PROJECT MANAGEMENT
CONSULTING
INTEGRATED SYSTEMS
TRAINING

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The Standard in Project Management®

Management Information

The Management information module organizes a series of related projects into a single portfolio consisting of reports that capture project objectives, costs, timelines, accomplishments, resources, risk and other critical factors. Executives can then regularly review entire portfolios, spread resources appropriately and adjust project to produce the highest returns.

The module utilizes a drill capability through all the other modules. It provides the Client, Executive, and Management Level with readily accessible status information and easy data query capability.

Features:

- Generate summary reports across the projects
- Drill down capability through all the other modules up to the 3rd level in the Cost & Commitment
- Provide the real time data on overall view across all projects
- Create new project using a wizard
    - Select Company/Contacts
    - Select Templates from Standard or a particular project
    - Project Elements
    - Document Numbering Structure
    - WBS

Project Information

The Project Information module helps you identify and setup the multiple Funding, the multiple Currencies, the multiple calendars and the Unit of Measurement to be used throughout your project. This module maintains the project elements and the Work Breakdown Structure (WBS) of your project. An unlimited number of project elements, up to nine levels structure for the WBS, and unlimited number of WBS are completely user-defined. Cost Types and User Codes will also be established and maintained within this module. The user codes are later used to produce ad-hoc reports, satisfying shareholders and other external parties without affecting the way you control your project.

An unlimited numbers of standard curves can be defined and setup in this module. The standard curves are used to spread the hours, quantities and amounts to generate commodity curves, labor curves, cash flow curves against various base lines sources.

Features:

- Setup of the Project Information including Scope and Scope Revisions
- Setup the different Funds and Split Fund Percentages
- Setup the multiple Currencies
- Setup the multiple Calendars
- Select the Unit of Measurement for your project
- Define and Setup unlimited Project Elements
- Define and Setup unlimited Numbering Structures and Work Breakdown Structure (WBS)
    - 9 Levels structure
    - 36 characters long
- Combine Structure Elements feature

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- Define and Setup your Company/Contacts library
- Define and Setup unlimited Cost Type to be used in your project
- Define and Setup unlimited User Codes and relations to WBS
- Define and Setup unlimited Standard Curves based on your past experience
- Define and Setup unlimited Group and attach rights to them
    - By module
    - By screen
    - By related group of fields
- Add Users to Groups

Estimating

The Estimating module gives you everything you need to build a cost estimate for any size of projects to any level of detail, with efficiency and effectiveness. The "Work Operation" and "Work Element" features organize the development of your database information in terms of Unit Rates and Unit Price for various type of work and maintain the detailed build-up of these rates. With flexible user interface and cost estimating methods, point and click reproduction capabilities, this module provides the estimating solution you need.

Features:

- User defined unlimited Labor, material, construction equipment library with daily rate and hourly rate
- Work Element Library
    - Create Work Element based on the three components: Labor, material and construction equipment.
    - Use the Unit Price and Unit Rate from these Work Elements on your estimate
    - Combine Work Elements into a Work Operation
    - Use the Unit Price and Unit Rate from these Work Operations on your estimate
- With Work Operation and Work Element concept, create comprehensive estimates in record-time.
    - Just apply the Quantity and select the related Work Element or Work Operation
- Allow seven pre-defined cost types associate with cost items
    - Labor
    - Material
    - Construction Equipment
    - Subcontract
    - Plant Equipment
    - Distributable
    - Others
- User defined "Add-On" can be added at the Item level, at the Cost Code level, or at the bottom line in any cost type combinations.
- Apply the Performance Factor to adjust for weather, geography and other job-specific conditions for a project done in another area or country.

Project Control

The Project Control module combines creation of budgets, keep track of costs and commitment and manage cash flow into one integrated module. It has been specifically designed for the EPC industry to support project management practices and common business tools. It provides a tool to effectively define, manage and control costs from project inception to completion. The sub-modules include: Budget, Cost and Commitment, Contract Administration, Contract Monitoring, Potential Change orders, Change Orders, Claims log, Construction equipment, and Labor Control.

Features:

- Create and Manage user-defined base lines
    - 3 default base line: Original, Current Budget and Forecast

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- o   Create as many base lines as necessary
- o   Copy budget feature allow you to speed up entry
- Flexible input/update for the Budgets data and Trends
  - o   Directly from PMIV Estimating module
  - o   Excel Template import capability
  - o   Up to 6 modes to enter the budget and trends
  - o   View your different base lines by your defined user groups and their respective user codes
- User defined budget change types with their respective reference and status codes
  - o   Post or Un-post Budget Changes
  - o   Affect the related base lines
- Funding Management
  - o   Track encumbrance of funds
  - o   Support multiple-funding sources
  - o   Unlimited Split Fund percentages
  - o   Funding source can be broken down at Budget, Commitment and Forecast levels
  - o   Create cash flow for each funding source
- Up to 3 levels Cost and Commitments breakdown
  - o   Contract Bid Item, Pay Item and Line Item
  - o   9 different input modes
  - o   Maintain an Allocated Budget, Current Forecast and Supplemental Funds for each Breakdown
  - o   Capture Planning and Scheduling Activity data in all levels
  - o   Contingency balance calculated automatically
- Support multiple currencies and Calendars
  - o   User defined base currency for multi-currency environment
  - o   User defined cut of date for Calendar
- Contract Administration and Contract Monitoring
  - o   Collect Actual Hours, Quantities and Amounts in lowest level and roll-up automatically to upper levels
  - o   Flexible input/update modes
  - o   Flexible Earn Method selection, choose from Equivalent Percent Complete or Physical Percent Complete
  - o   Capture Material on Hand
  - o   Extra Work Bill (Labor, Equipment, material and Others)
  - o   Quantity Sheets and Quantity estimates information
  - o   Keep the history data from the pervious closed periods
  - o   Generate Progress Payment reports
- Tracking and managing Potential Change Order and Change Order
  - o   Log and track all Potential Change Orders on the project
  - o   Track the evolution of each item in the PCO, from the estimated amount to the final approved amount
  - o   Create Change Order based on items from one PCO or multiple PCO
  - o   User defined PCO and CCO Template and Memorandums
- Payment
  - o   Track payments to the contractors and suppliers.
  - o   Integrated with Client Accounting System
- Cash flow
  - o   User Defined Curve data
  - o   Create Cash Flow based on various base Lines
  - o   Create Cash Flow based on Commitment data
  - o   Create Cash Flow based on Funding Source
- Report
  - o   Various predefined reports in the system
  - o   Easy to use report wizard interface
  - o   Report can be grouped, sorted and filtered by User

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Engineering Control

The Engineering Control module enables the engineering department to measure budget and schedule progress against pre-established plans. This allows for timely review and analysis of on-going project activities and if necessary, for corrective actions to be implemented. The work is planned and tracked by task. The tasks are then grouped into Engineering Design Package and the Engineering Design Packages are grouped into Construction Package for Planning & Scheduling purposes. The task is associated to Milestones or Control Points with pre-defined percent complete for each Control Point and number of days between Control Points. The task has an Activity attribute. The Budget is broken down by Activity. The Spent Hours are collected at the Activity level. The Earned Hours are generated at the task level roll-up to the Activity. The performance is calculated by dividing the Spent hours by the Earned Hours.

The user can decide to use the Control Points at the first level or at the second level in relation with the magnitude of the Engineering project.

Features:

- Define and Setup your Engineering Discipline
- Setup the Drawing Numbering Structure based on the Project Elements
- Define and Setup the Engineering Activities
- Budget by Activity
- Control Point definition
- Development of the task
- Schedule, Actual and Forecast per Control Point
- Trending Program Setup
- Engineer Roster
- Timesheet capability
    - Import/Export
    - Activity Level
    - Employee level
- Availability compare to Requirement
    - By Discipline
    - By WBS
- Earned Values
    - By Discipline
    - By WBS
- Progress and Performance
    - By Discipline
        - Summary
        - Detail
    - By WBS
        - Summary
        - Detail
- Engineering Design Package (EDP)
    - Define and Setup your Engineering Design Packages
    - Assign drawings to EDP
    - CPM report to export to Planning & Scheduling package
- Construction Package
    - Define and Setup your Construction Packages
    - Assign EDP to Construction Package
    - CPM report to export to Planning & Scheduling package
- Forecast capabilities
- Planning & Scheduling Interface
    - Import/Export
- Various Reports
    - Various predefined reports in the system
    - Easy to use report wizard interface
    - Report can be grouped, sorted and filtered by User

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Procurement Control

The Procurement Control module allows user to quickly and easily process requests for Capital or Expense items. These requests are then routed electronically for the appropriate approvals. All project personnel that need to be involved with the requisition will be notified electronically. After the approval process is complete, the Requisitions are routed to the Purchasing Department, eliminating the need to re-enter the data. The requisitions can be split or consolidated as required based on the system rules or buyer's needs. When the quotations are received and entered into the system, PMIV allows the user to do a Bid Analysis at the item level and split the Purchase Order or at the PO level.

The sub-modules include: Procurement Setup, Material Control, Purchasing and Contracting.

Features:

- Track detail information of suppliers and bidders, including scope of work, qualifications and suppliers/bidders history
- Setup
    - Expeditors
    - Inspectors
    - Type of Purchase Orders
- PO template
- Requisition Template
- User defined Purchase Order numbering structures
- Allow revision on the requisitions.
- Up to 9 levels of approval cycles
- Allow originator to attach Specifications and Drawings to the requisition
- Bidder analysis can be done at item level or PO level
- Integrated with the Project Control module, eliminating double-entry and enforcing utilization of data at the source
- Various standard management reports

Electronic Data Collection (EDC)

The Electronic Data Collection (EDC) module covers the Electronic Data Delivery, the Certified Payroll, the Prevailing Wage Rates, The Daily Diary and the Labor Interview. All these sub-modules are linked to each other in order to validate and report exceptions or violations between the different data information.

Features:

- Electronic Data Delivery
    - Prime and Subcontractors Information
    - Labor Information
    - Equipment Information
    - Validation at the source
    - Excel Template, if necessary
- Certified Payroll
    - Validation at the Source
    - Excel Template if Export from Accounting System is not available
    - Violation Logs
- Prevailing Wage Rates
    - By County
    - Validation of the Certified Payroll rates
- Daily Diary – Also available in Pocket PC
    - Inspector Information
    - Weather Condition
    - Company Information
    - Work Operation based on the Work Breakdown Structure
    - Labor information and Hours (batch load available)

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- o   Equipment Information
- o   Material Information
- o   Quantity Information
- o   Remark, Voice Recording available
- o   Picture
- o   Duplication capabilities
- Labor Interview
  - o   Company Information
  - o   Labor Information
  - o   Interview Record, Voice Recording available
  - o   Security

Quality Assurance / Quality Control

The **Quality Assurance/Quality Control** allows you to establish quality assurance plans and procedures at the program/projects levels. These plans set the performance standards: methods for measuring, evaluating, auditing, and reporting performance, and procedures for handling situations when performance deviates from standard.

The plans and procedures are an integral part of the system. The QA/QC effort lasts through the life cycle of the project from inception, to Engineering, Procurement, Construction, Start-up, Commissioning and Operation & Maintenance.

QA: A planned and systematic set of activities necessary to provide adequate confidence that requirements are properly established and products or services conform to specified requirements.

QC: the process by which product quality is compare with applicable standards; and the action taken when nonconformance is detected.

Features:

- User defined Numbering Structure for QA/QC Plan and procedure
- User defined Numbering Structure for QA/QC Division Specifications
- Defects Liability & Warranty log
  - o   By Location
  - o   By Item
  - o   By Equipment
  - o   By Type
  - o   Various Verified by Entities
  - o   Tracking various Dates until Acceptance
- Handover Punch List
  - o   By Location
  - o   By Item
  - o   By Category
  - o   By Type
  - o   Various Verified by Entities
  - o   Tracking various Dates until Acceptance
- Reports
  - o   Various predefined reports in the system
  - o   Easy to use report interface
  - o   Report can be grouped, sorted and filtered by user