Web-Based Contract Management Services - WBCMS
Background

- The Ministry is replacing various labour intensive paper-based methods of recording contract activities with a Web-Based Contract Management Services solution where field data is captured in an electronic format.

- MTO entered into a partnership with Aurigo Software Technology Corp. to provide a complete set of applications, hosting services, including all equipment, hardware, third-party software, facilities and services necessary to host and maintain the applications.

- The ministry and its service providers will access the central database and use the system via internet browser

- The solution and its operations will be sustained through a subscription fee model.
Objective

- Streamline processes and introduce automation
- Reduce duplication
- Increase efficiencies and effectiveness
- Improve documentation to support decision making
- Stakeholder alignment
WBCMS Contract Delivery Benefits

- All contract documents including tender, items list, quantities, drawings and any documents included at time of tender will be loaded electronically to WBCMS.
- WBCMS is browser enabled which means that users will be able to record activities while on site – for example when performing a site condition survey, users will be able to create the record, enter notes, take pictures or videos and attach the information to the record providing a baseline to compare to after the work is done.
- MTO and its users will benefit from this transformation which supports the project’s key objectives of streamlining processes through automation and eliminating multiple entries of data. This would include electronic diaries, inspection records, reports, change order submissions, invoices for payment, etc.
- At a glance, Contract Administrators will be able to see all work progress at any given time (i.e. Instruction Notices, non-conformance records, change orders and project progress to their associated contract, inspection work and items posting from contractor,…).
SaaS Model

✓ Office & Field Access, Native iOS & Android via browser, Tablets & Smart Phones
✓ SSAE 16 Certified, 128 Bit Encryption
WBCMS scope – Full Contract Delivery Life Cycle

- Close
- Award Contract
- Contract Set-up
- Monitor Contract Schedule
- Maintain Contract Documents
- Monitor Contract Costs
- Monitor Quality Control
- Monitor & Assess Performance
- Contract Set-up
Project Summary

- WBCMS Project to be delivered in 3 Phases

  ✓ **Phase I** –
    - Discovery, reviews, configure, test, train, and implementation activities related to all contracts associated with the delivery of Construction Contracts
      - Construction Contracts
      - CA Contracts
      - Lab Contracts
      - Inspection Contracts

  ▪ **Phase II**
    - Area Maintenance Contracts (AMC) – long term agreements
      - As most contracts are already awarded this will result in a migration of business processes (not data)

  ▪ **Phase III**
    - Engineering Services Contracts – pre-construction activities
Streamlined processes

- Contract set-up
  - Pay items uploaded
  - Contract documents electronic
  - User permissioned to access contract

- Pre-administration
  - Set-up key contacts, material, equipment and labour lists,
  - Activities required as per contract specs (diaries, milestones, tasks)
  - Schedules
  - Permission to start work

- Administration
  - Start-up meetings
  - Change orders done on-line
  - Instruction notices and correspondence back & forth
  - Pay items are updated – DWR
  - Material testing
  - Reconciliation of payment request – easy

- Closing activities
  - Performance Assessment
  - Construction Report
  - Warranties
WBCMS General product features

- All records are workflow enabled,
- Separation of duties, per role, per contract.
- User enrolment – managed by company administrators
- Dashboard
- Contract set-up
  - Default contract management file structure
- Head Office business administrator
  - Maintain libraries
- Regional business administrator
  - Manage and maintain regional user enrolment
- Search engine capabilities
  - Contract level
Award

- Assign roles to users
- Enter designations
- Manage user
- Attach documents
Pre-Administration Activities

- Independent audit
- Submit required plans
- Compiling milestone activities
- Set-up diaries
- Forecasting schedule
- Review critical path

Pre-Administration
Pre-Construction Activities

- Site condition survey
- Designation of construction zone
- Security seal tags
- Start-up & all meetings
- Permission to start
Administration

- Change orders
- Payment requests
- Manage incidents & events
- Requests for clarification
- Recording daily activities
- Material testing
Administration…. Cont’d

- Construction report
- Warranty
- Certificate substantial performance
- Final completion – Acceptance cert

Administration
Administration – Key activities

- Recording daily activities
  - Inspection logs
  - Item Postings - Reconciliation
  - Daily Work Records - Reconciliation

- Requests for clarification

- Change orders/Change proposal
  - Details
  - Estimate – Price Agreement

- Claims
  - Field, Regional level
  - Head Office level

- Liens

- Material testing
  - Established 3 unique workflows
    - Field
    - Lab
    - MERO

- Manage incidents & events
- Work Directives

- Payment requests
  - Work completed
  - Summary info for payment request

- Generate reports
  - Construction endorsement report - (summaries available monthly, yearly per contract or multiply contracts by region)
  - CA endorsement report
  - Non-conformance report
Close

- Warranties released
- Milestone reports
- All claims closed
- Performance assessment
- All liens released
Questions