Contract Communications and Obligations

AVEVA ProCon Quick Guides

AVEVA ProCon – bp



AVEVA PROCON

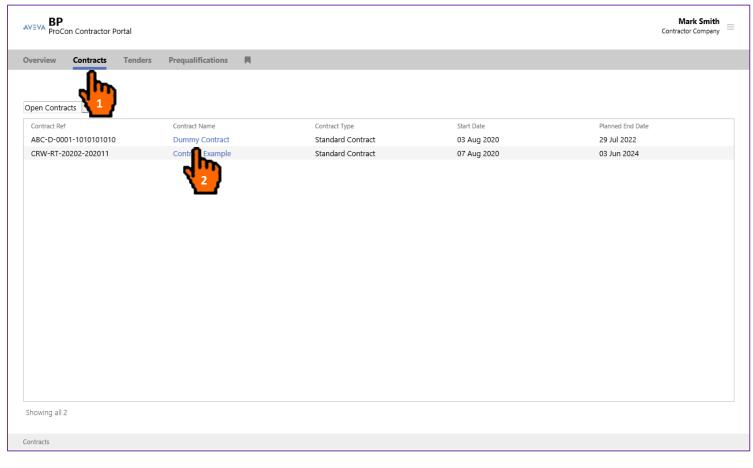
Quick Guide will cover

Contractor Portal

Creating and Sending a Communication
Replying to a Communication
Creating a Revision to a Communication
Agreeing/Not Agreeing to a Communication
Contract Obligations

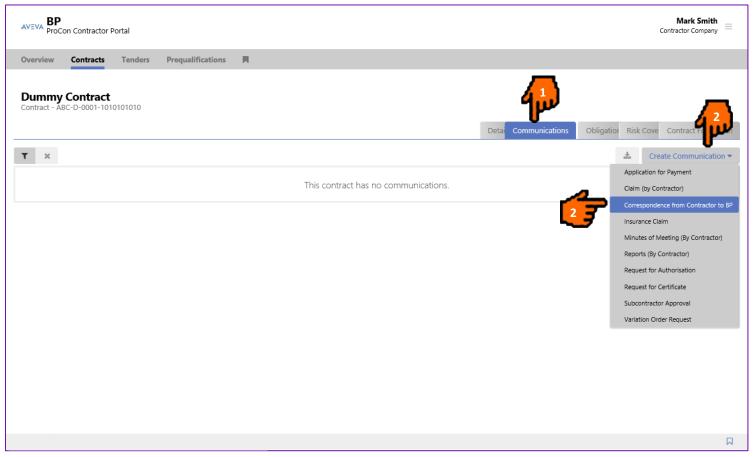






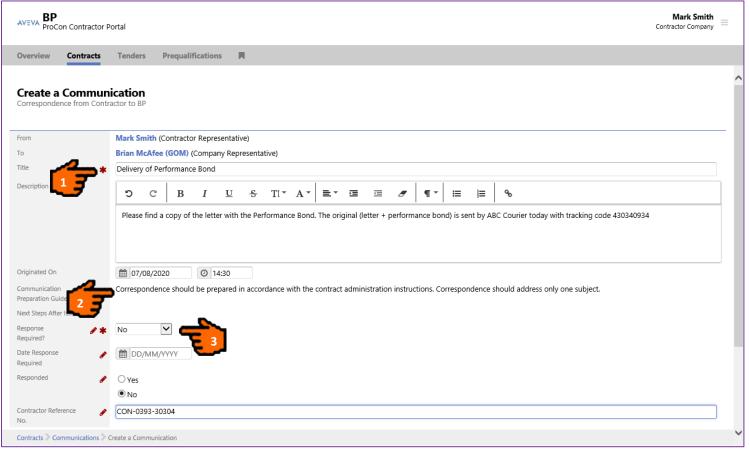
- 1. Click the Contracts tab to access open and closed Contracts.
- Select the Contract you want to view.Once selected the Contract details will be displayed.





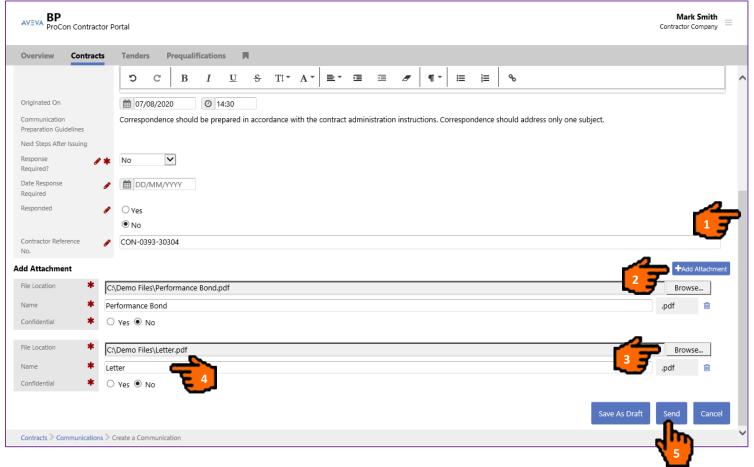
- Click on the Communications tab to navigate to the Communications page.
- 2. To create a new Communication, click the "Create a Communication" button and select the Communication template you want to use from the drop-down menu.





- Enter the appropriate information as required.
- 2. Additional guidance may be displayed to support the creation of the Communication.
- Each Communication type can have specific fields that are available to populate. Fields marked with a red asterisk (*) are mandatory to complete.

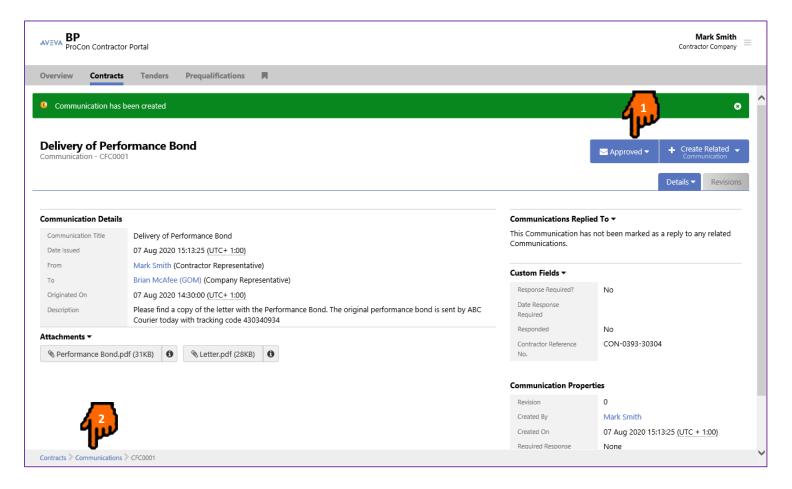




- Scroll the page to complete the remaining details
- To add an attachment(s) to the Communication, click the "+Add Attachment" button. You can add more than one attachment by clicking the button for each attachment you wish to attach.
- For each attachment click the "Browse" button ("Choose Files" in Chrome) and select the file you wish to attach.
- 4. If required, you can update the document name and select to make the attachment Confidential.
- 5. Click "Save As Draft" if you wish to save it in draft state for completion later. To immediately send the Communication to the Company, click "Send". This will publish the Communication on the Company portal.

Note: The Next Slide shows page if you chose "Send"



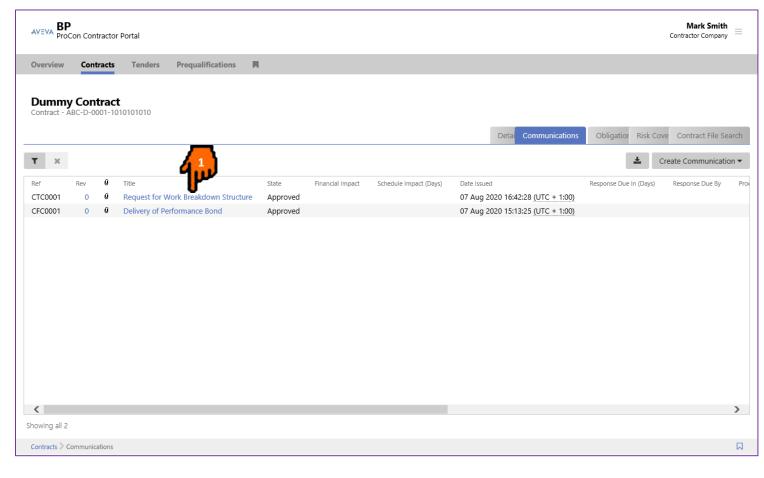


The Communication has been created.

- 1. The communication will show as "Approved" if it has been sent to bp and does not require agreement. If the communication has been sent to bp and does require agreement it will show as "Awaiting Agreement from Company".
- 2. To navigate back to the Communications Register page, click on the breadcrumb link at the bottom of the page.

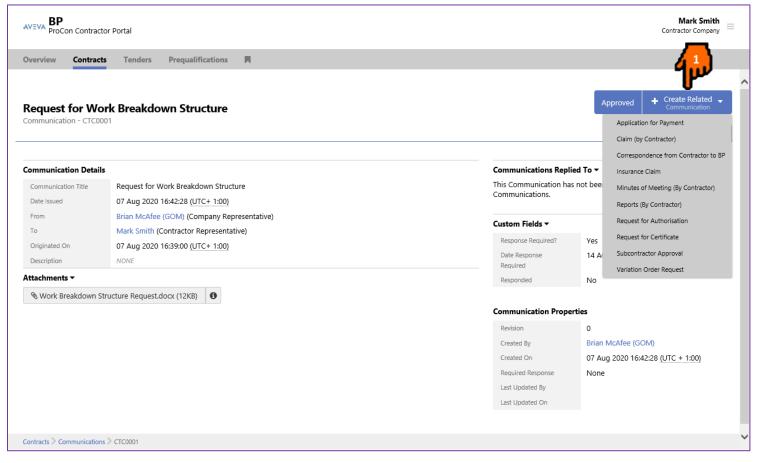






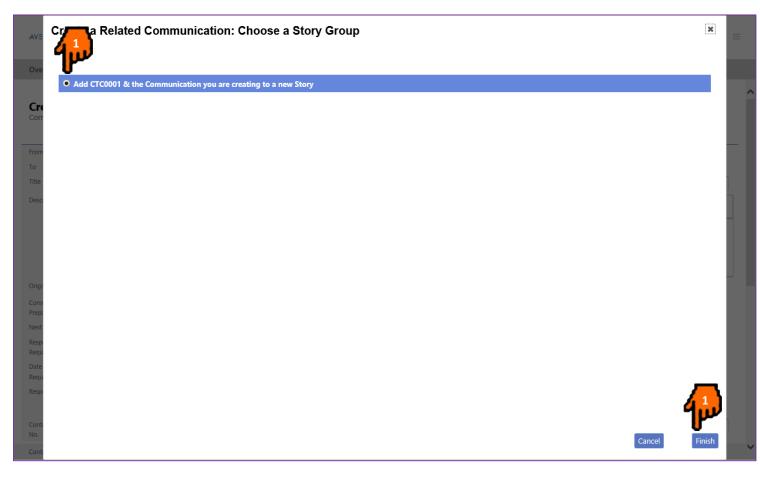
1. From the Communications Register page, open a Communication which requires a reply.





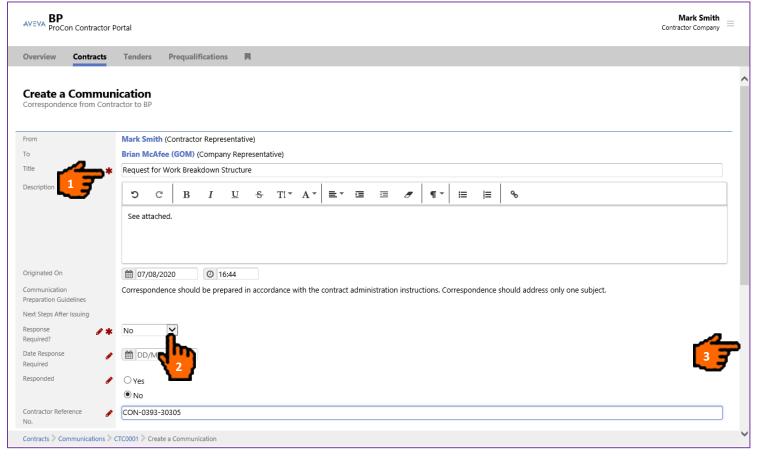
1. Click the "Create Related Communication" button and select the appropriate Communication template from the drop-down menu.





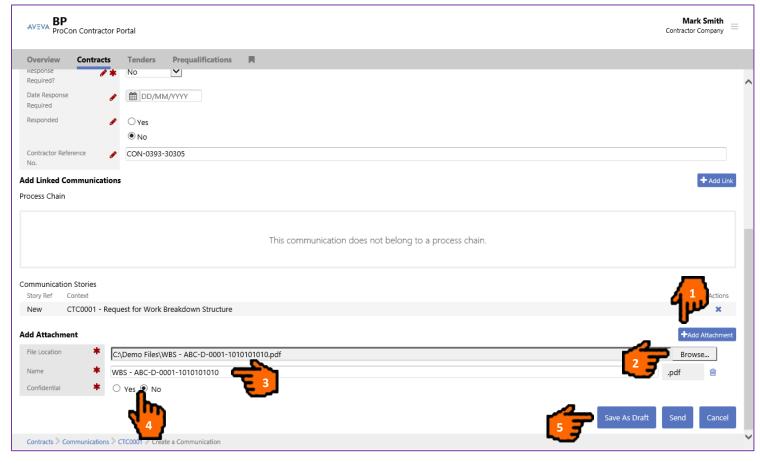
1. The option to relate the communication to the existing communication is select by default. Click the "Finish" button to create the new communication.





- 1. Enter the appropriate information as required.
- Enter values for any custom fields associated to this Communication.
- 3. Scroll to the bottom of the page

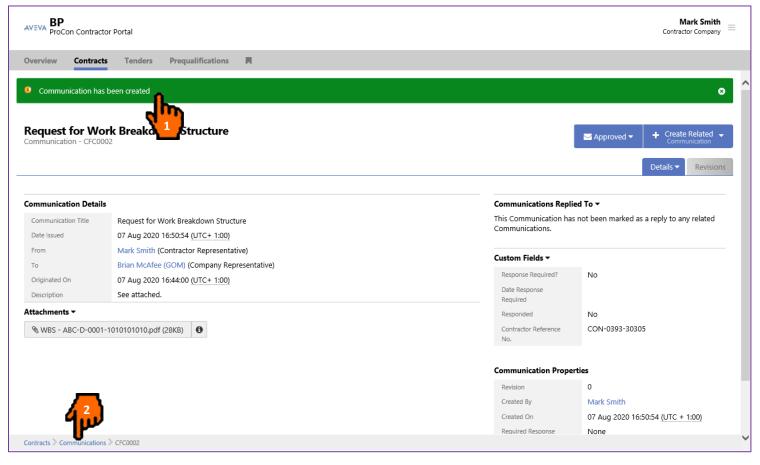




- To add an attachment to the Communication, click the "+Add Attachment" button
- 2. Click the "Browse" button ("Choose Files" in Chrome) and select the file you wish to attach.
- 3. If required, update the file name.
- 4. Select whether the file Is Confidential. If "Yes" is selected, only users identified with having confidential access will be able to view this file.
- 5. Click "Save As Draft" if you wish to save it in draft state for completion at a later date. To immediately send the Communication to the Company, click "Send". This will publish the communication on the Company.

Note: The Next Slide shows page if you chose "Send"

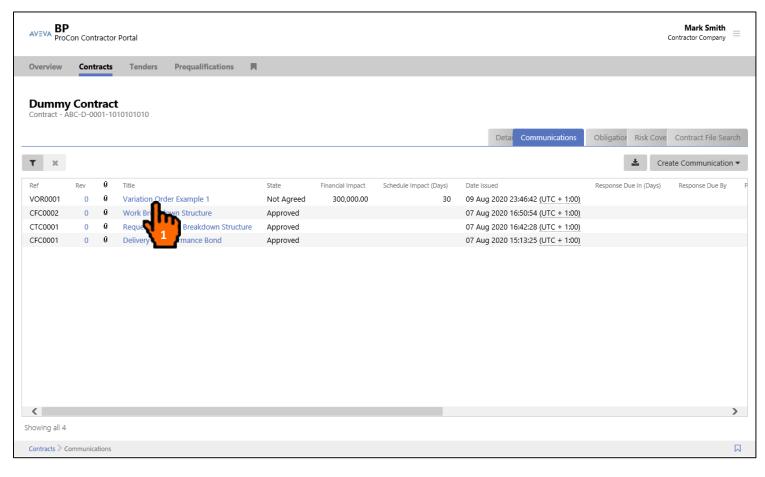




- The communication has been successfully created.
- To navigate back to the Communications Register page, click on the breadcrumb link at the bottom of the page.



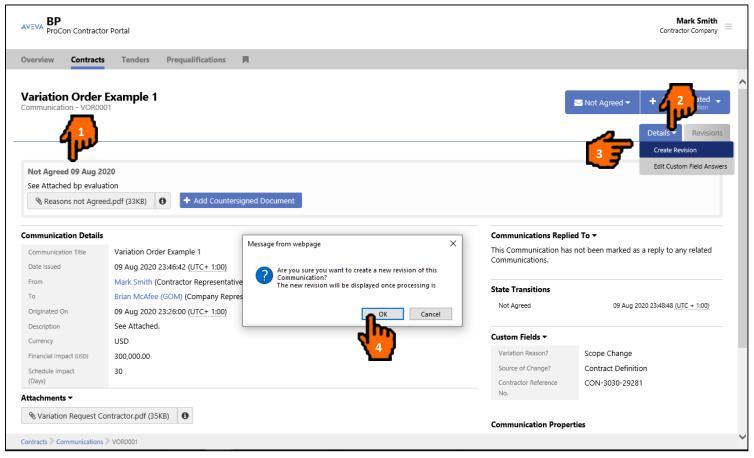




1. From the Communications register page, select the Communication you want to revise. Revisions can only be created for Communications in the "Rejected" or "Not Agreed" states.

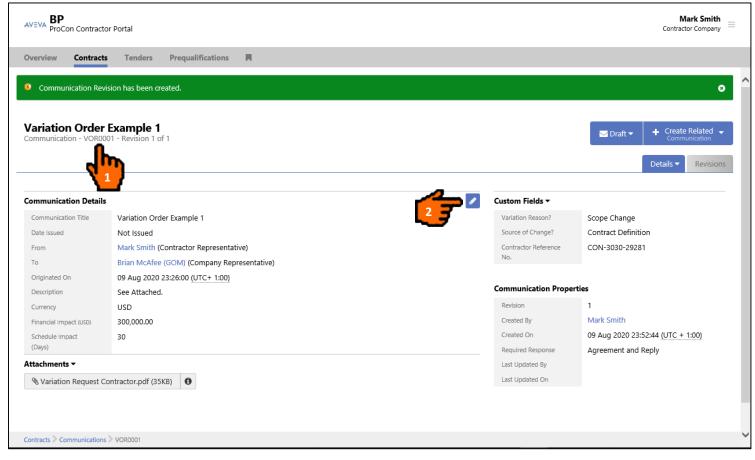
Note: To maintain consistent referencing please recreate revisions during agreement cycles rather than new communications.





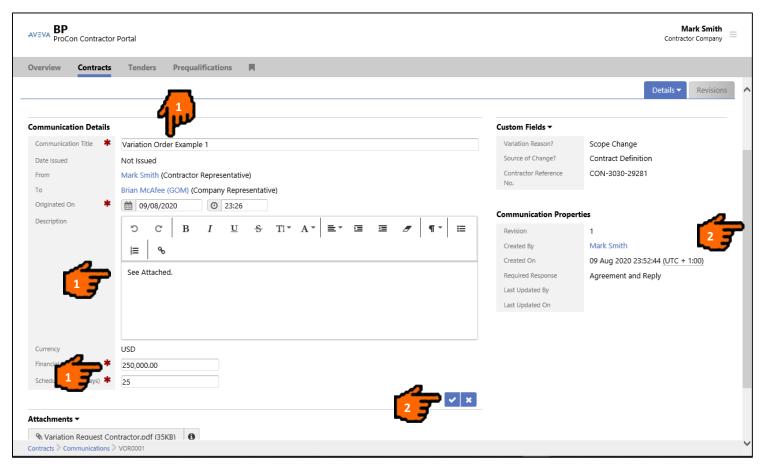
- The reason the communication was "Not Agreed" or "Rejected" may be shown.
- Click on the drop-down icon in the "Details" tab.
- 3. Select "Create Revision" from the drop-down list.
- 4. Click "Ok" in the pop-up dialog box to confirm.





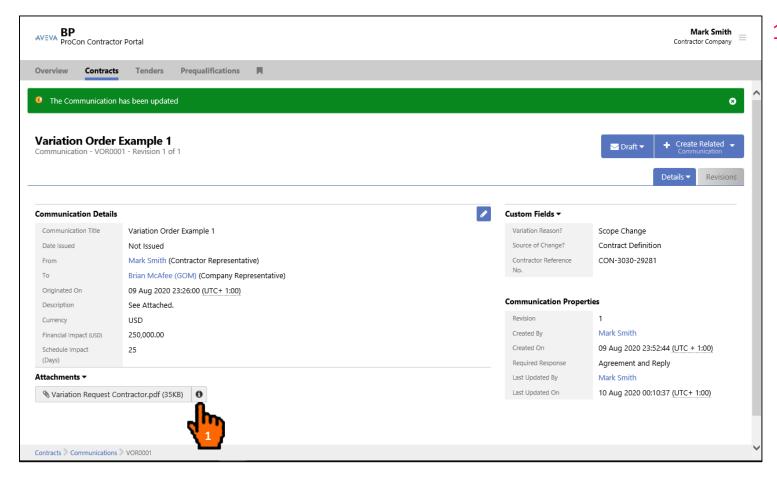
- A separate revision of the Communication with the same communication reference number has been created.
- 2. To edit the details of the Communication click on the 'Edit' icon in the "Communication Details" section.





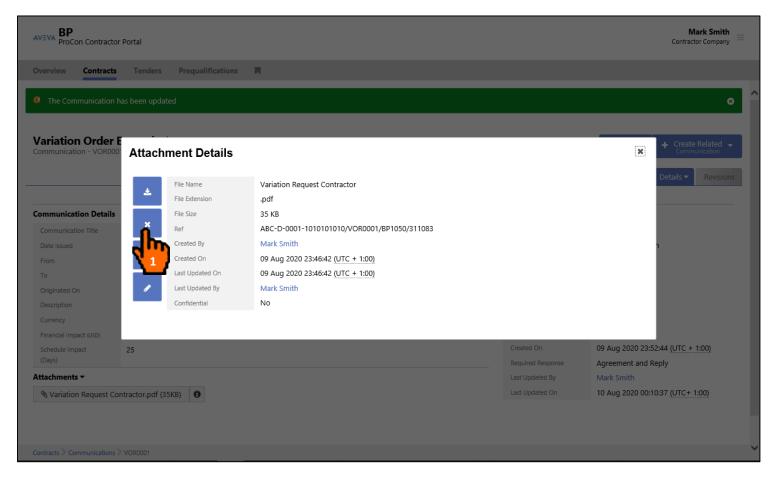
- Edit the Communication details as necessary.
- 2. Scroll to the bottom of the page.
- 3. When all necessary changes to the communication details have been made click the "Save" icon.





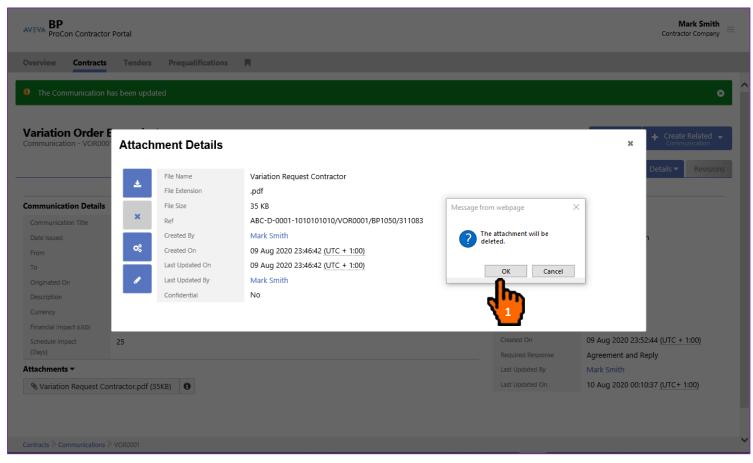
 To update any attachments. Click the "View Attachment Details" icon.





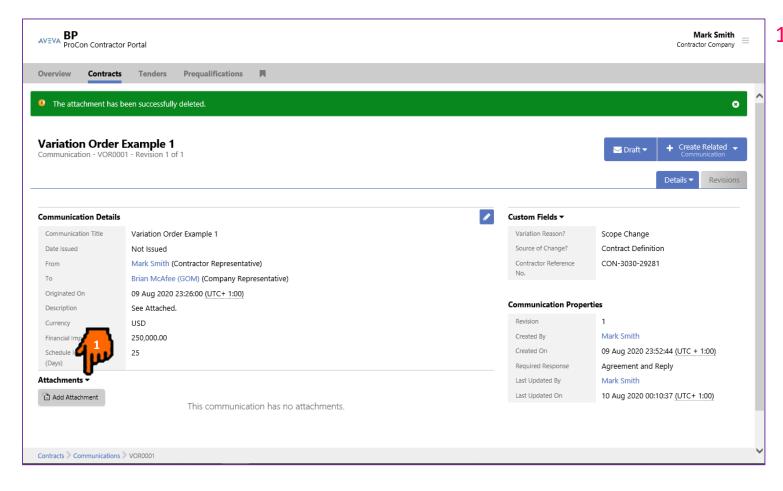
1. Click the "Delete" icon to remove an attachment.





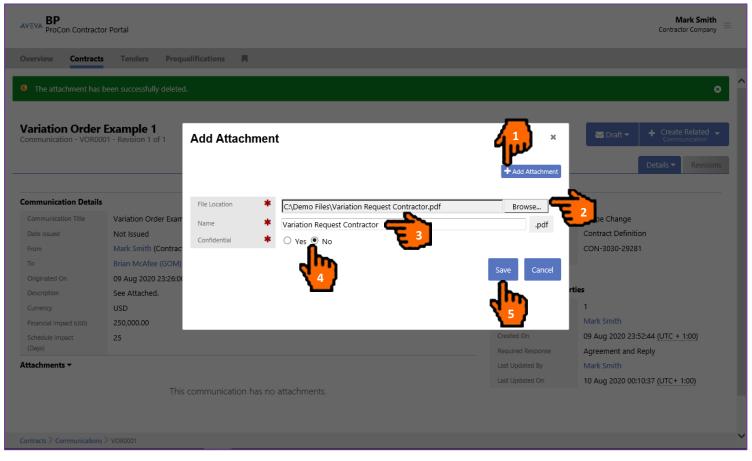
1. Click the "Ok" button in the pop-up dialog box to confirm the attachment deletion.





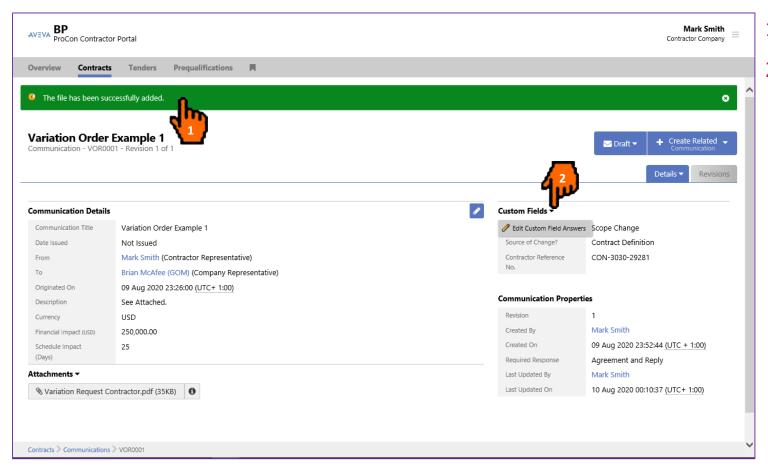
. To replace the deleted attachment with and updated version. Click the "Attachments" drop-down menu and select "Add Attachment".





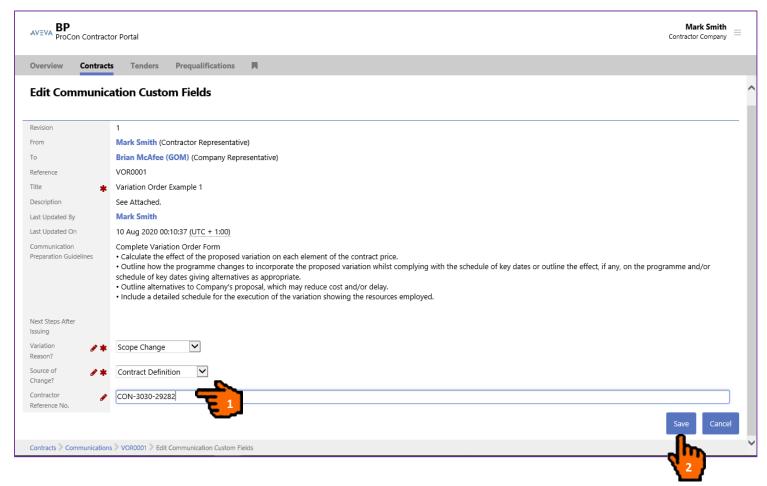
- To add an attachment to the Communication, click the "+Add Attachment" button
- 2. Click the "Browse" button ("Choose Files" in Chrome) and select the file you wish to attach.
- 3. If required, update the file name.
- 4. Select whether the file Is Confidential. If "Yes" is selected, only users identified with having confidential access will be able to view this file.
- 5. Click the "Save" button to add the attachment.





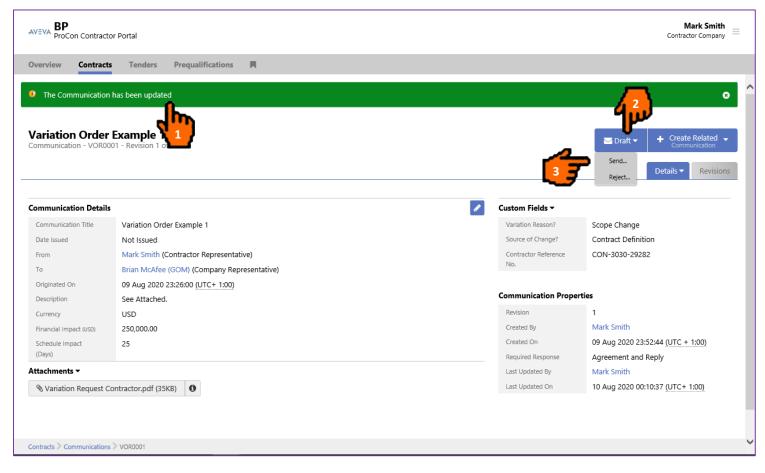
- Attachment successfully added.
- To edit the custom fields associated to the Communication, click on the drop-down icon next to "Custom Fields" and select "Edit Custom Field Answers" from the drop-down menu.





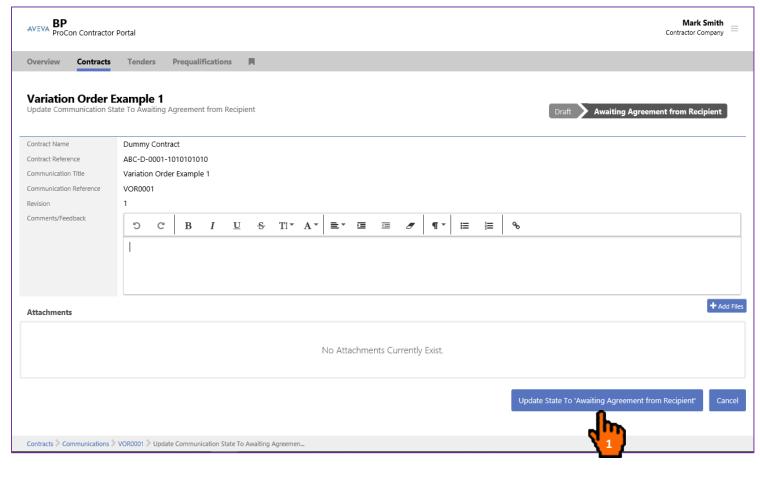
- Update custom fields as required.
- 2. Click the "Save" button.





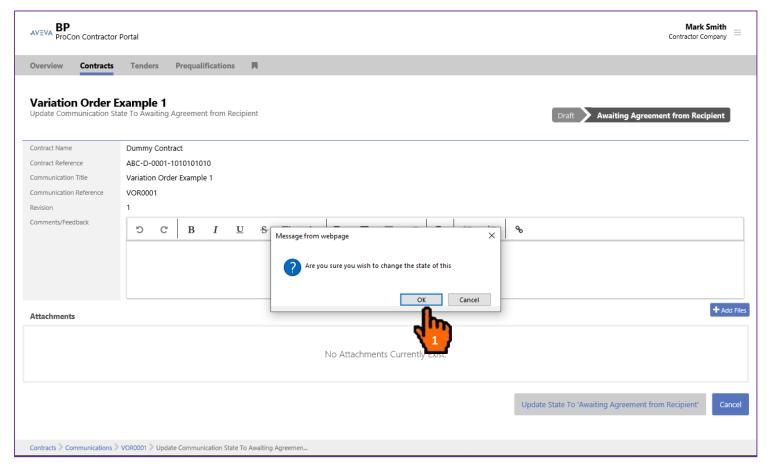
- The communication custom fields are updated.
- To send the revised communication click the "Draft" button.
- 3. From the drop-down menu select "Send".





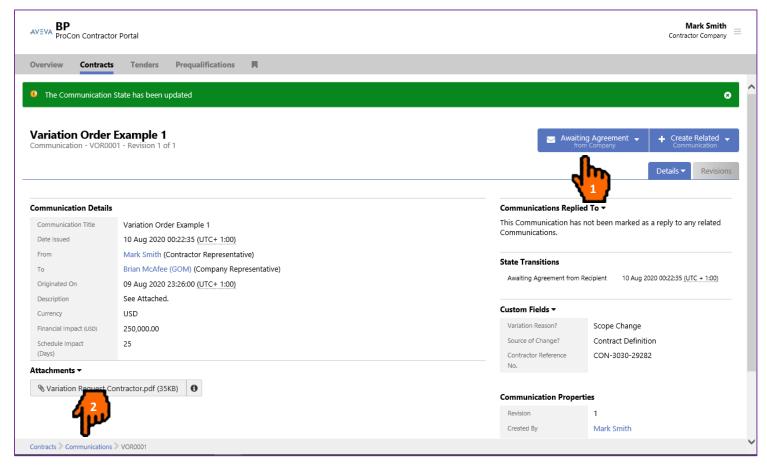
1. Click the "Update State To 'Awaiting Agreement from Recipient'" button to send the revised communication to the bp.





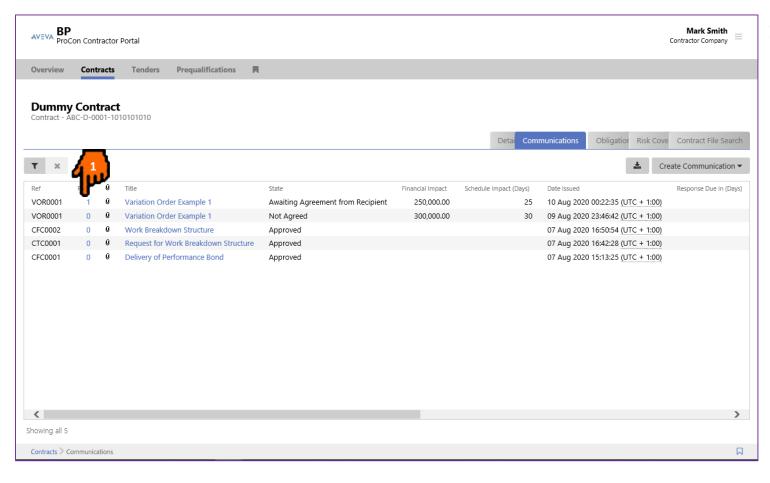
1. Click the "Ok" button in the pop-up dialog button to confirm sending.





- I. The communication revision has been sent and the example shown is "Awaiting Agreement from Company".
- To navigate back to the Communications Register page, click on the breadcrumb link at the bottom of the page.

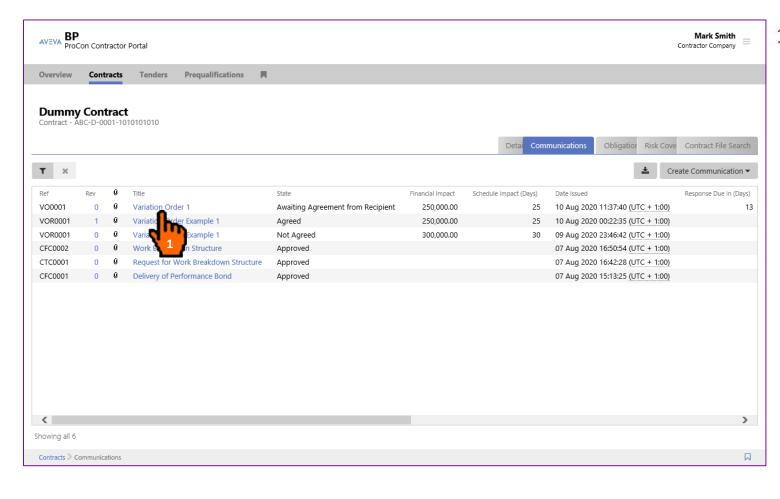




 The revised Communication will be displayed in the Communication register. Click on the Rev number to see a complete revision history of the Communication.

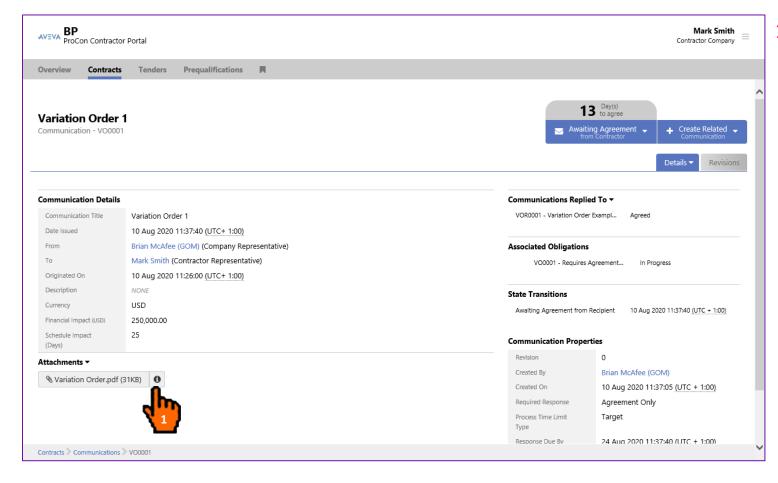






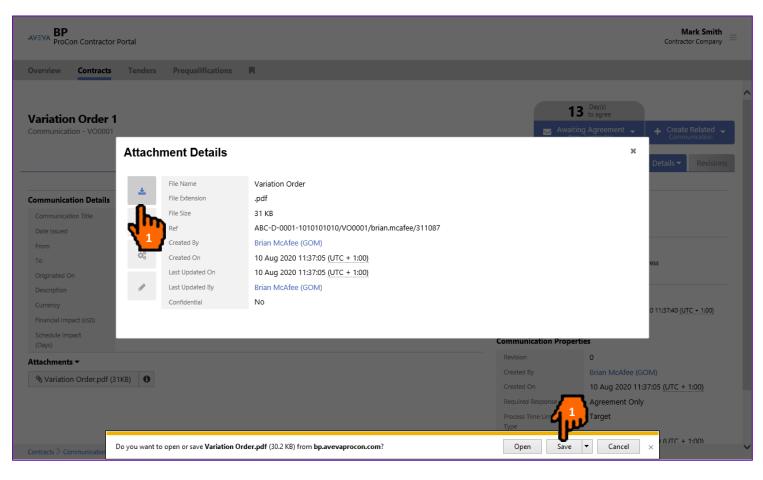
 From the Communication register, click the title of the Communication you want to update to agreed.





 Click the "View Attachment Details" icon to download an attachment for your records and/or to update the document with a signature.



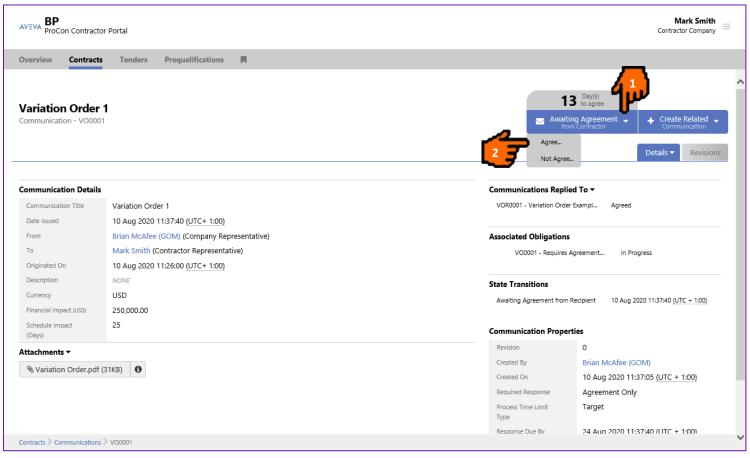


- Click the "Download" icon.
- 2. Click the "Save" button to download the attachment.

Note: Options depend on browser used and computer setup.



Agreeing/Not Agreeing to a Communication

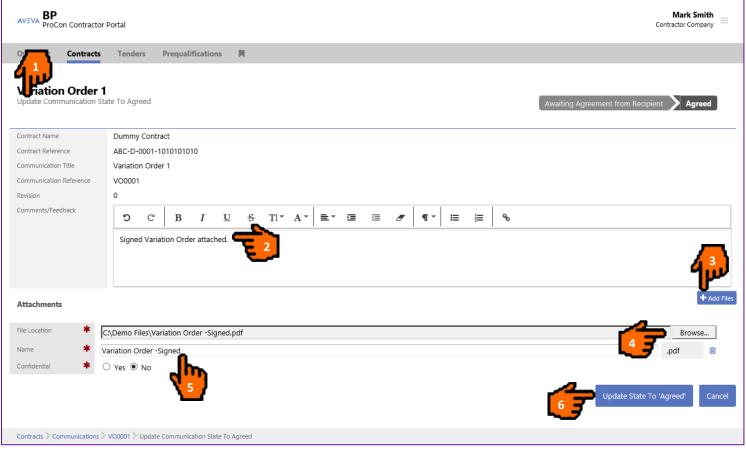


- Once you have reviewed all of the information contained in the Communication, and want to make a decision, click on the "Awaiting Agreement from Contractor" button.
- 2. From the drop-down menu select "Agree.." or "Not Agree.." based on your final decision.

Note: The following slides show screens when "Agree.." was chosen. The options would be the same if "Not Agree.." had been chosen.



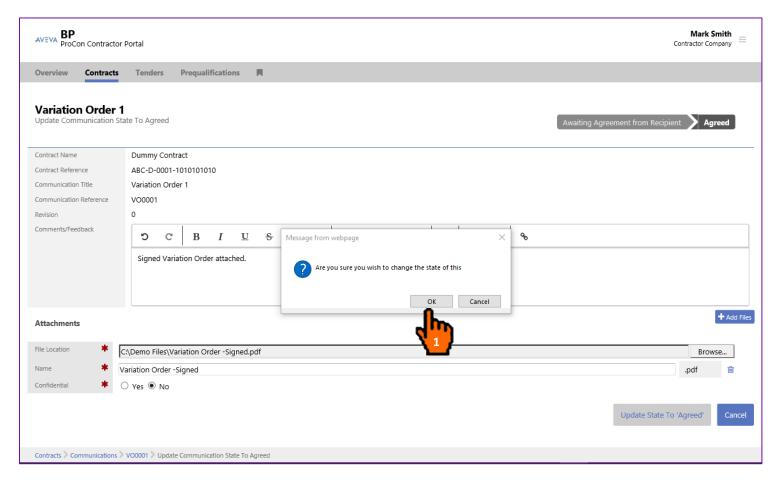
Agreeing to a Communication



- 1. The "Update Communication State" page is displayed.
- 2. Add any relevant comments/feedback, if required.
- To add an attachment e.g. signed document click the "+Add Attachment" button
- 4. Click the "Browse" button ("Choose Files" in Chrome) and select the file you wish to attach.
- 5. If required, update the file name.
- 6. Click "Update State To 'Agreed'" or "Update State to 'Not Agreed'" depending on what option you chose as communication decision.



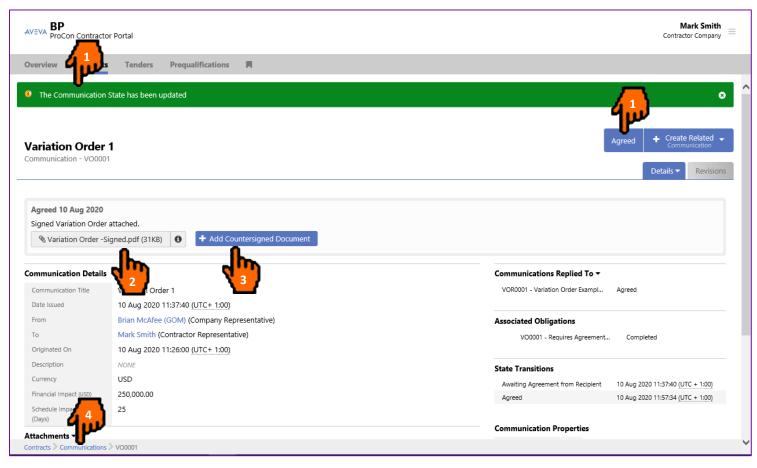
Agreeing/Not Agreeing to a Communication



 Click the "Ok" button in the pop-up dialog box to confirm decision and notify bp.



Agreeing/Not Agreeing to a Communication



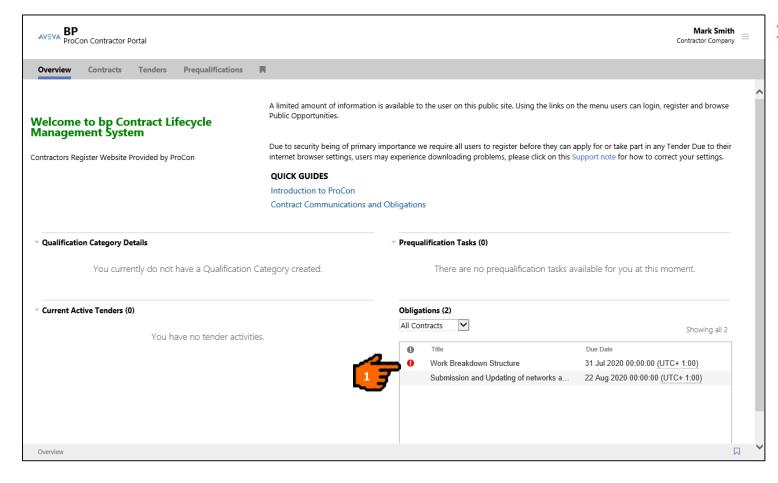
- 1. The Communication state has been updated to "Agreed" as shown on the Communication details page.
- 2. If any signed documents or feedback was attached it will be shown above the contract details.
- 3. If signed documents have been added a counter signed document may be added by bp after they receive notification.
- To navigate back to the Communications Register page, click on the breadcrumb link at the bottom of the page.

Note: The same steps can be followed to "Not Agree" a Communication. The resulting 'State' will be displayed as "Not Agreed" in this situation.



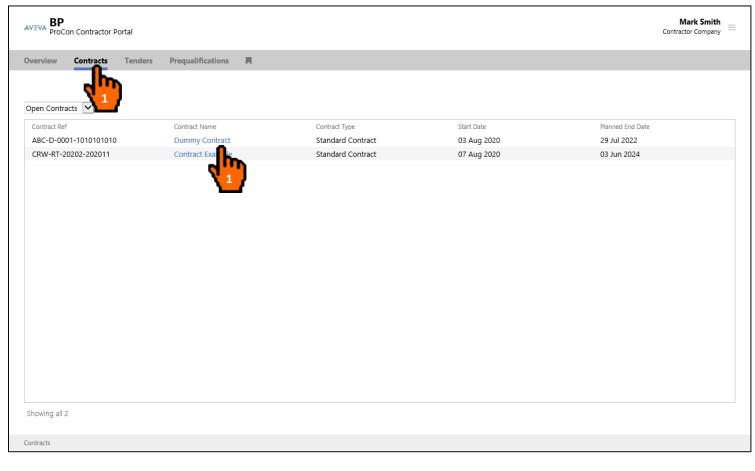
Manually completing Contract Obligations





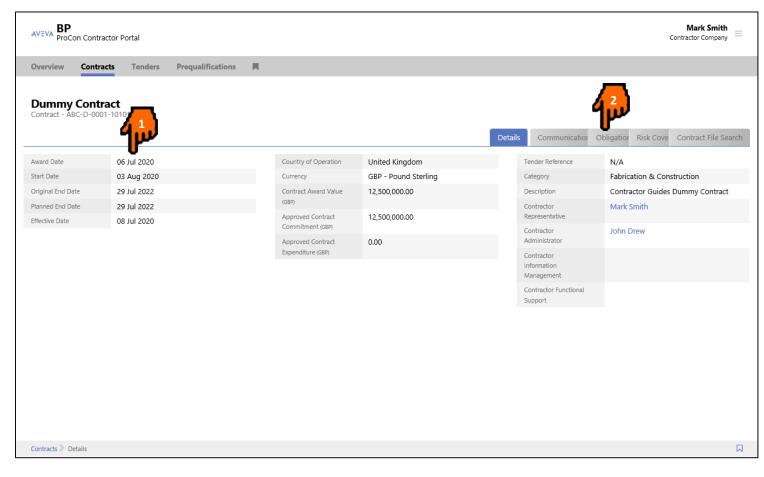
 All Obligations, across all Contracts, are visible from the Overview page. Contract Obligations under the terms of the contract need to be manually managed.





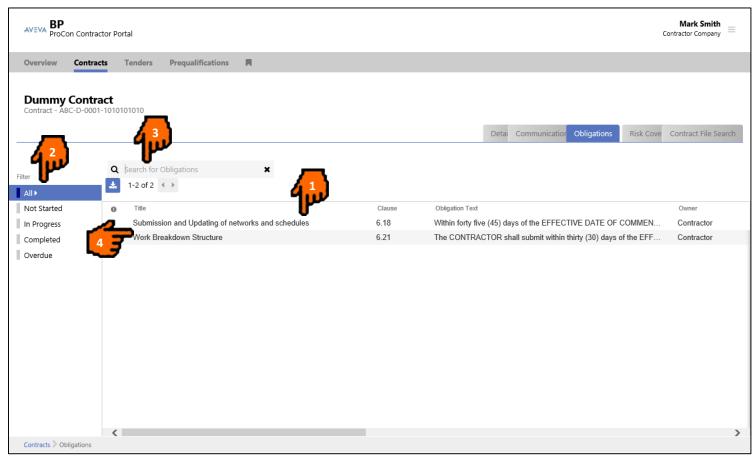
- To view all Obligations associated to a specific Contract, click the Contracts tab to access open and closed Contracts.
- Select the Contract you want to view.Once selected the Contract details will be displayed.





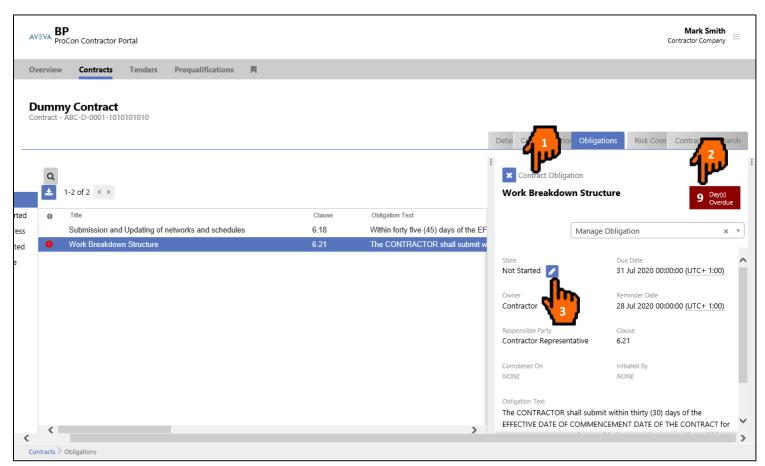
- 1. The Contract Details page displays summary information relating to the Contract.
- 2. Click on the Obligations tab to navigate to the Obligations page for this Contract.





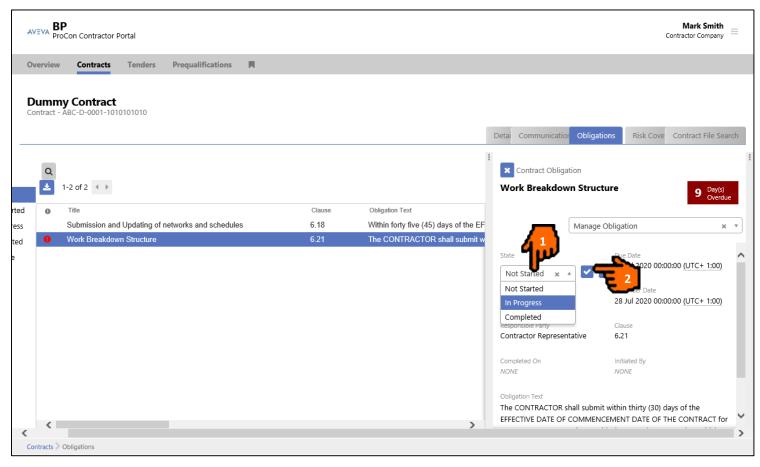
- All of the associated Contract and Communication related Obligations will be displayed in tabular format.
- Filter Obligations based on State.
- 3. Use Filter option to return obligations based on name.
- 4. To view the details of a specific Contract Obligation, click on the Obligation itself.





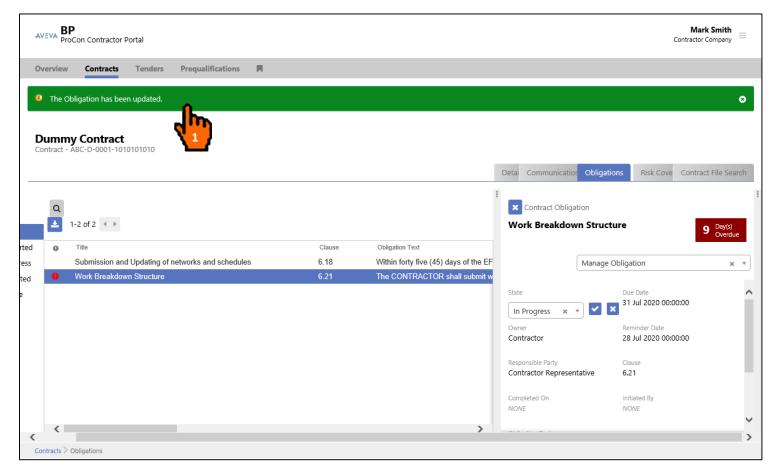
- 1. The Contract Obligation details will be displayed in a new panel, on the right of the screen.
- The number of days remaining, before the Obligation is due, is displayed prominently for the user.
- 3. To begin the process of completing this Obligation, click on the pencil icon to change the "State". This changes the status and helps other Contract Team Members know that this obligation is currently in progress.





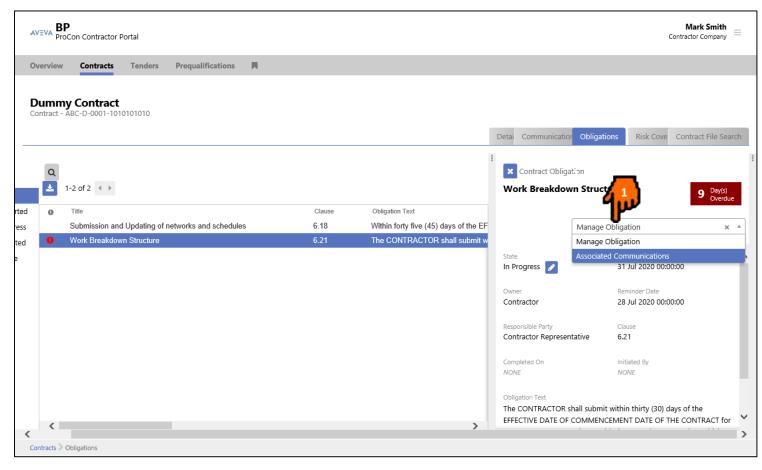
- Click on the drop-down arrow and select "In Progress".
- 2. Click on the "Save" icon to confirm the change in status.





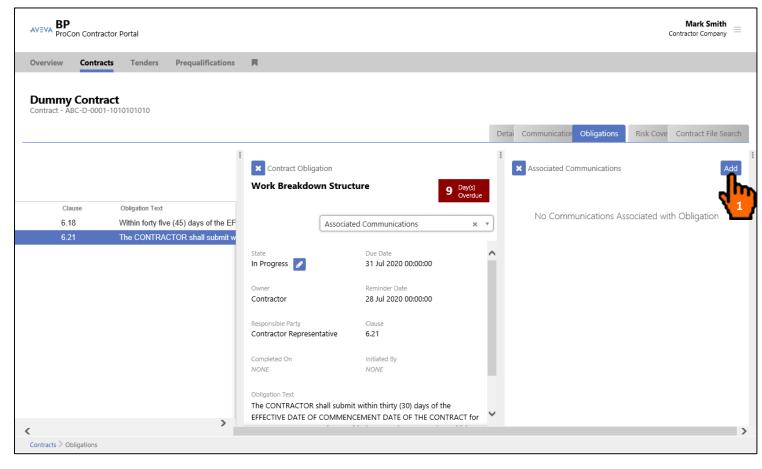
 The change in state is immediate and visible to all Contract Team Members. The user can now complete their task, outside of the system, and upon completion return to mark the Obligation as "Complete".





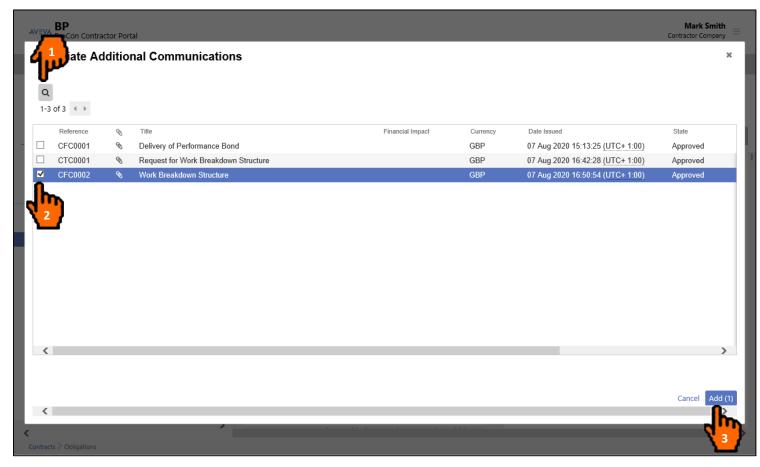
1. To view all Communications related to the Obligation, click the "Manage Obligation" drop-down and select "Associated Communications".





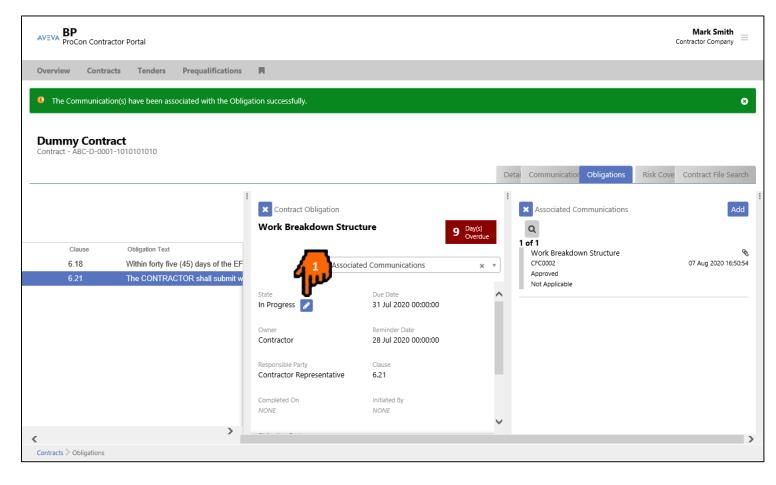
1. Click the "Add" button to manually associate a communication with the obligation.





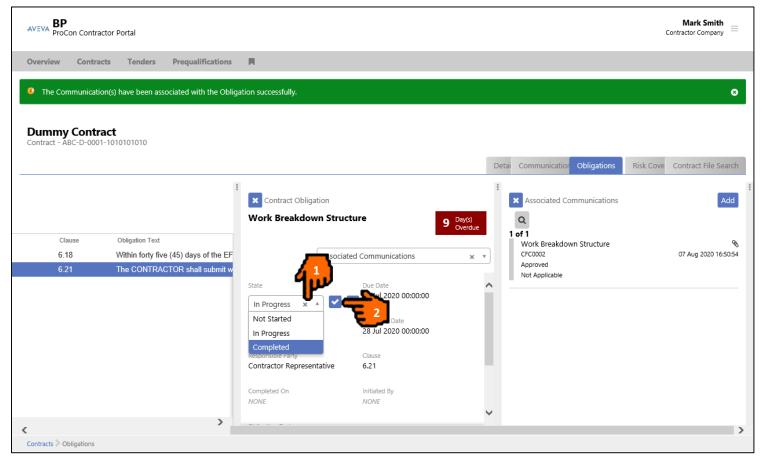
- Optionally use the filter to find the communication based on the communication name
- 2. Click the tick box beside the communication that fulfilled the contract obligation.
- 3. Click the "Add" button to complete the association.





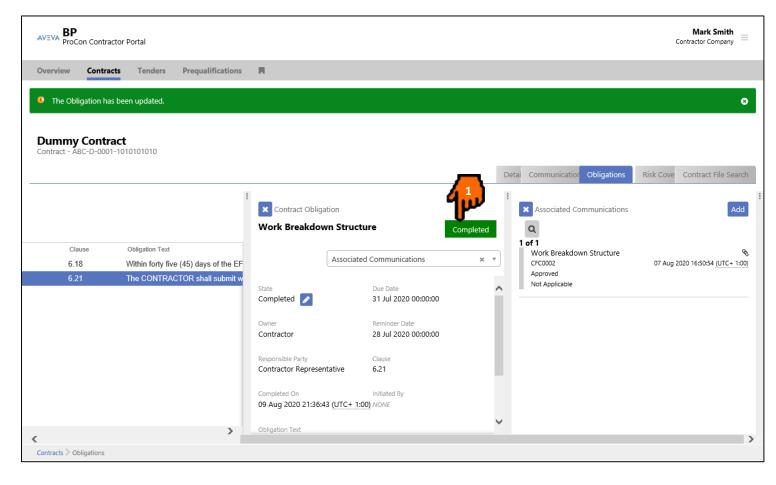
 click on the pencil icon to change the "State" of the obligation to completed.





- Click on the drop-down arrow and select "Completed".
- 2. Click on the "Save" icon to confirm the change in status.





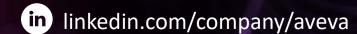
The Contract Obligation shows as completed.

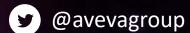


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The Company shall not be obliged to disclose any revision to these forward-looking statements to reflect events or circumstances occurring after the date on which they are made or to reflect the occurrence of future events.







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The company's engineering, planning and operations, asset performance, and monitoring and control solutions deliver proven results to over 16,000 customers across the globe. Its customers are supported by the largest industrial software ecosystem, including 4,200 partners and 5,700 certified developers. AVEVA is headquartered in Cambridge, UK, with over 4,400 employees at 80 locations in over 40 countries.

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