

NBS Contract Administrator Training Guide

Using NBS Contract Administrator



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Introduction

Course Objectives

The objective of this course is to provide delegates with a sound understanding of NBS Contract Administrator. Upon completion of this course delegates will have a good knowledge of how to use NBS Contract Administrator, and be able to utilise this information within their own working environment.

Pre-requisites to the course

It is assumed that delegates are familiar with the Windows operating system environment, and are comfortable in using a mouse/keyboard.

Assistance after the course

If more help is required then please contact NBS Software Support using the details below:

Address:	NBS The Old Post Office St Nicholas Street Newcastle upon Tyne NE1 1RH
Telephone:	0345 456 9594
Fax:	0191 232 5714
Email:	support@theNBS.com
Web:	www.theNBS.com/support

Section 1: Getting Started

Upon completion of this chapter you will be able to:

- ✓ Open the NBS Contract Administrator software.
- \checkmark Apply a valid licence unlock code where required.
- Either create a brand new 'data store' file to use in association with jobs you created within NBS Contract Administrator, or use an existing data store that has already been set up for you
- Enter your own company details, ensuring any forms issued from NBS Contract Administrator show the correct issuer information

Opening the software

To start using NBS Contract Administrator, double click on the desktop icon.



Alternatively go to Start > All Programs > NBS > NBS Contract Administrator.

Licensing NBS Contract Administrator

After installation, NBS Contract Administrator must be licensed before it can be used.

When you attempt to run **NBS Contract Administrator** for the first time after installation, the licensing wizard will start to guide you through the steps required to generate a licence code, store the licence for the software in a specified location and unlock the software.

The following dialog box will appear:

🖙 Licence Wizard
Software Subscription Security Choose between a new or an existing licence.
This Product is a subscription service and is protected against unauthorised usage.
To obtain a Licence to use this Product please ring NBS Customer Centre between 9am and 5pm Monday to Friday on 0345 456 9594.
Select "new" to continue the Software Security Wizard - you will then be given the opportunity to obtain a new licence.
Alternatively, if your organisation has already obtained a licence, select "Existing" to use that one.
New
Existing
< Back Next > Cancel

If this is the first time that **NBS Contract Administrator** is being used in your company, select the **New** radio button, and then click **Next**.

🖙 Licence Wizard
New Licence Select a location for your new licence.
Please select a location for the LicenceStore file. This file should have read and write permissions for all users of this software.
Choose Licence Location: C:\Program Files (x86)\NBS\NBS Contract Administra
< Back Next > Cancel

You will then be prompted where to save the licence store file:

To choose a different licence location, click the button indicated, and browse accordingly.

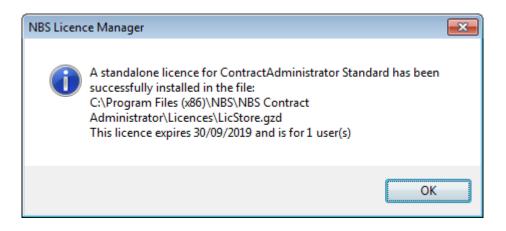
Finally, you will be presented with a request code.

Licence Wizard			— ×
Unlock Licence Unlock a licer	nce for this ma	ichine.	<u>I</u>
and 5pm Mono They will ask y shown below. They will then p	day to Friday ou for the Rec provide you w uld enter belo	, ith a Licence Ur w. Activate the (94. nlock Code
Request Code 9B888931-8CE			
Unlock Code:			
		[Unlock
	< Back	Next >	Cancel

Telephone **NBS Customer Centre** on 0345 456 9594 and quote your license request code shown in the Request Code text box.

In the Unlock Code box, enter the unlock code supplied to you.

Click **Unlock** and then **Finish**. A confirmation message similar to the one below will be shown.



Clicking on 'OK' will then complete the licensing process. NBS Contract Administrator will then open for normal use.

Data stores within NBS Contract Administrator

Once your software has been licensed, you need to define where the NBS Contract Administrator data store is held. A data store is the file that contains details regarding all your jobs, contact information and company details to be used in NBS Contract Administrator.

Data stores can be either created individually so that each user has their own or they can be created so that multiple users can access the same jobs if it is to be used across an office network. Once a network data store has been set up, every person who needs it can link to it centrally and share the same material.

Creating a new data store

Once **NBS Contract Administrator** is opened for the first time after installation, you will need to create a new data store or locate an existing one.

\$	Data store setup wizard ×
	NBS Contract Administrator data store setup Choose existing or create a new data store.
	Welcome to the NBS Contract Administrator data store setup wizard You do not currently have a data store setup for use. NBS Contract Administrator uses a data store, Caftab.cadb, to contain all company and job detail information. Using the options below, select to either use an existing data store or create a new one. More about data stores
	 Use an existing data store NBS Contract Administrator will search your local or network drives for an existing data store. Alternatively you can browse to a data store directly. More about using an existing data store
	 Create a new data store Create a new, empty NBS Contract Administrator data store in a location of your choice. More about creating a new data store
-	< Back Next > Cancel
_	< Back Next > Cancel

Using an existing data store

Select the **Use an existing data store** radio button by clicking on it, and then click on Next. You will then be asked to locate your data store; the file will be called CAFtab.cadb. Locate your previously created data store file and click '**open'**. This will then ensure the software uses your previously created file.

Examples of where you may already have a previously created data store available would be if your office already has **NBS Contract Administrator** installed on other computers.

If this is the case, rather than creating a brand new data store, you could use the same data store as is used on your existing setup.

Getting Started

Creating a new data store

Select the Create a new data store button by clicking on it, and then click on **Next**. You will then be asked to specify a location for your data store.

If the software is only going to be accessed on one PC, then save the data store file to your own PC. If the software is going to be used across a network you may want to save the data store file on a network location. This would be used where more than one person is using the software at any one time, and everyone would want access to the same company details.

Typically a new data store would be created when this is the first time **NBS Contract Administrator** has been installed on any computers in your office, or if you wish to keep the work carried out on installation of **NBS Contract Administrator** completely separate from existing installations.

Setting up your data store for multiple users

If you want more than one user to access the same data store and therefore the same jobs; you should follow these steps:

- Once NBS Contract Administrator has been installed and licensed, go to one machine and start the software which will then start the Data store setup wizard.
- Use the option in the Data store setup wizard to Setup a new data store, you will then be asked to enter a location for the data store to reside. Ensure that all machines and users have full access to this folder on the network.
- From every other client PC, you can then use the option in the Date store setup wizard to '**Use existing data store**'; you will then need to browse to the location that was specified in point two.
- All versions of NBS Contract Administrator will then use the same data store.

Setting up your company details

After you have licensed **NBS Contract Administrator**, and created or located a data store you will be asked to complete the **Issuer Details** setup.

Issuer's role: The choices for the first drop down are Employer's Agent, Employer or Contractor. These are new roles on D&B contracts.

Information in the 'Postal Address' is for the address book. Information entered in the 'Form Address' area will be printed on all of your forms produced within **NBS Contract Administrator**. You can select either 'Contract Administrator' or 'Architect' and that will determine whether the user can issue 'Architects Instruction' forms or 'Contract Administrator Instruction Forms'.

The notes section provides a useful area to store your own internal information about the company. This could include details such as additional phone numbers etc.

0	Dat	a store setup wizard		×
Issuer setup Fill in the details about	t your organization.			*
Company Name*	XYZ Architects	Telephone 0147852369 Fax 0147852369		Notes
Issuer role For DB contracts For all other contracts	Employer's Agent	v v		^
Street	The Old Post Office St Nicholas Street Newcastle upon Tyne	County Tyne and Wea Country UK Post code NE1 1RH	ar	
Line 2	The Old Post Office, St I Newcastle upon Tyne, N UK	This address will be inserted relevant form headers	i on	~
			< Back	Finish Cancel

Exercise

- 1. Select Tools > Edit Issuer Details.
- 2. Amend the issuer's details by adding two contacts and selecting **Employer** as another role.

Section 2: User Interface

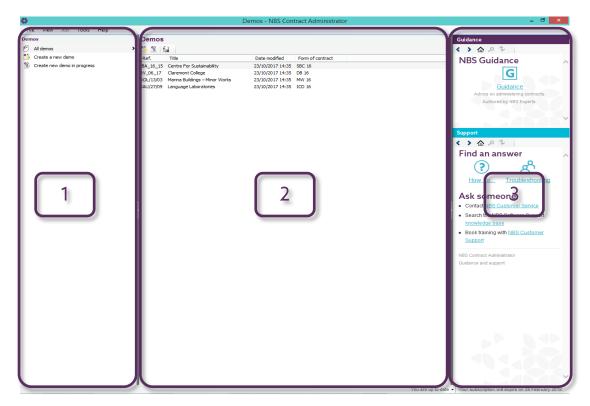
Upon completion of this section you will be able to:

- ✓ Understand the NBS Contract Administrator user interface and terminology.
- ✓ Understand the different categories of job in NBS Contract Administrator.
- ✓ Navigate through NBS Guidance and Support.
- ✓ Manage and maintain the address book.

User Interface

The screen layout within NBS Contract Administrator has been designed to provide a clear, intuitive user interface, with clearly marked areas from which to obtain guidance on forms being used.

Once a form of contract has been decided upon for your job, users can only access forms that are associated with that contract. With multiple methods of working with forms, users can quickly become comfortable and familiar with the interface – enabling them to use the software easily and simply.



The NBS Contract Administrator screen is broken down into three main areas:

- 1. Job browser
- 2. Displays all jobs in current view
- 3. NBS Guidance and Support

Using jobs in NBS Contract Administrator

In order to start administering forms within NBS Contract Administrator, an associated job needs to be created first.

The job contains details on where the work is being carried out, the various team members responsible for carrying the work out, the form of contract to be used for this job as well as the contract sum involved. It also details the contract administration forms that have been issued in association with the work being carried out.

By using 'jobs', it enables information to be easily organised and quickly accessed. All the associated details for a particular job will be kept together within one place for that 'job' – at a glance users can see what form of contract is being used, which forms have already been issued and when, and which forms are still awaiting issue.

The left hand side panel is the job browser and this enables users to create a new job, or create a job in progress, as well as browse all current jobs. The central pane displays all jobs that are associated with the selected type of job. Users can view the job title, its reference number and the form of contract being used for that job.

Categories of job

There are three different types of job status within NBS Contract Administrator, these are:

Current jobs

This displays information on jobs that are currently ongoing. From here, users can access forms that have been issued or are in a draft state and they can also add new forms to a job.

They can also view details on all the different team members involved with the job and any revised contract sums.

Archived Jobs

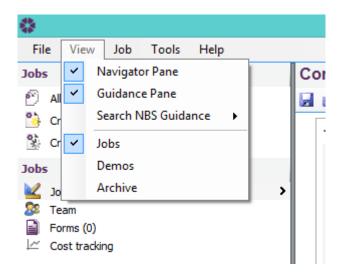
NBS Contract Administrator allows users to set a job to be 'Archived'. This might be done if a job has been completed, or if the job is currently on hold. By setting the job to be archived it will no longer appear in the list of current jobs, and so make it easier to organise jobs.

Demo Jobs

NBS Contract Administrator also comes with example demonstration jobs. These are intended to give users an opportunity to look at how jobs can be set up within NBS Contract Administrator. Users can view, issue, recall and delete forms within these demo jobs without impacting on their own 'real' jobs.

Alternating between different types of job status

To alternate between the three different categories of job status, click on the '**View**' drop down menu and select accordingly:



Opening a job

To open a job within **NBS Contract Administrator**, double click on the job title. The central work area will then alter to show details of all forms used so far within that job. The left hand task bar will then change to show a reference library, from where new forms specific to that job can be added.

Users can also access details for this job. This includes the team members involved in the job, as well as any revised contract sum details.

Guidance and support

NBS Contract Administrator includes information on how to carry out tasks within the software, as well as guidance on administering the contracts themselves. All of this information is written by industry experts at NBS.

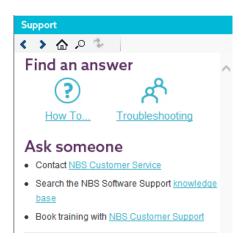
Having this guidance and support at your disposal ensures that the use of the software itself is trouble-free. Having expert-written guidance also ensures that any user who may be unfamiliar with a particular contract administration form can read precisely what the form is used for, understand how it is to be completed and has clear definitions on what each term used in that form means. The guidance can also be searched by keyword and browsed separately, clicking on the search icon.



All guidance is listed in sections.

This guidance synchronises with the content, to show information appropriate to the section that you are working in.

There is also comprehensive software support available within NBS Contract Administrator. The information here is designed to provide assistance in using the software and stay synchronised with the tasks that the user is performing.



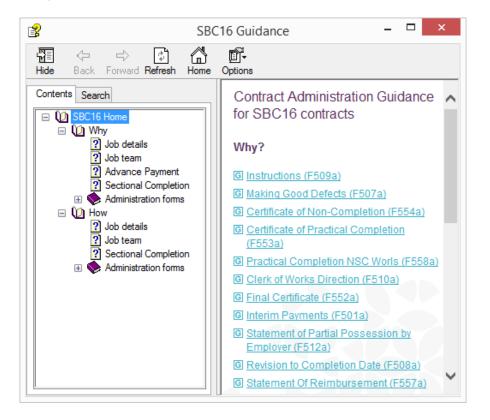
Searching Guidance and support for information

Both the Guidance and support sections are designed to stay in synchronisation with the tasks the user is carrying out, ensuring that only information relevant to the task in hand is displayed.

Users can search both these areas of the software at any point for information. Searching is performed by selecting the magnifying glass icon.

Searching Guidance

Once the Guidance search is open, and you open the links on the Contents tab on the left, the screen will look like this (it will default to the contract Guidance you have currently selected in your job, in this case the SBC16 contract is selected):



Only guidance relevant to the selected form of contract will be shown. Users can browse the guidance by either content type, or by searching for key words within the guidance.

Assistance in using NBS Contract Administrator

NBS Contract Administrator provides detailed help in using the software. If users are unsure on how to carry out a particular task in the software, the Support section can be consulted.

The Software Support section is broken down into two areas – 'How To' and 'Troubleshooting'. Accessing 'How To' gives users access to the **NBS Contract Administrator** help files, 'Troubleshooting' takes users to the NBS Subscribers website. The website provides access to knowledge base articles and videos designed specifically for **NBS Contract Administrator**. Please consult with the appendices for a more detailed explanation on how to use the search facility within the 'How To' section.

As well as software support within NBS Contract Administrator, you also have access to our unrivalled software support team, who will be happy to offer assistance with any query you may have. They can be reached at NBS on 0345 456 9594.

Managing the address book

NBS Contract Administrator allows you to store companies and their associated contacts in an address book for use on all jobs. This is beneficial as once a company's details have been entered, they will always be available for use in any future jobs you undertake, and so saves you time in having to re-enter the same information numerous times.

If you have a local data store you will only see company details that you have added, if however you have NBS Contract Administrator set to work across a network, other NBS Contract Administrator users can also have access to companies listed here.

To access the address book, click on Tools > Address Book.

Address Book
This is your global address book. Changes made here will be applied to affected forms when they are next opened for editing. Use the buttons below the company list to: • add new companies; • edit the details of existing companies; and • delete companies @ More about managing your address book
Company name / role / A Celtic College Cymric Construction Ltd Cymric Construction Ltd - Ivor Barch Associates - NBS - Neville Construction Ltd - Peace Haven Developments Plc - Weathervain Builders - Weston North - XYZ Architects
New company Edit company Delete company Close

Adding companies to the address book

To add a company/individual to your company, select the **New Company** button at the bottom of the window. The **New Company** window will then be displayed.

0	New	Company - New Compar	ıy	- 🗆 🗙
Save	Close Save & Close Help			
Company Na Email		elephone	Roles Suer Suer Employer Contractor	^
Postal Add Number Street City/Town	Iress Count Count Count Post c	ry	Sub-Contractor Clerk of Works M&E Consultant Planning Supervi Quantly Survey Structural Engine Employer's Agen Edit roles	er
Form Add Line 1 Line 2 Line 3	This	address will be inserted on ant form headers	Notes	^
				~
Contacts Name	Position	Title	Email Address	Telephone Number
*				

Enter the details for company name and address by clicking in the relevant area and completing information as required.

Select the '**Roles**' boxes to signify the nature of the business. Companies can have multiple roles as well as different roles on individual projects.

The Companies and Contacts created here can then be used to complete other form areas, such as the distribution lists and Job details. In turn, this will help save you time in the future when setting up new jobs etc.

Adding Company Contacts

To add a contact within the company, click into first row within 'Contacts' marked 'Name' and enter the required information. While you are entering contact details, a blank contact space will appear below in case you wish to add another entry.

Clicking the 'Help' button at the top of the 'New Company' window will also display help in the right hand side panel, instructing the user what information needs to be entered in order to set up a new company.

Editing Company Details

Company Details are edited within your address book. You may need to do this if your own company changes address, or new members of staff need to be added. Similarly your customers may also need their details updating.

This can be accessed via **Tools** > **Address Book**. Either double click on the name of the company you wish to edit, or click on the company name, then click the **Edit Company button**.

•	Address Book	×
	your global address book. Changes made here will be applied to affected forms rey are next opened for editing.	
• ade • edi	e buttons below the company list to: d new companies; t the details of existing companies; and	
	about managing your address book	
Comp	any name / role	/ 🔺
Celtic Cymri Vor B Vor B	Intractor College c Construction Ltd arch Associates e Construction Ltd Haven Developments PIc erevain Builders on North	
•		-
Nev	v company Edit company Delete company Close	

-				Edi	t Company - ABC Inc.				х
s	ave	Close Save	& Close H	elp					
	ompany Na nail	MME ABC Inc.	o.uk	Tele Fax	23654789 321466987		Roles Issuer Employer Contractor Sub-Contractor		^
	Postal Add Number Street City/Town	Iress 1 High Street Newcastle upon Ty	yne	County Country Post code	Tyne and Wear UK NE4 6TH]]	Clerk of Works M&E Consultant Planning Superv Quantity Survey Structural Engine Employer's Ager Edit roles	isor / CDM Coordinato or eer	r V
	Form Add						Notes		
	Line 1 Line 2 Line 3	1, High Street Newcastle upon T	yne, NE4 6TH		dress will be inserted on form headers		1		
	Lille 5								
									~
Co	ntacts								
	Name		Position		Title	Email	Address	Telephone Number	
► *	Fred Blog)gs	MD		Mr	Fred.b	loggs@ABC.com	963258741	
*									

Company details will then appear, and can be edited accordingly.

Removing a role from a company

You may want to remove a specific role from a company, but not wish to delete the company details. To do so, open the company details for editing (see above). When the company details are open, deselect the role from the company details by clicking on the appropriate box.

Exercise

Open the Address Book and create two companies with the following details:

- Company Name: The Goode Building Company
- Telephone: 0191 112 334
- Facsimile: 0191 433 211
- **Postal Address**: 10 The High Street, Newcastle Upon Tyne, Tyne and Wear, NE2 5JH
- Form Address: 10 The High Street, Newcastle Upon Tyne, Tyne and Wear, NE2 5JH
- Roles: Clerk of Works, Quantity Surveyor
- Contacts:
 - Mr J Smith is the Principal architect of the company; he has no direct line but can be reached on jsmith@goodebuildingco.co.uk
 - Oscar Browne is a quantity surveyor, his direct line is 0191 112 340 with an email address of obrowne@goodebuildingco.co.uk
 - Finally Austin Bailey is the Clerk of Works at the Goode Building Company, there are no direct contact details for him at this time.
- Company Name: AJ Architects
- Telephone: 0191 489 76 66
- Postal Address: 65 Ripley Gardens, Gateshead, Tyne and Wear, NE3 8FY
- Form Address: Centenary House, Ripley Gardens, Gateshead, Tyne and Wear, NE3 8FY
- Roles: M&E Consultant
- Contacts: Martin Johnson is the M&E Consultant at AJ Architects. His direct number is 0191 489 76 80. He can also be emailed on Martin.Johnson@AJArchitects.com

Did you notice?

For AJ Architects, the Postal Address and Form Address are slightly different. It may follow that the address shown internally to yourselves may be different from the address that is displayed on forms you generate with NBS Contract Administrator.

Section 3: Starting a new job

Upon completion of this section you will be able to:

- ✓ Create a brand new job in NBS Contract Administrator.
- \checkmark Specify the various people involved in the job you are creating.
- ✓ Manage your own list of roles that exist within a company.
- \checkmark Edit company details as required.

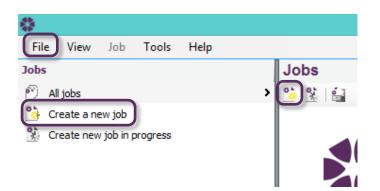
Starting a new job

First you need to make sure you are on the Jobs page. Select View then Jobs.

\$				
File	View	w Job Tools Help		
Jobs	~	Navigator Pane		Jobs
🐑 Al	~	Guidance Pane	- >	°* °*
🐪 Cr		Search NBS Guidance 🔸		
🔆 Cr	~	Jobs		
		Demos		
		Archive		
	_			
				· · · ·

There are three ways to create a new job within NBS Contract Administrator:

The following screenshot shows three different areas from which a new job can be started. Selecting any of these methods will result in the Job Details form being displayed.



The new job then opens and the editing window in the centre will prompt you to add details about the job from the contract.

٥	Job Details - New job - NBS Contract Administrator	- 0 ×
File View Job Tools Help		
Jobs	Contract Administrator*	Guidance
🕙 All jobs		<>合24
Create a new job	Job Details Team	JOB DETAILS
Jobs	Fields with a (+) are required	Base date
Job Details >	*Form of contract: MW v *Job title: New job	The base date of the job as stated in the
Se Team I Forms (0) I∠ Cost tracking	*Contract revision: 2016 v *Job reference:	contract, usually either the tender return date or one slightly earlier. Although not defined in the contract, it is the date from which the currency of certain documents is
	Options	
	The following options are specific to this job only. To change the default options for new jobs, please use the options menu under Tools > Options, or consult the help documentation.	Support く 入 企 や
	Currency: £ Pounds	
	Form logo: RIBA crest 🗸	JOB DETAILS
	Output location: C:\Users\filetchek\Desktop\Output\	JOB EDITOR
	Works	NBS Contract Administrator stores
	Description: Address:	information on jobs in order to produce
		accurate financial reports and to ensure that consistent job descriptions and
		addresses are printed on contract forms.
	Telephone:	Below are descriptions of all the fields
	Fax:	involved in creating a new job.
	E-mail: Post code:	Please accurately complete all the job
		fields before adding any contract
	Contract Conditions Current Status	administration forms.
	★Employer: Employer Name Total estimated additions: € 0.00	
	Contractor: Contractor Name Total estimated omissions: £ 0.00	Mandatory fields
Add a new MW form	Contract sum: £ 0.00 Total Advance Payment: £ 0.00	Before a job can be saved the following
Architects/Contract Administrators Instruction	Advance payment: £ 0.00 Amount certified to date: £ 0.00	fields must be completed:
Interim Certificate	Contract dated:	Job title
Non-Completion	Commission date:	
 Practical Completion Certificate of Making Good 	Base date: Defects liability end date: -	Form of contract
Final Certificate	Date of possession: Amended completion date: -	Job reference
Adjustment of Completion Date	Original completion date:	Employer
		Contractor
		In addition the form of contract field will be
	Rate of damages: £ 0.00 per Day v	locked once a draft form has been added to
	Retention Bond:	ajob
	Full retention: 5%	

In order to begin administering forms for a job, there is specific information that needs to be entered:

Form of Contract

This is set at MW (Minor Works) by default. This identifies the form of contract being used on the job. The form of contract selected here will determine the Contract Administrator forms the user can have access to.

Once forms are issued, the form of contract is then locked. By doing this, it then ensures that only forms associated with that type of contract are issued – i.e. if you opt to use JCT IFC 2016 as the form of contract, you cannot issue a form found in the Minor Works Building Contract.

Contract revision

2005, 2011, or 2016 versions

Job Title

A brief description of the work to be undertaken.

Job Reference

Each job within **NBS Contract Administrator** must have a unique short reference to identify it. This may be the job number, file reference or other identifier within your office.

This reference is also used to construct the file names of all the automatically generated PDF documents of issued forms. For example, the 2nd Architects Instruction to be issued on job reference IBA_04_20 will be named IBA_04_20_ArchitectInstruction_2.pdf

Options

You have options to choose the form of currency, the form logo (which can be either RIBA Crest, Custom logo which you can import from your files, or none at all), and the Output location which is defaulted to the Output folder on your machine or network.

Contract Conditions

Before you can start issuing forms within **NBS Contract Administrator**, you need to create a new job.

This will prompt you to fill in the Job Details, - including the Job name and location, the parties to the contract, dates, contract sum, retention percentages and suchlike.

You do this once only, and the software will then transfer the details automatically when producing the forms and certificates for that job. The details outlined below are what form the conditions of the job contract.

Employer Details:

Clicking on the 'Employer Name' box displays a drop down box containing companies as created within the Address Book. Clicking on a name here sets this company to be the employer.

Contract Conditions		
* Employer:	Employer Name	6/
* Contractor:	Employer Name	ie.
	XYZ Architects	\sim
Contract sum:	ABC Inc.	

Contractor Details:

Similar to 'Employer Details' - this enables the user to select from the Address Book and identify who the Contractor is going to be for the job.

Contract Condition	ons		Cu
* Employer:	XYZ Architects	- V 🕏	Tot
* Contractor:	ABC Inc.	~ ウ	Tot
Contract sum:	£	0.00 E	dit Tot
Advance payment:	£	0.00	An

Once selected the icon to the right of these boxes become active and you can select the link to amend the contact information.

Please Note

Progress can only be made on a job once the Employer and Contractor details have been provided. Until these details have been entered, no forms can be produced.

Contract Sum

The figure entered here is for the total cost of work to be carried out for the job. Once the job is underway, this field cannot be altered. Anything that results in the Contract Sum varying (such as the issuing of an Architects Instruction) is taken care of by **NBS Contract Administrator**, with the revised contract sum calculated automatically.

The Works

Used to specify where the work is to be carried out.

The user can also state on which date the contract has been dated etc. as well as decide what logo is to be used on any forms generated within **NBS Contract Administrator**.

The Team Tab

The Team tab allows users to add team members from the various companies in the address book to your job. Companies entered as Employers and Contractors on the job details tab are entered into the job team automatically.

To add additional members, click on the **Add Member** button and then select the company role from the list.

Assigning roles and companies to the team tab

Once a role has been assigned to the team tab, the company who are performing that role needs to be selected. This is done from the 'Company name' button. Clicking here will display a list of all the companies currently contained in the Address Book.

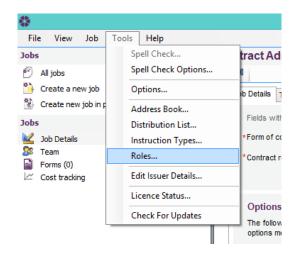
To assign an individual within that company to the specific role, click on the 'Allocated Staff' button in the 'Contact' column to select the contact within that company who will be responsible for the selected role.

Section 3

Please note that the details entered on the team tab are used to generate the distribution lists and associated transmittal sheets for all issued contract administration forms.

Creating your own Roles within a company

NBS Contract Administrator comes with a pre-defined list of company roles. However, you can personalize this list to suit the needs of your office by adding your own roles. Go to Tools > Roles.



The Roles window will appear.

\$ Roles	- 🗆 🗙
Current roles: Issuer Employer Contractor Sub-Contractor Clerk of Works M&E Consultant Planning Supervisor / CDM Coordinator Quantity Surveyor Structural Engineer Employer's Agent Architect Principal Designer	Role: Add role Delete role Image: Comparison of the state of
	OK Cancel

Adding Roles

To add a new role, enter the name of the new role in the Role box and then click on the Add Role button. This will add your new role to the Current roles list.

Deleting Roles

Please note that you cannot delete the NBS Contract Administrator pre-defined roles. To delete a user defined role select the role in the Current Roles list and then click on the Delete Role button, you will be asked to confirm your decision as this may affect any companies which have had this role assigned to them.

Editing Company details

If alterations need to be made to company details, such as a new role needs assigning, or a new staff member has joined a company then such changes can be made from here.

Job Details Team			
Issuer	Сотрапу	Contact	
Architect	✓ XYZ Architects	Allocated Staff V	
Role	Company	Contact	
Employer	XYZ Architects	✓ Allocated Staff ✓	₽ %
Contractor	ABC Inc.	✓ Allocated Staff ✓	0.8
Contractor	ABC Inc.	✓ Allocated Staff ✓	♥ S.

Clicking on the highlighted icon next to any of the rows as shown above will then display the company details form. From here users can make adjustments as required.

Click the 💿 icon to edit company details

Further tabs available to the user

Depending on the form of contract used, the user will have access to different tabs along the top of the job screen.

An example of this would be 'Sectional Completion'. This is only available if Intermediate and Standard forms of contract are used. The sectional completion tab is used to record details of phases of work (sections) during your job, if they're applicable. If you do not need to add any sections, ensure that the **No sections included** button is selected.

Se	ectional Completion - abc123 The Fox And Hounds	
H		×
	Job Details Team Sectional Completion	_
	Fields with a (*) are required	
	No sections included	
	O Include sections Add section	

To add sections, ensure that the **Include Sections** button is selected and click on the **Add section** button. A section will appear for you to complete, by clicking in the boxes and completing the information required. You can add as many sections as required throughout the duration of the job. However, once a form is issued you will no longer be able to remove any previously added sections. Section details must be entered in the Sectional Completion tab before they will be available in the section drop down lists on any of the forms that deal with sections.

Exercise

- 1. Create a new Job using one of the three icons shown earlier.
- 2. Complete the **Job details** form, ensuring that MW05 is used as the form of contract.
- 3. On the **Team** tab, ensure that the clerk of works you created earlier is appointed, and that an email address of abailey@goodebuildingcompany.co.uk is entered.
- 4. You need to have a landscape architect within the list of team members. Create a brand new company, with contacts, and then create a brand new role of landscape architect. Add this new company and contact to your list of team members.
- 5. On the job details tab, set an advanced payment of £750.

Did you notice?

Were you able to provide the advanced payment of £750? If not, why?

Using the guidance within the software, find out why you may have been prevented from giving an advanced payment.

Section 4: Working with forms

Upon completion of this section you will be able to:

- \checkmark Be familiar with the various methods of adding forms to your job.
- ✓ Understand how to use NBS Contract Administrator in completing these forms.
- ✓ Be able to issue a form from within NBS Contract Administrator.
- ✓ Be able to amend a distribution list to ensure the correct people receive as many copies of the form as they require.
- \checkmark Be able to recall a form that requires amendment.

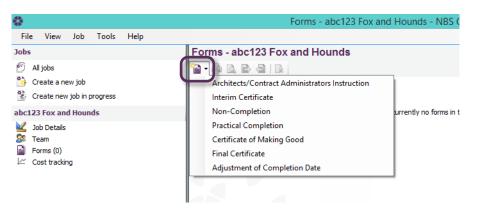
Adding a Form to your job

Once a job has been created, **NBS Contract Administrator** only allows access to the form library appropriate for that form of contract.

There are a number of different methods for adding a form to your job:

Via the Form icon in the Forms List view

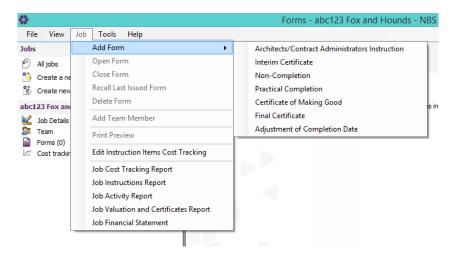
Clicking on the icon indicated displays a list of available forms. Once a form is selected, a draft copy will then be added to the job. The job details panel will also update to show a copy of the form has been added to the job, the form will then open in the centre of the screen.



Via the 'Job' drop down menu

Forms can also be added via the 'Job' drop down menu at the top of the **NBS Contract Administrator** screen. Again, clicking here displays the library of forms available for the type of contract selected for the job.

Selecting a form here will add a draft copy of the form to the job, and open the form in the centre of the screen.



Using the form library

Once a form of contract has been selected, the forms available for the job will be displayed in the bottom left hand screen:

Right-clicking on the mouse on any of the forms will display the 'Add to...' dialog box. Clicking here will then add a draft copy of the form to the job, and display the form in the centre of the screen.

Add	a new ICD form	
	Architects/Contract Administrators Jostruction Interim Certificate Add to New job	
	Statement of Reimbursement	
	Partial Possession by the Employer	
	Non-Completion	
	Practical Completion	
	Section Completion	
	Certificate of Making Good	
	Final Certificate	
	Adjustment of Completion Date	

Alternatively, users can also hold the left mouse button down on the form they wish to add, and drag the mouse pointer to either the left hand task bar or to the central screen – this will then add a draft copy of the form to your job.

Another route to add a form is by selecting one from the list and clicking on the text above that says 'Add a new [contract] form'. So for the example above, click on 'Add a new ICD form'.

Once the first form is added to a job, certain fields in the job details such as the form of contract are 'locked' and it will no longer be possible to edit them.

Completing form details

Once a form has been added to a job, a draft copy of that form will then open in the centre of the screen.

The editors have been designed to reflect the way that the forms appear when printed. Opening a form for editing will display the form in the central work area.

Various tools have been put in place to make form editing as comprehensive and easy as possible, such as selection fields, calendar fields, radio buttons, linked fields and text boxes. Descriptions and examples of how these are completed can be found in the appendices section.

Working with Instruction Forms

Architects/Contract Administrator Instructions allow you to add as many or as few instructions items as required.

ed date Shee		er 2017
	DRAFT	
	Show costs on printer	d form 🔍 🤟
	Office use: Approx	kimate costs
	£ omit	£ add
	0.00	0.00
-		
	1 - Draft	
	on 1 ע	on 1 - Draft <u>U</u>

To add an instruction item, click on the **new item** button found in the toolbar at the top of the Al form.

This will add a blank item for you to complete. Number them consecutively and consistently. Do not use the anticipated number of the Instruction i.e. 1.1, 1.2 etc. as this may end up not being the order of issued forms

Works: situated at:	Pub Extension including new kitchen and toilets 10 Main Street Durham Co. Durham		
		DRAFT	
Under the terms of the	ICD Building contract dated 22 September 2017	Show costs on printe	d form 🔍 🤟
		Office use: Approx	kimate costs
		£ omit	£ add
No. Title		0.00	0.00
Description			
Type (for Cos	t Tracking Report) 🗸 🗸		
Title		0.00	0.00
Description			
Type (for Cos	t Tracking Report) V		

Click on the **Type** (for cost tracking) drop down button and select an instruction type from the list. Item types allow you to attribute costs to any of the types on the list and to create a financial report based on this information.

In the area above the Item type, add more detail about the instruction by clicking the box and then typing your information. This information can be copied and pasted from elsewhere, i.e. an email.

To issue the form click on the icon at the top of the centre panel as shown below.

Ar	chi	tects/Contra	ct Administrators Instruction 1 - Draft*		
۳	H	🖉 🖨 🗋 🖻	😂 💞 🙀 🐰 🗈 🛍 B Z 🗵		
		Contractor: address:		Created date: Sheet:	22 Sep 1 of x

As soon as you select to issue the first instruction you are given the following warning which indicates that certain figures and team member's details will become locked and will no longer be able to be edited. This is why one should be careful to add all the confirmed details into the job at the start.

	NBS Contract Administrator	
U	Issuing a form will automatically save all your changes. Issued forms can be changed back to draft status using Recall Last Issued Form. Please note, this is only available for the last issued form on each job. Issuing a Contract Administration Form will lock the following fields in the job details editor: - Employer - Contractor - Form of contract - Job reference - Currency - Contract sum - Full retention percentage - Half retention percentage Do you want to continue?	
	Yes No	

Click 'Yes' and you will be asked to choose an issue reason from the value list. This will help filter the instructions in the instruction reports later.

۰.	NBS Contract Administr	ator	×
E.g. F This i	se enter an issue reason. For Payment, For Construction, For In nformation will be included on the ac mittal sheet.		1
Other	on't show this message again	ок	~

The software will then confirm that PDF files of both the instruction and an accompanying transmittal sheet (for your records and to accompany your fax if you use them), and will tell you where they have been saved and ask you whether you would like to open the file.

NBS Contract Administrator	
The certificate(s) and its accompanying transmittal sheet has been exported to pdf files. File location: C:\Users\fletchek\Desktop\Output\025mko\CAFs File names: 1. 025mko_Instruction_1.pdf 2. 025mko_Instruction_1_T.pdf Do you want to open the saved files?	
Yes No	

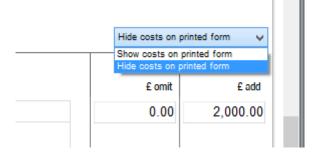
The PDF files can then be emailed as attachments, saved to your records and printed if required. The instruction then becomes locked and can no longer be edited, however, it is still possible to print off copies and create other PDF files. This is the transmittal sheet:

Des dias			lah safa	
Practice na	me:	XYZ Architects	Job ref:	abc123
Practice ad	dress:	The Old Post Office, St Nicholas Street Newcastle upon Tyne, NE1 1RH UK	Issue date:	22 September 2017
Form code	Form titl	e		Form number
Form code	Form titl Architects	e /Contract Administrators Instruction		Form number
Form code Issued to:		•		
		•		
Issued to:		Contract Administrators Instruction		1
		Contract Administrators Instruction		1 No. of copies

The instruction will show the figures by default. It will also have the Draft number and the Issue number as these may be different depending on the order of issue.

Issued by	: XYZ Architects				Con Adm	nitect tract ninist ructio	trator's
address	The Old Post Office, St Nicholas Newcastle upon Tyne, NE1 1RH UK			eference:	abc123	3	
	 Newcastle Breweries 5, Bath Lane Newcastle upon Tyne, NE4 6TH UK 			Draft no:		of	1
	: ABC Inc. : 1, High Street Newcastle upon Tyne, NE1 1TH UK						
	 Pub Extension including new kitc 10 Main Street Durham Co. Durham 	hen and toilets					
	Under the terms of the	ICD	Building Contra	act dated	22 S	eptemb	er 2017
				Office us	e: Appro £ omit	oximate	costs £ add
1 UPGRADE TO	FRIDGE FREEZER				0.00		2,000.00

You can still print versions with or without costs using the hide costs option.



Once the form has been issued, amounts entered into either the '**omit**' or '**add**' columns will update the **Revised Estimated Contract Sum** amount found under the job details section.

F				Current Status		
Employer:	New castle Bre	eweries	©	Total estimated additions:	£	10,000.00
Contractor:	ABC Inc.		🗘	Total estimated omissions:	£	1,000.00
Contract sum: £		70,0	00.00	Total Advance Payment:	£	0.00
Advance payment:			0.00	Amount certified to date:	£	0.00
Contract dated:	22 September	2017		Revised estimated contract s	um:£	79,000.00
Commission date:	08 September	2017				
Base date:	22 September	2017		Detects liability end date:		
Date of possession:	29 September	2017		Amended completion date:	-	
Original completion date:	01 January	2018				
Rectification period:	0	Months	~			
Rate of damages: £	0.00 per	Day	~			
		or pro-rata	thereto			
Retention Bond:						
Full retention:			5 %			
	mpletion:		2.5 %			

In the list of forms the icons look like this:

Forms - abc123 The Fox And Hounds							
🛅 = 🖨 🖾 🖶 🕘 😥							
Form Title	Number	Status	Date created				
Architects/Contract Administrators I	2		22/09/2017				
Architects/Contract Administrators I	1	\bigtriangleup	22/09/2017				

The orange square indicates a Draft form, the white triangle indicates an issued form that can still be recalled. You can recall the last issued form on any project by selecting this button:

Forms - abc123 The Fox And Hounds								
🛅 - 🌧 🚨 🔂 🕞								
Form Title	Number	Status	Date created					
Architects/Contract Adr Recall rs I	2		22/09/2017					
Architects/Contract Administrators I	1	\triangle	22/09/2017					

A Grey circle will indicate that the form has been issued and no longer can be recalled.

You should remove any PDF copies saved as these may give inaccurate reports. The software will warn that you may need to do this.

0	Recall report	×					
When this recalled, t any repor	PDF copies and Job reports When this form was issued, a PDF copy was generated in the output directory. Once the form is recalled, this PDF will no longer be an accurate record of the form and should be deleted. In addition, any reports generated since this form was issued may now be out of date. PDF copy location: C:\Users\fletchek\Desktop\Output\025mko						
?	Are you sure you want to recall issued certificate number: 1. Architects/Contract Administrators Instruction now?						

Removing instructions that are no longer required

Clicking into the item description will turn the item grey to indicate it is selected.

2	NEW SOUND SYSTEM		0.00	8,000.00
	Bose sound kit arranged by client			
	None	~		
3	REMOVE OLD JUKE BOX		1,000.00	0.00
	Return to stores			
	Loose equipment	~		

Clicking here will delete the selected instruction item.

	tects/Co							- Draft*
🏪 📙	🖉 🧔 🞑	2	ABC 🕞	1 %		3 I	U	

Selection fields

	None	
	Description	
No.	Title	

Selection fields are marked with a drop down arrow button. Clicking on the button will show the available options, as shown below. Just click on the one to be used.

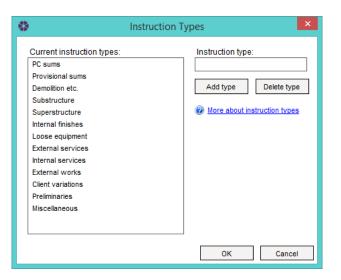
lo.	Title	
	Description	
	None	
	None	
0.	PC sums	
	Provisional sums	
	Demolition etc.	
	Substructure	
	Superstructure	
	Internal finishes	
	Loose equipment	
	External services	
	Internal services	
	External works	
	Client variations	
	Preliminaries	
	Miscellaneous	

Defining your own instruction types

Earlier in this guide we looked at using Instruction Forms. These forms include an 'Instruction type' and these are used to categorize Architects and Contract Administrators Instruction items.

Categorizing into different types allows these forms to be subsequently grouped by Instruction type in the Job Financial Statement report discussed in section six.

Whilst **NBS Contract Administrator** comes with a series of pre-defined Instruction types, you are able to add new types to suit the needs of your company.



To add custom instruction types, go to **Tools** > **Instruction Types**, the Instruction Types window will appear.

Adding an instruction type

To add a new instruction type, enter the name of the new instruction type in the Instruction Type box and then click on the **Add type** button. This will add your new instruction type to the Current instruction types list.

Deleting an instruction type

Please note that you cannot delete the NBS Contract Administrator pre-defined Instruction types. To delete a user defined type select the user type in the Current Instruction types list and then click on the Delete type button - you will be asked to confirm your decision as this may affect instruction items which have had this instruction type assigned.

If an instruction type is deleted, then any instruction types that have been issued, or are in a draft status, and did have the deleted type associated with them, will no longer have an instruction type associated with them.

Spell check

When you have completed your instructions, you may want to use the spell check facility which is available within **NBS Contract Administrator**.



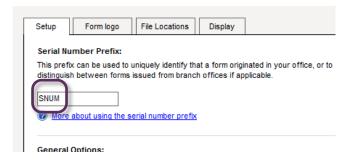
Clicking the 🎬 icon launches the Spell Check.

Fields populated on issue

Certain fields in your forms will remain blank until the forms are issued. Fields such as Issue date and final date for payment will not be entered until your form has been issued.

et	I	nte	erim C	erti	fica	te
	Serial no:	SI	1UM/000	01		
	Job reference:	St	ampEx R	efurb		
	Certificate no:	1				
	Date of valuation:	09	October	2017		
	Issue date:	09	October	2017		
	Due date: The final date for payment is 14 days from the due date.	23	October	2017	•	

The serial number is also automatically entered when a form is issued. SNUM is the default prefix, however this can be changed to reflect a specific requirement in the **Tools > Options** area.



Final certificate

Once the final certificate is issued, it is not possible to add or issue any further forms in your job.

Issuing a Form

Whenever any form is issued within **NBS Contract Administrator**, a PDF copy of the form is automatically generated, along with a transmittal sheet. The transmittal sheet is used to indicate which forms have been produced, and how many copies of each form the intended recipients should receive. The 'Issued to' area is populated from the Distribution List.

Once the PDF files have been created the user will be given the location where these files can be found, as well as an opportunity to open and view the PDF files.

Distribution Lists

It is good working practice to check the **Distribution List**. To do this, click on the tab marked '**Distribution List**'. If you wish to remove someone from the distribution list and therefore the transmittal sheet, uncheck the check box in the **Send** column. You can also amend the number of copies that are to be sent to each contact by clicking in the Copy field and typing in a new number.

		± Approximate value of pre	ontract Sum/Tender Pri vious issued Instructio Sub-to te value of this Instructi	ns£ tal£	25,000.00 0.00 25,000.00 -250.00
		×	pproximate aujusteu to	tar z	24,750.00
Distribution	Contractor 3	Quantity Surveyor	Clerk of Works		
	Employer 1	Structural Engineer		Other	
	Principal Designer	M&E Consultant		File 1	

Alternatively, the distribution list can be accessed by clicking on the '**Distribution**' section located at the bottom of the open form. As the mouse pointer hovers over this section, it will highlight in blue to indicate a clickable link.

After you have checked the distribution list, to issue your form; open the form in the editor by double clicking on it. The form then opens with a toolbar at the top of the screen, as shown below.

You can also manage your distribution list globally for all Jobs via **Tools > Distribution List**.

Starting the Issue process



Clicking on the 🖹 icon then starts the process of issuing your form to those on the distribution list.

Locked fields

Upon issuing the form for the first time in a job, certain fields will be locked down, and the user will not be able to edit them - a warning is given as illustrated below:

	NBS Contract Administrator	
3	Issuing a form will automatically save all your changes. Issued forms can be changed back to draft status using Recall Last Issued Form. Please note, this is only available for the last issued form on each job. Issuing a Contract Administration Form will lock the following fields in the job details editor: - Employer - Contractor - Form of contract - Job reference - Currency - Contract sum - Full retention percentage - Half retention percentage Do you want to continue?	
	Yes No	

By doing this, **NBS Contract Administrator** is ensuring that the addresses used on issued forms remain consistent (i.e. you cannot change who the employer is). Also, if you had issued a form, or performed a calculation within **NBS Contract Administrator** then went to edit the Contract Sum on the job details form, it would result in any subsequent forms being based on incorrect information.

Click Yes to confirm and continue.

Reason for Issue

If desired, the user can provide an explanation as to why the forms were issued i.e. 'Architect's Instruction for amendments to first floor external opening', or a message to pass on to the reader, indicating what you require them to do with the forms you have issued to them. You can select from a list of Issue reasons, or enter your own. If you wish, you can suppress the message from ever appearing again by checking the box next to 'Don't show this message again'. This can be reactivated by accessing Tools > Options > Display.

\$	NBS Contract Admini	strator	×			
Please enter an issue reason. E.g. For Payment, For Construction, For Information. This information will be included on the accompanying transmittal sheet.						
Other	n"t show this message again	ОК	×			

Any text entered here will be displayed on the bottom of your transmittal sheet. You can choose to leave this blank, just click **OK** to continue.

NBS Contract Administrator will automatically convert your forms into a PDF format. You will then be asked if you wish to open your forms for viewing. If you wish to do this, your forms will be opened by your default PDF-compatible software, for example Adobe Reader.

i Please note:	
Although you can still open forms which have been issued from the active job, you will not be able to edit them. The Issue, Save, Save and Close buttons will be disabled.	
This prevents users from editing forms that have already been issued, and so causing any confusion as to what was issued, when and why.	

Form status

When there are no forms open, the form list is shown. From here the user can see what forms have been used in conjunction with the job so far and the status of them:

Form Title	Number	Status	Date created
Architects/Contract Administrators I	2		22/09/2017
Architects/Contract Administrators I	1	•	22/09/2017
Architects/Contract Administrators I	3	\triangle	12/10/2017

The orange square indicates that Form number two is in draft status. The white triangle shows that the form has been issued but is still capable of being recalled and the grey circle indicates the form has been issued but can no longer be recalled.

Any form can be opened for viewing by double-clicking, and any form can be printed. However, only forms that are in draft status can be edited.

Recalling an issued form

Occasionally you may need to recall a form that you have issued – for example an incorrect date may have been entered to an extension of time certificate, or there may be a misspelling on an instruction form.

NBS Contract administrator allows you to recall the last issued form, allowing you to alter text, figures and spelling mistakes. This allows you increased flexibility when issuing forms.

If an issued form can be recalled, then a button will be displayed at the top of the form window.



Click the ڬ button to begin the recall process.

Amendments can then be made as required; the benefit of this is that the majority of work for that Architects Instruction Form will not have to be re-done from the very beginning. Click on the **Issue Form** button to reissue the form.

Please note:

You can only recall the last issued form within a job.

You will also need to delete any PDF documents which were created when you issued the original version of the form. By not deleting these forms, it may lead to confusion if there are (at first glance) multiple copies of the same form.

Exercises

Exercise One

Using the job you created in Section Three, do the following:

- Add an Architects Instruction Form.
- In the draft AI Form, complete the first item as follows:
 - Title: 'New Concrete Sills to Bays'
 - Details: 'Replace 3 no. cracked Bath Stone Sills to windows bays to ground floor main elevation Use 3 no. precast concrete sills of dimensions to match existing stonework.'
 - Omit: Column is left blank
 - Add: £250 entered.
- Specify a second item:
 - Title: 'Fire Compartmentation in roof space'
 - Details: 'Provide 2 no. of one-hour fire resistant partitions in roofspace over the original party wall positions comprising a stud framework and 2 no. layers 12.5mm Wonderboard screwed to each side and sealed in accordance with the manufacturer's recommendations.
 - **Omit**: Column is left blank
 - Add: £500 entered.
- Issue the form, ensuring that the pricing information has been included.

Locate the PDF forms produced, and check they are correct.

Check the status of the form - is it an orange square?

Open your job details - has the contract sum updated correctly?

Exercise Two

- From the forms list, add a second Architects Instruction form, this time using a different method of adding.
- Complete the item editor, as follows:
 - Title: Extract Fan WC 2
 - Details: Supply and fix 1 no. 'Loovent' as per specification ref. N10_30 to wall of first floor WC_2 ducted to the outside through adjoining roof using roof cowl accessories.
 - **Omit**: Column is left blank
 - Add: Enter £500
 - Ensure that pricing information is not included in the issued copy.
- Close the form ensuring that your changes are saved.

Exercise Three

- Re-open the form from Exercise One.
- Were you able to re-issue the form? If not, why could this be?
- Re-call the form, repeat the steps outlined on the previous page, and then re-issue the form.
- Go back to the forms list and ensure that all forms are showing a status of 'issued'.

Exercise Four

- Create a new type of role named 'Landscape Architect'.
- Open the address book and locate Goode Building we created earlier, add a new team member called 'Stephen Irwin'.
- Give this team member a role of 'Landscape Architect'.
- Set the distribution list to include this new member and ensure they receive two copies of all forms issued.

Section 5: Managing your jobs

Upon completion of this section you will be able to:

- ✓ Have a clear understanding of the different types of job category within NBS Contract Administrator.
- \checkmark Be able to re-order your jobs according to differing criteria.
- \checkmark Be able to change the status of your jobs.
- \checkmark Be able to delete a job that is no longer required.

Managing your jobs

As explained earlier, there are three different categories of job:

- 'Jobs' which details jobs that are currently active within your company. •
- 'Demo' which shows examples of jobs that have been created by NBS to illustrate the different forms of contract and associated forms that can be used within them. These jobs enable users to become familiar with the software without affecting any real, current jobs.
- 'Archive' this provides a location to store jobs that are either completed, or which are currently no longer on-going, but may become active again sometime in the future.

Once the user has selected which category of job to view, all jobs within that category will be displayed in the central window.

Double-clicking on the job title will then display the titles of all forms used in that job so far in the centre of the screen. In turn, double-clicking on a form title will open that form.

Sorting your jobs

As more jobs are added to NBS Contract Administrator, you can personalise the way that they are ordered to make it easier to find your jobs.

Your list of jobs can be sorted in four ways, by most recently edited, by job reference, by contract type or by job title.

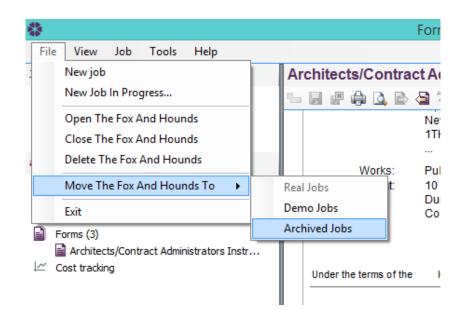
To cha	ange the	1 1 4			
sort	order,	Ref.	Title	Date modified	Form of contract
simply	click on	IBA_06_10	Badminton Courts	19/07/2017 10:07	ICD 05
the	relevant	IBA_04_4	Language Laboratories	19/07/2017 10:07	IFC 98
column	title:	IBA_04_20	Fairbridge School Library	19/07/2017 10:07	JCT 98
		IBA_06_05	Carling Academy Extension	19/07/2017 10:07	MW 05
		IBA_04_16	Marine Buildings Renovation	19/07/2017 10:07	MW 98
		IBA_06_15	Centre For Sustainability	19/07/2017 10:07	SBC 05

NBS Create Training Guide

Archiving your jobs

When you have finished working on a job, you may store it in an archive area in **NBS Contract Administrator** - this will mean that your job explorer is a more manageable size.

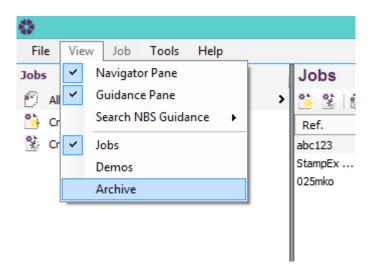
To archive a job, select the job in the job explorer. Go to File > Move [job] To > Archived Jobs.



Accessing archived jobs

To access an archived job, go to **View > Archive**. The job explorer will change to show your archived jobs.

If a job is moved to the archive, it can still be opened, with forms edited and issued as per normal.



Moving an archived job back to Jobs view

To move a job from archived jobs, back to the Jobs view, select the job in the job explorer. Go to File > Move [job] to > Real jobs. The job can then be accessed under the Jobs view, within the job explorer.

By organising your jobs into the 'archive' or 'job' view, it will help keep your current jobs clean and ordered. At a glance, users can see which projects are currently on hold, have been completed, or are currently on-going.

Deleting your jobs

NBS Contract Administrator allows you to delete your jobs; this should be considered carefully as this cannot be undone at a later time.

Please note that if you delete a job, your associated exported PDF forms will not be deleted and will remain in the output location specified in the job details. To delete a job, click on the job in the job explorer and go to File > Delete job. You will be asked to confirm that you are sure, click OK to continue or Cancel.

0	NBS Contract Administrator ×
♪	Warning Deleting New Pub, will also delete all its associated draft and issued forms. Once deleted, you will NOT be able to retrieve this information. PDFs of issued forms will not be deleted.
	Are you sure you want to delete New Pub?

Alternatively, from the job explorer, users can also right-click on the name of the job, and select '**Delete**'.

Exercise

- 1. Change your view in NBS Contract Administrator to display Demo Jobs.
- 2. With the list of jobs open, sort the list into alphabetical order.
- 3. Open the 'Centre for Sustainability' then archive it.
- 4. Change your view in NBS Contract Administrator to display only Archived Jobs.
- 5. Locate the Centre for Sustainability job, and move it back to Demo Jobs.

Section 6: Printing forms, exporting forms and creating reports

Upon completion of this section you will be able to:

- ✓ Export forms you have created.
- \checkmark Print a copy of your forms to retain for use in the office.
- ✓ Work with accurate financial reports produced by NBS Contract Administrator.

Previewing, printing and exporting your forms

There are a number of ways to view a print preview and print your forms.

You can:

• Click on 'Forms' in the job details panel, then right-click on the form you wish to print/preview from within the central pane;

Bin Mary John Taola Mala	Forms - StampEx	Refurb Star	mp excha	nge refurbishment - NBS Contract Adr
File View Job Tools Help tobs All jobs Stanpex Create a new job Create a new job in progress StampEx Refurb Stamp exchange refurbishmen Job Details Team Forms (9) Architects/Contract Administrators Instr Proteins Centerst 2) Non-Completion (1) Practical Completion (1) Practical Completion (1) Final Certificate (1) Adjustment of Completion Date (1) Cost tracking	Forms - StampEx Refurb	Number 1 1 Open 2. Arch Recall Last Is Delete	Status hitects/Cont ssued Form	refurbishment Date created 09/10/2017 09/10/2017 tract Administrators Instruction cts/Contract Administrators Instruction 09/10/2017

• Or open the form and click on the **Print Preview** button 🞑 located in the top toolbar;

	tampEx Refurb Stamp exchange refurbishment	
🚡 - 🖨		

• Finally you can click on the form you want to print preview or export in the list of forms associated with your job, then click on the 'Job' drop down menu, and select accordingly.

File View	Job Tools Help			
obs	Add Form	amp e	xchange	refurbishmen
All jobs	Open 2. Architects/Contract Administrators Instruction	1.	-	
Create a ne	Close Form	mber	Status	Date created
Create new	Recall Last Issued Form		0	09/10/2017
ampEx Refur	Delete 2. Architects/Contract Administrators Instruction		•	09/10/2017
	Add Team Member	-	0	09/10/2017
💪 Job Details	Add Team Member			09/10/2017
💈 Team	Print Preview 2. Architects/Contract Administrators Instruction			09/10/2017
Forms (9)	TRUCK CONTRACTOR			09/10/2017
Architec	Edit Instruction Items Cost Tracking			09/10/2017
Interim (Job Cost Tracking Report			09/10/2017
Non-Cor	Job Instructions Report		\triangle	09/10/2017
Practical	Job Activity Report			
Certifica				
Final Cer	Job Valuation and Certificates Report			
Adjustm Cost tracking	Job Financial Statement			

Your form will open in a new print preview window. From here, you can print or export the form by clicking on the relevant buttons.

Printing a form

To print the form, click on the **Print** button.



Exporting a form

There will be times when you need to share information that you have produced using **NBS Contract Administrator** with others who do not have the software and therefore cannot read the files in their native format.

Fortunately **NBS Contract Administrator** makes it very easy for you to export information to PDF which can be opened in Adobe Acrobat Reader.

To export the form, click on the **Export** button.



You will be asked to specify a location for the exported report (PDF format) to be created, click **Save** when you have browsed to the desired location.

Please note that printing or exporting a draft form does not change its status to 'issued'. The only way to change the state of a form to 'Issued' is by issuing the form, as described in section four of this guide.

Reporting on your job

NBS Contract Administrator can generate reports on the financial position and contract communications for each job. The reports for the active job are generated by selecting a report title from the Job menu.

\$										F	orms	- Sta	mpEx	Ret	furb St	tamp	o exch	ange re
File	e View	Job	Tools	He	lp													
Jobs			Add Forn	n										•	amp e	exch	nange	refur
	All jobs		Open 2. A	Archi	tects/C	Contrac	ct A	dmin	nistrat	tors In	structi	on						
•	Create a ne		Close For	m											mber		Status	Dat
2	Create new		Recall Las	st Iss	ued For	rm									inder			09/1
110			Delete 2.	Arch	itects/(Contra	act A	Admii	nistra	ators Ir	nstruct	tion					ŏ	09/1
Stan	ipEx Refur		Add Tear	n Me	mher												\odot	09/1
<u>~</u>	Job Details Team																•	09/1
-	Forms (9)		Print Prev	/iew	2. Arch	itects/	/Cor	ntract	t Adr	ministr	rators I	nstruc	tion					09/1
	Architec		Edit Instru	uctio	n Items	s Cost	Tra	cking	9									09/1 09/1
	📄 Interim (Job Cost	Trac	cina Re	-port											ŏ	09/1
	Non-Cor		Job Instru		-	· ·											\triangle	09/1
	Practical Certifica		Job Activ			512												
	Final Cer		Job Valua	÷		ertifica	ates l	Reno	urt									
	📓 Adjustm		Job Finan				ites i	керо										
~	Cost trackin	9	JOD TIMan		Statem	ciii	-											

The options are:

Edit Instruction Items Cost Tracking

Before you print the Job Cost Tracking Report, you will need to edit the figures to reflect the claimed and final agreed figures. Each column will need a figure in it otherwise it will show as TBA (To Be Agreed) on the Job Cost Tracking report.

Form title		Status	∇ Number Created date						
Architects	/Contract Adr	ninistrators	4 23 January 2017						
				Omit			Add		
Number	Title	Туре	Description	Estimated	Claimed	Agreed	Estimated	Claimed	Agreed
4.01		External services	INCOMING GAS MAIN Accept the	400.00	500.00	450.00	248.00	400.00	
4.02		Superstructure	(a) HIP TILES OMIT: Farland	372.00	400.00	400.00	514.00		
		Superstructure	(b) HIP IRONS OMIT: 4 no. hip	0.00	0.00	0.00	0.00	0.00	0.
4.03		Internal finishes	PICTURE-HANGING FACILITIES	0.00	0.00	0.00	80.00	200.00	80.
4.04		Superstructure	VELUX ROOFLIGHTS OMIT: single	0.00	0.00	0.00	0.00	0.00	0.
4.05		Substructure	MORTAR MIXES This is to confirm	0.00	0.00	0.00	0.00	0.00	0.
4.06		Substructure	REDUCED LEVELS Excavate to	0.00	0.00	0.00	0.00	0.00	0.
Architects	/Contract Adr	ministrators	3 23 January 2017						
				Omit			Add		
Number	Title	Туре	Description	Estimated	Claimed	Agreed	Estimated	Claimed	Agreed
3.01		Miscellaneous	Demo instruction number 3, item	0.00			100.00		
A	/Contract Adr	ministrators	2 23 January 2017						

Job Cost Tracking Report

This report gives a breakdown of all draft and issued Architects Instructions within a job. It gives a summary of all individual items within the job and the overall estimated, claimed and agreed costs.

12 October 2017	10.22AM	XYZ ARCHITE	ECTSLTD	Pac	ge:2 of	4
12 0010001 2011	10.02740	JOB INSTRUCTION ITEMS C			,	
Job reference:	IBA_16	15	Date of possession:	19	December 2016	
		- For Sustainability				
	Elway R	lge University Coad stle-Upon-Tyne	Original date for completi Revised date for completi	ion: 23	September 2017 October 2017	
Contractor:	66 High	stle-Upon-Tyne	Contract sum:	£6	13,750.00	
nstruction	Item			Cost		
Number Date	Numbe	# Type / Title / Description	E	stimated	Claimed	Agreed
4 Draft	Archit	ects/Contract Administrators Instruction				
	4.01	External services		-152.00	-100.00	tba
		8438_63 dated 6 August 1989 rece in the sum of £248.00 for the new i and supply and installation of gas r their quotation is attached. This su against the provisional sum of £40 ref.3_2G in the bill of quantities.	incoming gas main neter. A copy of m is to be set			
	4.02	Superstructure		142.00	tba	tba
		(a) HIP TILES OMIT: Farland concr tiles, bill of quantities ref.5_15E. A Red Bank 300mm long red Terraco segmental ridge tiles, list no.259	DD in lieu: 4 no.			
		Superstructure		0.00	0.00	0.00
		(b) HIP IRONS OMIT: 4 no. hip iron ref.5_15F. ADD in lieu: 4 no. Red E red Terracotta Scroll hip finial tiles Hip tiles and finial tiles to be obtain Bank Manufacturing Co. Ltd.	Bank 300mm long 225mm diameter			
	4.03	Internal finishes		80.00	200.00	80.00
		PICTURE-HANGING FACILITIES IN ROOM Supply and fix aluminium p 12m long and 100 no. type (b) U-s	picture rail approx.			

All reports can be exported to either .pdf or .xls file types. This means the .xls file can be opened in Excel as a spreadsheet.

Job Instruction Report

This report gives a summary of all issued Architects (or Contract Administrator) Instructions within a job and their estimated impact on the contract sum. A summary of draft Architects Instructions is presented in a separate table.

Job Activity Report

This report gives a chronological summary of all issued contract administration forms on a job, with a summary of draft contract administration forms presented in a separate table. It shows the commitments made (the estimated adjustments to the contract sum as detailed on issued instructions) and the amount of money certified on payment certificates, and uses both to keep a running total of the amount still outstanding on the contract.

Job Valuation and Certificates Report

This report deals with monies defined in a job. It lists all the payment certificates, detailing the current amount retained by the employer and the outstanding contract value. Draft forms are not included in this report.

Job Financial Statement Report

This report shows the financial effect of all issued instructions, grouped by instruction type. It also details all of the payments made, as well as the outstanding contract amount. Towards the end of the report is a list of nominated sub-contractors applicable to the job. Financial information on draft forms is not included on this report.

\$							Print P	review						_ 0
Ξ	Drint	04	0 🛛 X		100 % 🗸	₼ 👽 1/1 🕝	Backward 🕑 <u>F</u> o	rward 🛛 🗋 🖪	xport					
								4	5 .		6	7 .		
-														
					12 October 2017 1	0:65AM	XYZ ARCH	TECTSLTD		Page	e: 1	of 1		
1							JOB FINANCIA							
1													'	
1														
1				L	Job reference:	IBA_16_15			Formofo	ontract SBC 1	16			
1						Centre For Sustainability			Date of poss	ession: 19 De	cember	2016		
÷						Fairbridge University			inal date for com					
-						Elway Road Newcastle-Upon-Tyne		Rev	ised date for com	pletion: 23 Oc	tober 2	017		
2						Neville Construction Ltd								
						66 High Street Newcastle-Upon-Tyne Tyne and Wear								
1				L										
3				L	Contract sum:						£	613,750.00	1	
1				L									+	
1				L	Total advance payn	nent					£	5,000.00		
1				L										
4				L									.	
1														
1					Instructions: -			Omit	Add	Net				
1					PC sums			0.00	200.00	200.00				
5					Miscellaneous			0.00	100.00	100.00			ı I	
1					Totals of adjustment			0.00	300.00	300.00	£	614,050.00		
1					Contract sum as ad	iusted by final certificate:					£	N/A		
1											-		1	
- 6					Payments certified: Issue date	- Cert. number Serial number	Cumulative	Amount certifiea	Certified to date	Retention				
÷					Interim	our, number Genamümber	reimpursement	certined	oate	Retention				
÷					23 January 2017	1 -	1,000.00	63,586.32	63,586.32	3,399.28				
-					23 January 2017	2 -	2,000.00	66,995.68	130,582.00	6,978.00				
1					23 January 2017	3 -	3,000.00	7,599.99	138,181.99	7,430.63				
7					23 January 2017 23 January 2017	4 - 5 -	4,000.00 5,000.00	26,775.51 28,117.50	164,957.50 193,075.00	8,892.50 10,425.00				
1					23 January 2017	6 -	5,000.00	28,117.60 55,632.00	248,707.00	13,353.00				
- 1					23 January 2017	7 -	5,000.00	57,975.65	306,682.65	16,404.35				
1					Outstanding contra	ctvalue					£	302,367.35		
8													1	
1														
1							< END OF	REPORT >						
							.2							

Exercise

Exercise One

Open the first architect's instruction form that you created as part of exercise four. Once the form is open, export a copy of the form to PDF format, and ensure it is exported to the Windows Desktop.

Exercise Two

Change the view from 'Real' jobs to 'Demo' jobs, then select the job entitled 'Language Laboratories':

- Which report could you run to view how many Instruction forms have been issued?
- What was the original contract sum for the Language Laboratories job?
- What is the total adjusted contract sum as a result of all the instructions issued?
- Which report would be used to determine any outstanding contract value?
- For the Language Laboratories job, what is the outstanding contract value?

Section 7: Office and User Settings

Upon completion of this section you will be able to:

 ✓ Customise the way in which NBS Contract Administrator functions in order to suit your own preferences.

Defining your office settings

There are a number of options available within NBS Contract Administrator that can be used to customise system settings.

0		Forms - IB.
File View Job	Tools Help	
Demos P All demos Create a new demo Create new demo IBA_16_15 Centre Fo Job Details Team	Spell Check Spell Check Options Options Address Book Distribution List Instruction Types Roles	ns - IBA_16_15 Centu Tite Cts/Contract Administrators I rtificate cts/Contract Administrators I cts/Contract Administrators I cts/Contract Administrators I
 Sectional Completic Forms (32) Architects/Control Interim Certifica Statement of Re 	Edit Issuer Details Licence Status	Certificate ent of Retention ent of Reimbursement Certificate
Statement of Re	imbursement (7) on by the Employer (1) (1) ttion (1)	ent of Retention Statement of Reimbursement Interim Certificate Statement of Retention Statement of Reimbursement Interim Certificate

The options menu is divided into four different tabs as shown overleaf. Selecting each tab displays the relevant options available. Selecting one of these tabs then displays the options below, relevant to that tab.

Setup tab

The setup tab is divided into two sections:

Serial Number Prefix

All payment forms created in NBS Contract Administrator are given an automatically generated serial number when they are issued. This facility could be used to distinguish between forms issued by different branches of your office and can be a combination of up to 4 letters and numbers.

The prefix of serial number is determined by what you enter here.

٥			Opt	ions		×					
[Setup	Form logo	File Locations	Display							
	This prefi	Serial Number Prefix: This prefix can be used to uniquely identify that a form originated in your office, or to distinguish between forms issued from branch offices if applicable.									
	SNUM										
	General	Options:									
	The follow Administra		ne how certain info	rmation is disp	olayed by default in NBS Contract						
	Default cu	rrency £ Pour	ids 🗸								
	Clear all 'E	Clear all 'Don't show me again' selections made to date: Clear all									
[Help				OK Can	;el					

General Options

Currency – This section allows the user to set up a default form of currency to be displayed on any forms generated within **NBS Contract Administrator**.

Restore help pop up information – A number of information boxes within the software display helpful information to the user. These help boxes can be switched off if desired. In order to set these help boxes to reappear, the user can click on **Clear all**.

Form Logo Tab

This tab allows the user to show either the RIBA crest on forms generated within **NBS Contract Administrator**, to not show any type of logo, or to use a custom logo such as your own company's logo.

\$	Options	×							
[Setup Form logo File Locations Display								
	By default, NBS Contract Administrator will display the RIBA crest logo in the bottom left corner of your forms. You can also select to not display a logo, or show your own custom logo by browsing to its location using the option below.								
	More about displaying a custom logo on forms								
	Display Options:								
	 Display the RIBA crest (default) 								
	O Do not display a logo								
	O Display a custom logo:								
	Preview: File location:								
[Help OK Cano	el							

Clicking on the browse button \square enables the user to select the logo they wish to use.

File Locations Tab

When NBS Contract Administrator is opened for the first time, you will be given the option to create a new data store to contain all your job information, or to browse to an already existing data store. If at a later date you need to change your data store, this can be done from this tab.

Once you have selected your desired data store select the OK button and the data store will be recorded in NBS Contract Administrator.

Default Output Directory

The output location is a directory where all of your PDFs (issued forms) will be created. Once you have selected your desired directory, click the OK button and the default output directory will be changed for all future jobs created in NBS Contract Administrator.

Clicking either browse button allows the user to select an appropriate location.

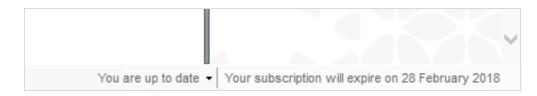
\$	Options ×	
Setup Form lo	go File Locations Display	
To change a file locat your network or local	on, select the browse button and navigate to the desired location on machine.	
More about the d More about the d	ata store location	
Wore about the o		
Data store location:	C:\Users\fletchek\Desktop\CAFtab.cadb	
Default output directo	ry: C:\Users\fletchek\Desktop\Output\	
Help	OK Cancel	

Display Tab

This option allows the user to show or hide the status display bar. The display bar is shown in the bottom right hand corner of the **NBS Contract Administrator** software.

*			Opti	ons			×
	Setup	Form logo	File Locations	Display]		
	Dist	blay Status Bar?					
	Help				Г	ок	Cancel

The status display bar shows your update status and your licence details.



The status bar also indicates if there are any updates available for NBS Contract Administrator. If there are updates available, the user can then download the update file and apply this to their version of NBS Contract Administrator.

NBS Contract Administrator can receive content updates periodically via the NBS website. These updates can include updates to the software itself, as well as updates to the content within – such as new guidance notes, or new forms of contract.

Appendices

- Appendix 1 Types of entry within NBS Contract Administrator
- Appendix 2 Types of form supported in NBS Contract Administrator
- Appendix 3 Working with Payment forms
- Appendix 4 Administration Tools
- Appendix 5 LAN Settings and Software system requirements

Appendix 1 – Types of entry within NBS Contract Administrator

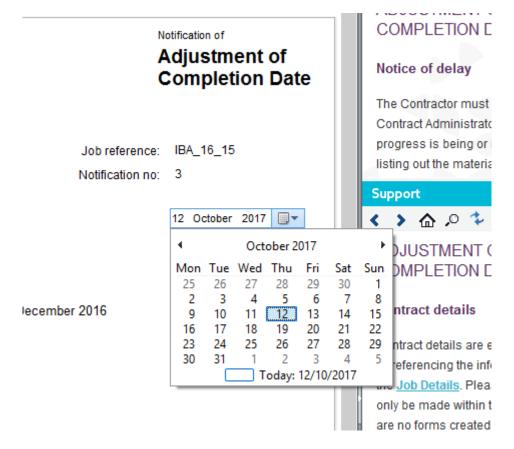
Completing Forms

Many of the forms within **NBS Contract Administrator** require certain information to be completed, before they can be issued.

These fields typically require text to be inserted (in an instruction form for example) or a date to be specified. Below is a description of these fields, and how they can be completed.

Calendar fields

Some selection fields are for selecting dates, when you click on them a calendar will appear.



To select a date that is shown in the displayed month, click on the required date. If you require a date from a different month, use the arrows \checkmark \blacktriangleright to move the calendar to the selected month, from there you can click on the desired date. Alternatively click on the name of the month, this will then display a drop down list from which the user can select the month they require.

Linked fields

Some fields are populated by information that is entered elsewhere. For example, the retention field in an interim certificate is populated from the retention statement. These fields, which are populated by 'external information', are shown with a button. Clicking on the button will take you to the appropriate information entry point.

This interim c	This interim certificate of progress payment is issued under the terms of the				
MW Building Contract dated 03 January 2017					
	Value of work executed and of materials and goods on site (calculation attached) Amount payable (97.5 % of the above value)	£ 1,000.00 £ 975.00			
	Less total amounts previously certified	£ 56,905.00			

Radio buttons

Radio buttons allow a user to select only one option from a series of choices. When you select an item, the other choices are deselected. Deselected items will be struck through in both print preview and exported PDF format.

Under the terms of the SBC Building Contract dated 12 December 2016
I/We hereby certify that the Contractor has failed to complete
 the Works
O Section no of the Works
by the relevant Completion Date, namely 23 October 2017

Click on a radio button to select the appropriate value.

Editable boxes

Under the t	erms of the	SBC	Building Contract dated 12 December 20	16
I/we hereby	state that a	part of t	he Works, namely	
-				
was taken i	nto possess	ion by t	he Employer	
on	•			

Many forms come with static text the user cannot edit. However, there will be some areas where the user is required to enter details specific to the job. Such areas are shown as indicated below.

Fully editable fields are shown as white boxes. To enter information, click into the box and complete as required

Spell check options

You can change the options using the spell check options tool.

	Spell Checking Options	x				
Options	User Dictionary Contents Common Misspellings	_				
Che	ck spelling as you type					
✓ Igno	ore words in UPPERCASE					
🗌 Igno	ore words in Mixedcase					
✓ Igno	ore words with numbers					
✓ Igno	re Internet and file addresses					
Langua	ge:					
English	English (U.K.)					
L		_				
	OK Cancel					

The spell checker will work through your document and locate words not found in the dictionary. Once a word is found, you have the option to:

- **Ignore** This will disregard the word.
- **Ignore All** This will disregard the word for the remainder of the document.
- Add This will include the word into your dictionary.
- **Change** This will replace the word with the highlighted suggestion.
- Change All This will replace all words spelt this way with the highlighted suggestion.
- **AutoCorrect** This will change the word to the most obvious replacement.
- Options Click on this button to alter spell check options, e.g. ignore words in upper case.

Spelling: E	nglish (U.K.)	×
Not in dictionary:		
Accept the quotation ref.no.	^	Ignore
		gnore All
	~	Add
Suggestions:		
refine refund	<u>^</u>	Change
reno ravine	C	hange All
ravin revenue	~ A	utoCorrect
Option	s Undo	Cancel

Appendix 2 - Types of form supported in NBS Contract Administrator

The following forms are all included within **NBS Contract Administrator**. The forms available to you on a job are defined by the Form of Contract selected when setting up the Job Details:

Standard contracts

JCT Standard Building Contract 2005 (SBC)

- Instruction
- Clerk of Works Direction
- Interim Certificate
- Statement of Retention
- Statement Of Reimbursement
- Partial Possession by Employer
- Non-Completion
- Practical Completion
- Practical Completion NSC works
- Section Completion
- Certificate of Making Good
- Final Certificate
- Revision to Completion Date

JCT Standard Building Contract 2011 (SBC)

- Instruction
- Clerk of Works Direction
- Interim Certificate
- Statement of Retention
- Statement Of Reimbursement
- Partial Possession by Employer
- Non-Completion
- Practical Completion
- Section Completion
- Certificate of Making Good
- Final Certificate
- Revision to Completion Date

JCT Standard Building Contract 2016 (SBC)

- Architects/Contract administrators Instructions
- Interim Certificate
- Statement of Retention
- Statement Of Reimbursement
- Partial Possession by Employer
- Non-Completion
- Practical Completion
- Section Completion
- Certificate of Making Good
- Final Certificate
- Adjustment of Completion Date

SBCC Scottish Standard Building Contract 2005 (SBC/SCOT)

- Instruction
- Clerk of Works Direction
- Interim Certificate
- Statement of Retention
- Statement Of Reimbursement
- Partial Possession by Employer
- Non-Completion
- Practical Completion
- Section Completion
- Certificate of Making Good
- Final Certificate
- Revision to Completion Date

SBCC Scottish Standard Building Contract 2011 (SBC/SCOT)

- Instructions
- Clerk of Works Direction
- Interim Certificate
- Statement of Retention
- Statement Of Reimbursement
- Partial Possession by Employer
- Non-Completion
- Practical Completion
- Section Completion
- Certificate of Making Good
- Final Certificate
- Revision to Completion Date

Design and Build contracts

JCT Design and Build Contract 2005 (DB)

- Instruction
- Non-Completion
- Practical Completion
- Section Completion
- Notice of Completion of Making Good
- Final Statement
- Interim Payments Notice
- Revision to Completion Date Section

JCT Design and Build Contract 2011 (DB)

- Instruction
- Non-Completion
- Practical Completion
- Section Completion
- Notice of Completion of Making Good
- Final Statement
- Interim Payments Notice
- Revision to Completion Date Section

JCT Design and Build Contract 2016 (DB)

- Instruction
- Interim Payments Notice
- Statement of Retention
- Statement of Reimbursement
- Non-Completion
- Practical Completion
- Section Completion
- Notice of Completion of Making Good
- Final Statement
- Adjustment of Completion Date

Intermediate contracts

Intermediate Building Contract 2005 (IC)

- Instructions
- Interim Certificate
- Record of Reimbursement
- Partial Possession By Employer
- Non-Completion
- Practical Completion
- Section Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

Intermediate Building Contract 2011 (IC)

- Instructions
- Interim Certificate
- Record of Reimbursement
- Partial Possession By Employer
- Non-Completion
- Practical Completion
- Section Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

Intermediate Building Contract 2016 (IC)

- Architects/Contract Administrators Instruction
- Interim Certificate
- Statement of Reimbursement
- Partial Possession By Employer
- Non-Completion
- Practical Completion
- Section Completion
- Certificate of Making Good
- Final Certificate
- Adjustment of Completion Date

Intermediate Building Contract with Contractor's Design 2011 (ICD)

- Instruction
- Interim Certificate
- Record of Reimbursement
- Partial Possession By Employer
- Non-Completion
- Practical Completion
- Section Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

Intermediate Building Contract with Contractor's Design 2016 (ICD)

- Architects/Contract Administrators Instruction
- Interim Certificate
- Statement of Reimbursement
- Partial Possession By Employer
- Non-Completion
- Practical Completion
- Section Completion
- Certificate of Making Good
- Final Certificate
- Adjustment of Completion Date

Minor Works Building Contract 2005 (MW)

- Instruction
- Progress Payment
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

Minor Works Building Contract 2011 (MW)

- Instruction
- Interim Certificate
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

Minor Works Building Contract 2016 (MW)

- Architects/Contract Administrators Instruction
- Interim Certificate
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Adjustment of Completion Date

Minor Works Building Contract with Contractor's Design 2005 (MWD)

- Instruction
- Progress Payment
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

Appendices

Minor Works Building Contract with Contractor's Design 2011 (MWD)

- Instruction
- Interim Certificate
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

Minor Works Building Contract with Contractor's Design 2016 (MWD)

- Architects/Contract Administrators Instruction
- Interim Certificate
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Adjustment of Completion Time

SBCC Scottish Minor Works Building Contract 2005 (MW/SCOT)

- Instruction
- Progress Payment
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

SBCC Scottish Minor Works Building Contract 2011 (MW/SCOT)

- Instruction
- Interim Certificate
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

SBCC Scottish Minor Works Building Contract 2016 (MW/SCOT)

- Architects/Contract Administrators Instruction
- Interim Certificate
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Adjustment of Completion Date

SBCC Scottish Minor Works Building Contract with Contractor's Design 2005 (MWD/SCOT)

- Instruction
- Progress Payment
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

SBCC Scottish Minor Works Building Contract with Contractor's Design 2011 (MWD/SCOT)

- Instruction
- Interim Certificate
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Extension of Time

SBCC Scottish Minor Works Building Contract with Contractor's Design 2016 (MWD/SCOT)

- Architects/Contract Administrators Instruction
- Interim Certificate
- Non-Completion
- Practical Completion
- Certificate of Making Good
- Final Certificate
- Adjustment of Completion Date

OTHER

- Instruction
- Stage Payment Certificate
- Statement of Deductions
- Completion Certificate

Appendix 3 - Working with Payment forms

All payment forms have been designed to auto-calculate values where possible. Where appropriate, payment forms are dealt with as "packages" and can only be added and issued as such. This is because they have such a strong relationship – fields in one form populate fields in the other.

Please note that record/statement of reimbursements can only added alongside an interim payment and an interim certificate, if an advance payment is recorded in the job details.

Retention Amounts

The retention amount is calculated using the retention percentage specified in the job details. All retention amounts are calculated using the Full retention percentage, until a certificate of practical completion is issued; all retention amounts will then be calculated using the Retention post practical completion percentage.

NBS Contract Administrator allows you to overwrite the auto-calculated retention amount in a statement of retention, progress payments and in interim payments. For example; in a statement of retention click on the Amount of Retention button. The edit amount window will appear, to specify a different amount, i.e. to round-up to the nearest pound, click on the Enter amount manually radio button and then enter the new amount in the box.

Gross	Amount subject to:			Amount of	
valuation	Full retention	Half retention	Nil retention	retention	
328,087.00 0.00	328,087.00	0.00	0.00 0.00	16,404.35 0.00	

Appendix 4 - Administration Tools

Some tools are not held within NBS Contract Administrator, this is to allow problems to be resolved without the need to open the software. They are accessible from the Windows start menu, going to Start > All Programs > NBS > NBS Tools > NBS Contract Administrator Tools.

Alternatively in your search bar in the Windows menu, search from NBS Contract Administrator Tools.

Remove Locks

>> 1	NBS Contract A	dministrator To	ols		
Remove Locks Comp	act and Repair	Licensing	LAN Settings		
	This tool allows unlocking of projects which are left checked out for editing as a result of an application crash or something similar.				
Browse To data store:			Unused lock Used within last 10 mins		
C:\Users\fletchek\Desktop\ Record ID Record Type		Machine ID	Time Last Used		
Record ID Record Type 2da447eb Project	Locked By FletcheK	NCL-TRAINE	12/10/2017 00:00:00		
Data store version: 2.3.0		Refre	sh List Remove Locks		
L			Exit		
			LAN		

While you are working in a job, **NBS Contract Administrator** will lock that job to stop anyone from trying to edit that job at the same time. If a problem occurs with your machine, e.g. a power failure, then this project will not have its lock removed and will therefore remain un-editable.

If you find that your project is locked, click on the project in the list and then click on the **Remove Locks** button.

Compact and repair

All of your jobs are held within a **NBS Contract Administrator** database. To ensure that the database remains a manageable size, you are recommended to regularly carry out the Compact and Repair process.

Click on the Compact and Repair tab in NBS Contract Administrator Tools.

»	NBS Contract Administrator Tools	<
	Remove Locks Compact and Repair Licensing LAN Settings	
	This tool allows the compaction of the selected data store, in order to reduce the size of the file on disk.	
	Browse To data store: C:\Users\fletchek\Desktop\CAFtab.cadb	
	Check this box if you would like to replace your existing data store with the compacted version, or leave unchecked if you would like to choose where the compacted version is saved to.	
	□ Replace Original?	
	Compact and Repair	
L	Exit	

If the correct database is not displayed in the Browse to data store box, then click on the browse button and locate your database, note that this is your CAFtab.cadb file.

Choose whether or not you want to replace your original database with your compacted database, by selecting the '**Replace Original**?' check box. Please note that if you do not select this option, you will be asked to specify a location for your compacted database.

Click on the 'Compact and Repair' button. If you haven't specified to 'Replace original', then you will be asked to provide a location for your newly compacted file. Browse to an appropriate location and click OK.

Licensing

From here, the user can unlock any software licences which may have become locked as a result of an application crash or fault with the PC. From this tab, the user can also review license status, upgrade or renew their existing licence.

Before carrying out any work on the licence for **NBS Contract Administrator**, it is advised to contact NBS Software support on 0345 456 9594.

2	•	NBS Contract A	Administrator Too	bls	×
Г	Remove Locks	Compact and Repair	Licensing	LAN Settings	
	The NBS Licence Vi result of an applicati	ewer tool allows unlocking ion crash or something sin	g of licence tokens whic nilar.	h are left locked as a	
	You can also review	your licence status, and u	upgrade or renew your l	icence using this tool.	
	To launch the NBS L	licence Viewer, click the b	utton below.		
				Launch Licence Viewer	ר
					-
				Exit	

Alternatively, the licence viewer can be accessed within the **Contract Administrator** software via '**Tools** > **Licence Status**'.

Appendix 5 - LAN Settings and Software system requirements

>> NBS Contract Administrator Tools	×
Remove Locks Compact and Repair Licensing LAN Settings	
Using a proxy server	
If you need to use a proxy server to access external information, select the checkbox and then complete the required information.	
More about using HTTP proxy servers	
Use an HTTP proxy server	
Address: Port:	1
Authentication	
Integrated Windows Authentication	
O Use basic authentication	
Username:	
Password: Re-enter password:	1
Test Connection	1
	-
Exit	

NBS Contract Administrator can receive content updates periodically via the NBS website. These updates include updates to the software itself, as well as updates to the content within – such as new guidance notes, or new forms of contract.

If your computer connects to the internet via a proxy server, then it is important to complete the details within the 'LAN Settings' tab of **NBS Contract Administrator** to facilitate this functionality within the software. If you are unsure as to what these settings should be, please contact NBS Software support on 0345 456 9594.

Appendices