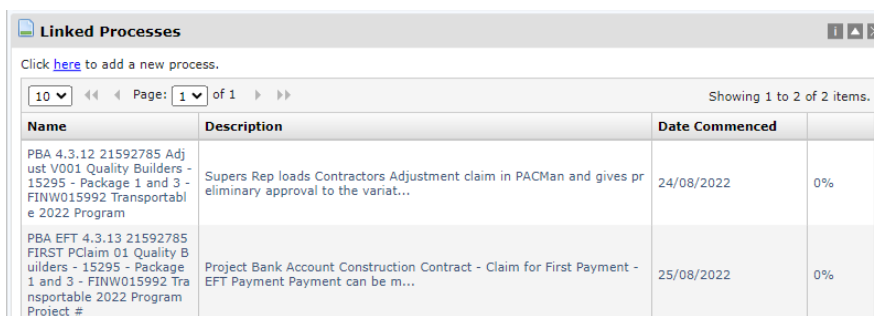


Accessing a process via the Contract Dashboard

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



Select your Process from the list of Active Processes displayed.



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

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




| <ul style="list-style-type: none"> ▼ DETAILS <input checked="" type="checkbox"/> Associations <input type="checkbox"/> Stakeholders <input type="checkbox"/> Parties <input type="checkbox"/> UNSPSC <input type="checkbox"/> Items <input type="checkbox"/> Lease/Property <input type="checkbox"/> Partners | <table border="1"> <thead> <tr> <th>Name ▲</th> <th>Status</th> <th>Go To</th> </tr> </thead> <tbody> <tr> <td>4.3.11a [REDACTED] Wandi Primary School Construction Works [REDACTED] 978</td> <td>Complete</td> <td>➔</td> </tr> <tr> <td>4.3.12 21588978 Adjust 001 Wandi Primary School - Construction Works</td> <td>Complete</td> <td>➔</td> </tr> <tr> <td>4.3.12 21588978 Adjust V013 Wandi Primary School - Construction Works</td> <td>Active</td> <td>➔</td> </tr> <tr> <td>4.3.13 21588978 Claim 01 Wandi Primary School - Construction Works Project # [REDACTED]</td> <td>Complete</td> <td>➔</td> </tr> </tbody> </table> | Name ▲ | Status | Go To | 4.3.11a [REDACTED] Wandi Primary School Construction Works [REDACTED] 978 | Complete | ➔ | 4.3.12 21588978 Adjust 001 Wandi Primary School - Construction Works | Complete | ➔ | 4.3.12 21588978 Adjust V013 Wandi Primary School - Construction Works | Active | ➔ | 4.3.13 21588978 Claim 01 Wandi Primary School - Construction Works Project # [REDACTED] | Complete | ➔ |
|---|--|--------|--------|-------|---|----------|---|--|----------|---|---|--------|---|---|----------|---|
| Name ▲ | Status | Go To | | | | | | | | | | | | | | |
| 4.3.11a [REDACTED] Wandi Primary School Construction Works [REDACTED] 978 | Complete | ➔ | | | | | | | | | | | | | | |
| 4.3.12 21588978 Adjust 001 Wandi Primary School - Construction Works | Complete | ➔ | | | | | | | | | | | | | | |
| 4.3.12 21588978 Adjust V013 Wandi Primary School - Construction Works | Active | ➔ | | | | | | | | | | | | | | |
| 4.3.13 21588978 Claim 01 Wandi Primary School - Construction Works Project # [REDACTED] | 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:

| | |
|---|---|
|  Help screen | With search function and also shows information relevant to individual screens. |
|  | By hovering your mouse over this icon you can see instructions on what needs to be completed. |
|  | 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 Bold Task Name . |
| 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.

◀◀ Page 1 of 1 ▶▶

| Status | Task Name | Attachments | Additional Info | Not Applicable | Go To |
|--|---|-------------|---|--------------------------|-------|
| <input checked="" type="checkbox"/> Complete | Link Process to Contract - search in ENTITY field @ Top of Screen | |  | <input type="checkbox"/> | |
| <input checked="" type="checkbox"/> Complete | Supers Rep Enters Adjustment | |  | <input type="checkbox"/> | ➔ |
| <input type="checkbox"/> Incomplete | Supers Rep Approves Assessed Adjustment | |  | <input type="checkbox"/> | ➔ |
| <input type="checkbox"/> Blocked | CM Obtains Agency Endorsement (if required) and Approves Adjustment | |  | <input type="checkbox"/> | |
| <input type="checkbox"/> Blocked | CM Attaches signed Variation Valuation copies (from SRep) | |  | <input type="checkbox"/> | |

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