



AVEVA CONTRACT RISK MANAGEMENT V8.1

CONTRACTOR TRAINING GUIDE

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1 Introduction

AVEVA Contract Risk Management is BHP Minerals Australia's chosen Post-Award Contract Management system. It is used to communicate commercial and contractual information between Company and Contractor.

2 Logging In

2.1 Forgot Password

① When you receive your Username from your Company Representative, you need to use the Forgot Password link on the login page.

② Enter your Username and your Email address, click Submit.

An email will be sent to you with a password reset link.

Click this link and follow the prompts to reset your password.

Upon successful first login, you will be prompted to accept the terms and conditions.

Already Registered?

Username

Password

Remember My Password

Login

[Forgot Password?](#)

Forgot Your Password?

To receive an email with a link to reset your password, please enter your username and registered email address.

Username * john.contractor

Email * john@contractor.com

Submit Cancel

2.2 Setting User Preferences

1 If this is your first time logging in, you will be prompted to set your current Time Zone.

This must match your computer's time zone.

Select the appropriate Time Zone from the dropdown list and click Save.

If your computer Time Zone changes, you will be prompted to repeat these steps at your next login.

User Preferences

Settings

- Allow ActiveX * Yes
- Document Control Support
- Preferred Page Size 50
- Time Zone set on my PC (UTC+08:00) Perth
- Preferred Language English
- Preferred Format English (United Kingdom)

Save Cancel

3 Navigation Overview

3.1 Overview Tab

- 1 Your Menu. From here you can change user preferences such as Contact Details, Time Zone and Password as well as viewing your company details.
- 2 Training Materials are available here.
- 3 Any obligations which require your attention are listed here. You can filter using the dropdown.
- 4 Qualification and Tenders are not applicable.
- 5 This area is known as “Breadcrumbs”. As you move through the system, the breadcrumbs will be generated so you can quickly move back to other areas. It is advisable to use Breadcrumbs instead of your browser Back buttons.
- 6 This icon will set the current page you’re on as your Home Page.
- 7 Menu Ribbon. The last icon will return you to your Home Page.

Please note, Tenders are not covered in this guide.

The screenshot shows the 'BHP TEST ProCon Contractor Portal' interface. At the top right, a user profile for 'John Contractor' is visible with a red circle '1' next to it. Below the header is a navigation ribbon with 'Overview', 'Contracts', and 'Tenders' tabs. The main content area includes a welcome message, a list of support requirements (Name, Company name, E-mail address, Telephone number, Name of BHP Contracts Representative, Contract / Bid Invitation number), 'Frequently Asked Questions', and 'Training Materials' (Introduction to ProCon, Instructions to Tender Online, Contract Communications and Obligations) with a red circle '2' next to it. Below this are sections for 'Qualification Category Details' (stating no categories are created) and 'Current Active Tenders (0)' (stating no tender activities) with a red circle '4' next to it. An 'Obligations (1)' section shows a table with one entry: 'VR0001 - Requires Reply - Requ...' with a due date of '19 Mar 2020 11:39:31 (UTC+ 8:...)'. A dropdown menu for 'All Contracts' is visible above the table, and a red circle '3' is next to the table. At the bottom left, a breadcrumb trail is shown with a red circle '5' next to it. At the bottom right, a home icon is present with a red circle '6' next to it. A red circle '7' is located at the bottom center of the page.

3.2 The Contracts Tab

- 1 The Contracts tab displays all the contracts you have access to.
- 2 You can filter the list for Open or Closed contracts.
- 3 Clicking the Contract Name link will take you to the contract itself.

AVEVA BHP TEST ProCon Contractor Portal

John Contractor Generic Contractor

Overview **Contracts** Tenders

Open Contracts

Contract Ref	Contract Name	Contract Type	Start Date	Planned End Date
100542-CON	Generic Contract	Standard Contract	09 Mar 2020	09 Mar 2022

Showing all 1

Contracts

4 Contracts

4.1 Contracts Tab

- 1 Contract Dates are shown here.
- 2 Location and Financials (if applicable) are shown here.
- 3 Contract contact/working team details are shown here. You can click on a contact name to view contact information.
- 4 Navigation Tabs
- 5 Clicking this will set as your Home Page.

The screenshot displays the 'Generic Contract' details page in the AVEVA ProCon Contractor Portal. The page is titled 'Generic Contract' with the ID 'Contract - 100542-CON'. It features a navigation bar with tabs for 'Overview', 'Contracts', and 'Tenders'. The 'Contracts' tab is active. Below the navigation bar, there are several sections of data:

- Contract Dates:** A table with columns for date and value. Callout 1 points to the 'Effective Date' row.
- Location and Financials:** A table with columns for location/financial type and value. Callout 2 points to the 'Approved Contract Commitment (AUD)' row.
- Contract Contact/Working Team Details:** A table with columns for role and name. Callout 3 points to the 'Contractor Representative' row.
- Navigation Tabs:** A row of tabs including 'Details', 'Communication', 'Obligation', 'Risk Cove', and 'Contract File Search'. Callout 4 points to the 'Details' tab.
- Home Page Button:** A small icon in the bottom right corner. Callout 5 points to this icon.

Field	Value
Award Date	09 Mar 2020
Start Date	09 Mar 2020
Original End Date	09 Mar 2022
Planned End Date	09 Mar 2022
Effective Date	09 Mar 2022

Field	Value
Country of Operation	Australia
Currency	AUD - Australian Dollar
Contract Award Value (AUD)	1,000,000.00
Approved Contract Commitment (AUD)	1,000,000.00
Approved Contract Expenditure (AUD)	0.00

Field	Value
Tender Reference	N/A
Category	None
Description	
Contractor Representative	John Contractor
Contractor Administrator	
Contractor Information Management	
Contractor Functional Support	

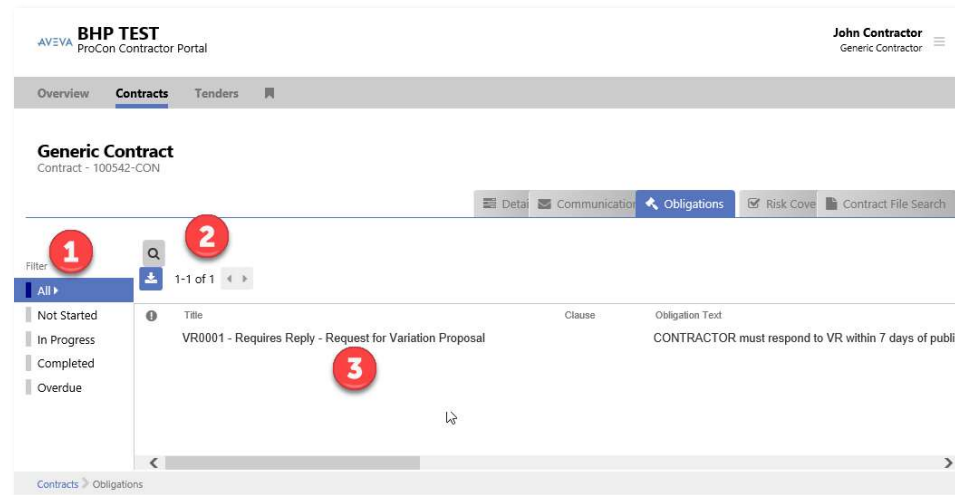
4.2 Communication Tab

- 1 Filtering is available here. Choose by State or Communication Template.
- 2 The Communication Register shows all the communications sent between Company and Contractor, and any Draft items you are working on.
- 3 You can download the register by clicking this button.
- 4 Create a new communication using this dropdown menu.

Ref	Stories	Rev	Title	State	Financial Impact	Schedule Impact (Days)
AFPO002		0	AFP - January 2020	Draft		
CTC0001		0	Letter to Company - Insurance Renewal	Approved		11 Mar 2020
AFPO001		1	Application for Payment #1	Awaiting Agreement from Recipient	45,000.00	10 Mar 2020
AFPO001		0	Application for Payment #1	Rejected		10 Mar 2020

4.3 Obligations Tab

- 1 Filtering is available here.
- 2 Search for Obligations here.
- 3 Obligations are listed here. Clicking the obligation will split the screen and show additional information:
- 4 Due Dates and other information is available here.
- 5 Dropdown list shows Manage Obligation or Associated Communications. Selecting Associated Communications will split the screen further, revealing more information.
- 6 This lists any associated communications. Clicking an item will take you to the communication.
- 7 You can add associated communications to an obligation here. This is typically reserved for Company to manage.



4.4 Risk Covers

This area shows all insurances, bank guarantees, or other risk covers you have in place. It is important to note that Risk Covers are handled on the Company side, and any renewals should be sent to Company using the Correspondence to Company communication.

- 1 Download a copy of your risk cover by clicking this icon.

Type	Description	Category	Agency/Bank	Reference	Expiry Date	Value	Certificate
Insurance	General Liability	Insurance	Allianz	987654321-123	31 Dec 2020	20,000,000	1

4.5 Contract File Search

- 1 Use the filters to find documents located in different areas.
- 2 Results are shown in this area
- 3 You can click the Name link to download the file.
- 4 The Actions column will perform other functions such as view the associated communication, view properties, download, rename, or delete.
- 5 You can also visit the Contract Library.

The screenshot shows the 'Contract File Search' interface. At the top, there are navigation tabs: Details, Communications, Obligations, Risk Covers, and Contract File Search. Below the tabs is the 'Search Filter' section. It includes a 'Search In' dropdown menu (1) set to 'Contract and all Communication Templates', a 'Date File Added From' field (2) with a calendar icon and 'DD/MM/YYYY' format, a 'File Added By' dropdown menu (5) set to 'All contract role members', and a 'Search On' dropdown menu (4) set to 'File Reference'. The 'Criteria' dropdown is set to 'Contains'. There is a 'Search For' text input field and a 'Search' button. Below the search filter is the 'Files' section, which contains a table of search results. The table has columns for 'Reserved', 'Confidential', 'Reference Number', 'Name' (3), 'Size (K)', and 'Actions' (4). The table lists four files: 'Estimate Request.pdf', 'General Liability Insurance.pdf', 'Contract.docx', and 'Calculation Sheets for AFP #1.xlsx'. At the bottom of the interface, there is a breadcrumb trail: 'Contracts > Contract File Search'.

Reserved	Confidential	Reference Number	Name	Size (K)	Actions
No	No	100542-CON/VR0001/john.smith/5489	Estimate Request.pdf	33	[Icons]
No	No	100542-CON/VR0001/CON0360/5459	General Liability Insurance.pdf	32	[Icons]
No	No	100542-CON/VR0001/CON0360/5458	Contract.docx	11	[Icons]
No	No	100542-CON/AFP0001/john.smith/5453	Calculation Sheets for AFP #1.xlsx	16	[Icons]



5 Communications

5.1 General Notes

You will receive email notifications of any newly received communications from Company.

There are two ways to send communications to Company, either as a New Communication, or as a Related Communication.

If, for example, Company has requested a reply to a Letter, then you would respond with a Related Communication. If the letter is for a new topic entirely, you would create a new communication.

5.2 Communication States

Communications are configured by Company side. The available states for a communication are defined as follows:

Any communication can be saved as Draft during creation.

Communications which require agreement, such as an Estimate, when issued will be in an "Awaiting Agreement from Recipient" state. The recipient then has the option to Agree or Not Agree. The Authoring party can Reject.

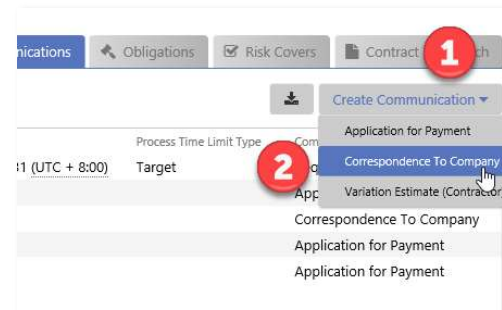
For items which do not require agreement, the state transitions from Draft to Approved. You can think of the word Approved as either Sent or Received, as it was Approved to Issue to the other party.

Any communication can exist in a Rejected state. The term Rejected is not a formal decision. Rejecting a communication is typically done for two reasons, firstly to rectify a mistake such as forgetting to add an attachment or correct a typo, and secondly in order to enable a revision to be created.

5.3 Creating a New Communication

- 1 Click on the Create Communication dropdown from the Communications tab.
 - 2 Select the appropriate communication template.
- In the event a communication you require is missing, please reach out to your company representative to get this configured.
- 3 Complete the form, noting any items with an asterisk are mandatory.
 - 4 Add an attachment by clicking the Add Attachment Button.
 - 5 Browse to your file. Repeat as required.
 - 6 Click Save As Draft when ready.

Note: Saving as Draft is a best practice and mandatory when creating expenditure claims, e.g. Application for Payment, and change related communications, e.g. Variation Estimate (Contractor).



This screenshot shows the 'Create a Communication' form for 'Correspondence To Company'. The form includes fields for 'From' (John Contractor), 'To' (John Smith), and 'Title' (Letter to Company). A red circle with the number '3' is positioned over the 'Title' field. The 'Description' field contains the text 'Please find attached supporting documentation'. The 'Originated On' field shows the date '13/03/2020' and time '06:24'. The 'Correspondence Type' is set to 'Letter'. A red circle with the number '4' is positioned over the 'Add Attachment' button. The 'Add Attachment' section shows a file path, a file name 'Supporting Documentation', and a file type '.docx'. A red circle with the number '5' is positioned over the 'Browse...' button. At the bottom right, there are buttons for 'Save As Draft', 'Send', and 'Cancel'. A red circle with the number '6' is positioned over the 'Save As Draft' button.

5.4 Draft Communication Overview

This is your Draft communication.

- 1 It contains three or four tabs, depending on the communication configuration.
- 2 Clicking the Custom Fields dropdown will allow you to edit custom field answers. This option is also available by clicking the Details tab again.
- 3 The Stories tab shows the related communications. You can click the titles of any related items to visit the communication.
- 4 The Revisions tab displays any revision history.

If the communication is Expenditure driven, the expenditure tab will be shown. This is where you would enter any expenditure you are claiming.

5.5 Creating Expenditure (No Line Items)

IMPORTANT: Expenditure can only be added to a Draft communication.

- 1 From your Draft communication, click the Expenditure tab
- 2 Choose an expenditure category.
- 3 Enter a Title for the expenditure line, and the value claimed.
- 4 Click Save to add the line.

The total financial impact is calculated.

Once you're ready, send it to Company.

Category	Sub-category	Currency	Financial Value
General	Labour	AUD	25
Retention	Retentio...	AUD	82
Retention	Retentio...	AUD	-10

Total Financial Impact (AUD): 96,300.00

5.6 Creating Expenditure (With Line Items)

IMPORTANT: Expenditure can only be added to a Draft communication.

- 1 From your Draft communication, click the Expenditure tab
- 2 Show all available line items
- 3 Enter the amount or quantity being claimed (Milestones are checkboxes).
- 4 The Financial Impact value is calculated automatically.

Once you're ready, send it to Company.

Communication - AFP0002

Details **Expenditure** Revisions

All Available Line Items

Code	Expenditure Title	Expenditure Type	Claimed	Financial Impact
A01	Line Item A01	Lump Sum	5,000.00	5,000.00
MS01	Milestone 1	Milestone Payment	5,000.00	5,000.00
PP1	Progress Line Item PP1	Progressive Payment	25.00	1,250.00
RI01	Reimbursable Items RI01	Reimbursable		
R1	Rate 1	Rate		
R1-1		Rate Version		
R2	Rate 2	Rate		
R2-1		Rate Version	12.00000	14,400.00
UR1	Unit Rate Line Item UR1	Unit Rate	50.00000	5,000.00

Showing all 6 Total Financial Impact (AUD): **35,650.00**

[Contracts](#) > [Communications](#) > AFP0002

5.7 Creating Related Communications

The process for responding to a communication with a related communication is very easy.

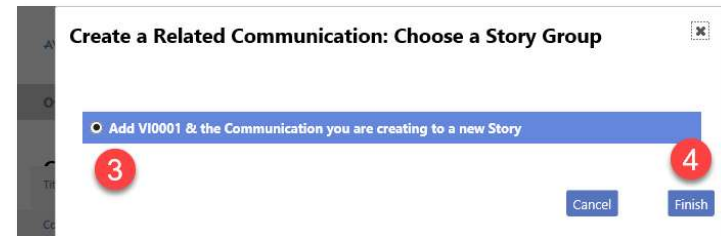
- 1 Go to the communication which requires the reply and click "Create Related Communication". Note: You may need to Agree/Not Agree, depending on the type of communication you are responding to.
- 2 Select the appropriate communication template.
- 3 When prompted, choose an appropriate story group.
- 4 Click Finish

Complete the form and attach documents as you would normally. When ready, Save as Draft, upload any additional files or include expenditure, and send to Company.

In some cases, the system may be configured to capture formal replies. Upon issuing to Company you will be prompted to mark the communication as a formal reply.

A dialog box will open, and you need to:

- 5 Select which item your related communication is in response to.
- 6 Click OK when done. This will also mark the obligation as completed.



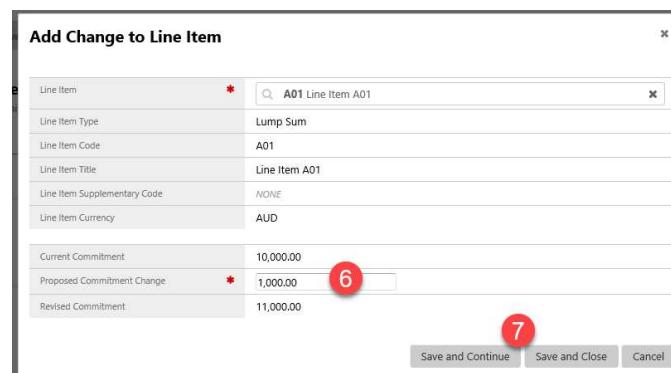
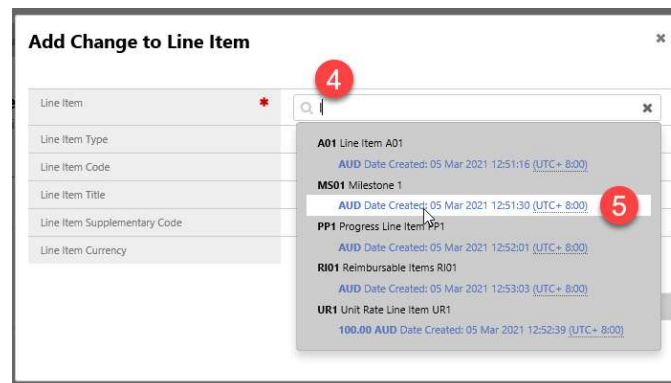
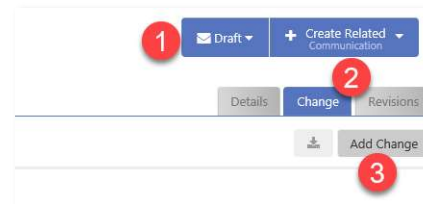
5.8 Creating Variation Request (With Line Items)

If Line Items are enabled on the contract, you will need to record the impact for each affected line item. This is a relatively simple process.

Create a related communication from the Variation Request from Company. You may need to select a story group.

- 1 Make sure you save your communication as Draft.
- 2 Click on the Change tab
- 3 Click the Add Change button
- 4 Start typing part of the line item code or description. A list of matches will appear.
- 5 Click the blue text beneath the line item.
- 6 Enter the financial impact. The revised commitment will be calculated below.
- 7 When ready, click Save and Close, or to add more lines click Save and Continue.

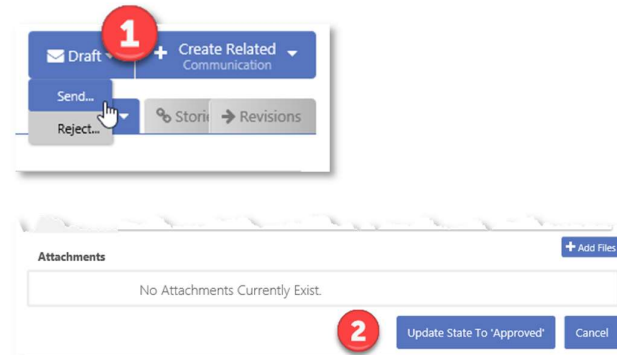
The total value is calculated and can now be sent to the Company for review.



5.9 Sending Communications

- 1 Once you are satisfied that all required documents have been attached and the fields are completed correctly, click on the Draft dropdown menu and choose Send.
- 2 Click on Update State to Approved. Confirm with OK.

This will issue the Communication to Company.



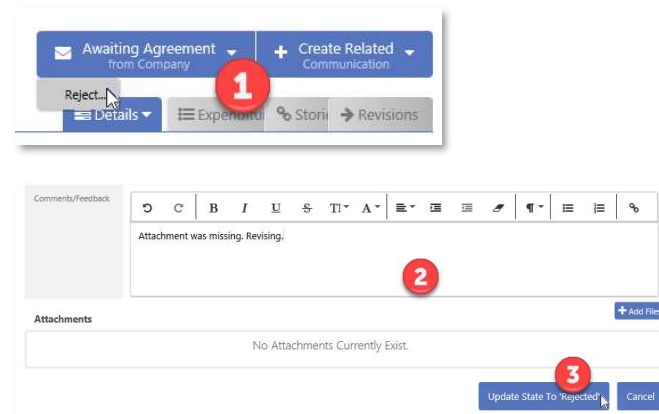
5.10 Creating Revisions

If Company responds to a communication with Not Agreed you may need to create a revision. You can also create revisions for communications you have placed in a Rejected state. As mentioned previously, rejected states are typically used to make a correction and enable a new revision to be created.

Revisions can only be made from Rejected and Not Agreed states.

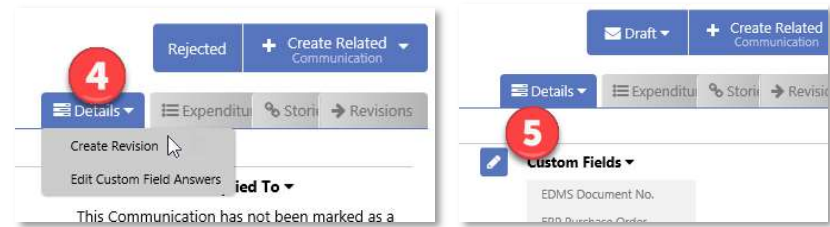
To create a new revision, visit the Communication requiring revision:

- 1 If the item is neither Rejected or Not Agreed, then click the Status dropdown, click Reject.
- 2 Enter a reason for the rejection in the comments.
- 3 Click Update State to Rejected and confirm the dialog box.
- 4 When the page reloads, click the Details tab dropdown icon, and choose Create Revision. Confirm the dialog box.



5 Your new revision will be in Draft state. Edit the information using the pencil icon.

When ready, proceed to send to Company.



5.11 Countersignatures

For Variation Directions, unless otherwise agreed, Contractor must sign the document first, sending it back to Company for execution and final signature.

When you receive a Variation Direction, the following steps should be taken:

- 1 Download the document and apply Contractor signature.
- 2 Click Awaiting Agreement from Contractor and select Agree.

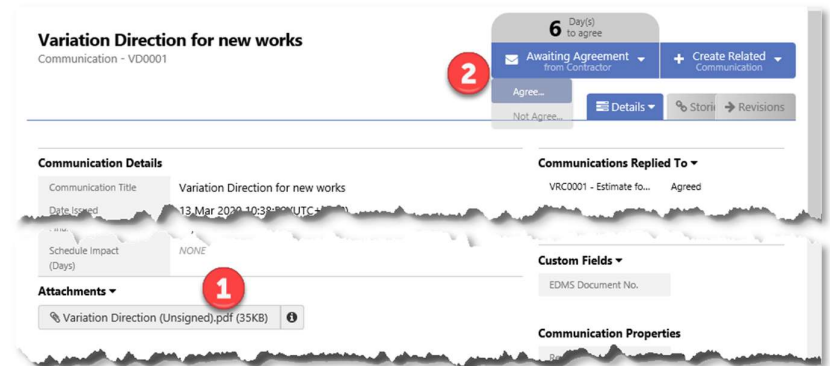
THE NEXT STEPS ARE EXTREMELY IMPORTANT!

- 3 Enter a comment for Company to see. An example is shown in the picture.
- 4 Click Add Attachment, browse to your Contractor Signed Variation Direction file.
- 5 When done, click Update State to Agreed.

The attachment will now be available for Company to add their countersigned executed Variation Direction.

The Variation Direction communication will now contain:

- 6 Original Unsigned document.



- 7 Contractor Signed document.
- 8 Company Executed (fully signed) document.

Variation Direction for new works
Update Communication State To Agreed

Awaiting Agreement from Recipient **Agreed**

Contract Name	Generic Contract
Contract Reference	100542-CON
Communication Title	Variation Direction for new works
Communication Reference	VD0001
Revision	0
Comments/Feedback	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Please find Contractor Signed Variation Direction. 3</p> </div>

Attachments **4** + Add Files

File Location	* C:\Users\sesa564820\OneDrive - AVEVA Solutions Limited\ProCom\BHP\Training\MINAU\Post-Award Docu... Browse...
Name	* Variation Direction (Contractor Signed) .pdf
Confidential	* <input type="radio"/> Yes <input checked="" type="radio"/> No

5 Update State To 'Agreed' Cancel

Variation Direction for new works
Communication - VD0001

Agreed + Create Related Communication

Details Store Revisions

Agreed 13 Mar 2020 **7**

Please find Contractor Signed Variation Direction. **8**

Variation Direction (Contractor Signed).pdf (35KB)
 Variation Direction Executed.pdf (35KB)
 + Add Countersigned Document

Communication Details		Communications Replied To	
Communication Title	Variation Direction for new works	VRC0001 - Estimate for New...	Agreed
Date Issued	13 Mar 2020 10:38:59 (UTC + 8:00)		
From	John Smith (Company Representative)		
To	John Contractor (Contractor Representative)		
Originated On	13 Mar 2020 10:37:00 (UTC + 8:00)		
Description	NONE		
Currency	AUD		
Financial Impact (AUD)	33,000.00		
Schedule Impact (Days)	NONE		

Associated Obligations

VD0001 - Requires Agree...	Completed
----------------------------	-----------

State Transitions

Awaiting Agreement from Recipient	13 Mar 2020 10:38:59 (UTC + 8:00)
Agreed	13 Mar 2020 10:54:23 (UTC + 8:00)

Attachments

Variation Direction (Unsigned).pdf (35KB) **6**

Custom Fields

EDMS Document No.

Communication Properties

Revision	0
Created By	John Smith
Created On	13 Mar 2020 10:38:04 (UTC + 8:00)
Required Response	Agreement Only
Process Time Limit	Target
Type	

Contracts > Communications > VD0001

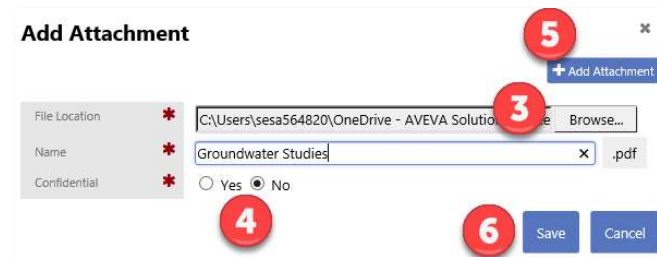
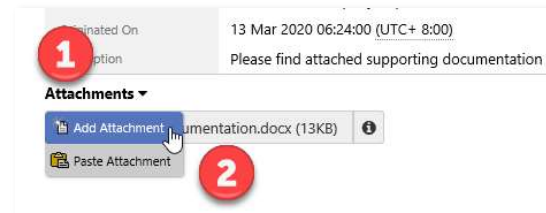
6 Working with Files

6.1 Adding Files by Browsing

From the Details tab of Draft communications, you can add additional attachments by:

- 1 Clicking the Attachments dropdown menu.
- 2 Select Add Attachment.
- 3 Browse to the file you wish to add.
- 4 Choose whether the file is considered Confidential.
- 5 Add additional attachments by clicking this button.
- 6 When ready click Save.

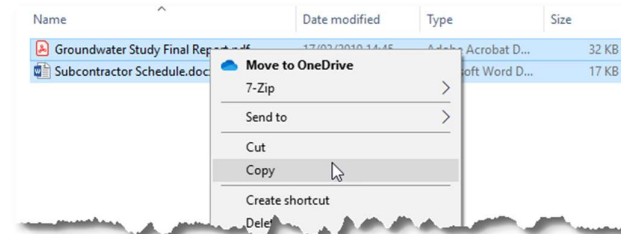
Your files will be uploaded.

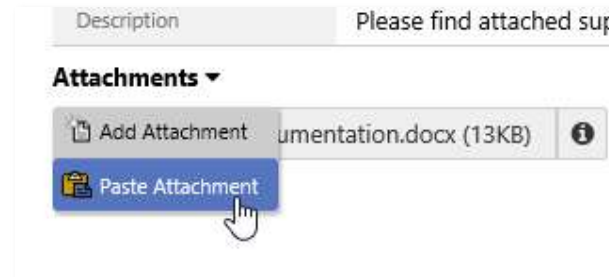


6.2 Adding Files by Pasting

If you have copied a file to your clipboard from Windows Explorer, the Paste Attachment option will allow you to quickly upload the file.

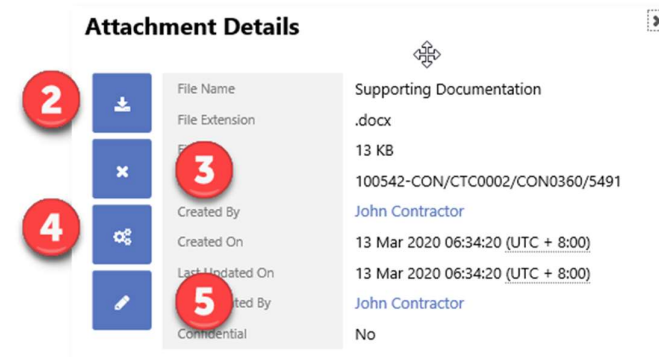
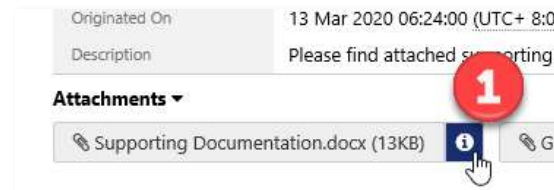
When uploading new files, you'll be prompted to mark as Confidential and, if you're uploading a single file, will allow you to rename the file as they are uploaded.





6.3 Changing File Properties

- 1 Click the Information icon. The following options are available:
- 2 Download the attachment here.
- 3 Delete the attachment.
- 4 Edit Properties (Rename, and Mark as Confidential).
- 5 Edit File (Upload a new version / Replace / Edit Online).



7 Process Diagrams

