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.
- ✓ 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.

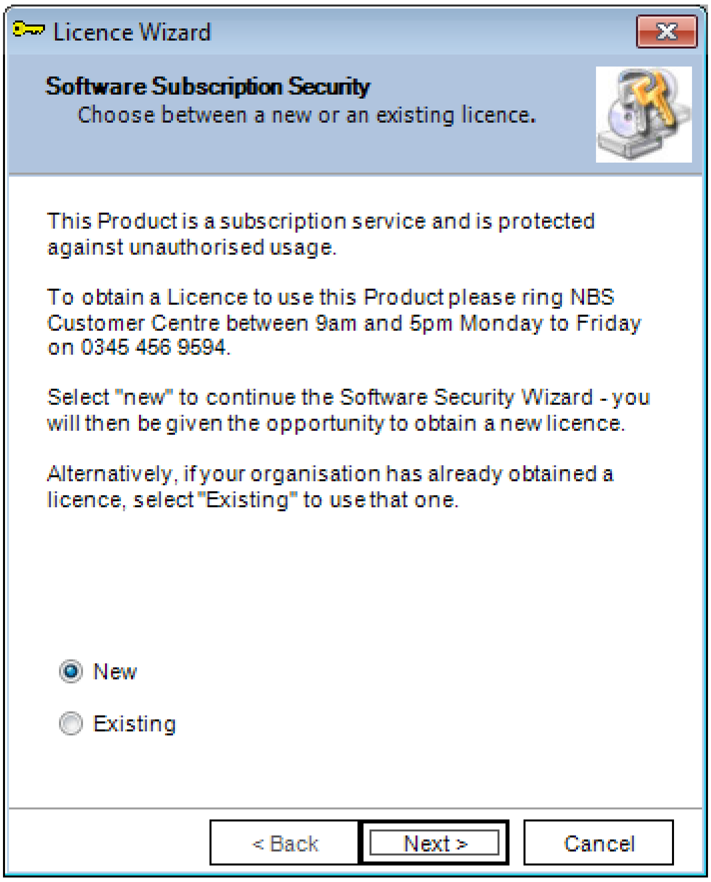
Alternatively go to **Start** > **All Programs** > **NBS** > **NBS Contract Administrator**.

Licensing NBS Contract Administrator

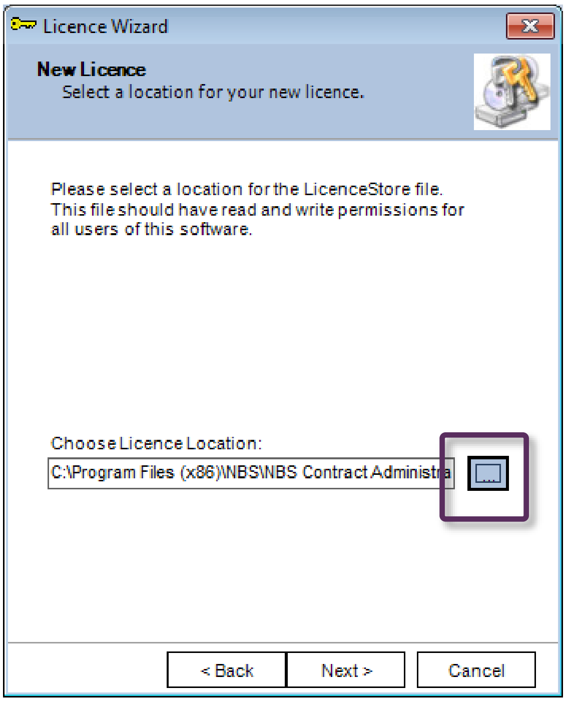
After installation, **NBS Contract Administrator** must be licensed before it can be used.

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:



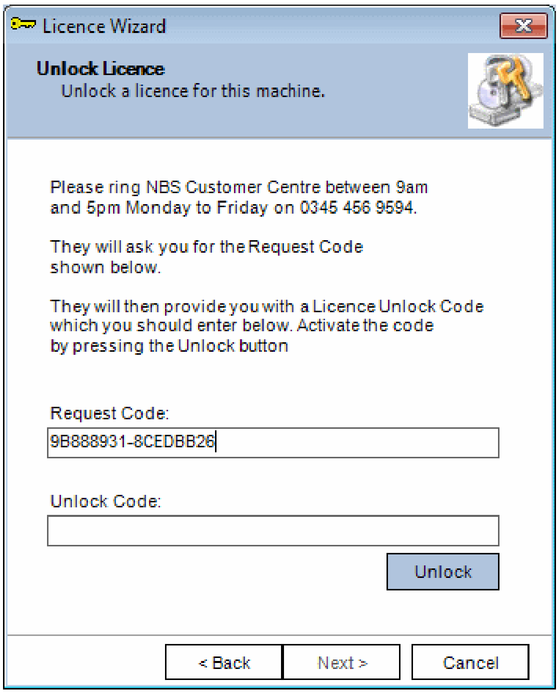
If this is the first time that **NBS Contract Administrator** is being used in your company, select the **New** radio button, and then click **Next**.



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.

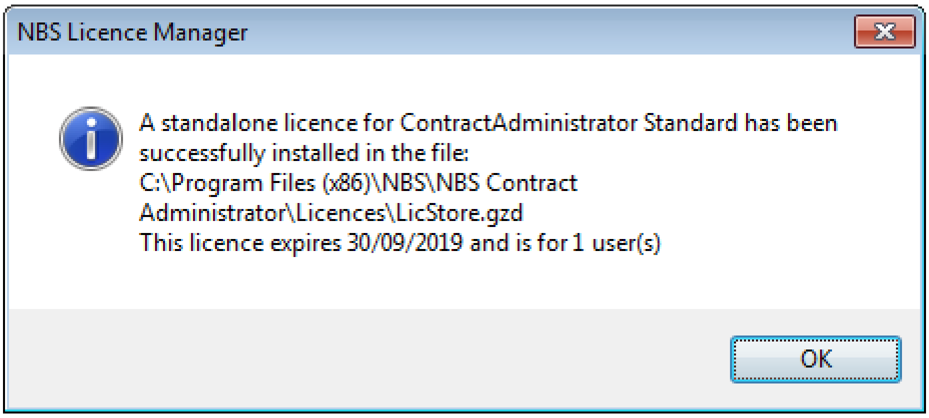
Finally, you will be presented with a request code.



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.

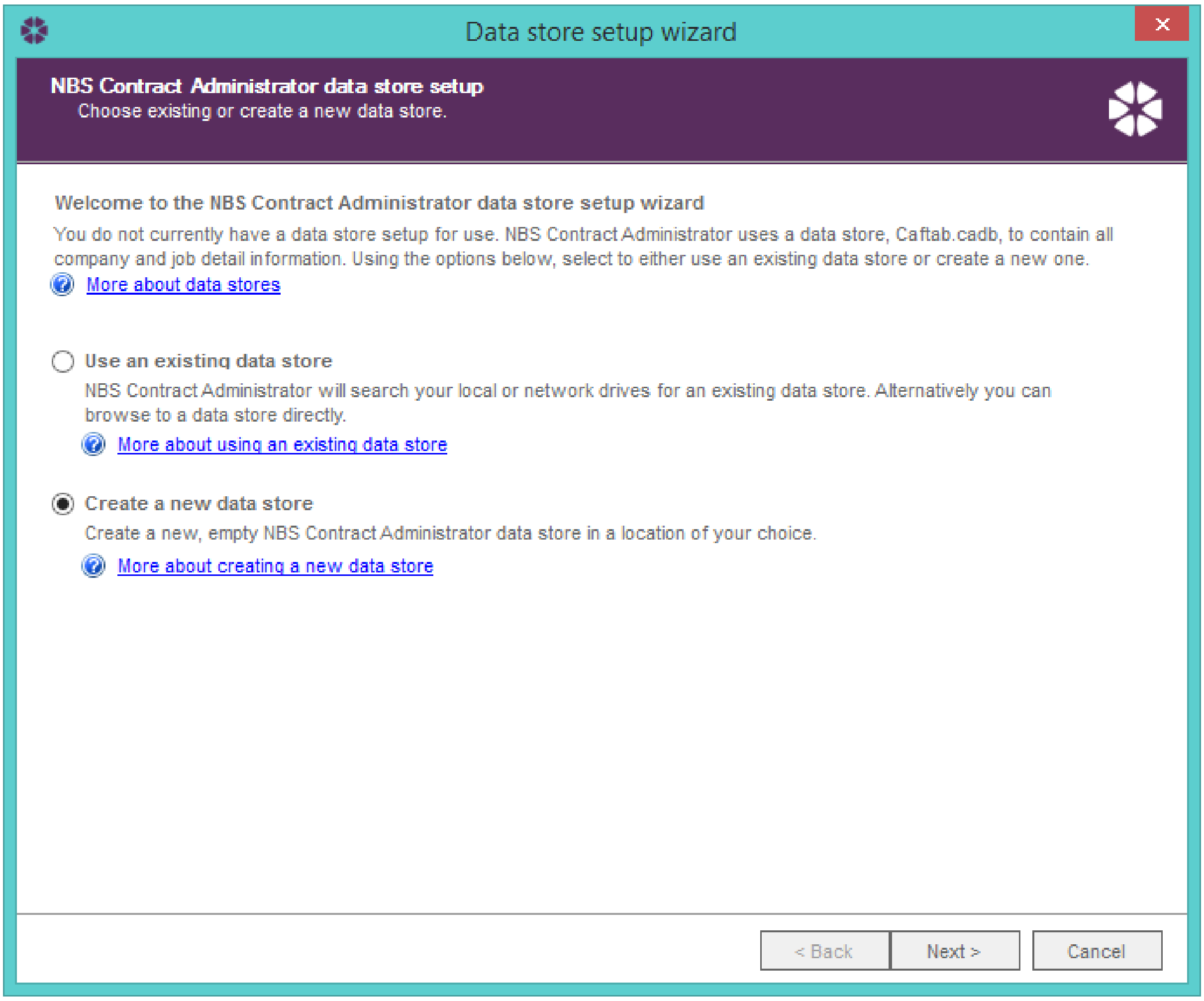
Data stores within NBS Contract Administrator

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.



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.

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.

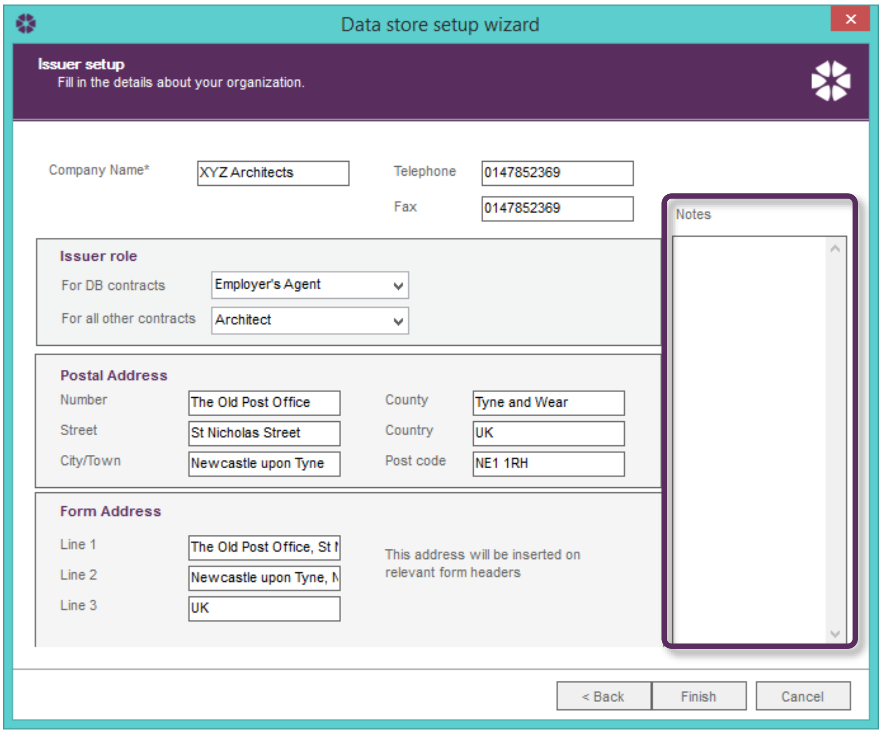
Setting up your company details

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.



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:

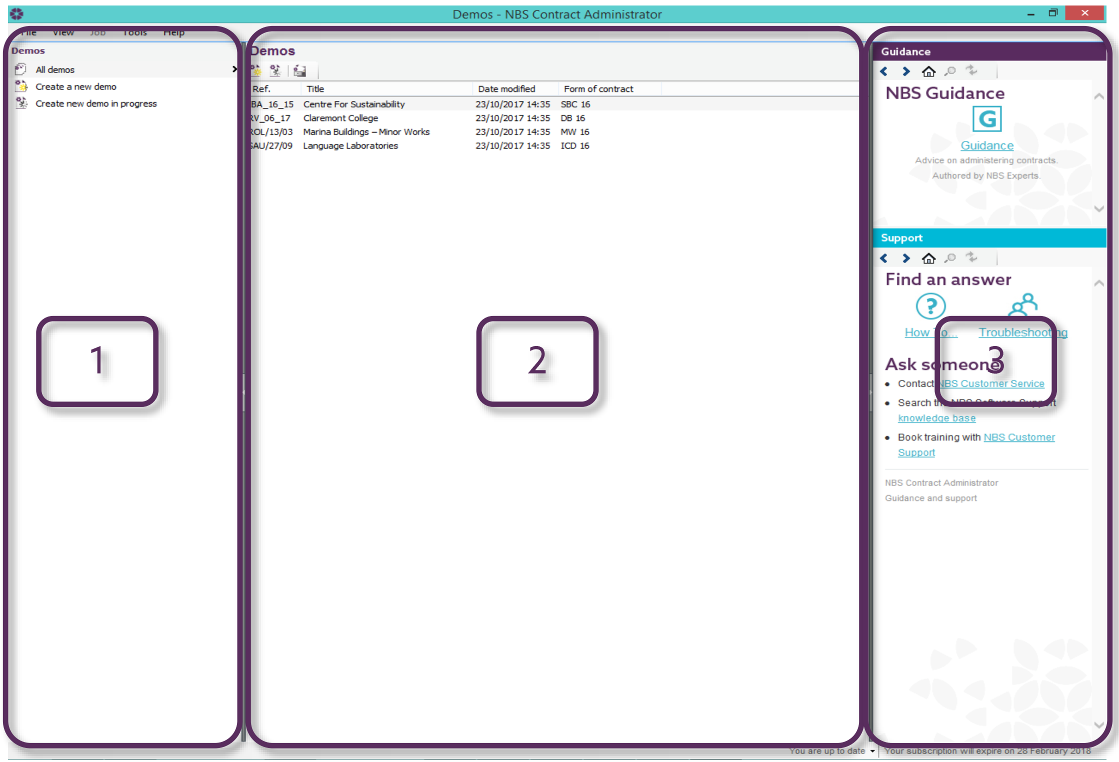
- ✓ Understand the **NBS Contract Administrator** user interface and terminology.
- ✓ Understand the different categories of job in **NBS Contract Administrator.**
- ✓ Navigate through **NBS Guidance** and **Support.**
- ✓ Manage and maintain the address book.

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

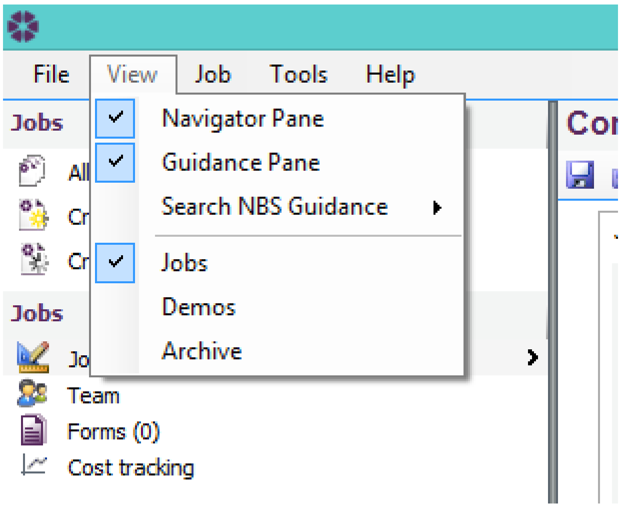
NBS Contract Administrator allows users to set a job to be 'Archived'. This might be done if a job has been completed, or if the job is currently on hold. By setting the job to be archived it will no longer appear in the list of current jobs, and so make it easier to organise jobs.

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.

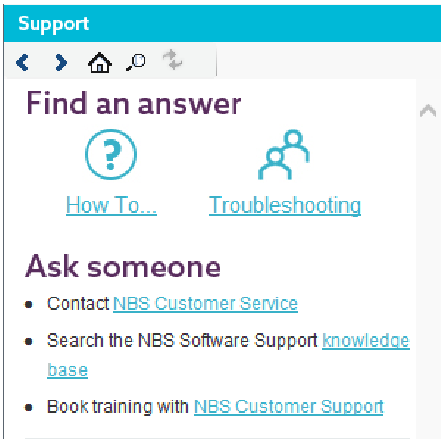
Having this guidance and support at your disposal ensures that the use of the software itself is trouble-free. Having expert-written guidance also ensures that any user who may be unfamiliar with a particular contract administration form can read precisely what the form is used for, understand how it 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.



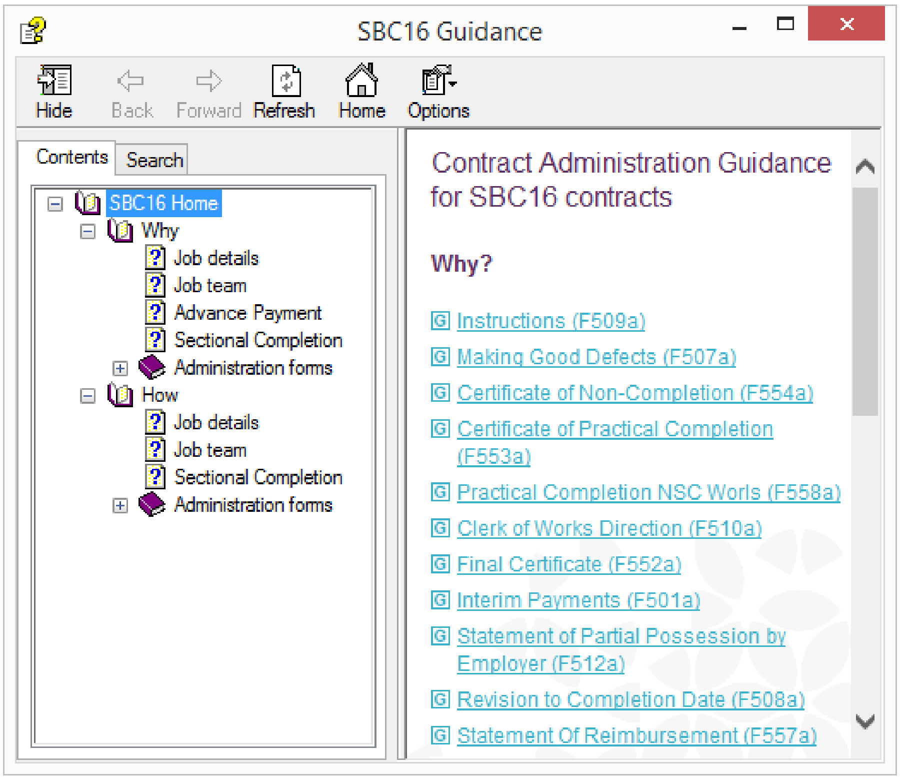
Searching Guidance and support for information

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.

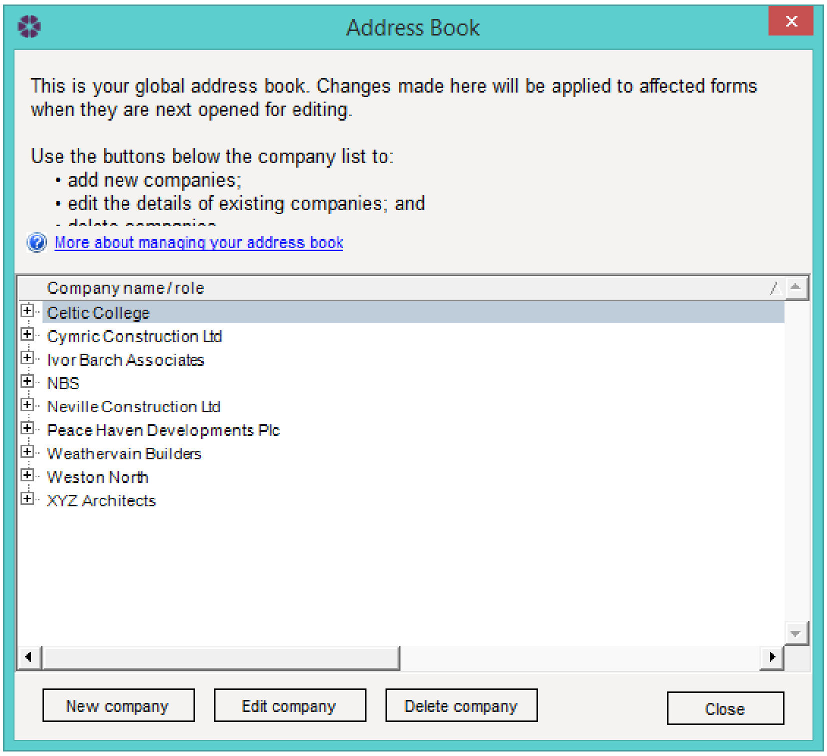
As well as software support within **NBS Contract Administrator**, you also have access to our unrivalled software support team, who will be happy to offer assistance with any query you may have. They can be reached at **NBS** on **0345 456 9594**.

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.

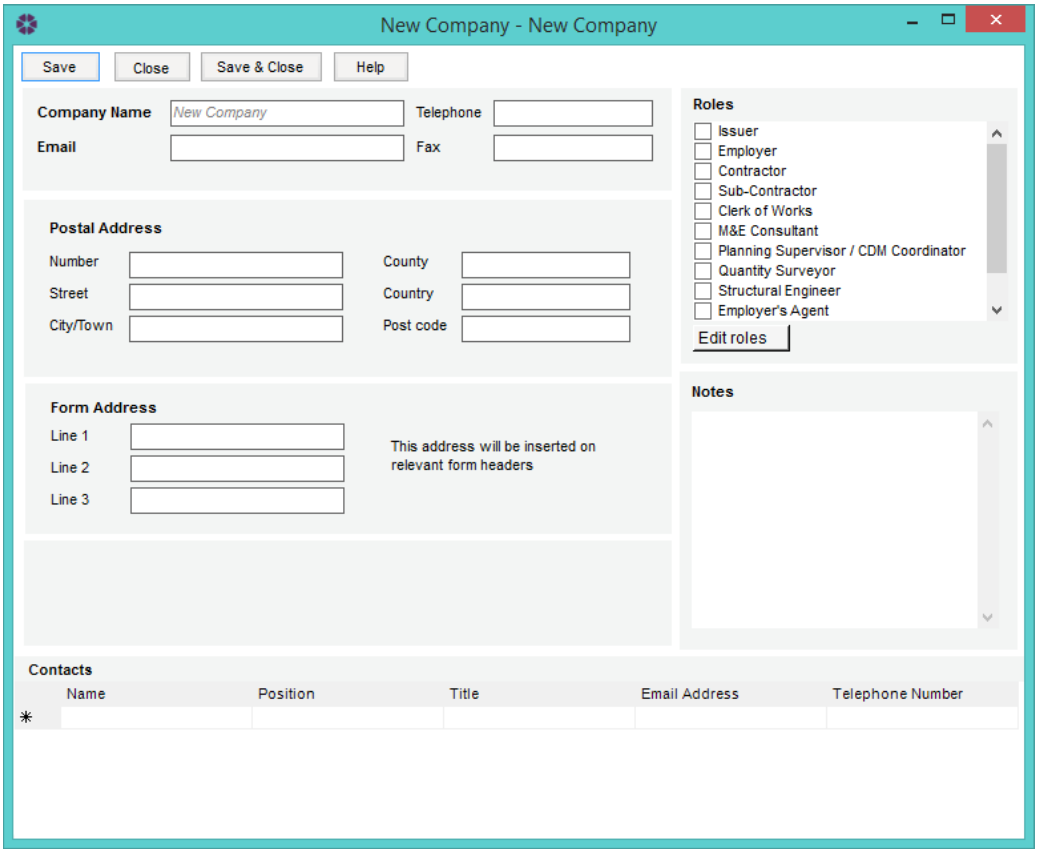
If you have a local data store you will only see company details that you have added, if however you have **NBS Contract Administrator** set to work across a network, other **NBS Contract Administrator** users can also have access to companies listed here.

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



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.



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

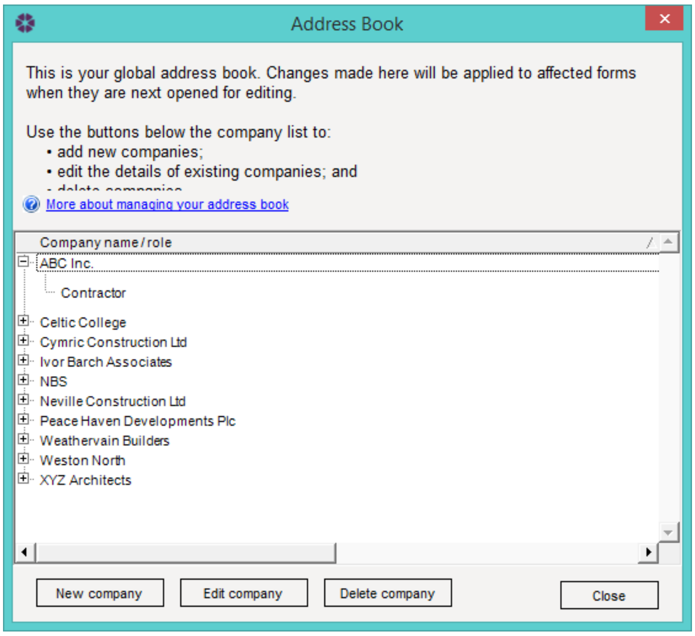
To add a contact within the company, click into first row within 'Contacts' marked 'Name' and enter the required information. While you are entering contact details, a blank contact space will appear below in case you wish to add another entry.

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.

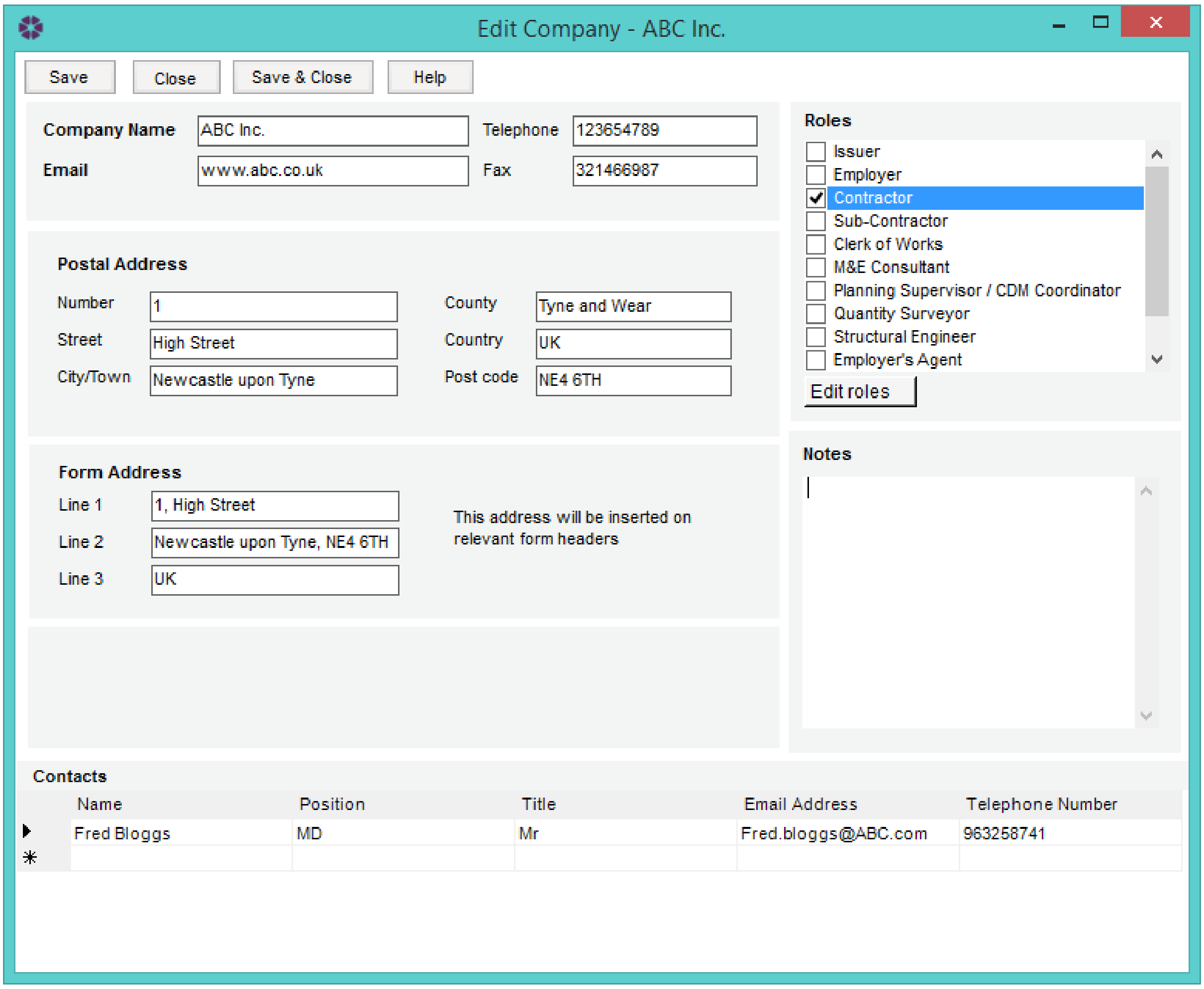
Editing Company Details

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**.



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**.

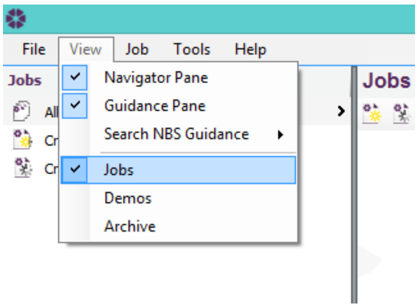
Section 3: Starting a new job

Upon completion of this section you will be able to:

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

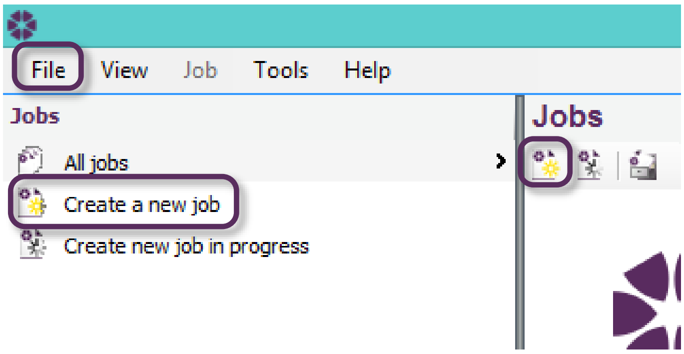
Starting a new job

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

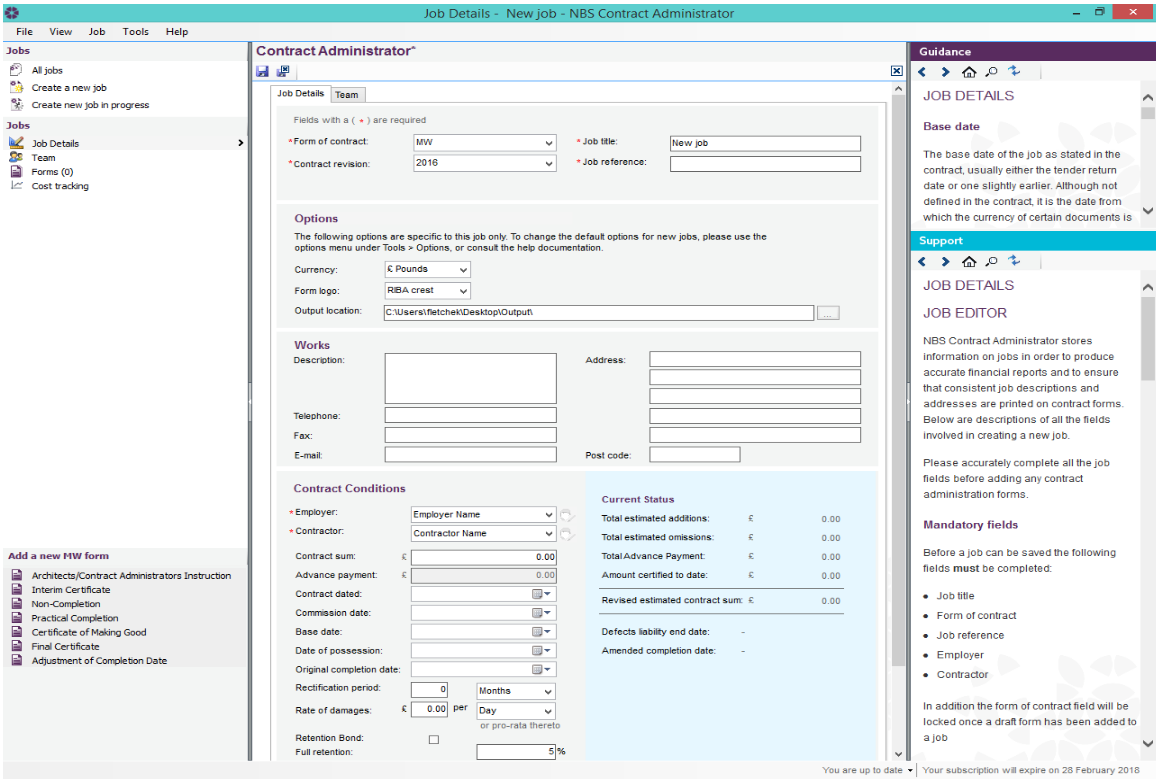


There are three ways to create a new job within **NBS Contract Administrator**:

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.



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

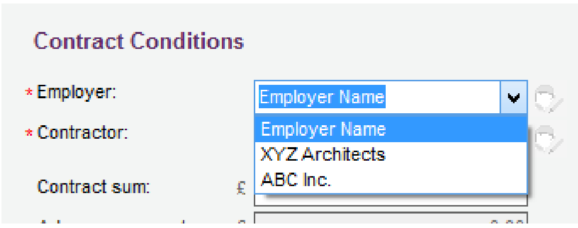
Before you can start issuing forms within **NBS Contract Administrator**, you need to create a new job.

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.

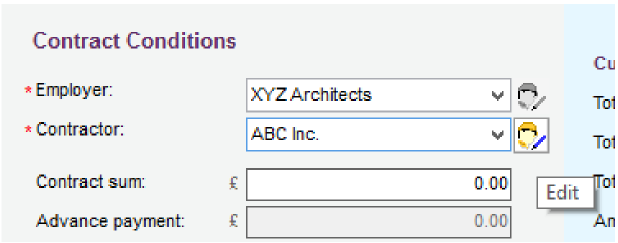
Employer Details:

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.



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.



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

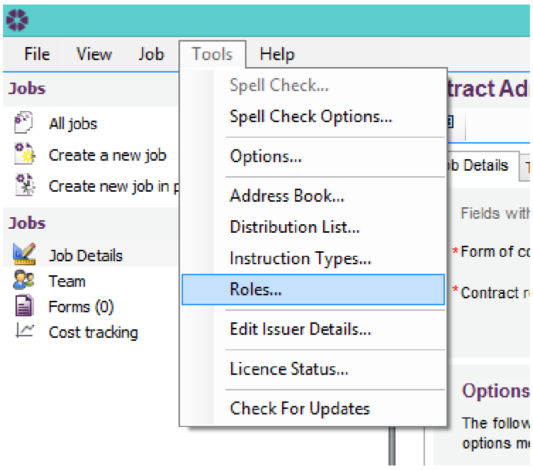
Once a role has been assigned to the team tab, the company who are performing that role needs to be selected. This is done from the 'Company name' button. Clicking here will display a list of all the companies currently contained in the **Address Book**.

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.

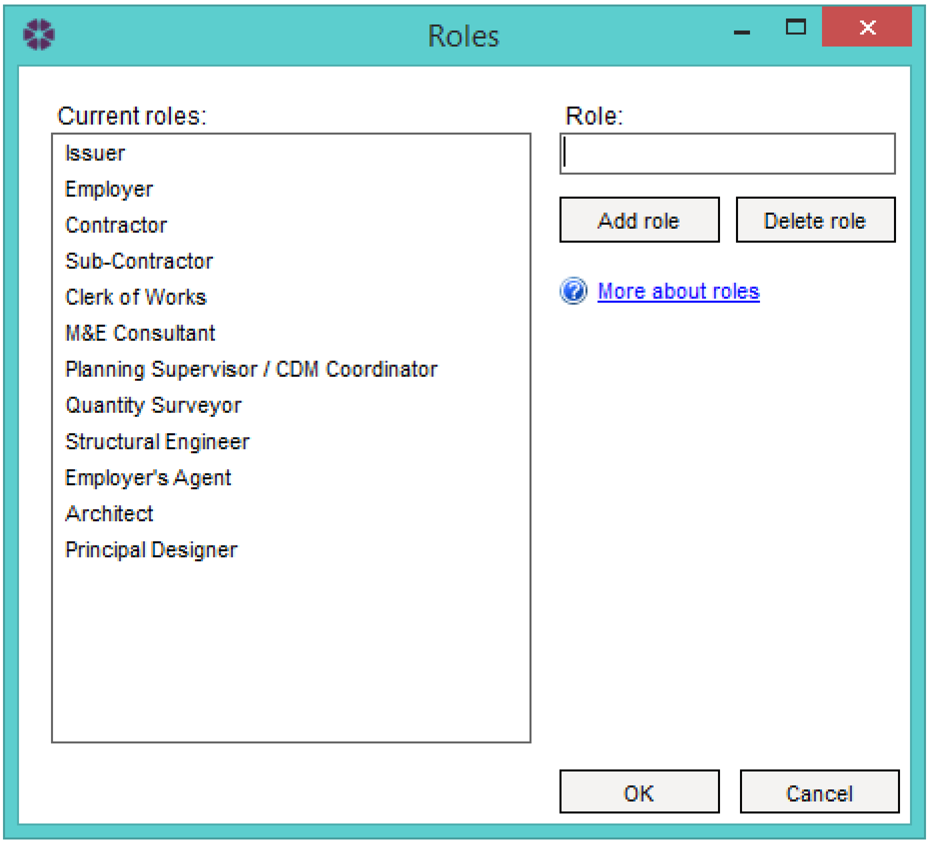
Please note that the details entered on the team tab are used to generate the distribution lists and associated transmittal sheets for all issued contract administration forms.

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.



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.

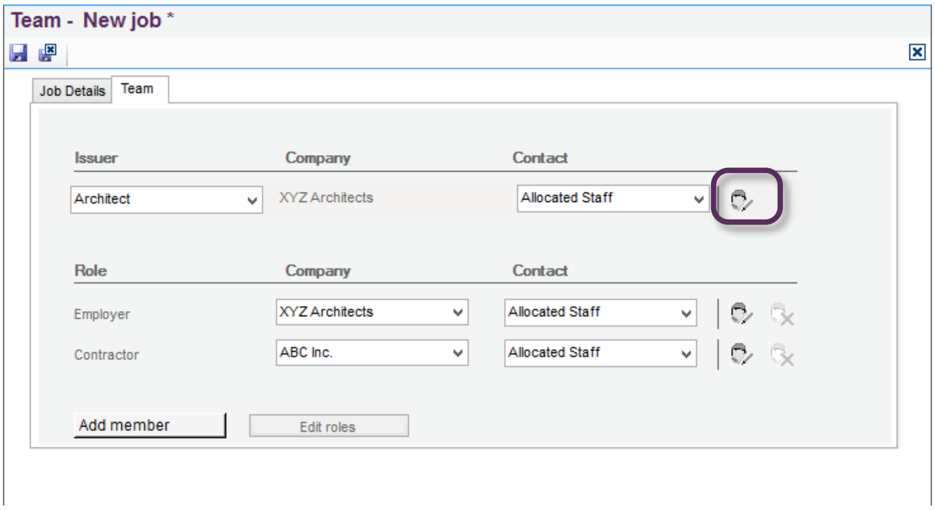
Deleting Roles

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.

Click the icon to edit company details

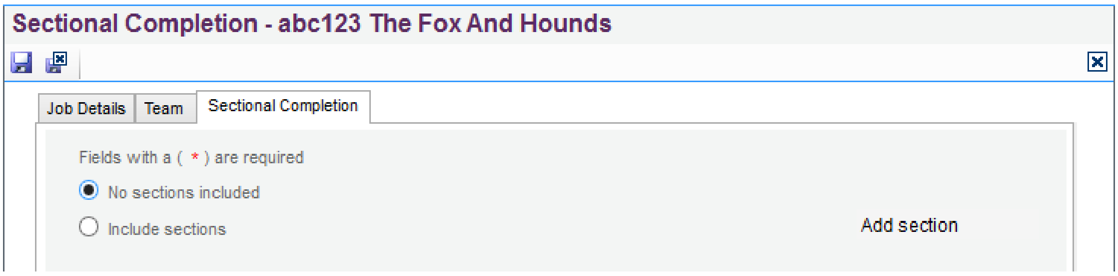


Clicking on the highlighted icon next to any of the rows as shown above will then display the company details form. From here users can make adjustments as required.

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.



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:

- ✓ 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.
- ✓ Be able to recall a form that requires amendment.

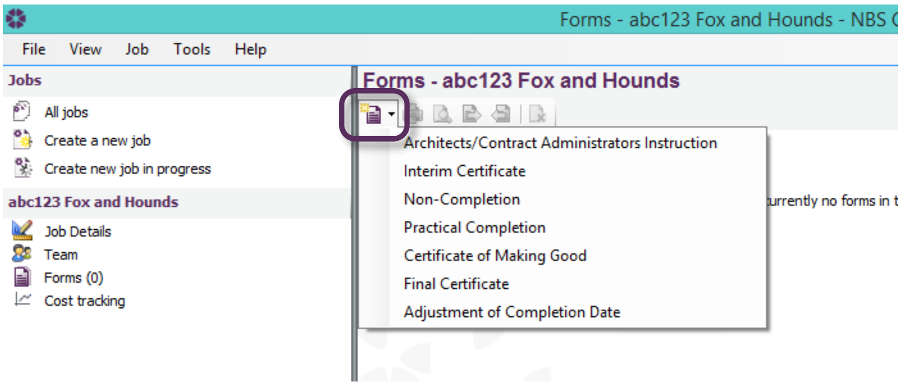
Adding a Form to your job

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

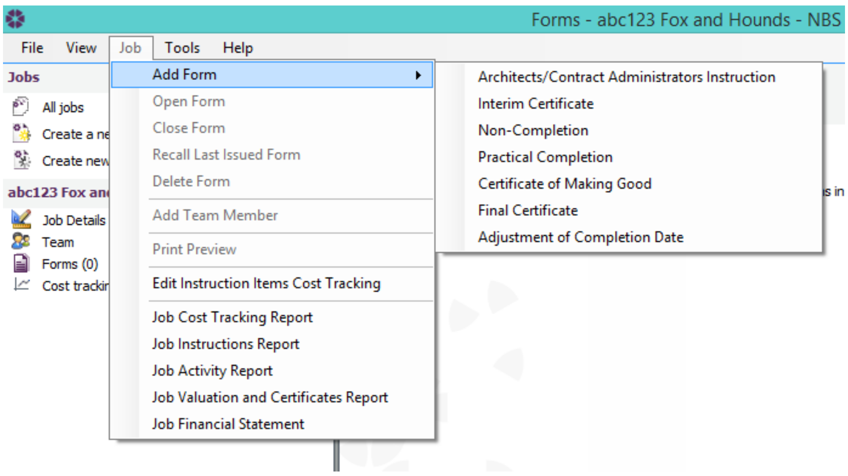
Clicking on the icon indicated displays a list of available forms. Once a form is selected, a draft copy will then be added to the job. The job details panel will also update to show a copy of the form has been added to the job, the form will then open in the centre of the screen.



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.

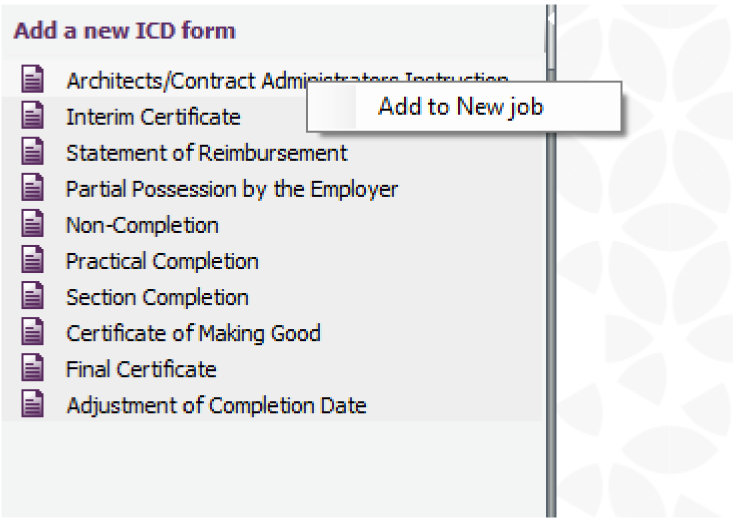
Selecting a form here will add a draft copy of the form to the job, and open the form in the centre of the screen.



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.



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

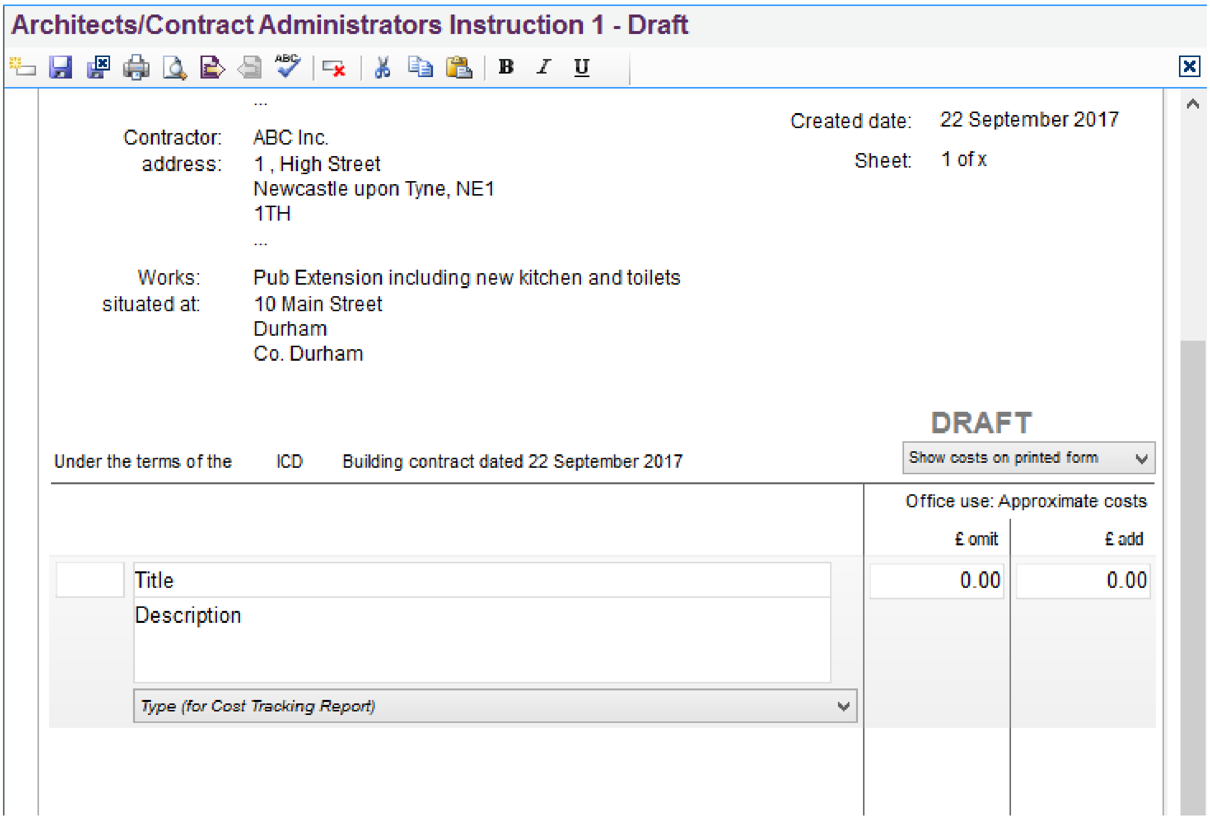
Once a form has been added to a job, a draft copy of that form will then open in the centre of the screen.

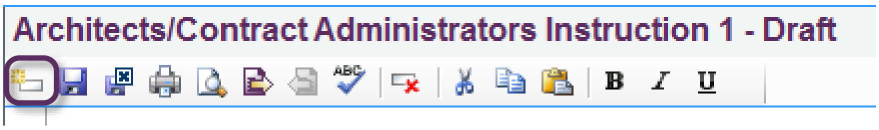
The editors have been designed to reflect the way that the forms appear when printed. Opening a form for editing will display the form in the central work area.

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

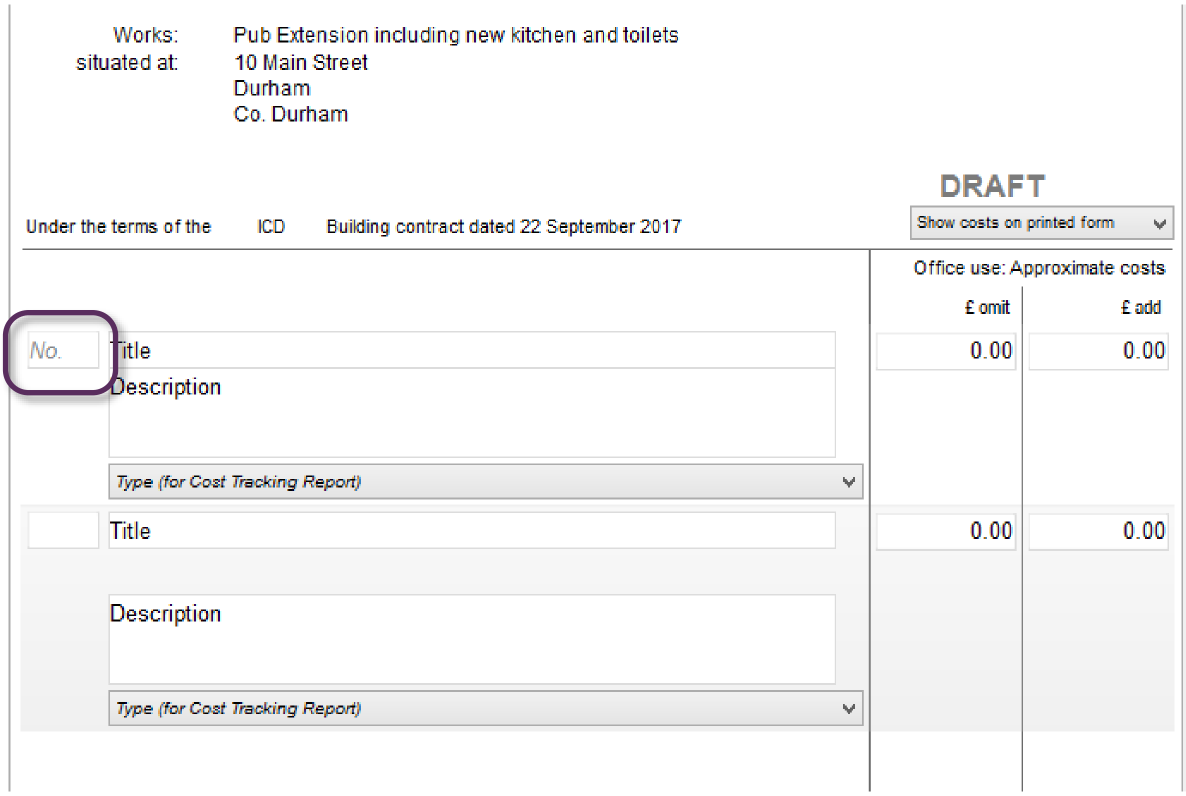
Architects/Contract Administrator Instructions allow you to add as many or as few instructions items as required.





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

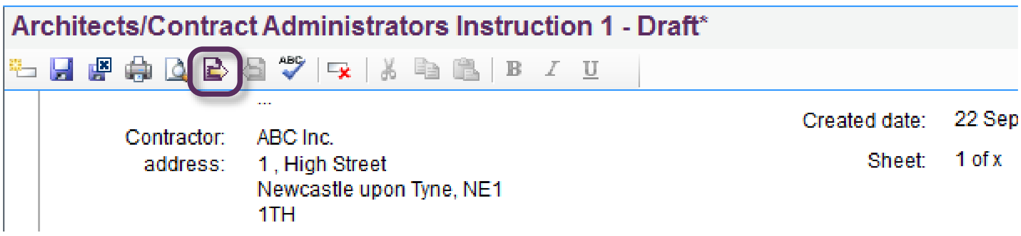
This will add a blank item for you to complete. Number them consecutively and consistently. Do not use the anticipated number of the Instruction i.e. 1.1, 1.2 etc. as this may end up not being the order of issued forms



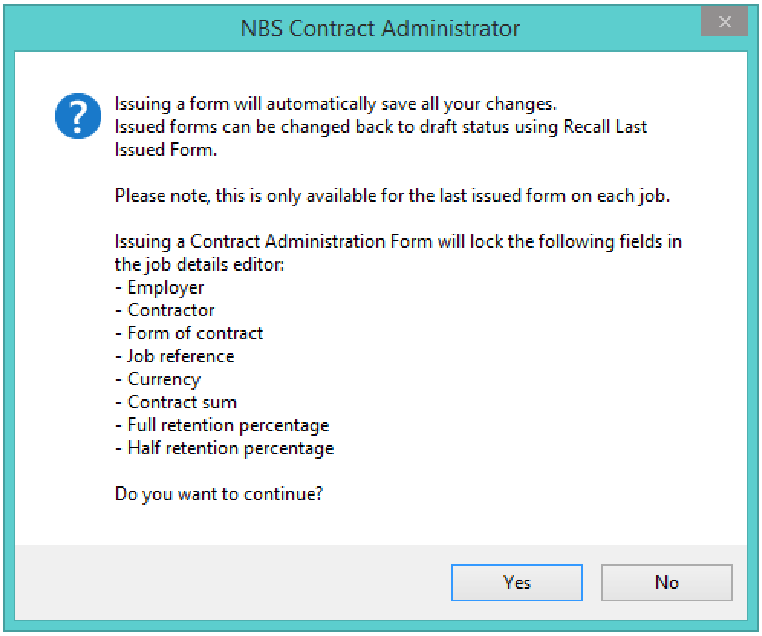
Click on the **Type** (for cost tracking) drop down button and select an instruction type from the list. Item types allow you to attribute costs to any of the types on the list and to create a financial report based on this information.

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.

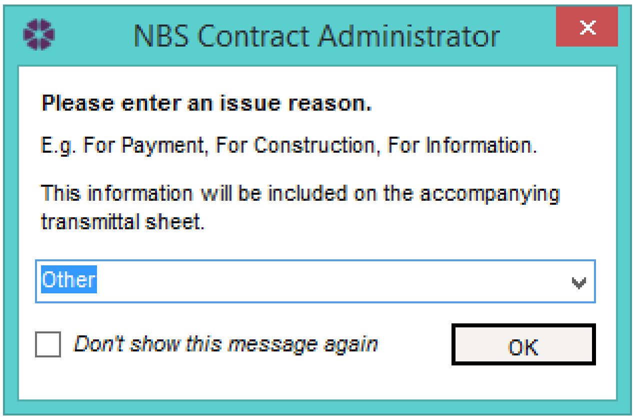
To issue the form click on the icon at the top of the centre panel as shown below.



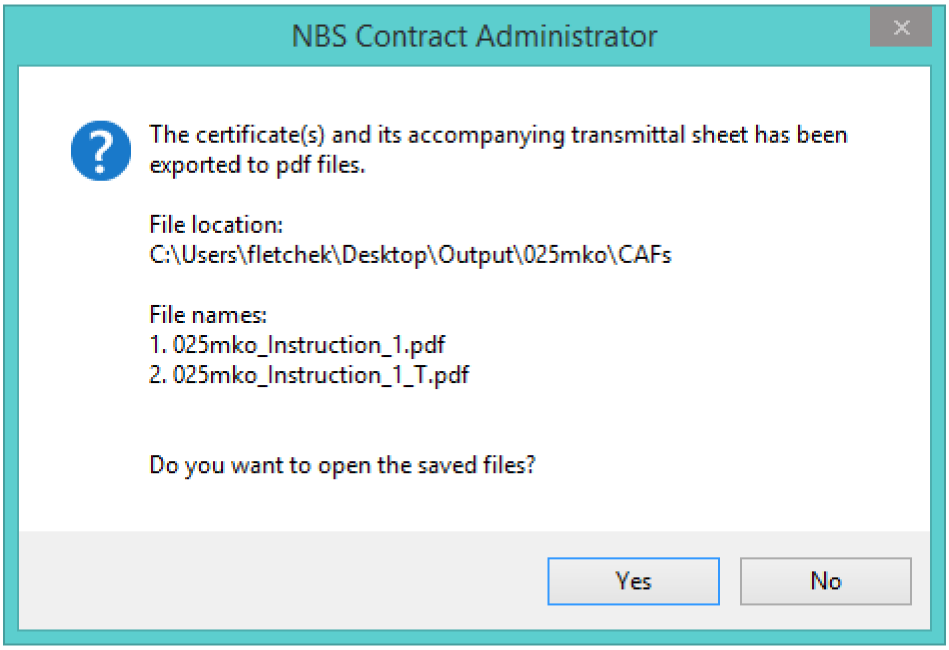
As soon as you select to issue the first instruction you are given the following warning which indicates that certain figures and team member's details will become locked and will no longer be able to be edited. This is why one should be careful to add all the confirmed details into the job at the start.



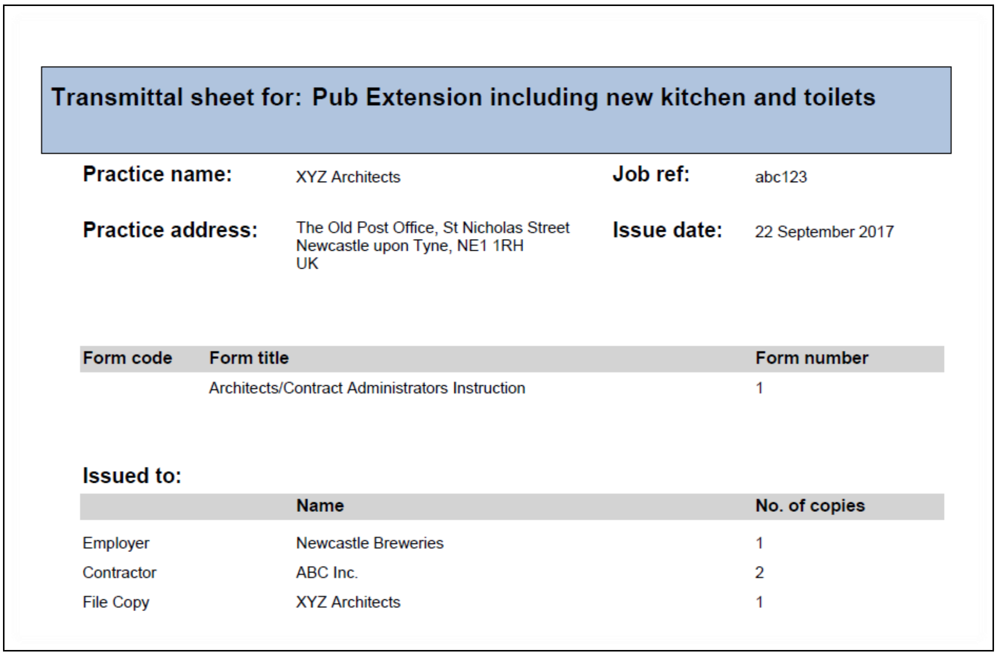
Click 'Yes' and you will be asked to choose an issue reason from the value list. This will help filter the instructions in the instruction reports later.



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.



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:



Transmittal sheet for: Pub Extension including new kitchen and toilets

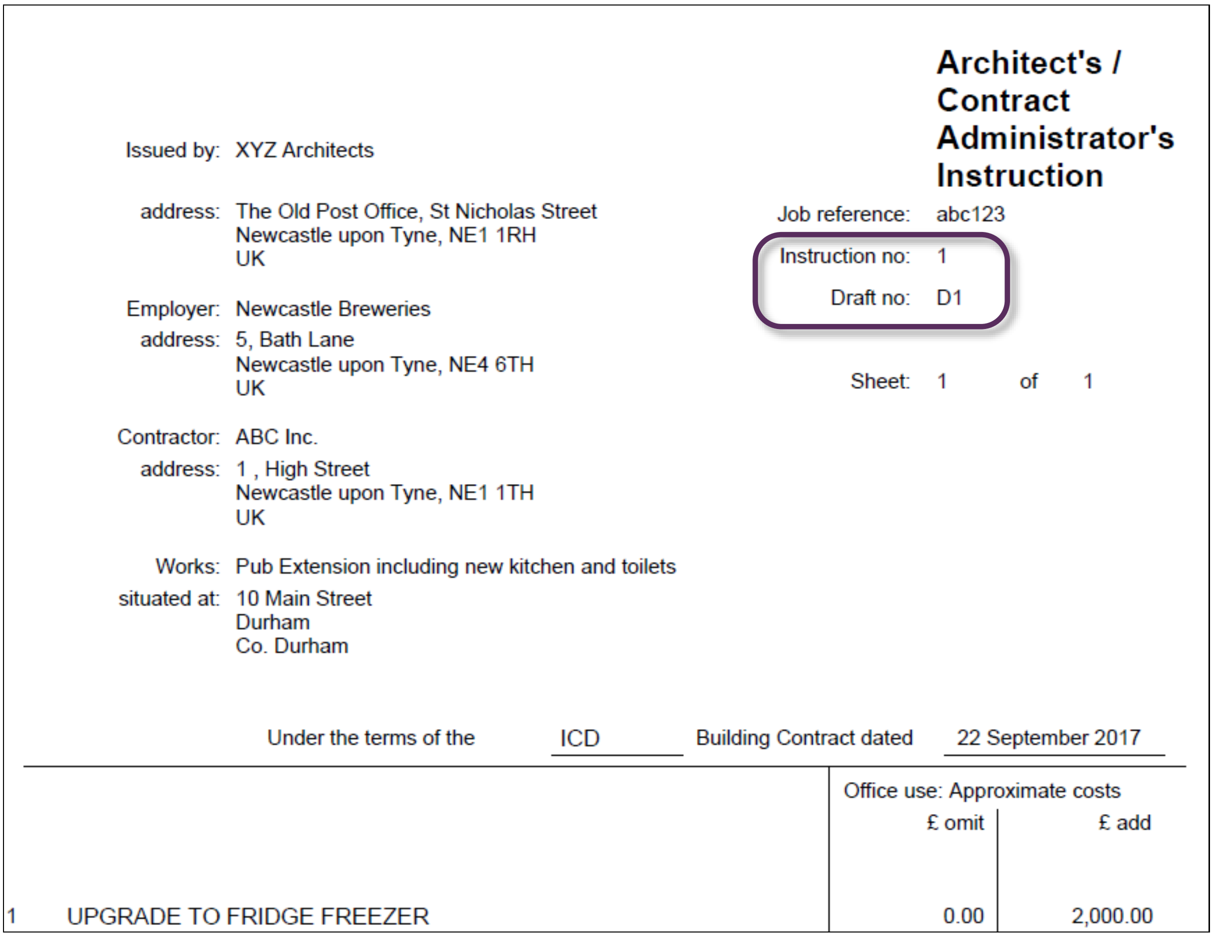
Practice name:	XYZ Architects	**Job ref:**	abc123
Practice address:	The Old Post Office, St Nicholas Street Newcastle upon Tyne, NE1 1RH UK	**Issue date:**	22 September 2017

Form code	Form title	Form number
	Architects/Contract Administrators Instruction	1

Issued to:

	Name	No. of copies
Employer	Newcastle Breweries	1
Contractor	ABC Inc.	2
File Copy	XYZ Architects	1

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.



Architect's / Contract Administrator's Instruction

Issued by: XYZ Architects

address: The Old Post Office, St Nicholas Street
Newcastle upon Tyne, NE1 1RH
UK

Job reference: abc123

Instruction no: 1

Draft no: D1

Sheet: 1 of 1

Employer: Newcastle Breweries
address: 5, Bath Lane
Newcastle upon Tyne, NE4 6TH
UK

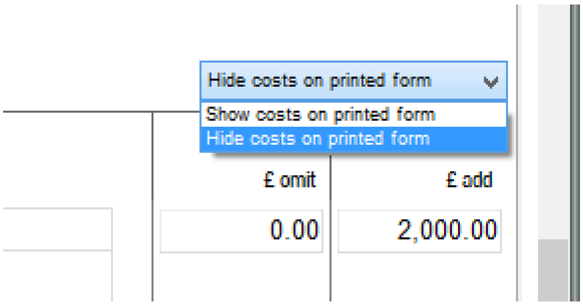
Contractor: ABC Inc.
address: 1 , High Street
Newcastle upon Tyne, NE1 1TH
UK

Works: Pub Extension including new kitchen and toilets
situated at: 10 Main Street
Durham
Co. Durham

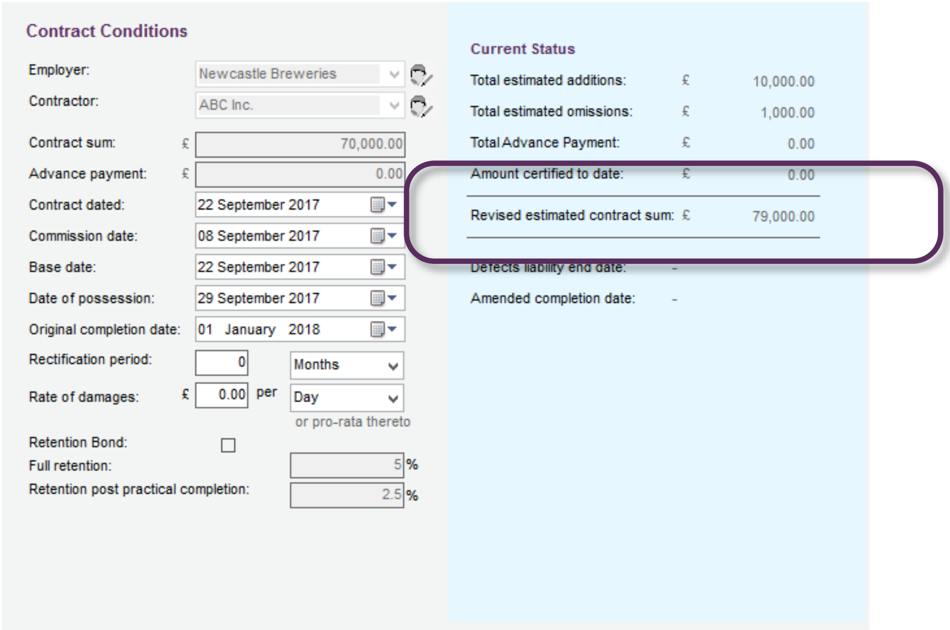
Under the terms of the ICD Building Contract dated 22 September 2017

	Office use: Approximate costs £ omit	£ add
1 UPGRADE TO FRIDGE FREEZER	0.00	2,000.00

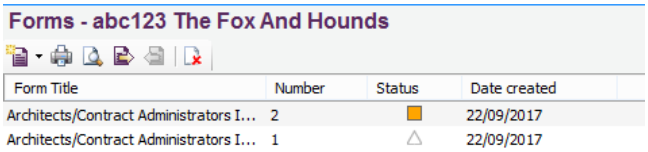
You can still print versions with or without costs using the hide costs option.



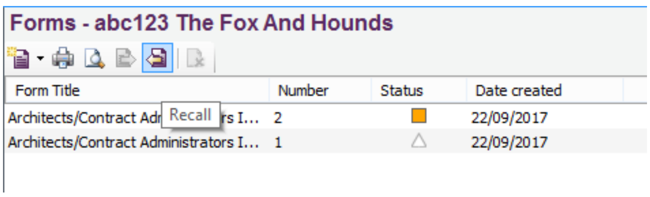
Once the form has been issued, amounts entered into either the '**omit**' or '**add**' columns will update the **Revised Estimated Contract Sum** amount found under the job details section.



In the list of forms the icons look like this:

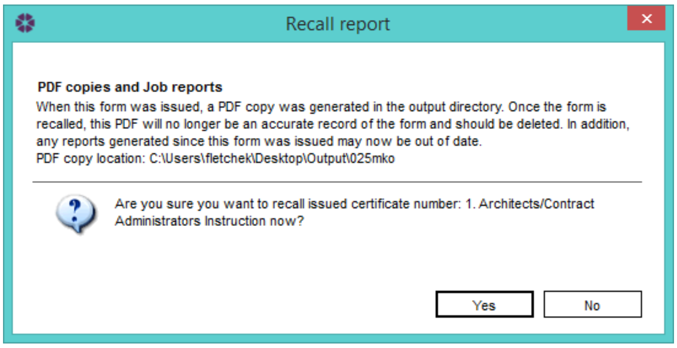


The orange square indicates a Draft form, the white triangle indicates an issued form that can still be recalled. You can recall the last issued form on any project by selecting this button:



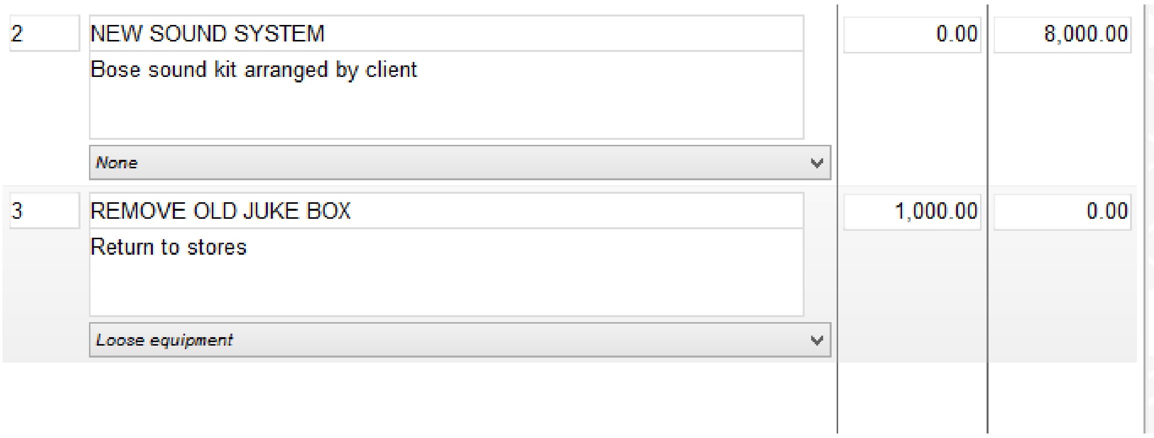
A Grey circle will indicate that the form has been issued and no longer can be recalled.

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

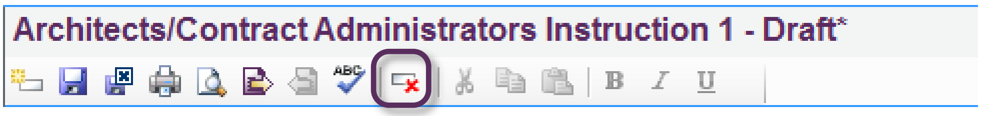


Removing instructions that are no longer required

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

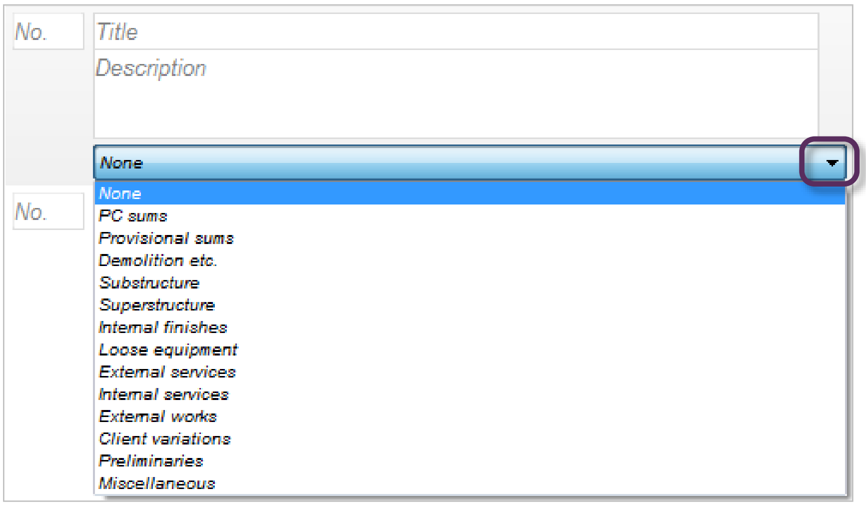


Clicking here will delete the selected instruction item.



Selection fields

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.

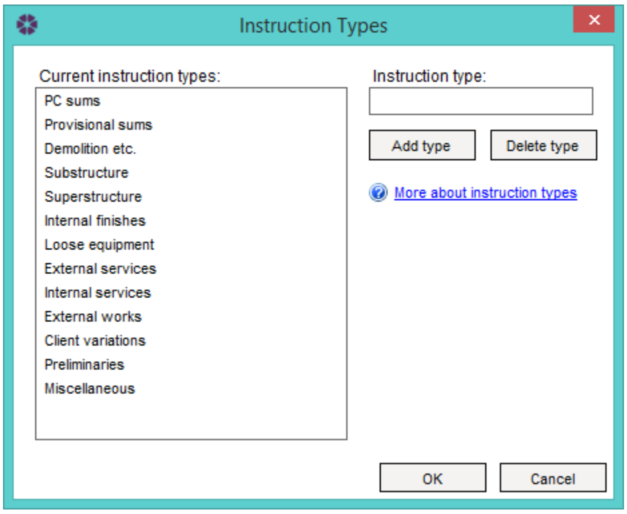


Defining your own instruction types

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.

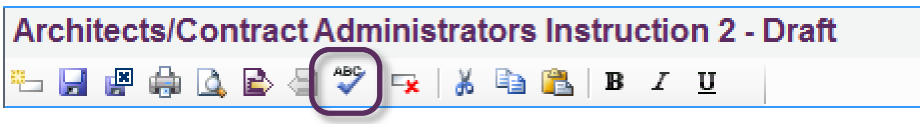
Deleting an instruction type

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

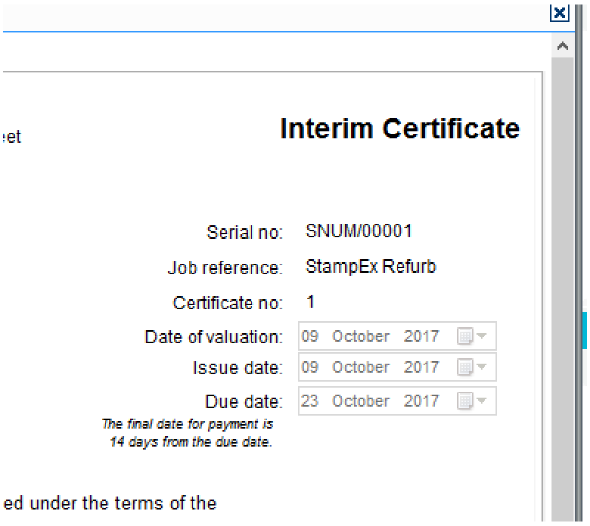
When you have completed your instructions, you may want to use the spell check facility which is available within **NBS Contract Administrator**.



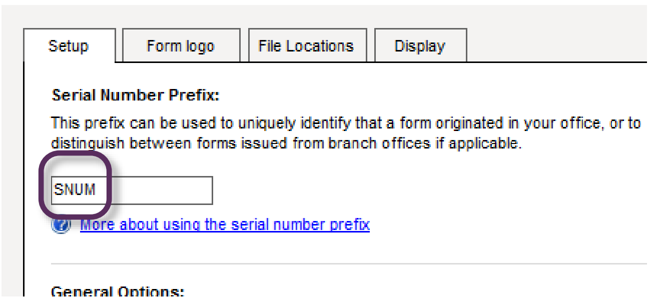
Clicking the  icon launches the Spell Check.

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.



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.

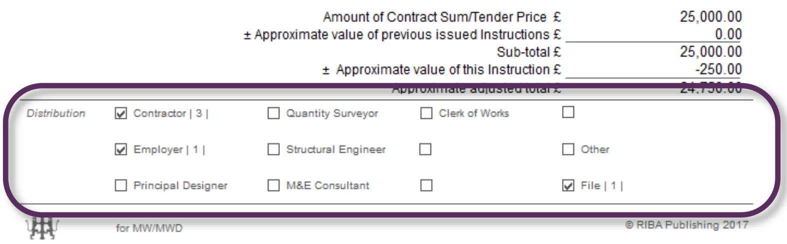
Issuing a Form

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.

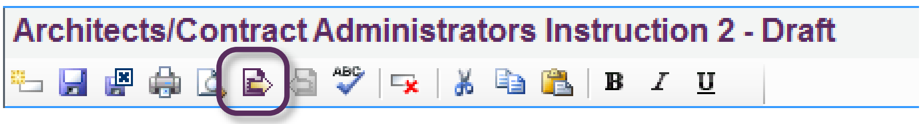


Alternatively, the distribution list can be accessed by clicking on the '**Distribution**' section located at the bottom of the open form. As the mouse pointer hovers over this section, it will highlight in blue to indicate a clickable link.

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**.

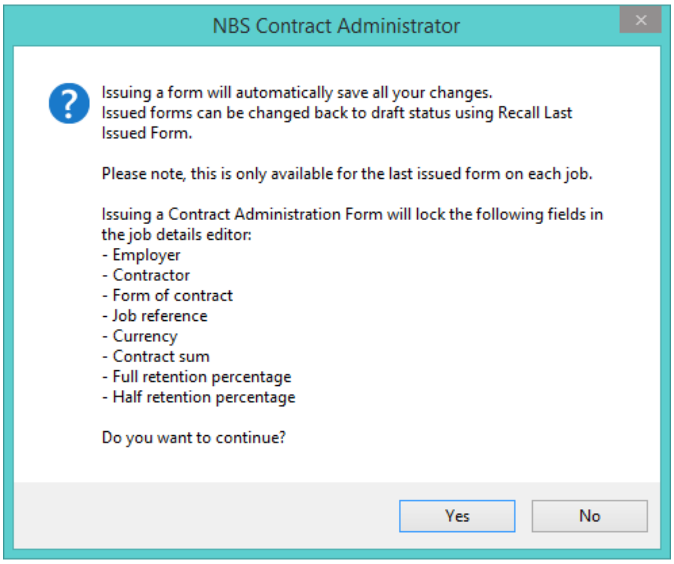
Starting the Issue process



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:

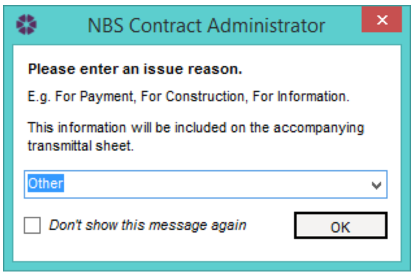


By doing this, **NBS Contract Administrator** is ensuring that the addresses used on issued forms remain consistent (i.e. you cannot change who the employer is). Also, if you had issued a form, or performed a calculation within **NBS Contract Administrator** then went to edit the Contract Sum on the 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**.



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.

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		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.

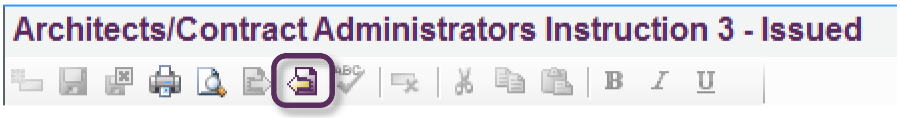
Any form can be opened for viewing by double-clicking, and any form can be printed. However, only forms that are in draft status can be edited.

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  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.**
- ✓ Be able to re-order your jobs according to differing criteria.
- ✓ Be able to change the status of your jobs.
- ✓ 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.

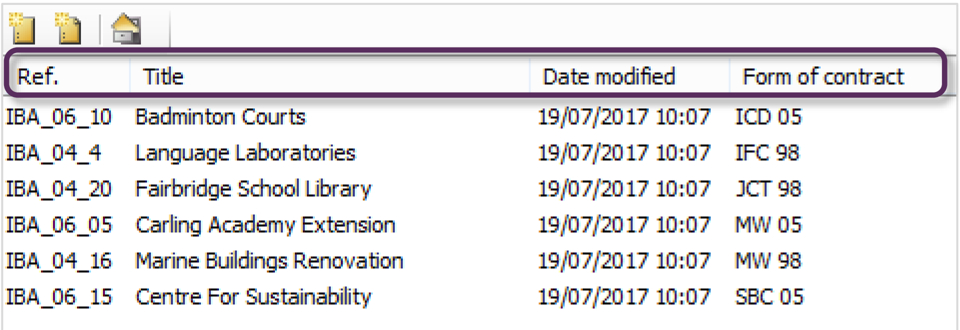
Double-clicking on the job title will then display the titles of all forms used in that job so far in the centre of the screen. In turn, double-clicking on a form title will open that form.

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 change the sort order, simply click on the relevant column title:

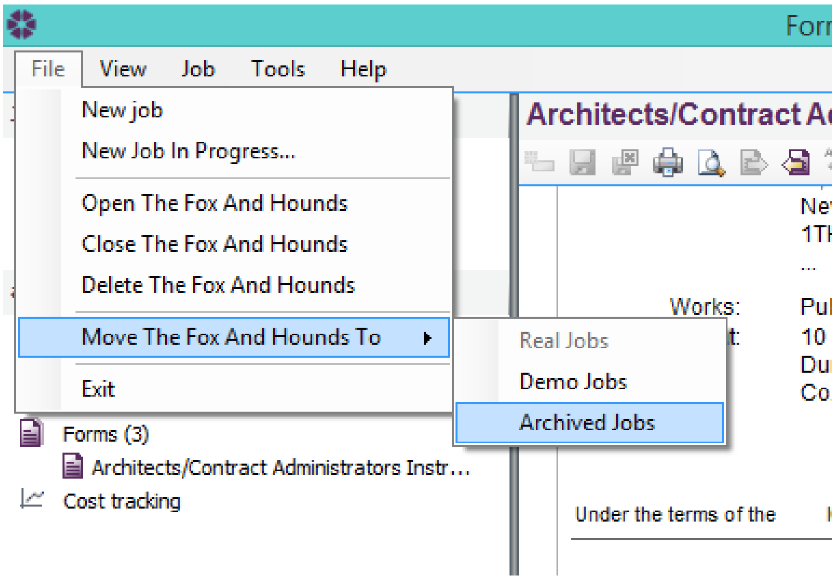


Ref.	Title	Date modified	Form of contract
IBA_06_10	Badminton Courts	19/07/2017 10:07	ICD 05
IBA_04_4	Language Laboratories	19/07/2017 10:07	IFC 98
IBA_04_20	Fairbridge School Library	19/07/2017 10:07	JCT 98
IBA_06_05	Carling Academy Extension	19/07/2017 10:07	MW 05
IBA_04_16	Marine Buildings Renovation	19/07/2017 10:07	MW 98
IBA_06_15	Centre For Sustainability	19/07/2017 10:07	SBC 05

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.

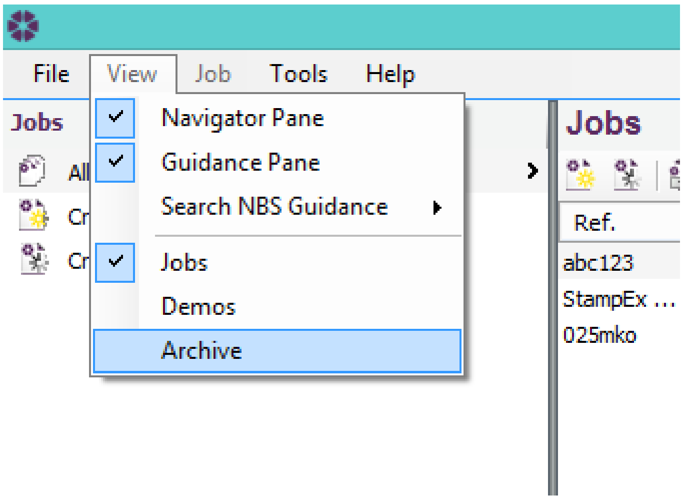
To archive a job, select the job in the job explorer. Go to **File** > **Move [job] To** > **Archived Jobs**.



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.

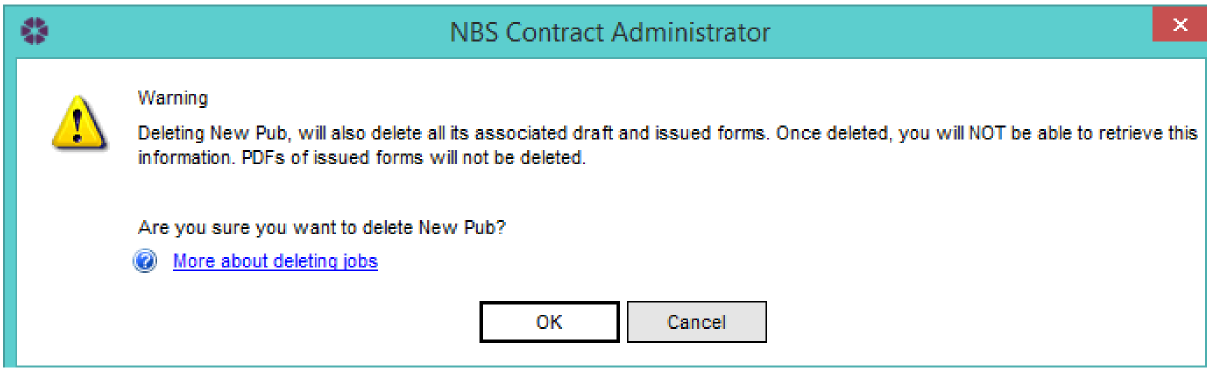
By organising your jobs into the 'archive' or 'job' view, it will help keep your current jobs clean and ordered. At a glance, users can see which projects are currently on hold, have been completed, or are currently on-going.

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.



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:

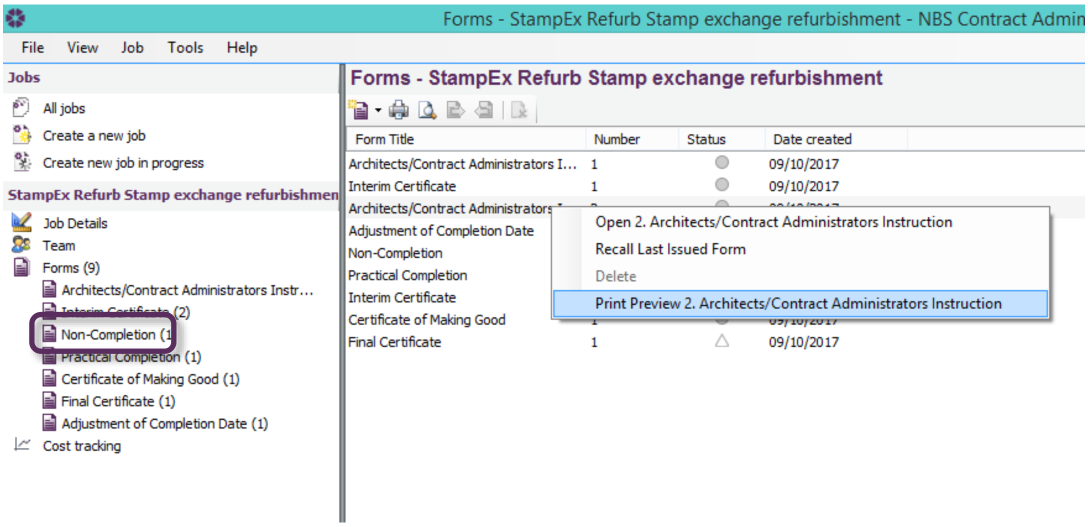
- ✓ Export forms you have created.
- ✓ Print a copy of your forms to retain for use in the office.
- ✓ Work with accurate financial reports produced by **NBS Contract Administrator.**

Previewing, printing and exporting your forms

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

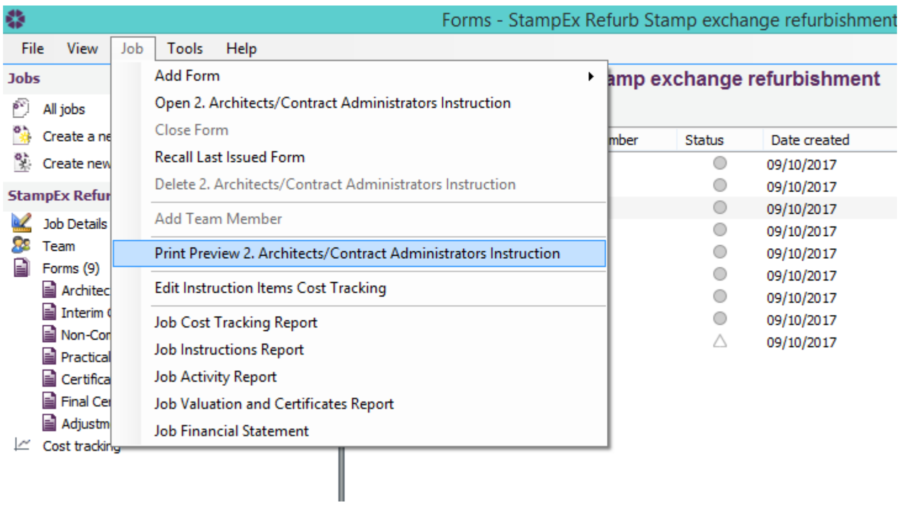
You can:

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



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

- 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.



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.

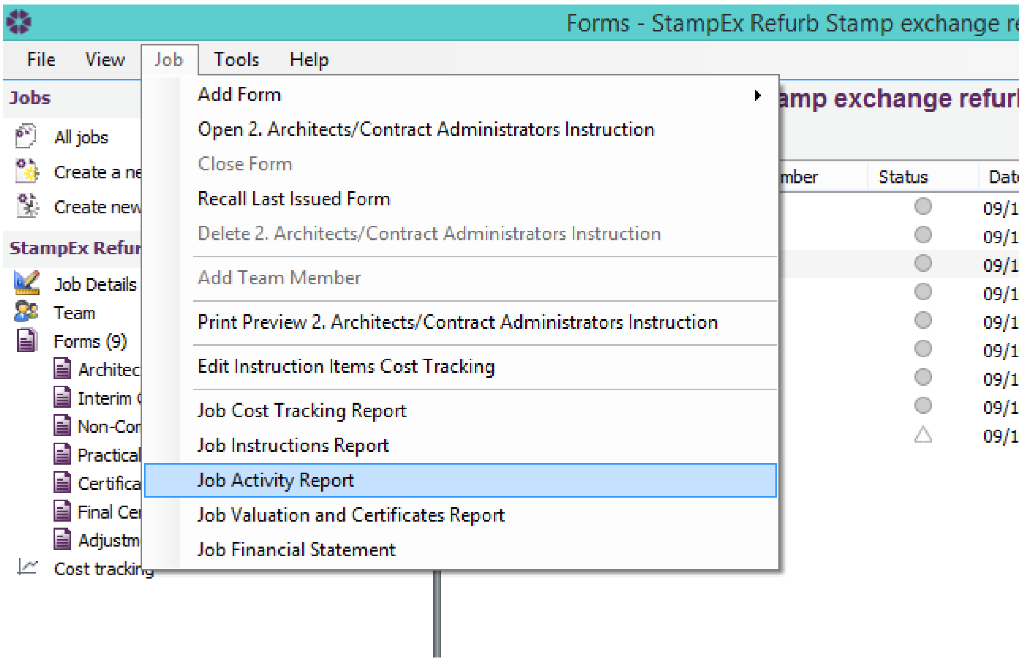
To export the form, click on the **Export** button.

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

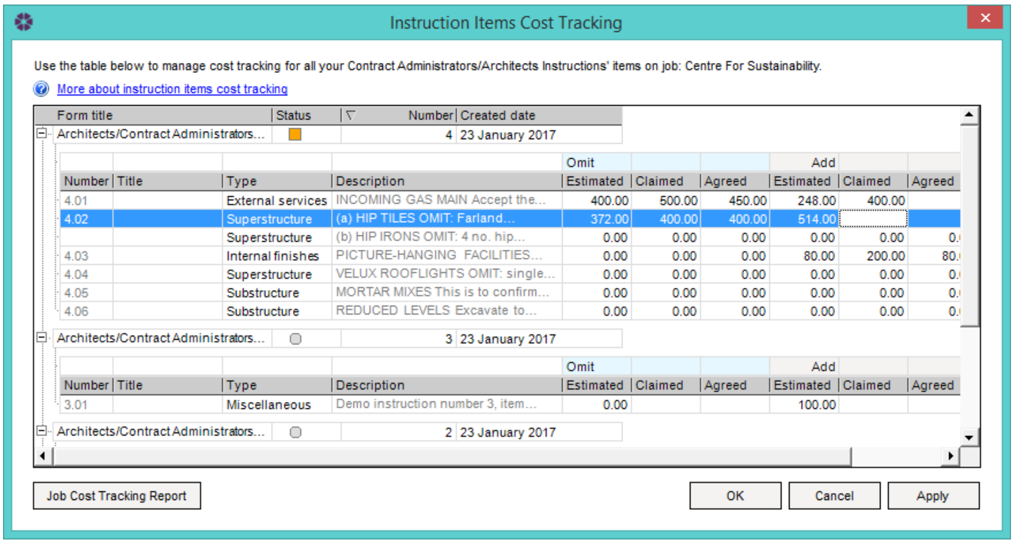
NBS Contract Administrator can generate reports on the financial position and contract communications for each job. The reports for the active job are generated by selecting a report title from the Job menu.



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.



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 10:52AM XYZ ARCHITECTS LTD Page: 2 of 4

JOB INSTRUCTION ITEMS COST TRACKING REPORT

Job reference: IBA_16_15

Centre For Sustainability

Fairbridge University
Elway Road
Newcastle-Upon-Tyne

Contractor: Neville Construction Ltd

66 High Street
Newcastle-Upon-Tyne
Tyne and Wear

Date of possession: 19 December 2016

Original date for completion: 22 September 2017
Revised date for completion: 23 October 2017
Contract sum: £ 613,750.00

Instruction Number	Date	Item Number	Type / Title / Description	Cost Estimated	Claimed	Agreed
4	Draft		Architects/Contract Administrators Instruction			
		4.01	External services	-152.00	-100.00	tba
			INCOMING GAS MAIN Accept the quotation ref.no. 8438_63 dated 6 August 1989 received from EuroGas in the sum of £248.00 for the new incoming gas main and supply and installation of gas meter. A copy of their quotation is attached. This sum is to be set against the provisional sum of £400 included under ref.3_2G in the bill of quantities.			
		4.02	Superstructure	142.00	tba	tba
			(a) HIP TILES OMIT: Farland concrete third round hip tiles, bill of quantities ref.5_15E. ADD in lieu: 4 no. Red Bank 300mm long red Terracotta third round segmental ridge tiles, list no.259			
			Superstructure	0.00	0.00	0.00
			(b) HIP IRONS OMIT: 4 no. hip irons, bill of quantities ref.5_15F. ADD in lieu: 4 no. Red Bank 300mm long red Terracotta Scroll hip finial tiles 225mm diameter. Hip tiles and finial tiles to be obtained from Farbridge Bank Manufacturing Co. Ltd.			
		4.03	Internal finishes	80.00	200.00	80.00
			PICTURE-HANGING FACILITIES IN ACTIVITIES ROOM Supply and fix aluminium picture rail approx. 12m long and 100 no. type (b) U-shaped hooks			

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

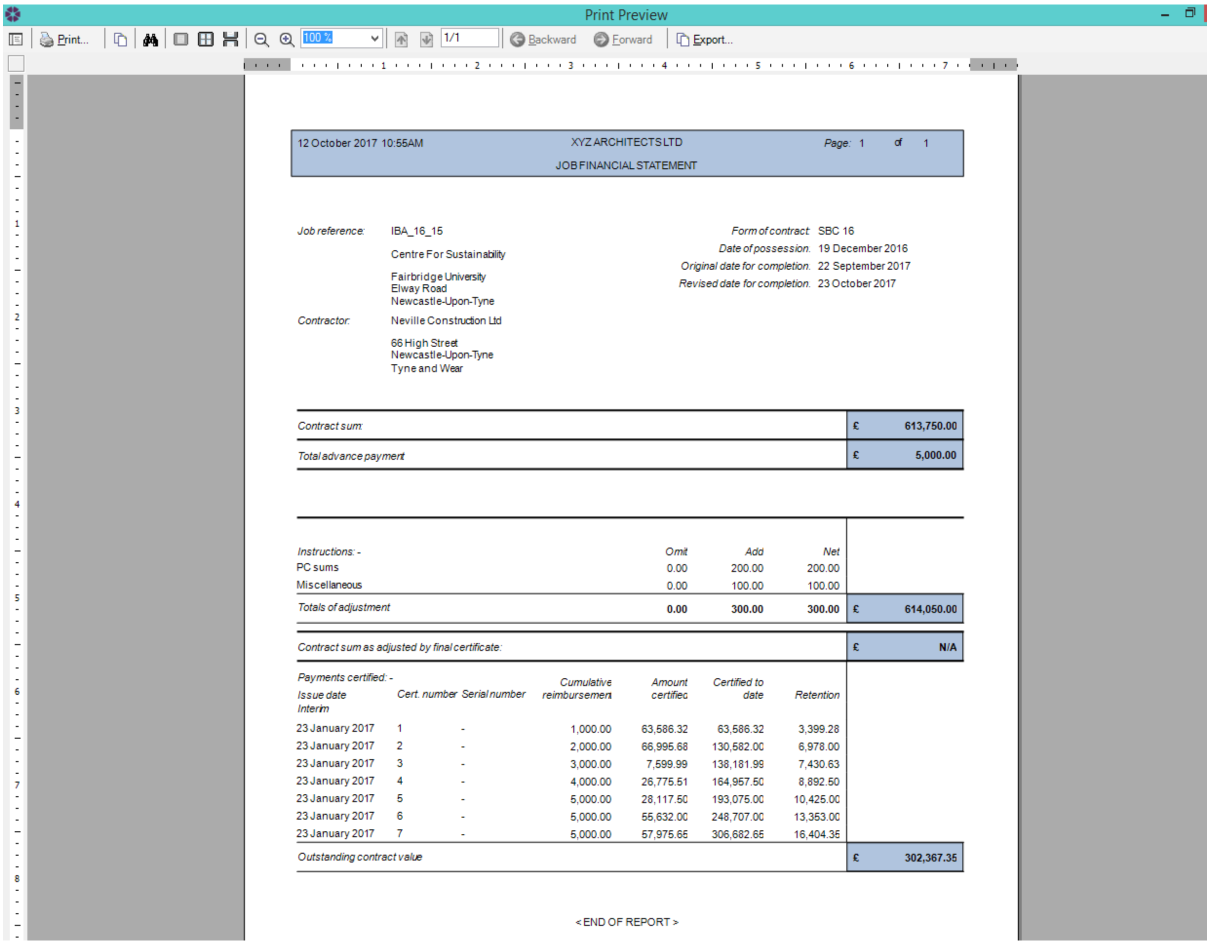
This report gives a chronological summary of all issued contract administration forms on a job, with a summary of draft contract administration forms presented in a separate table. It shows the commitments made (the estimated adjustments to the contract sum as detailed on issued instructions) and the 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.



12 October 2017 10:55AM | XYZ ARCHITECTS LTD | Page: 1 of 1

JOB FINANCIAL STATEMENT

Job reference: IBA_16_15

Centre For Sustainability

Fairbridge University
Elway Road
Newcastle-Upon-Tyne

Contractor: Neville Construction Ltd

66 High Street
Newcastle-Upon-Tyne
Tyne and Wear

Form of contract: SBC 16
Date of possession: 19 December 2016
Original date for completion: 22 September 2017
Revised date for completion: 23 October 2017

Contract sum:	£ 613,750.00
Total advance payment	£ 5,000.00

Instructions: -	*Omit*	*Add*	*Net*	
PC sums	0.00	200.00	200.00	
Miscellaneous	0.00	100.00	100.00	
Totals of adjustment	**0.00**	**300.00**	**300.00**	**£ 614,050.00**
Contract sum as adjusted by final certificate:				**£ N/A**

Payments certified: -

Issue date *Interim*	*Cert. number*	*Serial number*	*Cumulative reimbursement*	*Amount certified*	*Certified to date*	*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
23 January 2017	3	-	3,000.00	7,599.99	138,181.99	7,430.63
23 January 2017	4	-	4,000.00	26,775.51	164,957.50	8,892.50
23 January 2017	5	-	5,000.00	28,117.50	193,075.00	10,425.00
23 January 2017	6	-	5,000.00	55,632.00	248,707.00	13,353.00
23 January 2017	7	-	5,000.00	57,975.65	306,682.65	16,404.35

Outstanding contract value	**£ 302,367.35**

< END OF REPORT >

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?

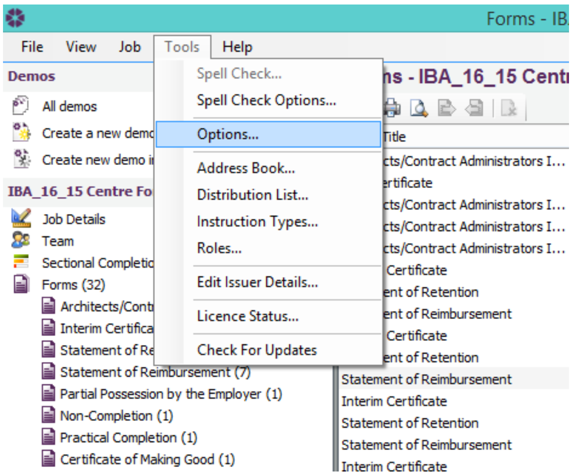
Section 7: Office and User Settings

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.



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.

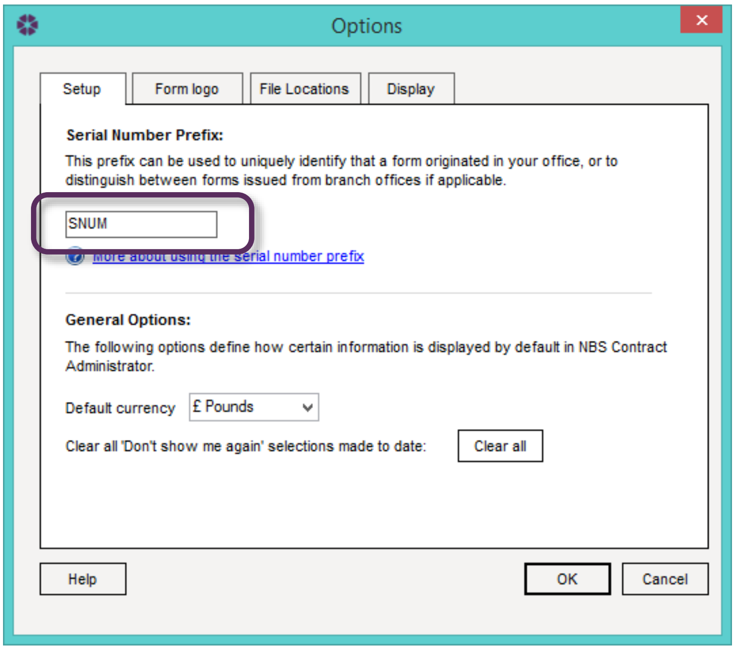
Setup tab

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.



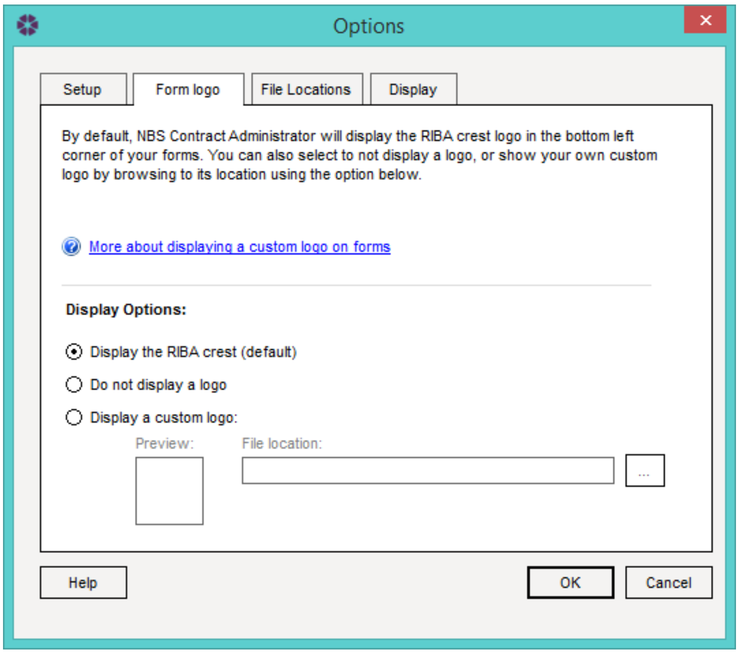
General Options

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.



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

File Locations Tab

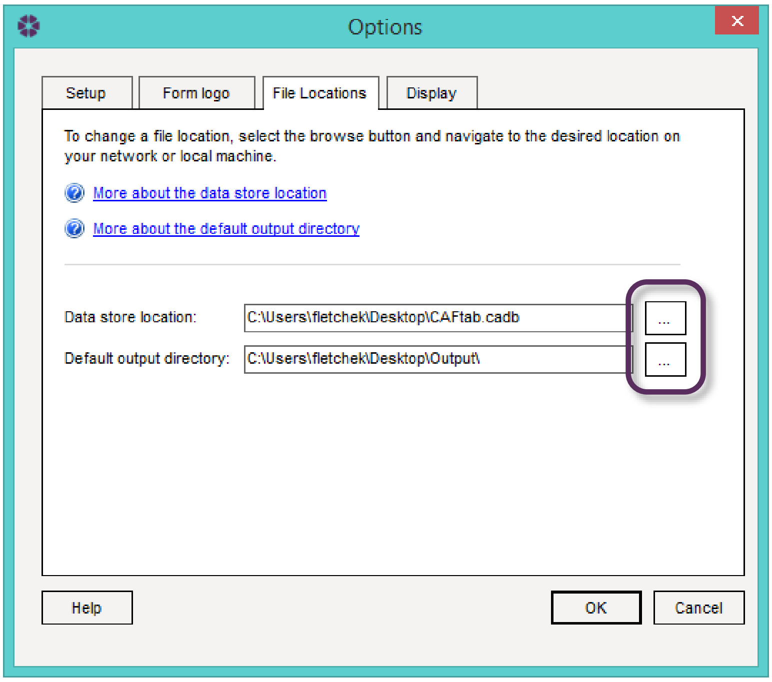
When **NBS Contract Administrator** is opened for the first time, you will be given the option to create a new data store to contain all your job information, or to browse to an already existing data store. If at a later date you need to change your data store, this can be done from this tab.

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

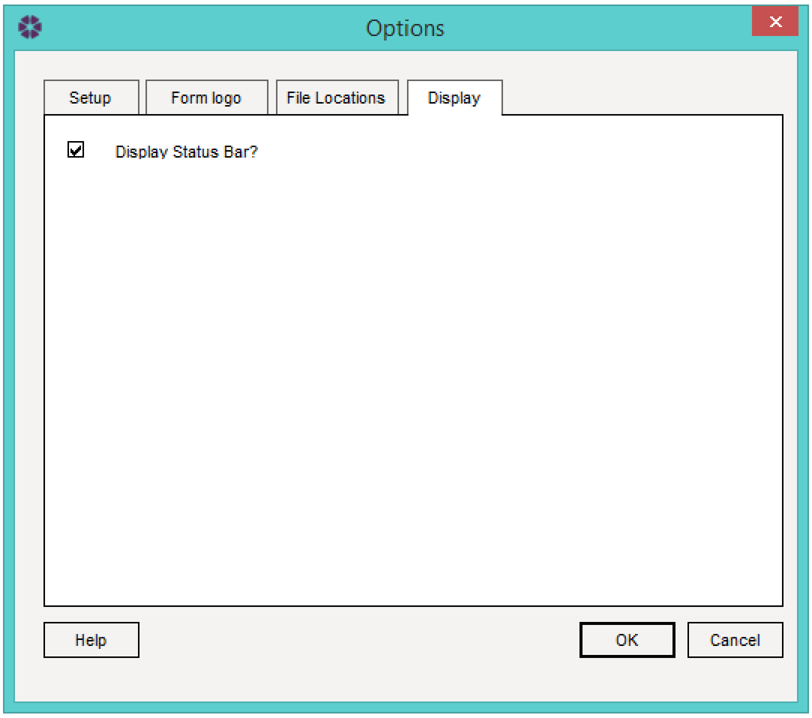
The output location is a directory where all of your PDFs (issued forms) will be created. Once you have selected your desired directory, click the **OK** button and the default output directory will be changed for all future jobs created in **NBS Contract Administrator**.

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

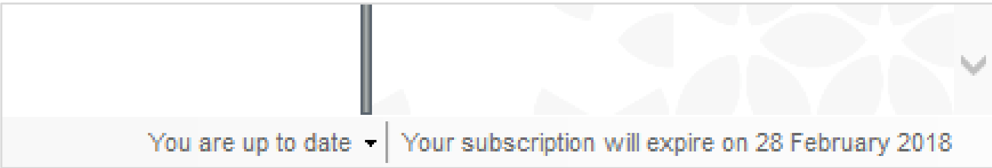


Display Tab

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.



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

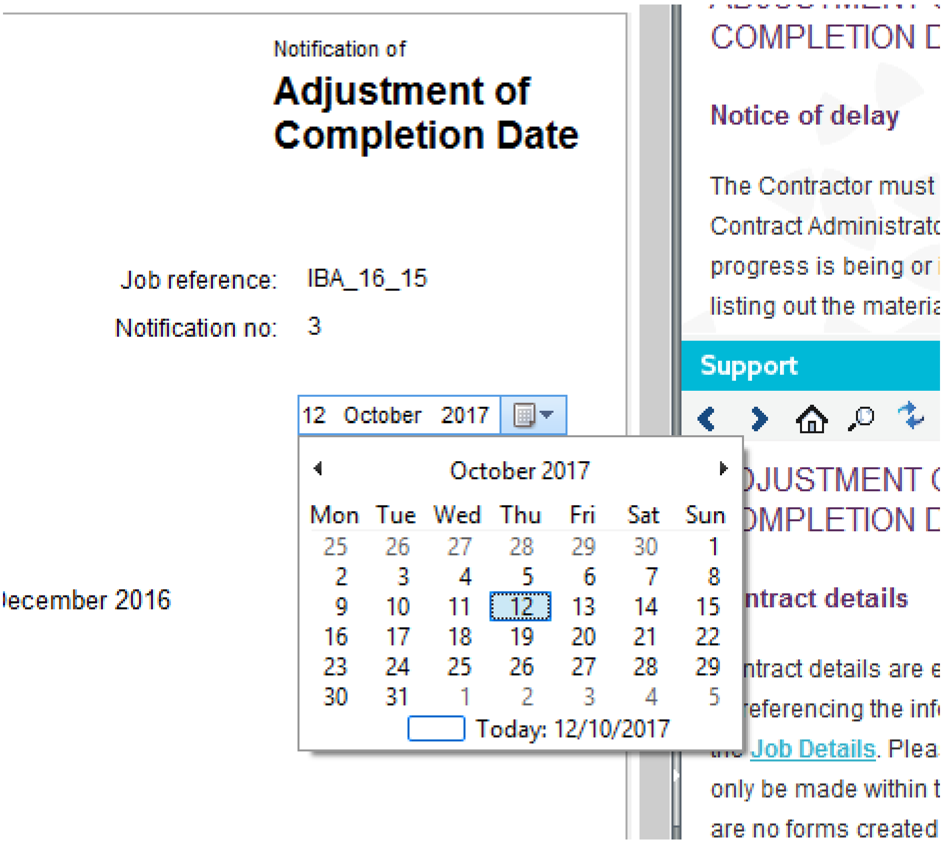
Completing Forms

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

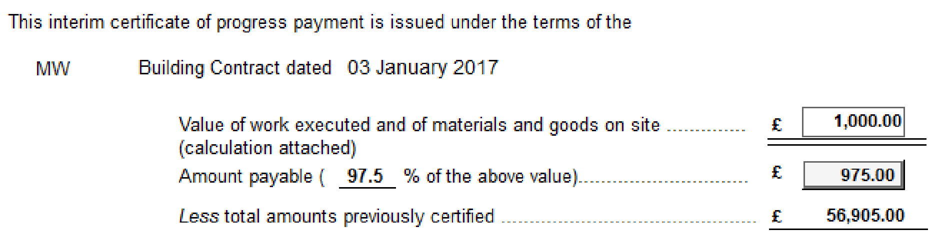
Some selection fields are for selecting dates, when you click on them a calendar will appear.



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  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.

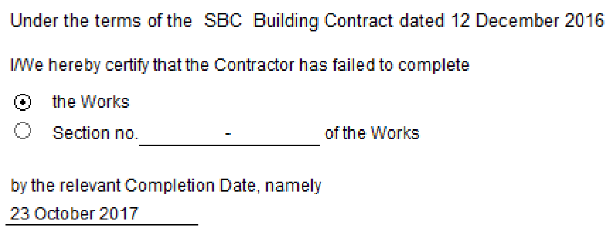

This interim certificate of progress payment is issued under the terms of the

MW Building Contract dated 03 January 2017

Value of work executed and of materials and goods on site .... £ 1,000.00
(calculation attached)
Amount payable (97.5 % of the above value)............................ £ 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

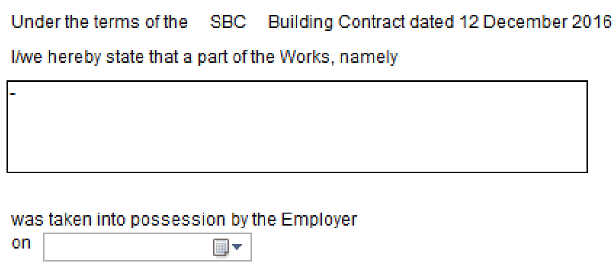
I/We hereby certify that the Contractor has failed to complete

the Works
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 terms of the SBC Building Contract dated 12 December 2016
I/we hereby state that a part of the Works, namely

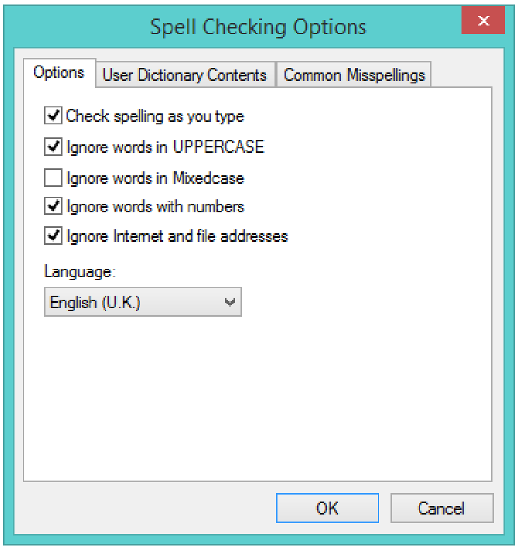
was taken into possession by the Employer
on

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

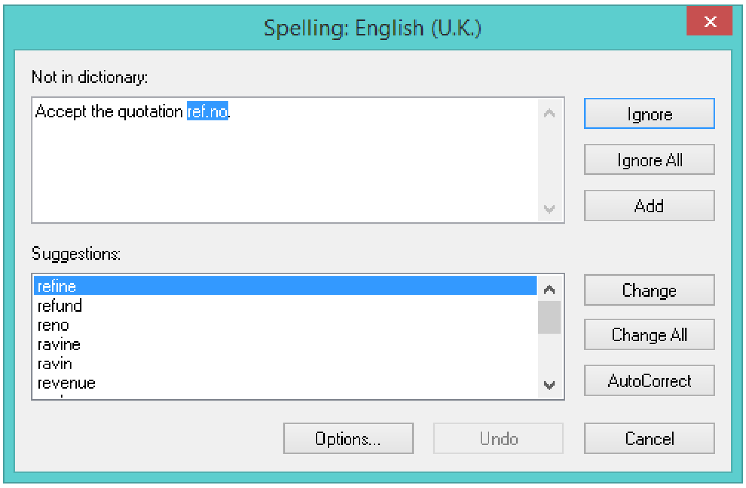
Spell check options

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



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.



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

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

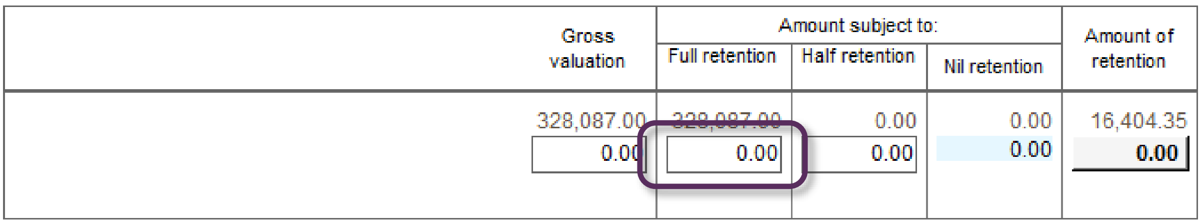
All payment forms have been designed to auto-calculate values where possible. Where appropriate, payment forms are dealt with as "packages" and can only be added and issued as such. This is because they have such a strong relationship – fields in one form populate fields in the other.

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.

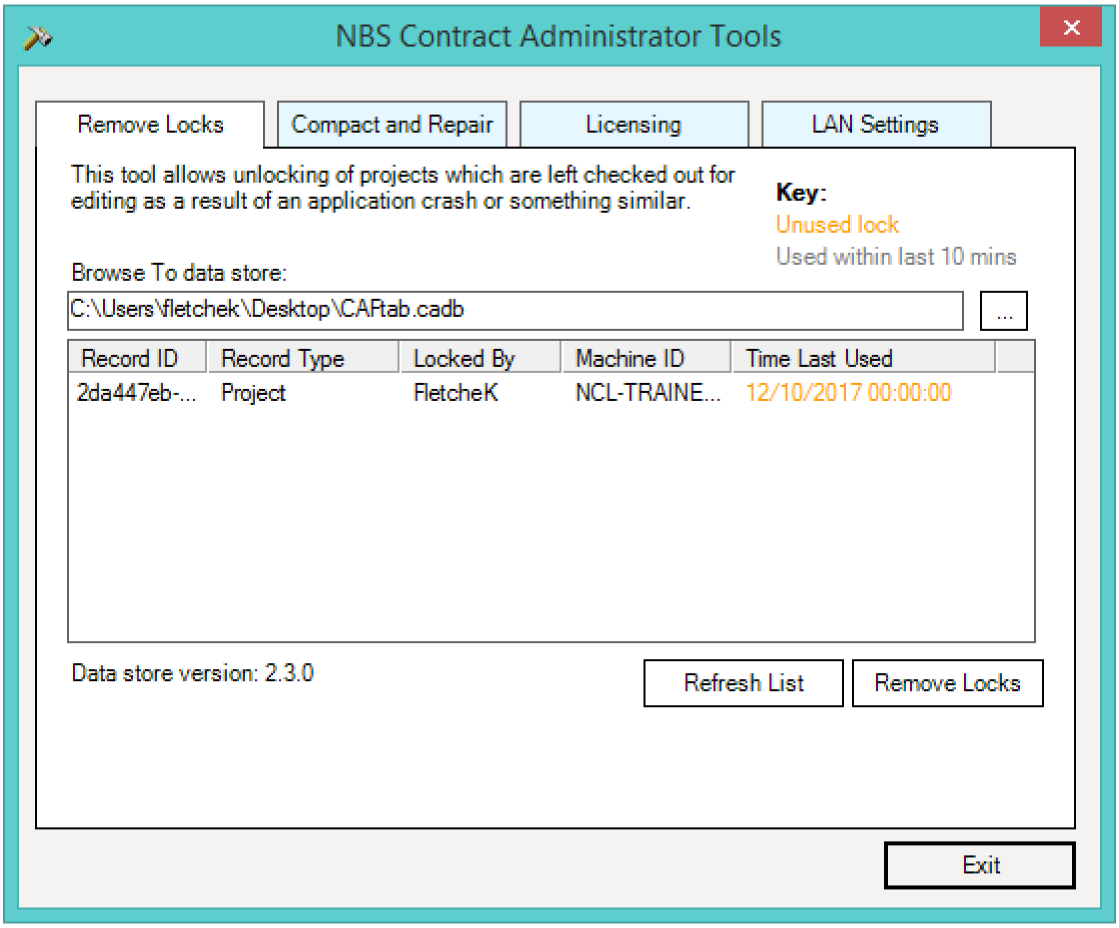


Appendix 4 - Administration Tools

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



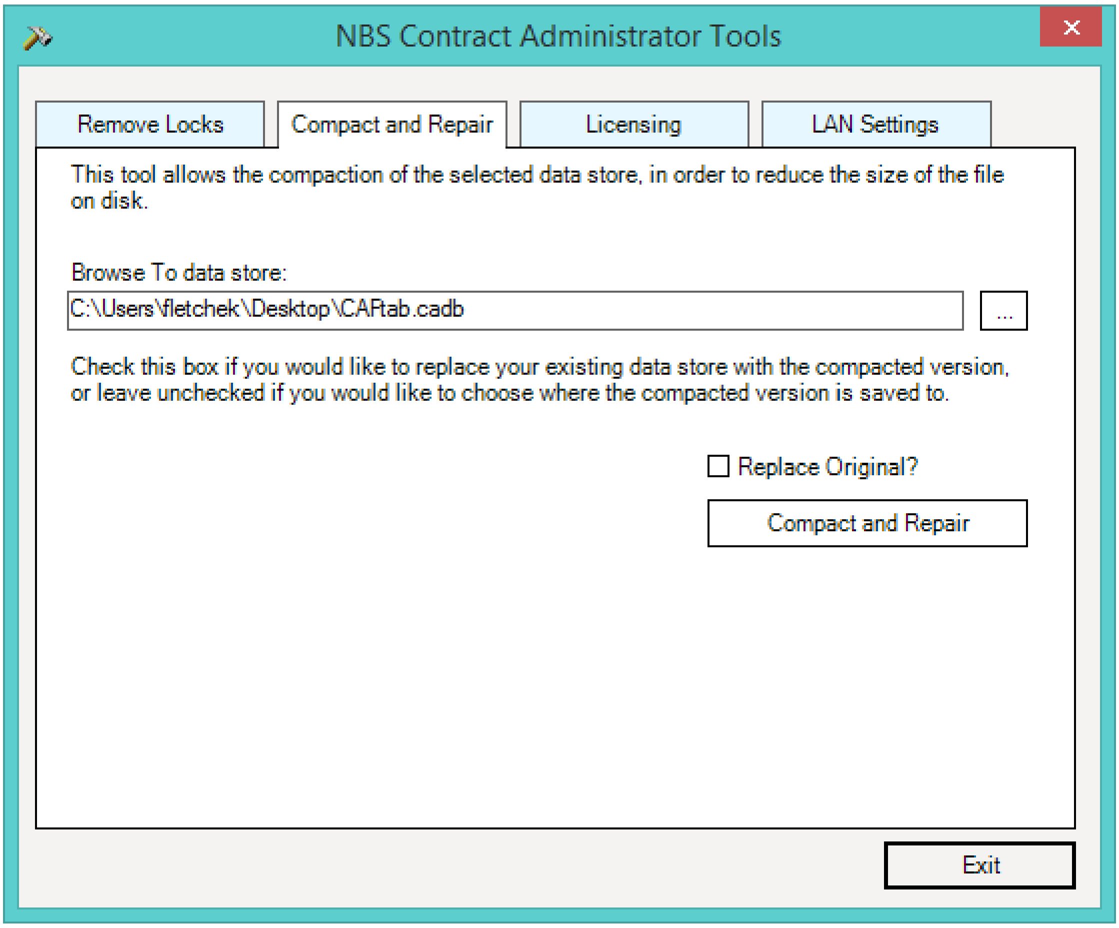
While you are working in a job, **NBS Contract Administrator** will lock that job to stop anyone from trying to edit that job at the same time. If a problem occurs with your machine, e.g. a power failure, then this project will not have its lock removed and will therefore remain un-editable.

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.



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.

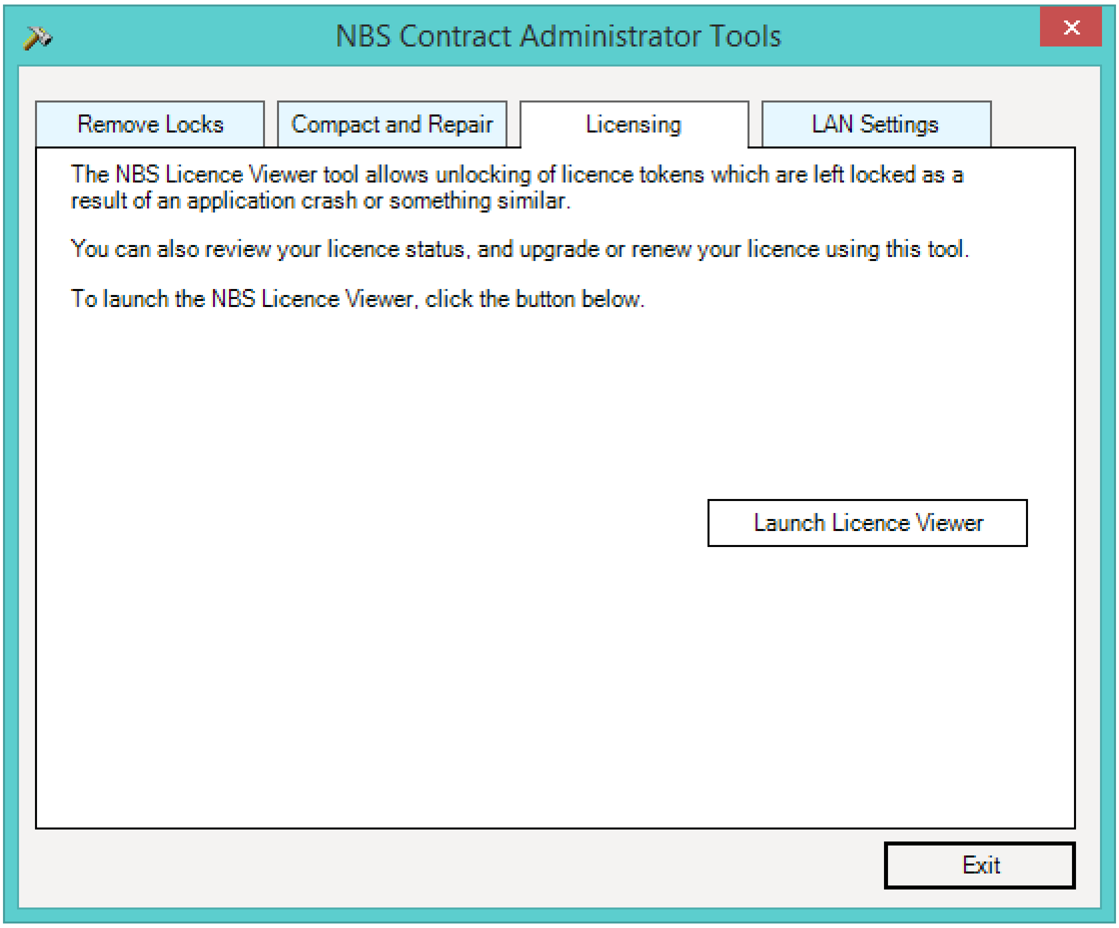
Choose whether or not you want to replace your original database with your compacted database, by selecting the '**Replace Original**?' check box. Please note that if you do not select this option, you will be asked to specify a location for your compacted database.

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

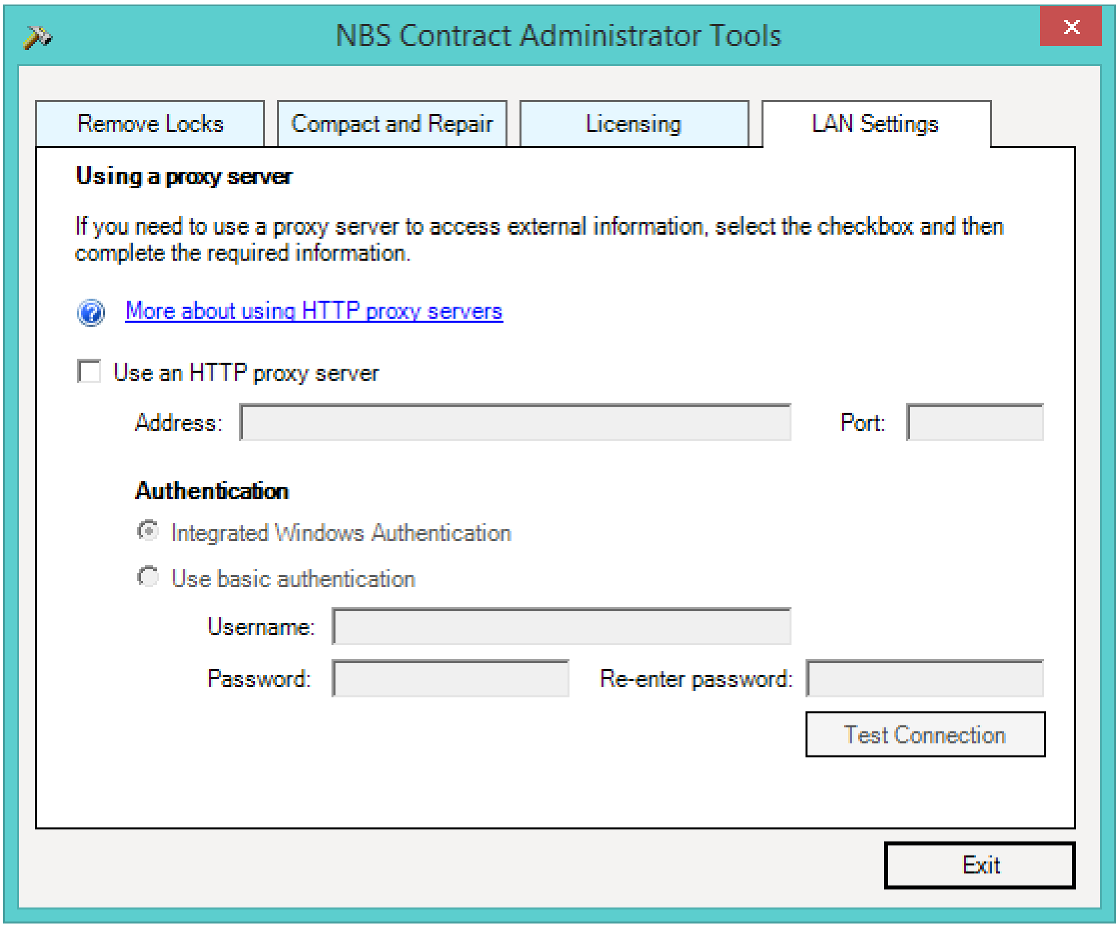
From here, the user can unlock any software licences which may have become locked as a result of an application crash or fault with the PC. From this tab, the user can also review license status, upgrade or renew their existing licence.

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



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 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.