



EPCplanner 2026



User Manual

Professional Project Controls for EPC Projects

Version	1.0.0
Platform	Windows · Android · iOS · macOS (Mac Catalyst)
Scope	Complete feature-by-feature operational guide
Prepared	JUNE 2026

IMPORTANT

This manual is organized feature by feature. After each workflow section, insert your own screenshot in the marked placeholder area. Keep captions directly under each image so the manual stays aligned with the real application screens.



I. Document Control

This document is the official user manual for EPCplanner 2026. It is controlled by the EPCplanner product owner. Modifications to this document must be reviewed and approved before distribution to client or pilot organisations.

Document Property	Detail
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Classification	Confidential — Authorised Pilot Organisations Only
Platform	Windows · Android · iOS · macOS (Mac Catalyst)



II. Revision History

Rev	Date	Author	Description of Change
R0	May 2026	EPCplanner Team	Initial draft for internal review. All 14 sections and 49 workflow screens covered.
R1	June 2026	EPCplanner Team	<p>CBS workflow subsections (Section 7.2–7.7) expanded with full step text. Section 8.6 Historical Reports and Section 9.9 Register Summary Reports populated.</p> <p>Document Control, Revision History, Glossary, Recommended Implementation Sequence, Administrator Pre-Deployment Checklist, and Enterprise Release Improvement Notes added.</p> <p>Added three positioning chapters: “Why EPCplanner — Single Source of Truth”, “System Workflow Overview” (with end-to-end architecture diagram), and “Governance Framework: Historical Snapshots, Freeze Guard & Audit Log”.</p> <p>Replaced workflow diagram with updated two-phase architecture (Project Setup Phase / Operational Reporting Cycle). Added three chapters: “Project Controls Philosophy”, “Reporting & Measurement Framework”, and “Register Progress Logic” (with calculation-sequence diagram).</p>



Part - A

EPCplanner Concepts & Architecture



III. Why EPCplanner — Single Source of Truth

The Problem with Fragmented Project Controls

On most EPC projects, the schedule lives in Primavera P6, the commercial baseline lives in a spreadsheet, engineering deliverable status lives in another spreadsheet maintained by Document Control, procurement status lives with the procurement team, and subcontractor progress lives with the construction team. Each of these sources is updated on its own schedule, by different people, with different assumptions about what “done” means.

As a project grows past a few hundred activities and a few thousand deliverables, these fragmented spreadsheet-based registers become difficult to control, audit, validate, and align with the schedule. Reconciling Engineering, Procurement, and Subcontractor registers against the Primavera schedule becomes a recurring manual exercise — repeated every reporting period, prone to version conflicts, and difficult to defend during a claim or audit.

EPCplanner replaces this network of fragmented register spreadsheets with a controlled, database-driven workflow. Every Engineering document, Procurement requisition, and Subcontract package lives in one structured database, linked directly to the Primavera schedule and to the commercial Cost Breakdown Structure. There is one place where progress is entered, one place where it is validated, and one place from which every report — technical or commercial — is generated.

Concern	Traditional Spreadsheet Approach	EPCplanner Approach
Data Location	Scattered across multiple Excel files held by different teams.	One project database covering schedule, commercial, and all register data.
Schedule Alignment	Manual cross-checking of register dates against P6 activity dates each period.	Each register item is linked to a task code; Validation reports day-delta gaps automatically.
Period Lock	Closed-period figures can be silently edited; tracing changes is difficult.	Freeze Guard blocks retroactive entry once a Cut-Off Date is closed.
Audit Trail	Reconstructed manually from file versions and email history, if at all.	Immutable Audit Log records every controlled action with user, timestamp, and detail.
Commercial Linkage	Physical progress and invoicing tracked in separate, loosely reconciled files.	CBS, Activity WF, and Cost/Invoice WF are linked — one progress update drives both.

EPCplanner Complements Primavera P6 — It Does Not Replace It

EPCplanner is not a Primavera replacement and not an attempt to move scheduling logic out of P6. Primavera P6 remains the master schedule, holding the Level 3 CPM logic — typically 5,000 to 10,000 activities for a major EPC project.

The detail that would otherwise bloat that schedule to 30,000–50,000 activities — individual engineering documents, individual purchase requisitions, individual subcontract deliverables — is instead tracked at Level 4/5 inside EPCplanner’s Register module, linked back to the relevant Level 3 activity. P6 stays clean and manageable for the planning team, while EPCplanner carries the operational detail and feeds summarised progress back to P6 through the two-way synchronization described in the next section.



IV. What EPCplanner Actually Is

EPCplanner is best described not as a reporting tool, and not as a Primavera add-on, but as an **EPC Project Controls Operating System**. A single application manages:

- Planning — schedule intake and two-way synchronization with Primavera P6.
- Commercial Progress — CBS, Weight Factors, and invoice/payment certificate generation.
- Engineering Deliverables — document register, stage gates, and review status.
- Procurement Deliverables — purchase request tracking through to delivery.
- Subcontract Packages — subcontractor deliverable tracking and payment linkage.
- Forecasting — lookahead and behind-schedule analysis for short-interval planning.
- Governance — role-based access, immutable audit logging, and period-lock controls.
- Reporting — S-curves, tabular progress, histograms, register packs, and feedback forms.

Each of these capabilities individually exists in some form elsewhere — in a spreadsheet, a separate tool, or a manual process. What makes EPCplanner different is that they operate on the same database, the same WBS, and the same period structure, so a single progress update cycle keeps planning, commercial, and reporting outputs consistent with each other.

Five Things That Make EPCplanner Different

Differentiator	What It Means in Practice
Single Source of Truth	One local-first database holds schedule, CBS, Weight Factors, and all register data — every report is generated from the same underlying figures.
Register-Driven Progress	Physical progress is calculated from real deliverable completion (drawings issued, PRs placed, subcontract gates met) rather than from estimated percentages.
Historical Period Control	Every closed Cut-Off Date is preserved as a locked historical snapshot, available for trend analysis and audit at any later date.
Forecasting Integration	Lookahead and Behind-Schedule reports are generated directly from the live register and activity data — no separate forecast spreadsheet to maintain.
Primavera Synchronization	Two-way connection reads the P6 schedule and writes actual progress, dates, and remaining duration back — keeping P6 current without manual re-entry.



V. System Workflow Overview

EPCplanner’s workflow divides into two distinct phases. The first is a one-time **Project Setup Phase**, completed before any reporting begins, which establishes the schedule baseline, commercial structure, weight factors, and register framework. The second is a recurring **Operational Reporting Cycle**, which repeats for every Cut-Off Date (COD) and includes actual updates, rollup, reporting, two-way synchronization with Primavera P6, and period closure. Where the cycle identifies trends that require a formal response — a schedule revision, recovery plan, or rebaseline — a Management of Change process is triggered, managed through Plan Versioning (Chapter 14). The diagram below shows both phases together, with each stage referenced to the relevant chapter of this manual.

EPCplanner 2026 — End-to-End Workflow Architecture

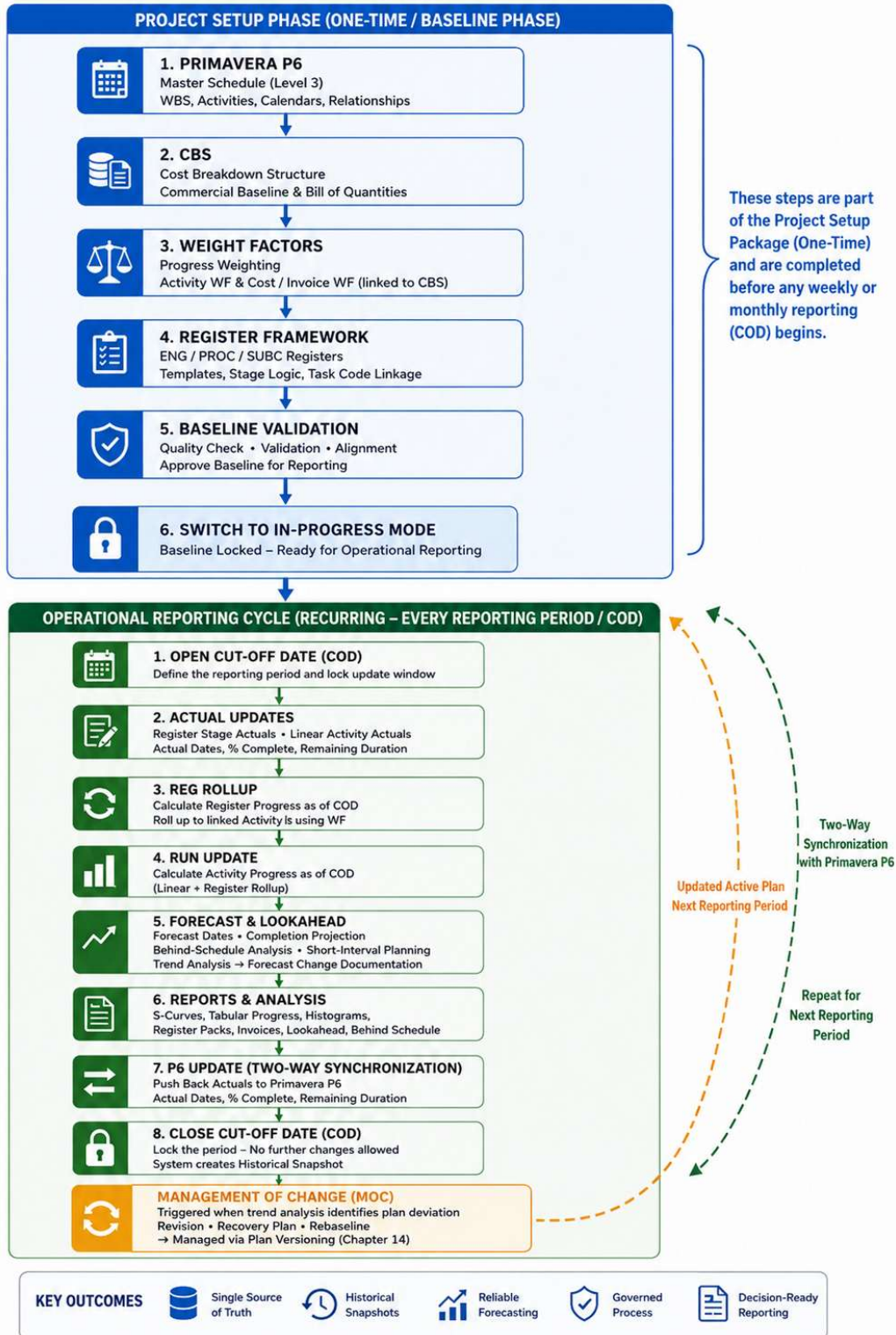


Figure 0.1 — EPCplanner end-to-end workflow architecture: the one-time Project Setup Phase (top) and the recurring Operational Reporting Cycle (bottom), connected by two-way synchronization with Primavera P6.



Project Setup Phase (One-Time)

These six steps are completed once per project, before any Cut-Off Date is opened. They establish the schedule baseline, commercial structure, weight factors, and register framework, and conclude with formal validation and the switch to In-Progress mode that locks the baseline for operational reporting.

Step	What Happens	Manual Reference
1. Primavera P6	Master Schedule (Level 3) is imported via XER or connected live (Oracle/SQL Server/SQLite) — WBS, Activities, Calendars, Relationships.	Section 4
2. CBS	Cost Breakdown Structure is imported, reviewed, validated, and promoted — the commercial baseline and bill of quantities.	Section 7.1–7.5
3. Weight Factors	Progress weighting is generated and validated — Activity WF and Cost/Invoice WF, both linked to the CBS distribution.	Section 6, Section 7.7
4. Register Framework	ENG / PROC / SUBC registers are imported and configured — stage templates, stage logic, and task code linkage to the schedule.	Section 9.3–9.6
5. Reports & Measurement Framework	S-curves, tabular progress, histograms, register packs, invoices, lookahead, and behind-schedule reports templates are generated for use.	Section 10
6. Baseline Validation	Quality check, validation, and alignment of all setup data against the approved baseline, ready for formal approval.	Section 9.6
7. Switch to In-Progress Mode	The baseline is locked. The project is now ready for operational reporting and the first Cut-Off Date can be opened.	Section 8.1



Operational Reporting Cycle (Recurring)

Once the project is in In-Progress mode, these eight steps repeat for every Cut-Off Date. Each cycle captures actual progress, recalculates Register and Activity status, generates forecasts and reports, synchronizes with Primavera P6, and closes with a locked Historical Snapshot of that period (see Governance Framework, page 9).

Step	What Happens	Manual Reference
1. Open Cut-Off Date (COD)	Define the reporting period and lock the update window for the new period.	Section 8.2
2. Actual Updates	Register stage actuals and linear Activity actuals are entered — actual dates, percent complete, remaining duration.	Section 8.3–8.4
3. Reg Rollup (Register Rollup)	Calculate Register progress as of the COD and roll it up to linked Activities using Weight Factors.	Section 8.5
4. Run Update	Calculate overall Activity progress as of the COD, combining linear progress and Register Rollup.	Section 8.5
5. Forecast & Lookahead	Forecast dates and completion projections are generated. Trend analysis is performed across closed periods to identify slippage patterns. Where negative trends or schedule deviations are identified, changes to the forecast are documented and form the basis for a Management of Change assessment — which may trigger a Revision, Recovery Plan, or Rebaseline in the next cycle (Chapter 14).	Section 10.5–10.6
6. Reports & Analysis	S-curves, tabular progress, histograms, register packs, invoices, lookahead, and behind-schedule reports are generated for issue.	Section 10
7. P6 Update (Two-Way Sync)	Calculated actual dates, percent complete, and remaining duration are pushed back to the connected Primavera P6 database.	Section 4
8. Close Cut-Off Date (COD)	Lock the period — no further changes allowed. The system creates a Historical Snapshot, and the cycle repeats for the next Cut-Off Date.	Section 8.5–8.6

Management of Change (MOC) — triggered by the recurring cycle

At the close of each reporting cycle, the trend analysis and forecast output from Step 5 may indicate that the current approved plan is no longer achievable. Where this is formally recognised, a Management of Change process is initiated — resulting in one of the following actions, each managed through Chapter 14 (Plan Versioning):

- (a) a Revision to reflect approved scope or sequence changes;
- (b) a Recovery Plan to address schedule slippage with a Revised Cut-Off Date that locks actual progress to date;
- or
- (c) a Re-baseline, formally approved by the Client or PMC, that resets the reference plan.

These actions do not interrupt the Operational Reporting Cycle — they update the active plan version against which the next cycle runs.



VI. Governance Framework: Historical Snapshots, Freeze Guard & Audit Log

Three EPCplanner capabilities work together as a single governance system: Historical Snapshots, Freeze Guard, and the Audit Log. Individually, each addresses a specific control need. Together, they give Clients, PMC organisations, and auditors confidence that reported progress figures are accurate, traceable, and cannot be altered after the fact without a visible record. This chapter describes the three capabilities together as the governance layer that underpins every other module in EPCplanner.

Why This Matters

Project progress data is used for far more than internal tracking. It feeds monthly invoicing, supports claims and variation negotiations, and is reviewed by Clients and PMC organisations who were not present when the data was entered. When a dispute arises about progress reported three, six, or twelve months earlier, the question is rarely “what is the progress now” — it is “what was reported then, who entered it, and has it changed since.” EPCplanner is built to answer all three questions directly from the database, without reconstruction from file versions or email threads.

Historical Snapshots

Every time a Cut-Off Date is closed, EPCplanner preserves the complete state of that period: register actuals, activity progress percentages, S-curve data points, CBS earned values, and the timestamp of the update. This is not a manual export — it happens automatically as part of closing the period, and the resulting snapshot cannot be edited afterwards (see Freeze Guard, below).

Historical Snapshots are accessed through the Historical Reports screen (Section 8.6) and support several uses that go well beyond simple record-keeping:

- **Trend Analysis** — compare progress velocity across multiple closed periods to identify slippage patterns before they become critical.
- **Audit Support** — respond to internal or external audit requests by reproducing the exact figures reported for any historical Cut-Off Date, with no risk that current-period edits have altered them.
- **Claims and Variation Support** — provide contemporaneous progress evidence for delay analysis, extension-of-time claims, or variation valuation, drawn directly from the period in question rather than reconstructed afterwards.
- **Retrospective Performance Review** — at project close-out or lessons-learned reviews, reconstruct the project’s progress history period by period without relying on archived spreadsheets of varying quality.

Freeze Guard

Freeze Guard is the control that makes Historical Snapshots trustworthy. Once a Cut-Off Date is closed, Freeze Guard prevents actual dates, quantities, and stage completions from being entered or modified for that period — from any module, by any user, including Administrators acting through normal data-entry screens.

This is the feature most valued by Client and PMC reviewers, because it directly answers a recurring concern with spreadsheet-based reporting: that figures issued for a closed period can be quietly revised in a later update with no record of the change. With Freeze Guard active, a correction to closed-period data requires a deliberate, logged action rather than a routine edit — and that action itself is captured in the Audit Log.

In practice, Freeze Guard means that the S-curve, register status, and CBS earned value reported to the Client for Period N will read exactly the same in EPCplanner six months later as they did on the day Period N was issued — a guarantee that few spreadsheet-based systems can offer.



Audit Log

The Audit Log is often introduced in user manuals as an administrative screen for reviewing user activity. Within EPCplanner's governance framework it serves a broader purpose: it is the record that connects every figure in every report back to the user, action, and timestamp that produced it. Combined with the 11-role RBAC model (Table 12.1), the Audit Log provides four distinct functions:

- **Traceability** — every import, validation run, rollup, update, and report generation is logged with the responsible user and timestamp, so any reported figure can be traced back to the action that created it.
- **Governance** — role-restricted actions (CBS promotion, period close, mode switches) are recorded against the authorising user, supporting separation-of-duties requirements common in EPC contracts.
- **Claims Support** — when a claim or dispute requires evidence of when information was known or recorded, the Audit Log provides a timestamped record independent of the reports themselves.
- **Audit Compliance** — internal and external auditors can review the log directly to confirm that controlled actions were performed by appropriately authorised roles, without requesting ad-hoc evidence from the project team.

How the Three Work Together

The three capabilities are deliberately interdependent. Freeze Guard ensures that a Historical Snapshot, once created, represents an unalterable record of what was reported. The Audit Log records the close action that created the snapshot and any subsequent authorised correction. Historical Snapshots then make that locked-down history usable — turning it from a passive safeguard into an active reporting and analysis resource.

Together, this governance layer is one of the strongest reasons a Client or PMC organisation will support the adoption of EPCplanner on a project: it does not just produce reports faster, it produces reports whose history can be trusted.



VII. Project Controls Philosophy

EPCplanner is built around a set of project controls principles intended to ensure that planning, progress measurement, forecasting, and reporting are generated from a single controlled process. These principles are not optional configuration choices — they are embedded in how the application structures data and enforces workflow, and they apply to every project regardless of size or contract type.

Single Source of Truth

All project progress calculations, forecasts, and reports are generated from a common data structure. This eliminates the need for multiple disconnected spreadsheets and reduces reporting inconsistencies across project functions.

Register-Driven Progress Measurement

Progress is measured through Engineering, Procurement, and Subcontract Registers using configurable stage templates and Weight Factors. Activity progress is therefore derived from actual deliverable status rather than manual percentage entry.

Controlled Reporting Cycle

Each reporting period operates through a formal Cut-Off Date (COD) cycle. Progress updates, rollups, forecasts, and reports are generated using controlled procedures to ensure consistency and repeatability.

Historical Data Preservation

Closed reporting periods remain protected through Cut-Off Date controls and Freeze Guard mechanisms. Historical project status can therefore be reviewed and reported without retrospective modification.

Primavera Synchronization

EPCplanner integrates with Primavera P6 through schedule import and controlled progress synchronization, maintaining alignment between schedule management and physical progress measurement.

Governance and Traceability

All controlled actions are recorded through Audit Log mechanisms, providing full traceability of project updates, administrative actions, and reporting activities.



VIII. Reporting & Measurement Framework

Before a project enters In-Progress Mode, EPCplanner requires the establishment of a Reporting & Measurement Framework.

This framework defines how project performance will be measured, calculated, presented, and distributed throughout the project lifecycle.

The framework typically includes:

- Progress Measurement Methodology
- Weight Factor Structure
- S-Curve Configuration
- Activity Spread Configuration
- Resource Histogram Configuration
- Tabular Report Definitions
- Lookahead Reporting Parameters
- Behind Schedule Analysis Criteria
- Report Layouts and Print Settings
- PDF, Excel, and HTML Output Formats

The Reporting & Measurement Framework is configured during the Project Setup phase and becomes part of the approved project baseline.

Once operational reporting begins, all reporting outputs are generated from the approved framework, ensuring consistency between reporting periods and preventing uncontrolled changes to project measurement methodology.

This approach ensures that project progress, forecasting, and management reporting remain aligned throughout the project lifecycle.



IX. Register Progress Logic

The Register Framework forms the core progress measurement engine within EPCplanner.

Engineering, Procurement, and Subcontract deliverables are managed through Registers using configurable stage templates. Each stage represents a measurable milestone within the deliverable lifecycle and can be assigned a proportional Weight Factor contribution.

The progress calculation process follows the sequence shown below:



Figure 0.2 — Register Progress Logic: the calculation sequence from individual register items to project-level progress, forecasting, and reporting.

This methodology allows project progress to be calculated from actual deliverable achievement rather than subjective percentage estimates.

Because all calculations originate from controlled register data, progress reporting remains traceable, auditable, and consistent across Engineering, Procurement, Subcontracting, and Project Controls functions.

The same progress dataset is subsequently used for S-Curves, Histograms, Tabular Reports, Forecasting, Lookahead Analysis, Behind Schedule Analysis, and Primavera P6 synchronization.



Part - B

EPCplanner User Guide



1. Application Access Flow

This section covers the startup path a user follows on first launch: license activation on Windows, login, and mandatory password change when the account requires it.

1.1 License Activation

On Windows, EPCplanner verifies the local machine license before the login screen appears. If no valid license is found, the License Activation page opens and blocks access until activation succeeds.

Step	Action	Expected Result
1	Start EPCplanner.	The application opens and checks the machine license.
2	If unlicensed, remain on the License Activation page.	The machine fingerprint and request data are displayed.
3	Copy the machine fingerprint or export the license request.	The request can be sent to the EPCplanner License Manager.
4	Paste the generated license key in the activation field.	The key is ready for validation.
5	Click Activate.	The license is stored on the machine and the application proceeds to login.

- Use Copy Machine Fingerprint when only the device identity is required.
- Use Copy License Request or Export License Request when the full request payload is needed.
- If activation fails, verify that the key was generated for the same machine fingerprint shown on screen.
- License activation is a Windows-only startup requirement before any operational screens become accessible.

NOTE

The license is tied to a single machine fingerprint. Never apply a key generated for a different machine.

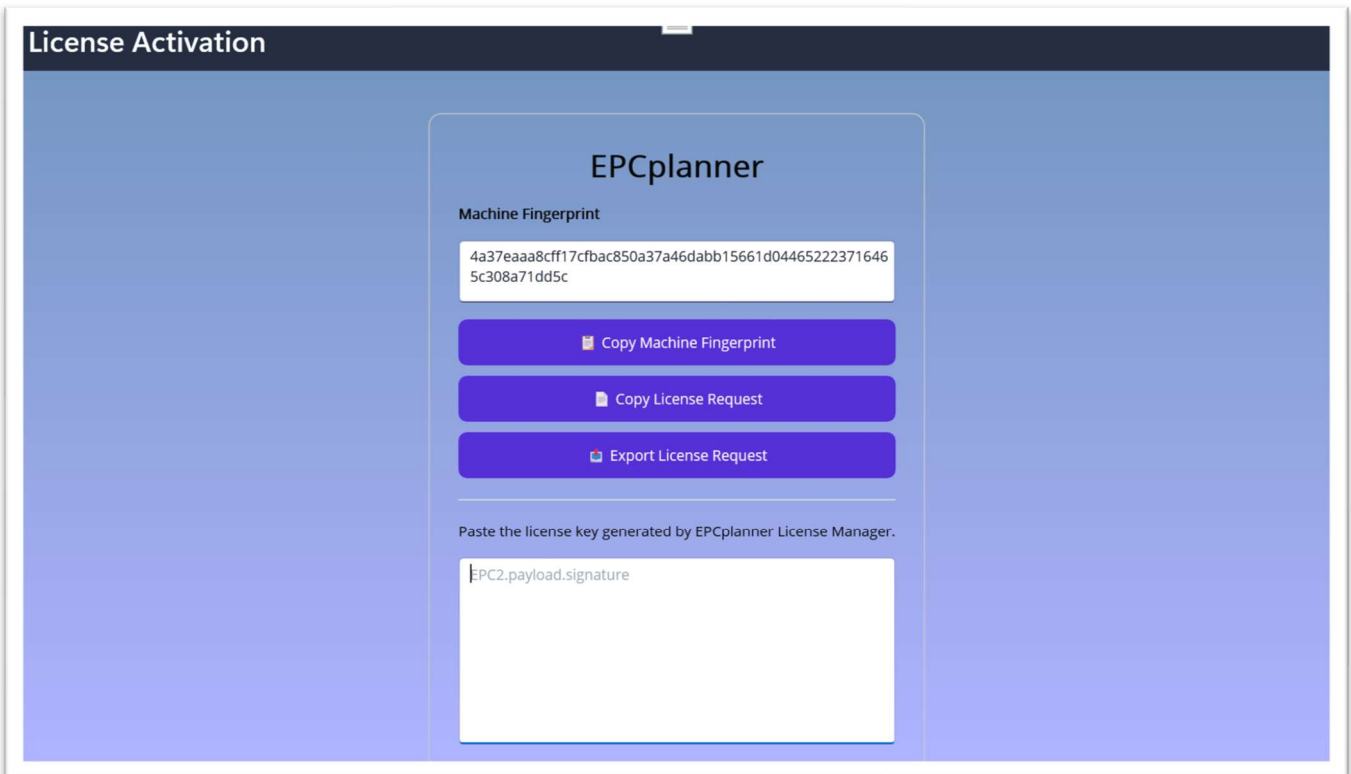


Figure 1.1 — License Activation page. Copy the Machine Fingerprint or export the License Request, then paste the activation code received from the EPCplanner License Manager.



1.2 Login

After successful license activation, the login page is presented. Access is controlled by role and permission mapping assigned by the system administrator.

Step	Action	Expected Result
1	Enter your Username.	The user account is ready for authentication.
2	Enter your Password. Use the eye button to reveal temporarily if needed.	The password field accepts the credential.
3	Click Login.	The application validates the account and opens the main shell.

- User accounts and roles are created and managed by the Administrator.
- If login fails, verify the username, password, account active status, and whether a forced password change is pending.
- Access rights are controlled by role and permission mapping — use approved accounts only.

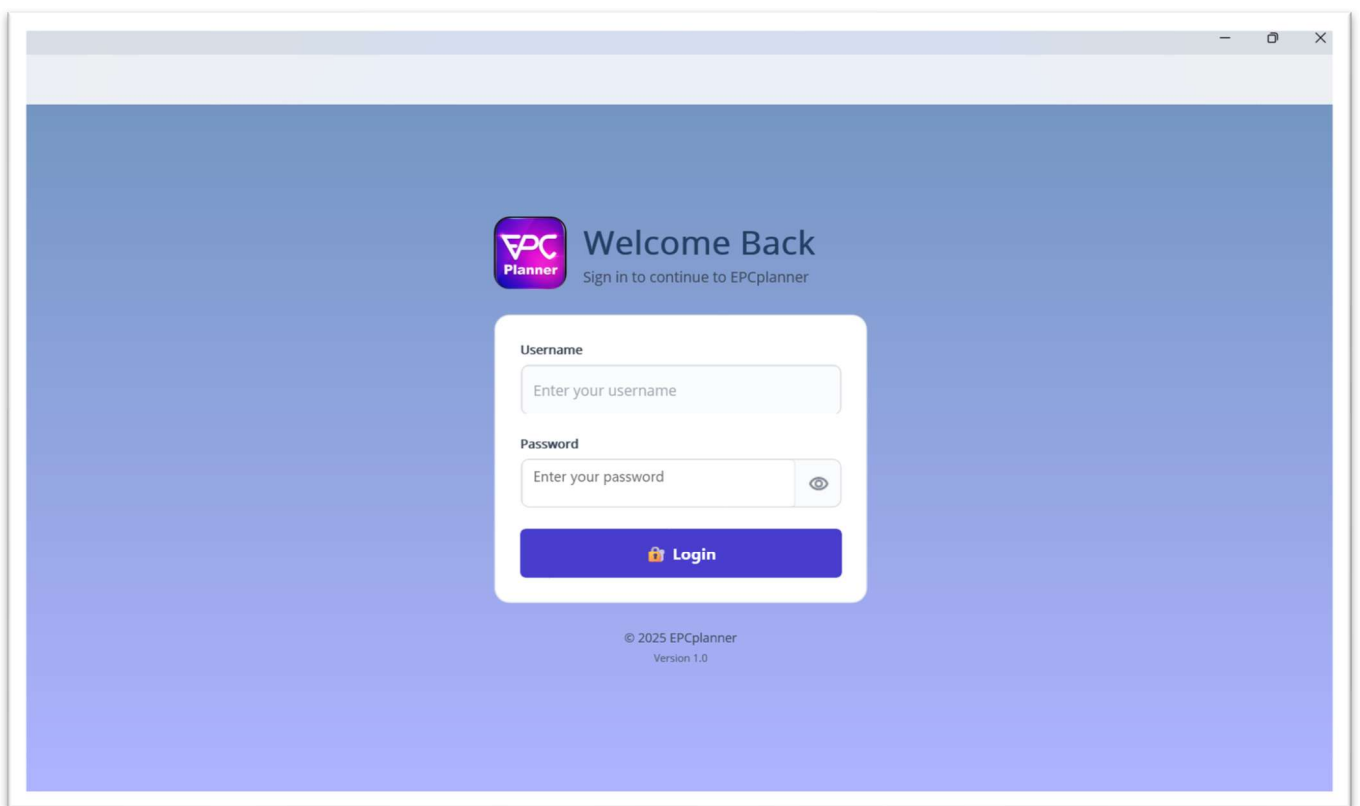


Figure 1.2 — Login page. User accounts and roles are controlled by the Administrator.



1.3 Mandatory Password Change

When an account is flagged for first-time login or forced update, EPCplanner opens the Change Password screen before granting access to operational modules.

Step	Action	Expected Result
1	Enter the current password. Default is: Welcome@12345	The application confirms the account identity.
2	Enter a new password meeting the policy requirements.	The new password must meet the complexity policy.
3	Confirm the new password.	The confirmation must match exactly.
4	Click Change Password.	The account is updated and the user proceeds to the application.

IMPORTANT

Password policy: minimum 12 characters including uppercase, lowercase, a digit, and a symbol. The new password must differ from the current password.

- Cancel should only be used when the password change is not mandatory; otherwise the user cannot proceed to normal work.

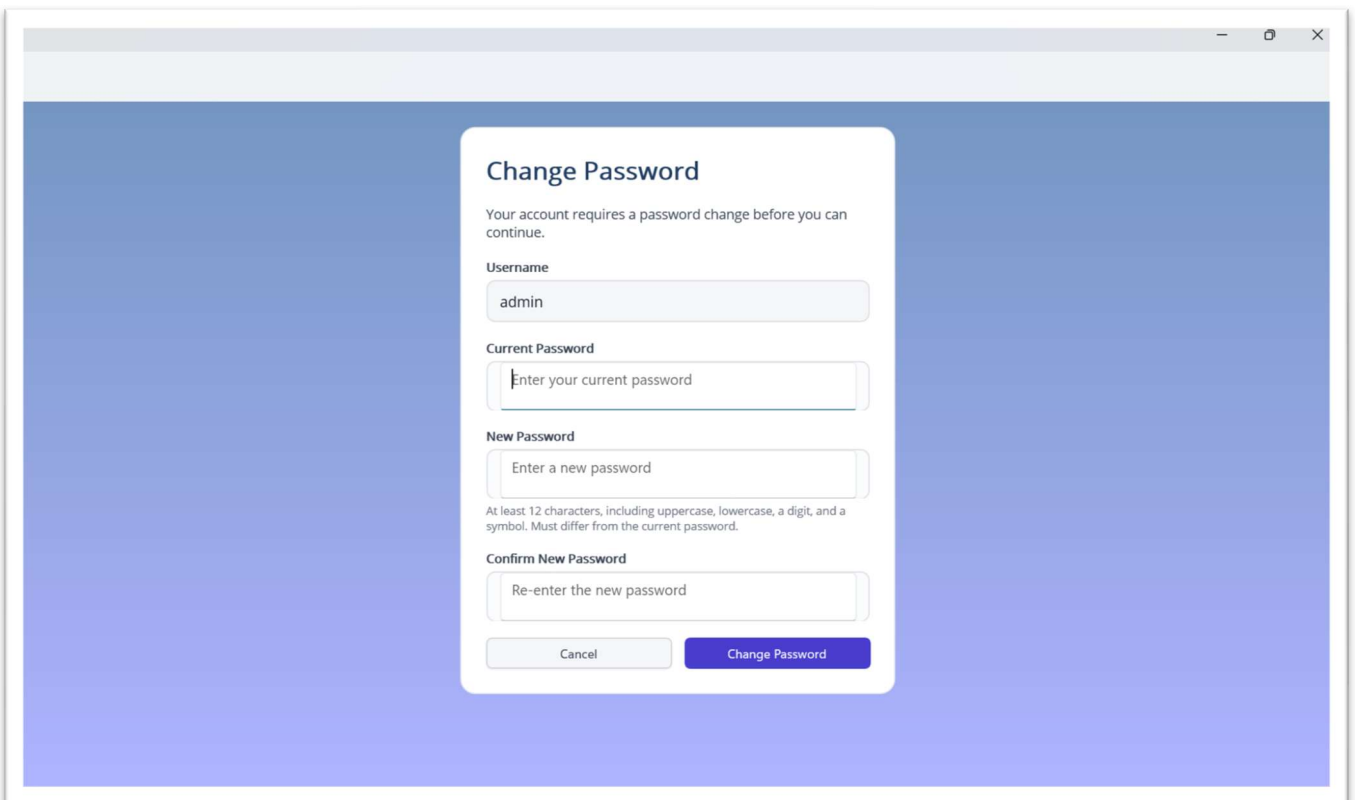


Figure 1.3 — Change Password page. Change the default password on first login.



2. Main Screen and Navigation

After successful login, the EPCplanner main shell becomes the working hub. All modules and workflows are launched from the top-level navigation and feature commands.

- File actions: database lifecycle (new, open, backup, restore), logout, and exit.
- Project actions: project setup, XER import, Primavera connections, and project selection.
- Module access: CBS, Weight Factors, Register, Progress Update, Reports, and Settings are accessed from dedicated pages.
- Administration screens are role-sensitive — some actions only appear or function for Admins.

IMPORTANT

Complete the Project Setup and P6 import before using any downstream module. All modules depend on a correctly initialized project database.

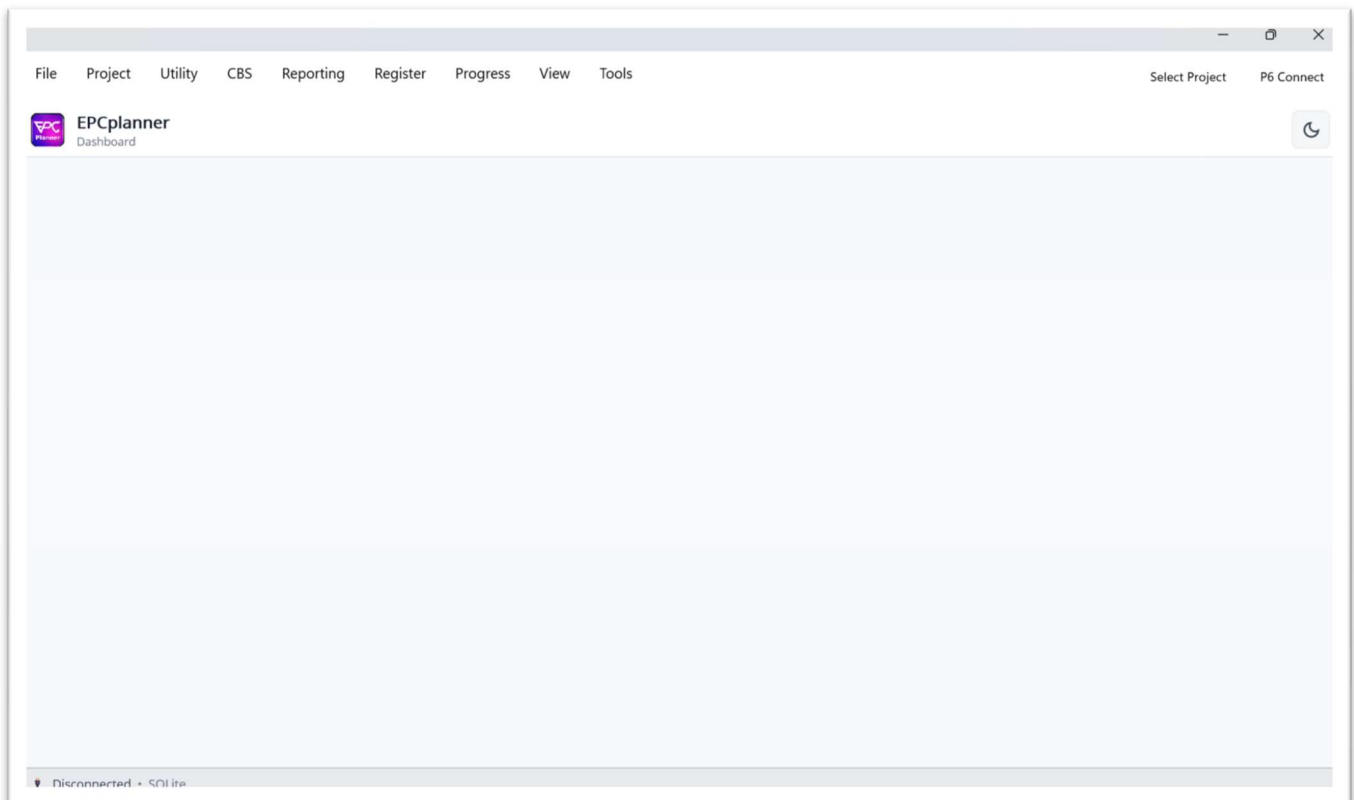


Figure 2.1 — Main application shell. All modules and commands are accessible from the top-level navigation.



3. Project Databases

EPCplanner operates on a local-first model. The SQLite project database file is the single source of truth for all project data. Treat the database file as the project file itself.

3.1 Create a New Project Database

Step	Action	Expected Result
1	Select File → New Project.	The application prompts for a database location and file name.
2	Choose the save folder and enter the file name.	A new SQLite project database file is created.
3	Wait for schema initialization to complete.	The project database is ready for setup and data loading.

3.2 Open an Existing Database

Step	Action	Expected Result
1	Select File → Open Database.	A file picker dialog opens.
2	Navigate to and select the required project database file.	The database opens and becomes the active project.
3	Verify the correct project is active before continuing.	All subsequent operations target the selected database.

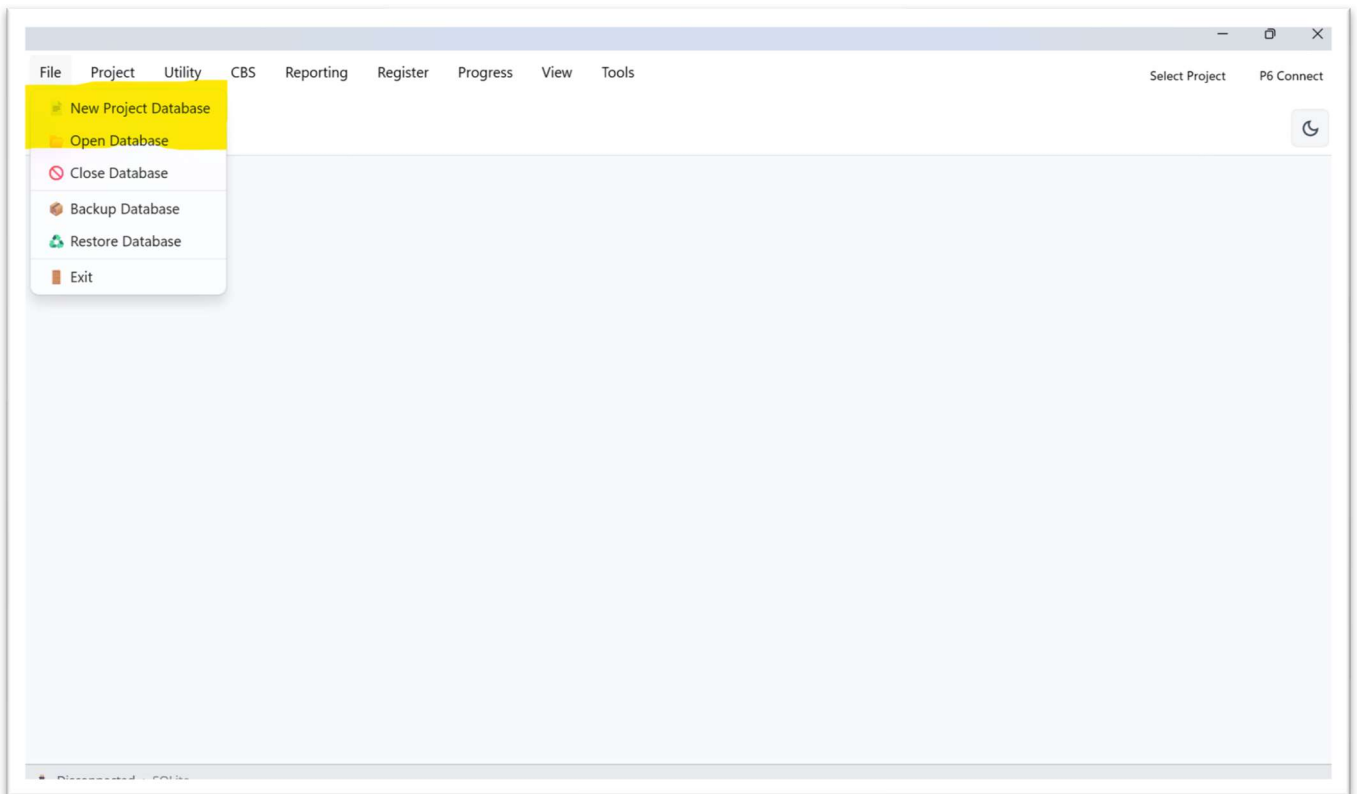


Figure 3.1 — New / Open database flow. Use File → New Project Database to create, and File → Open Database to open an existing project.



3.3 Backup and Restore

Step	Action	Expected Result
1	Use Backup Database before major imports or structural updates.	A backup copy of the active database is created.
2	Store the backup in a controlled folder with a dated name.	Recovery is possible if a later step fails or corrupts data.
3	Use Restore Database only when intentionally rolling back.	The selected backup replaces the current working state.

- Recommended: create a backup before XER import, major register import, large template changes, or migration work.
- Name backups with clear dates and milestones — example: ProjectA_before_XER_2026-03-23.
- Restore is a corrective action. Confirm the correct target file before proceeding.

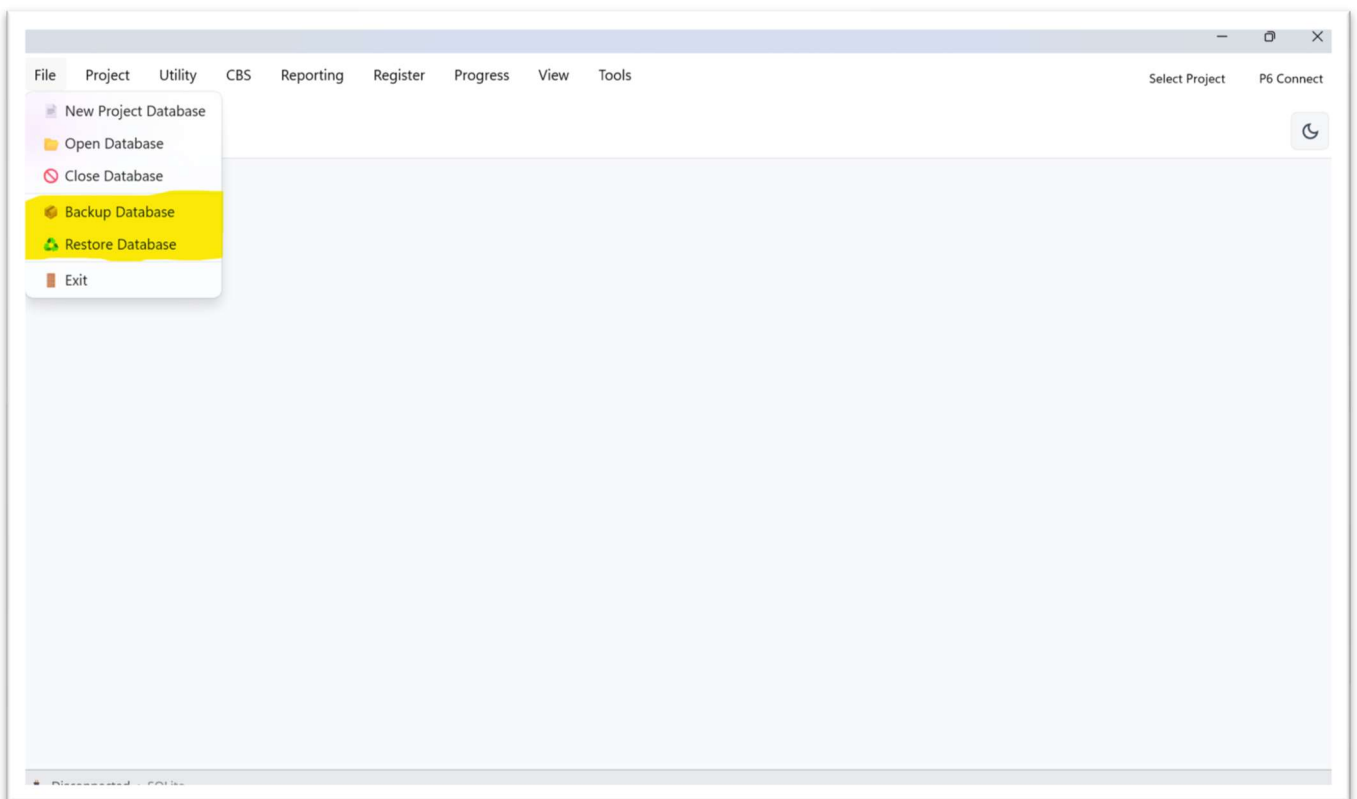


Figure 3.2 — Backup and Restore commands. Always back up before any major import or structural operation.



4. Primavera P6 Integration

EPCplanner integrates with Primavera P6 through two complementary pathways: XER file import for universal schedule intake, and direct database connection (Oracle, SQL Server, or standalone SQLite) for live two-way synchronization including progress push-back to P6.

4.1 Import Primavera XER

XER import loads WBS, activities, resources, relationships, and all related schedule data into the EPCplanner project database. This is the standard entry point for schedule-based workflows.

If a plan version already exists for the project, importing a new XER opens the Plan Revision dialog before the import proceeds, so the new schedule can be recorded as a Revision, Recovery Plan, Rebaseline, or Forecast. See Chapter 14, Plan Versioning, for the full workflow.

Step	Action	Expected Result
1	Select Project → Import XER.	The file selection dialog opens.
2	Pick the required XER file.	The application reads and profiles the file schema.
3	Confirm and run the import.	WBS, activities, relationships, resources, and calendars are loaded.
4	Wait for normalization and mapping to complete.	The project database is populated with schedule data ready for reporting and rollup.

- After import, review the WBS structure, activity list, calendars, and relationships before proceeding to dependent workflows.
- If Register rollup will be used, verify that the activity IDs and task codes are correct before linking register items.

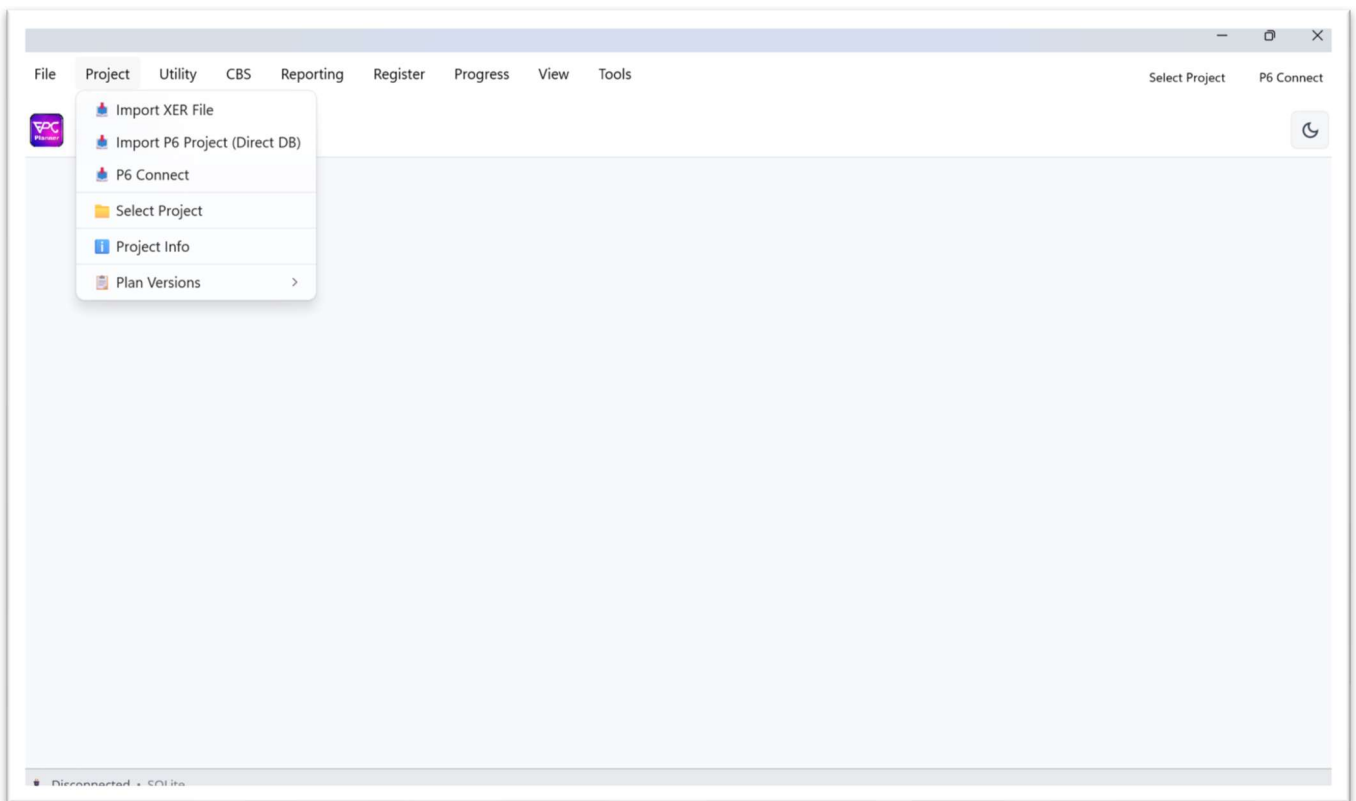


Figure 4.1 — XER import flow. Use Project → Import XER to load Primavera schedule tables into the project database.



4.2 Connect to Primavera Database

EPCplanner supports direct connection to Primavera P6 databases — Oracle, SQL Server, and standalone SQLite. Connection profiles are saved and named for controlled multi-environment use. Only Administrators can create Oracle or SQL Server connections; other users may create local SQLite connections.

Step	Action	Expected Result
1	Open the Primavera Connection screen.	Available connector options are displayed.
2	Select the connector type (Oracle / SQL Server / SQLite) and profile name.	The connection detail fields become editable.
3	Enter or browse the database path or server connection string.	The connection can be tested and saved.
4	Test the connection.	A success or failure status is returned immediately.
5	Browse the EPS tree and select the target Primavera project.	The project is linked to the EPCplanner database.

- Use named profiles (for example: Production, Test, Client-Copy) for controlled environments.
- Oracle and SQL Server connections are restricted to Administrator role — keep under admin control in shared workstation environments.

TIP

The P6 connection supports both Read (import) and Write (progress push). Progress push transfers actual progress, actual dates, and remaining duration from EPCplanner back to the live P6 project.

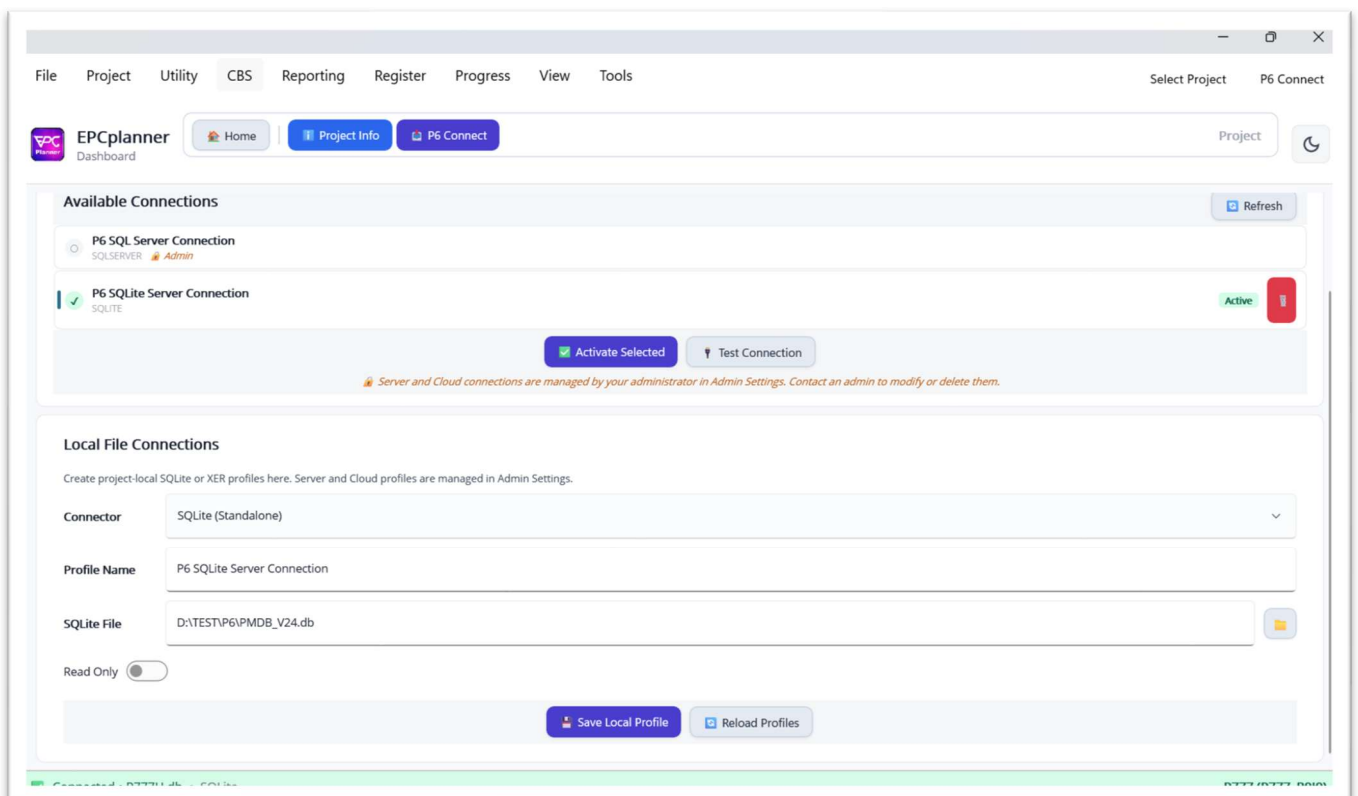


Figure 4.2 — Primavera connection page. Administrators manage Oracle and SQL Server profiles; other users may create local SQLite connections.



4.3 Select Project from EPS Tree

The Primavera project picker presents the EPS tree in the same familiar view used in Primavera P6. Select the correct project carefully — all subsequent imports and progress push operations target this selection.

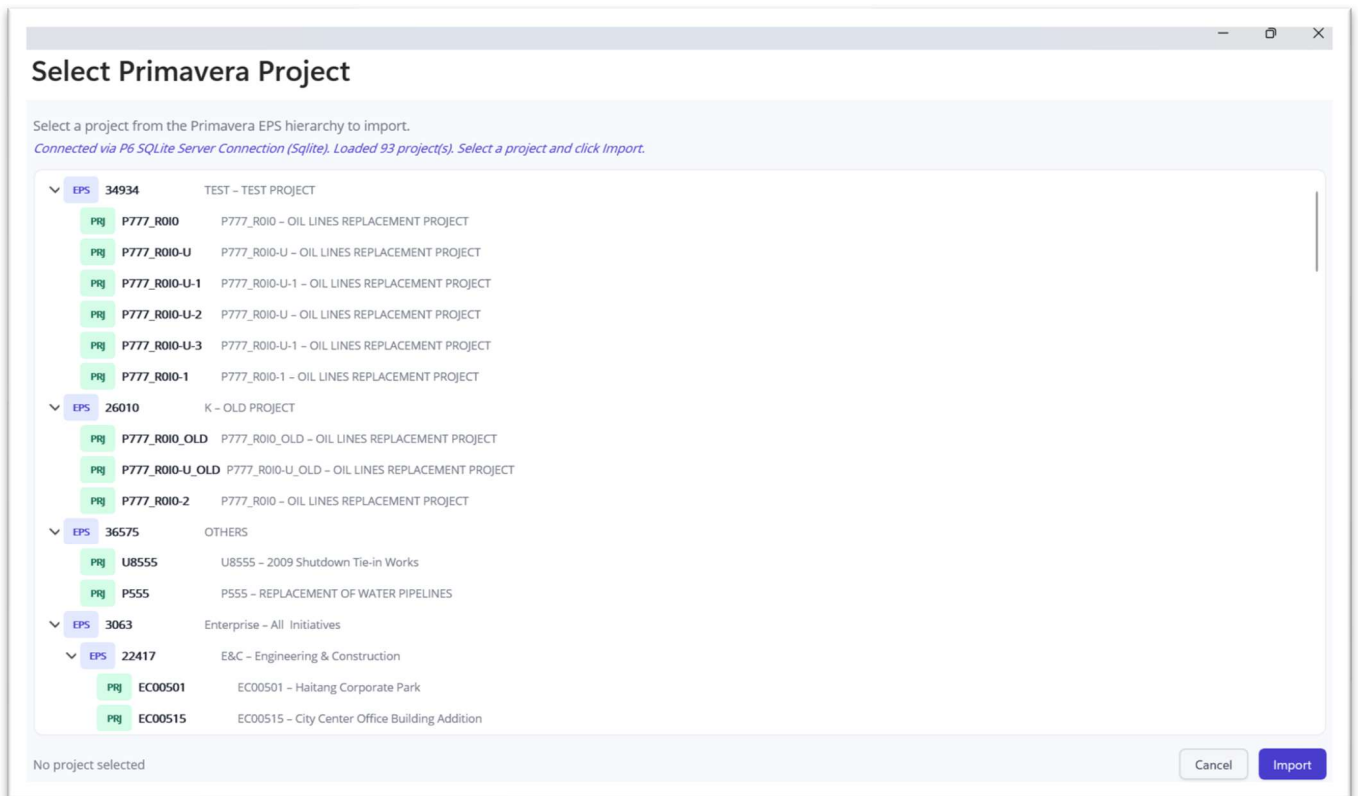


Figure 4.3 — Primavera project picker. Used for both importing the schedule and exporting actual progress back to the P6 project.



5. Project Setup

Project Setup stores the project identity and operating rules used across all modules and reports. Complete this section early, before any major data imports.

Step	Action	Expected Result
1	Open Project Setup.	The project setup page appears.
2	Enter project identity fields: project name, client project number, company project number, revision number, and issuance number.	Project metadata becomes available across all reports.
3	Define cut-off settings and reporting period logic.	Weekly and monthly routines use consistent period logic.
4	Save the changes.	The active project keeps the updated settings.

- Cut-off logic is critical — progress updates and actual date validation rules depend on it.
- Complete project setup before large data imports to ensure correct metadata appears in all generated reports.

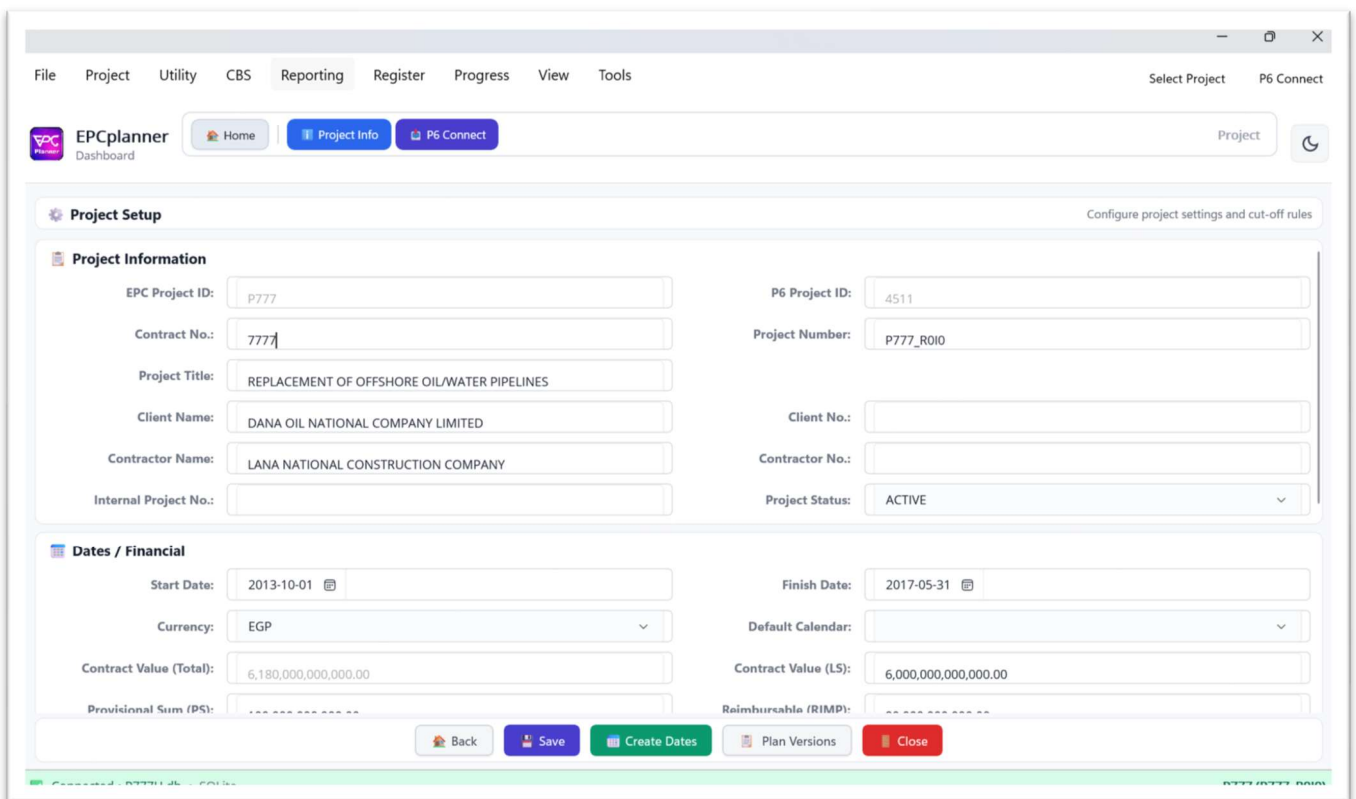


Figure 5.1 — Project Setup page. Configure project identity, cut-off settings, and reporting parameters before importing schedule data.



6. Weight Factors Workflow

Weight Factors (WF) distribute measurable planning weight across activities or CBS items based on configured scope logic. Correct WF distribution is the foundation for accurate progress calculation and S-curve generation. When a CBS is in use, Weight Factors are generated automatically from the CBS–Activity distribution (Section 7.7) and transferred here. Complete the CBS workflow (Section 7) before configuring Weight Factors manually.

Step	Action	Expected Result
1	Open the Weight Factors screen.	The WF workspace is ready.
2	Export the WF Template from the toolbar.	A blank Excel template is generated for data entry.
3	Fill in the WF data in the template and save.	The template is ready for import.
4	Import the completed WF Excel file.	Weight values are loaded into the current database.
5	Review totals and alignment with the intended scope.	Incorrect distributions can be identified and corrected.
6	Save and proceed to dependent workflows.	WF-based calculations become available in reports and rollups.

- Review total weight logic after every import. The total must equal 100% across the applicable scope.
- Do not proceed to formal reporting until the WF distribution is fully validated.

NOTE

Weight Factors directly drive S-curve generation, progress rollup, and CBS progress calculation. An incorrect WF distribution will produce incorrect results across all dependent reports.

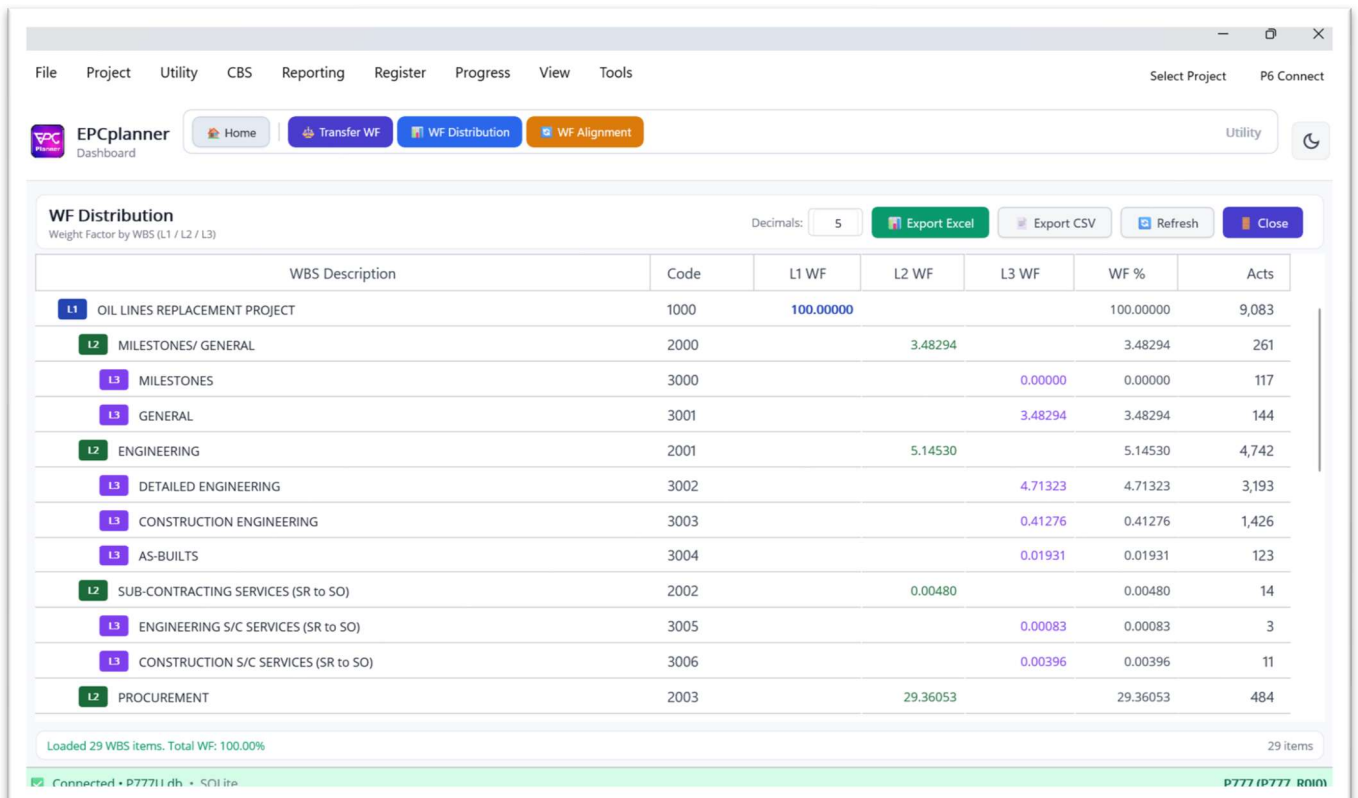


Figure 6.1 — Weight Factors screen. Import and validate weight distribution before proceeding to progress workflows.



6.1 Transfer Weight Factors

Use Transfer WF to roll up and transfer Register weight factors to the corresponding Activity weight factors. This links the register progress measurement system to the schedule-based progress engine.

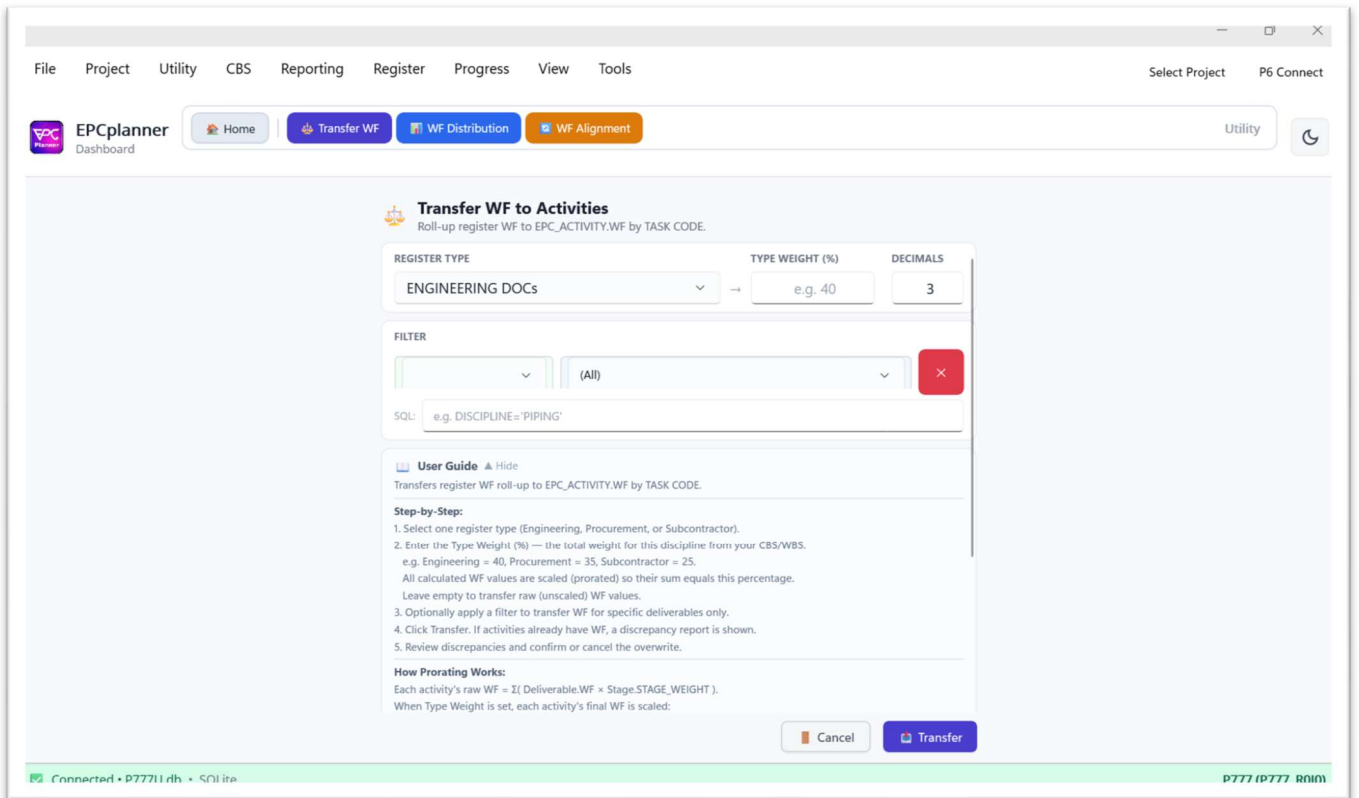


Figure 6.2 — Transfer Weight Factors screen. Transfers Register WF values to Activity WF for unified progress rollup.



6.2 Weight Factor Alignment

Weight Factor Alignment provides a side-by-side comparison between Activity progress WF and Cost/Invoice WF. Use this to detect and resolve any discrepancies between the physical progress measurement basis and the commercial measurement basis before issuing invoices or progress certificates.

The screenshot shows the 'WF Alignment' interface in EPCplanner. At the top, there are navigation tabs: File, Project, Utility, CBS, Reporting, Register, Progress, View, Tools. Below this is the EPCplanner Dashboard with buttons for Home, Transfer WF, WF Distribution, and WF Alignment. The main section is titled 'WF Alignment' and includes instructions: 'Compare and synchronize Weight Factors between CBS invoicing (WF Table) and progress reporting (Activity WF)'. There are controls for 'DECIMALS' (set to 4) and 'SYNC DIRECTION' (set to 'CBS → Progress (WF Table → Act)'). A 'Compare' button is active, and a 'Sync' button is disabled. A summary bar shows: 'All 9083 activities are aligned.' Below this is a table with columns: TOTAL (9083), ALIGNED (9083), MISMATCHED (0), CBS ONLY (0), ACTIVITY ONLY (0), Σ CBS WF (100.0000), Σ ACT WF (100.0000), and Σ DELTA (0.0000). A 'Show mismatched only' checkbox is unchecked. The main table lists 7 tasks, all with 'OK' status and 'Both' source.

TOTAL	ALIGNED	MISMATCHED	CBS ONLY	ACTIVITY ONLY	Σ CBS WF	Σ ACT WF	Σ DELTA
9083	9083	0	0	0	100.0000	100.0000	0.0000

TASK CODE	WBS	TASK NAME	CBS WF	ACT WF	DELTA	DELTA	STATUS	SOURCE
EABAP100	28365	AS-BUILT & FINAL DOCUMENTATION - PIPELINE & RISRES (INCL. DEMOLITIO...	0.0005	0.0005	0.0000	0.0000	OK	Both
EABAP101	28365	AS-BUILT & FINAL DOCUMENTATION - PIPELINE & RISRES (RADIAL-280)	0.0005	0.0005	0.0000	0.0000	OK	Both
EABAP102	28365	AS-BUILT & FINAL DOCUMENTATION - PIPELINE & RISRES (RADIAL-47)	0.0001	0.0001	0.0000	0.0000	OK	Both
EABAP103	28365	AS-BUILT & FINAL DOCUMENTATION - PIPELINE & RISRES (RADIAL-38)	0.0005	0.0005	0.0000	0.0000	OK	Both
EABAP104	28365	AS-BUILT & FINAL DOCUMENTATION - PIPELINE & RISRES (RADIAL-237)	0.0001	0.0001	0.0000	0.0000	OK	Both
EABAP105	28365	AS-BUILT & FINAL DOCUMENTATION - PIPELINE & RISRES (RADIAL-24)	0.0006	0.0006	0.0000	0.0000	OK	Both
EABAP106	28365	AS-BUILT & FINAL DOCUMENTATION - PIPELINE & RISRES (RADIAL-304)	0.0001	0.0001	0.0000	0.0000	OK	Both
EABAP107	28365	AS-BUILT & FINAL DOCUMENTATION - PIPELINE & RISRES (RADIAL-22)	0.0006	0.0006	0.0000	0.0000	OK	Both

This screenshot is identical to the one above, but the 'Show mismatched only' checkbox is checked. The table below the summary bar is empty, indicating that no mismatches were found.

Figure 6.3 — Weight Factor Alignment screen. Compare progress WF against Cost/Invoice WF to validate consistency before formal issuance.



7. CBS Workflow

The Cost Breakdown Structure (CBS) module manages the lump-sum price schedule, activity-to-bill linkage, invoice generation, and CBS-based reporting. CBS operates in conjunction with Weight Factors to calculate commercial progress and generate payment certificates.

7.1 Typical CBS Sequence

Step	Action	Expected Result
1	Open the CBS workflow screen.	The CBS workspace is ready.
2	Import CBS data from Excel using the mapper.	Staged data is loaded with field mapping applied.
3	Validate the imported CBS data.	Structural and mapping issues can be corrected before promotion.
4	Promote validated CBS data.	The CBS becomes the active commercial baseline.
5	Link CBS items to WBS/Activities using CBS Distribution.	Cost and progress relationships are established.
6	Generate WF from the CBS-Activity mapping.	Weight factors are automatically calculated from the bill structure.
7	Export or report CBS data and generate invoices.	Controlled payment certificate outputs are ready for issue.

- Validate before promoting — mapping issues detected early avoid costly corrections downstream.
- Link quality matters: downstream invoice calculations and progress reporting depend on clean activity relationships.
- CBS reports and invoice print workflows should be verified after each major data refresh.

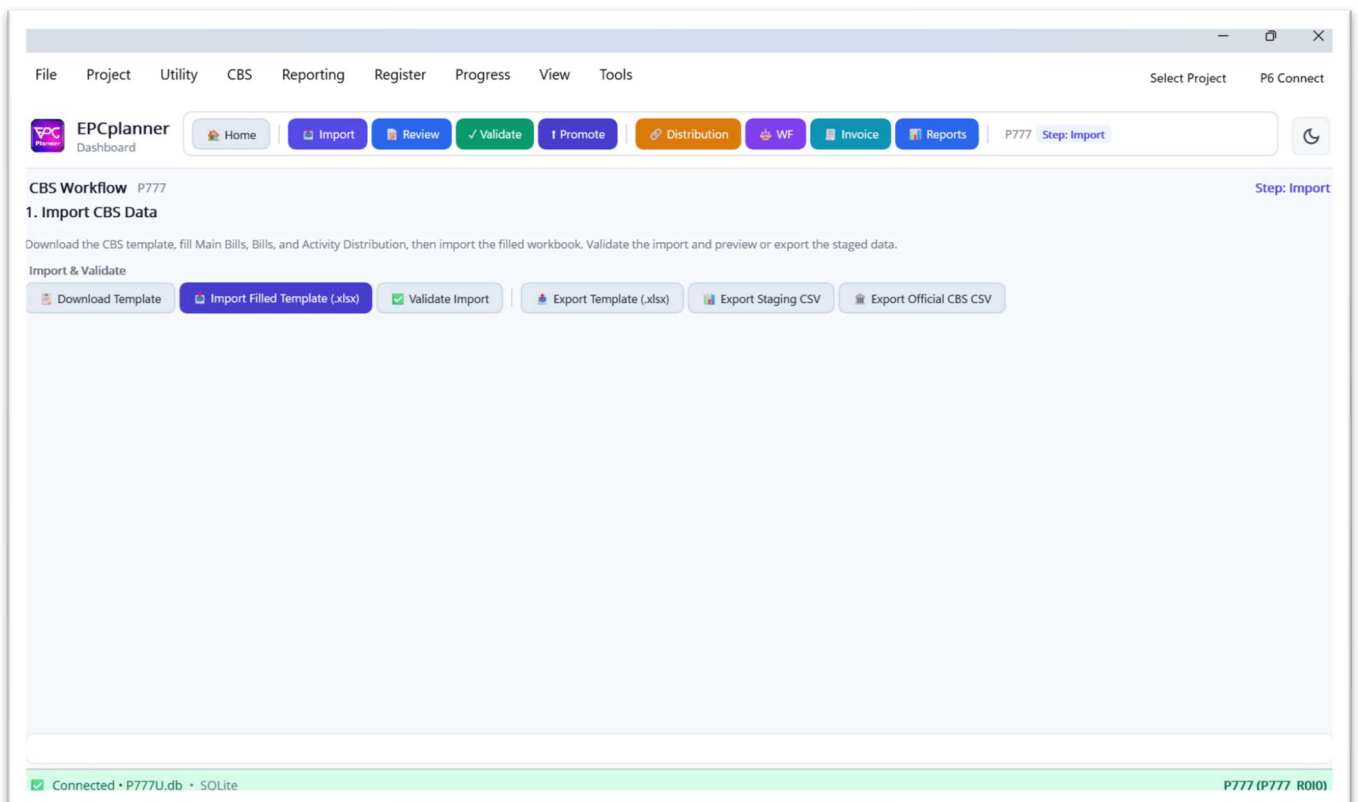


Figure 7.1 — CBS workflow screen. The main CBS workspace showing the bill structure and workflow controls.



7.2 Import CBS data

CBS data is loaded from an Excel template using a field mapper. Export the blank template, populate it with contract line items and pricing, then import the completed file. The mapper aligns source columns to the CBS target fields before staging the data for validation and promotion.

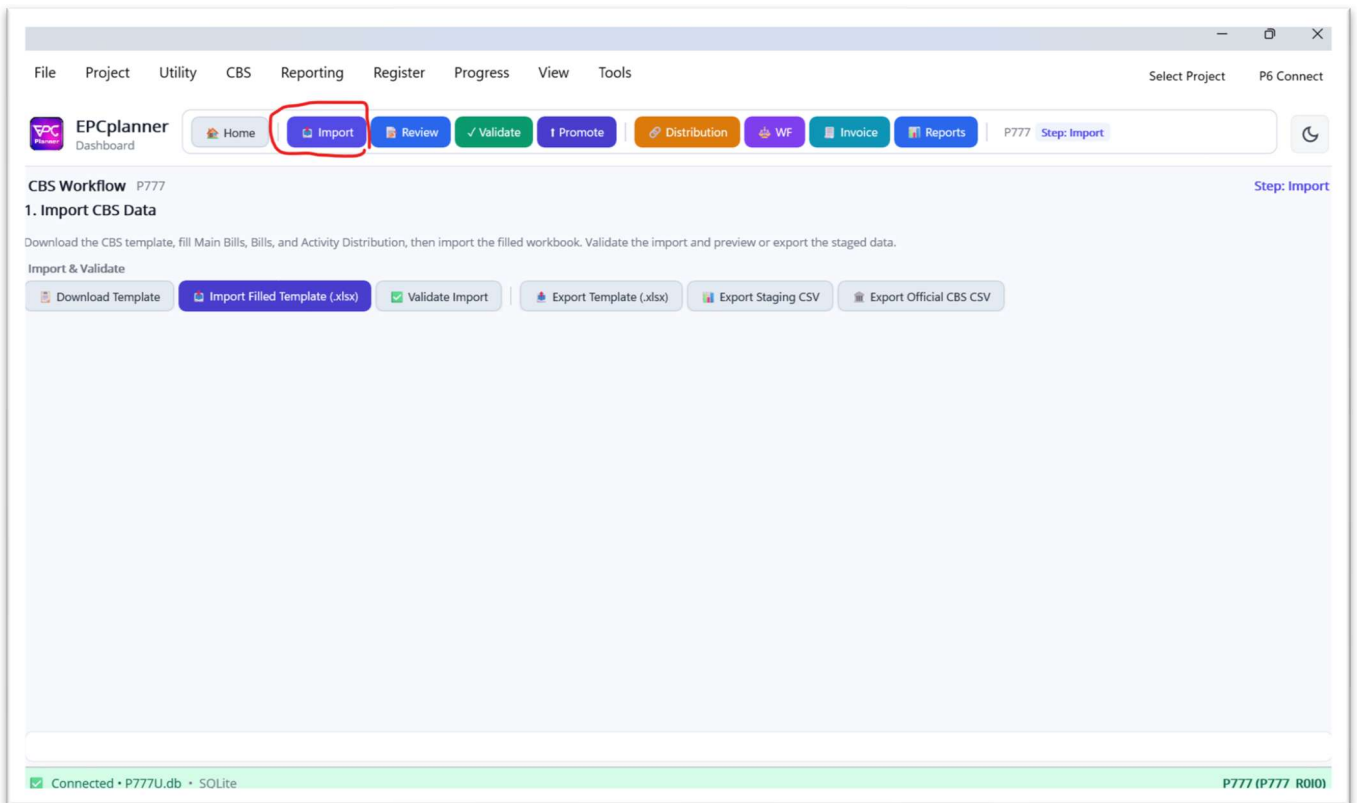


Figure 7.2 — CBS Import screen. Export the blank Excel template, populate it with contract line items and pricing, then import the completed file using the field mapper.



7.3 CBS Review

CBS Review presents the staged import data in tabular form before promotion. Use this screen to inspect all loaded line items, verify quantities, unit rates, and totals, and confirm that the field mapping has produced the correct values. Identify and correct any errors at this stage before proceeding to Validation.

CBS Workflow P777

2. Review & Edit CBS Step: Review

Review imported CBS hierarchy and staging rows before promotion.

Staging Preview (200 rows) Refresh Preview

Bill No	Description	Amount	ManhoursUnit	Parent
A1.1	Provision of Performance Bank Guarantee in accordance with the General Conditions of Contract.	1,554,098.00		
A1.2	Provision of Retention Bank Guarantee in accordance with the General Conditions of Contract.	353,206.00		
A1.3	Provision of Contractor Placed Insurances in accordance with the General Conditions of Contract.	3,009,193.00		
A1.5	Provision of Painting Guarantee in accordance with the General Conditions of Contract.	30,092.00		
A1.6	Project Management Services (Shall be inclusive all Project control, document control, secretarial services, QA, QC, HSE & administration)	19,741,878.00		
A10.1.1	NEW PLATFORMS INSTALLATION - GENERAL- Mobilisation	1,731,993.00		
A10.1.2	NEW PLATFORMS INSTALLATION - GENERAL- Demobilisation	929,744.00		
A10.2.1	Jacket Installation for CRP including Riser Fenders and Boat Fenders	2,310,579.00		
A10.2.2	Jacket Installation for Bridge Support of CRP	1,379,654.00		
A10.2.3	Deck Installation for CRP	1,574,701.00		
A10.2.4	Helideck Installation for CRP	314,940.00		
A10.2.6	Bridge Installation for CRP	209,961.00		
A10.2.7	Tie-Ins of CRP	2,342,501.00		
A10.2.9	Commissioning / Start-up of CRP	840,669.00		
A10.3.1	Jacket Installation for RP1 including Riser Fenders and Boat Fenders	1,932,914.00		
A10.3.2	Jacket Installation for Bridges Support of RP1	2,783,692.00		
A10.3.3	Deck Installation for RP1	1,562,128.00		
A10.3.5	Bridges Installation for RP1	1,249,704.00		

Figure 7.3 — CBS Review screen. Inspect all staged line items, verify quantities, unit rates, and totals before proceeding to Validation.



7.4 CBS Validation

CBS Validation checks the staged data against structural rules before promotion is permitted. Issues such as missing item codes, zero-value line items, duplicate entries, or mapping gaps are listed with descriptions. Resolve all validation errors before proceeding to Promote. Items with warnings should be reviewed and either corrected or accepted with documented justification.

CBS Workflow P777 Step: Validate

Staging Rows: 0 Staging Errors: 0 Staging Warns: 0 Dist Mappings: 14055 Dist Errors: 0 Dist Warns: 71

Distribution passed: 14055 mappings, 71 warnings.

Warning	Distribution	Item Code	Value 1	Value 2	Value 3	Description
Warning	Distribution	A15.1.4	15,004.02	15,004.00	0.02	Rounding difference
Warning	Distribution	A15.4.2.1	94,825.01	94,825.00	0.01	Rounding difference
Warning	Distribution	A16.1.2.11	15,335.02	15,335.00	0.02	Rounding difference
Warning	Distribution	A16.1.2.2	100,275.98	100,276.00	-0.02	Rounding difference
Warning	Distribution	A16.1.2.6	305,584.05	305,584.00	0.05	Rounding difference
Warning	Distribution	A16.1.2.8	60,949.01	60,949.00	0.01	Rounding difference
Warning	Distribution	A16.1.2.9	22,333.03	22,333.00	0.03	Rounding difference
Warning	Distribution	A16.1.3	30,060.60	31,454.00	-1,393.40	Amount mismatch
Warning	Distribution	A16.1.4	45,950.02	45,950.00	0.02	Rounding difference

Activity-Bill Distributions (7 rows)

Bill 'A16.1.2.11': 7 mapped activity distribution(s).

Task Code	Task Title	Weight %	Amount Dist
EABEL102	AS-BUILT & FINAL DOCUMENTATION - ELECTRICAL (BST-CN)	12.29	1,885.40
EABIC102	AS-BUILT & FINAL DOCUMENTATION - INSTR. & CONTROL (BST-CN)	11.76	1,803.01
EABME102	AS-BUILT & FINAL DOCUMENTATION - MECHANICAL (BST-CN)	2.33	357.48
EABPR102	AS-BUILT & FINAL DOCUMENTATION - PROCESS (BST-CN)	18.71	2,869.61
EABPR203	AS-BUILT & FINAL DOCUMENTATION - SAFETY (BST-CN)	0.37	57.32
EABST102	AS-BUILT & FINAL DOCUMENTATION - STRUCTURAL (BST-CN)	31.62	4,848.17

Distribution passed: 14055 mappings, 71 warnings.

Connected: P77711.db - SQLite P777 (P777) 0000

Figure 7.4 — CBS Validation screen. Structural checks against the staged data, listing missing item codes, zero-value lines, duplicates, and mapping gaps that must be resolved before promotion.



7.5 CBS Promote

CBS Promote converts the validated staged data into the active commercial baseline. Once promoted, the CBS becomes the reference against which all activity linkage, weight factor generation, and invoice calculations operate. Promotion is a controlled one-way action — ensure validation is fully resolved and the data has been reviewed before executing. A database backup before promotion is recommended.

WARNING

CBS Promote is a one-way action that cannot be undone through normal operations. Take a database backup immediately before promoting. Once the CBS is active, re-importing or re-promoting CBS data will overwrite the existing commercial baseline and recalculate all linked Weight Factors, invoices, and progress data.

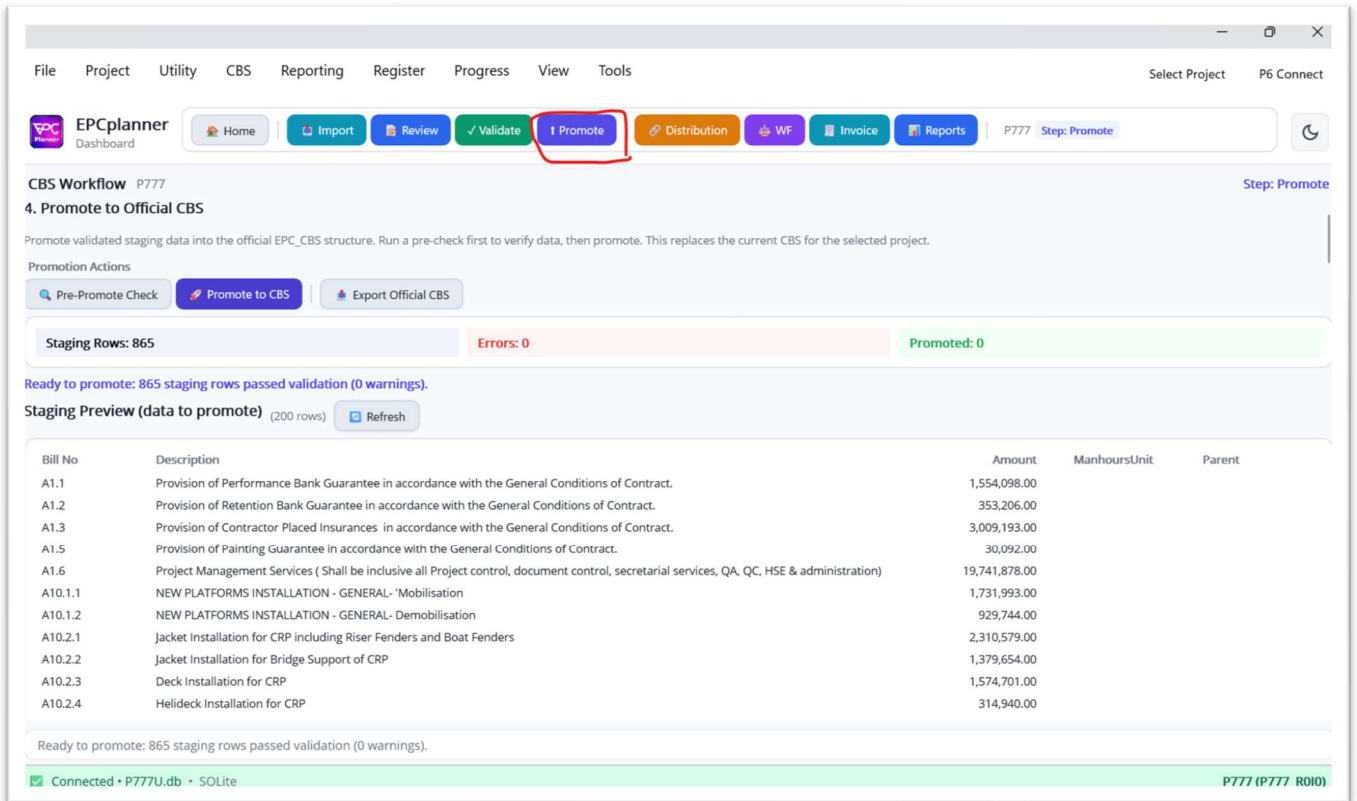


Figure 7.5 — CBS Promote screen. Convert validated staged data into the active commercial baseline. A database backup is recommended before this controlled, one-way action.



7.6 CBS Distribution

CBS Distribution manages the mapping between CBS items, WBS nodes, and activities. This mapping drives weight factor generation and determines how commercial progress is attributed across the project breakdown structure.

The screenshot shows the EPCplanner interface for the 'CBS Distribution' screen. The top navigation bar includes 'File', 'Project', 'Utility', 'CBS', 'Reporting', 'Register', 'Progress', 'View', and 'Tools'. The 'Distribution' button is highlighted with a red circle. Below the navigation bar, there are buttons for 'Home', 'Import', 'Review', 'Validate', 'Promote', 'Distribution', 'WF', 'Invoice', and 'Reports'. The 'Distribution' button is circled in red. The main area is titled 'CBS Workflow P777' and shows 'Step: Mapping'. Below this, there are controls for 'Project: P777_R010', 'Distribution %: 100', and buttons for 'Refresh', 'Show', 'Checked Only', 'Map →', 'Validate', 'Delete', 'Export Dist CSV', and 'Export CBS CSV'. The 'CBS Bill Items' section shows a list of bill items with checkboxes, where A1.1 is selected. The 'Primavera Activities (Task Code)' section shows a list of activities with checkboxes. The 'Activity-Bill Distributions' section shows a table with one row of data.

Task Code	Task Title	Bill No	Bill Description	Act Dist %	Weight %	Amount Dist	WFDist
HGEN104	PERFORMANCE BANK GUARANTEE	A1.1	Provision of Performance Bank Guarantee in accordance with the General Conditions of Contract.	100.00	100.00	1,554,097.97	0.15

Figure 7.6 — CBS Distribution screen. Map CBS items to WBS/Activities to establish the commercial progress basis.



7.7 CBS Weight Factor

CBS Weight Factor generates activity weight values automatically from the CBS-Activity distribution mapping. Once generated, these values populate the Weight Factors module and form the basis for physical progress calculation, S-curve generation, and period reporting. Review the generated values for completeness and total distribution before proceeding to progress update workflows.

Bill	Description	Cost	Manhours	Cost %	MH %	Final WF %
A1.1	Provision of Performance Bank Guarantee in accordance with the General Conditions of Contract.	1,554,098.00	0.00	0.189	0.000	0.189
A1.2	Provision of Retention Bank Guarantee in accordance with the General Conditions of Contract.	353,206.00	0.00	0.043	0.000	0.043
A1.3	Provision of Contractor Placed Insurances in accordance with the General Conditions of Contract.	3,009,193.00	0.00	0.365	0.000	0.365
A1.5	Provision of Painting Guarantee in accordance with the General Conditions of Contract.	30,092.00	0.00	0.004	0.000	0.004
A1.6	Project Management Services (Shall be inclusive all Project control, document control, secretarial services, QA, QC, HSE & ad...	19,741,878.00	46,104.00	2.398	1.312	2.398
A2.1.1	Carrying out all required Site Surveys/Data collection / verification of existing facilities before commencement of design work...	2,775,415.00	1,852.19	0.337	0.053	0.337
A2.2.1	PROCESS	1,146,618.00	21,762.19	0.139	0.619	0.139
A2.2.2	STATIC/ROTATING EQUIPMENT (MECHANICAL)	716,248.00	4,586.09	0.087	0.131	0.087
A2.2.3	PIPING	4,835,272.00	106,236.41	0.587	3.024	0.587
A2.2.4	SUB SEA PIPELINES WITH ALL CROSSINGS (INCLUDING ALL INTERFACE PROJECTS REFERRED IN THIS TENDER DOCUMENT)	2,302,370.00	48,235.76	0.280	1.373	0.280
A2.2.5	CONTROL & INSTRUMENTATION, TELECOMMUNICATION	2,933,941.00	61,477.85	0.356	1.750	0.356
A2.2.6	ELECTRICAL	2,182,735.00	37,627.89	0.265	1.071	0.265

WF preview: 865 items, total WF=100.00%.

Figure 7.7 — CBS Weight Factor screen. Activity weight values generated automatically from the CBS-Activity distribution mapping, ready for review before progress update workflows begin.



7.8 CBS Invoices and Reports

The CBS invoice and reporting module generates formal payment certificate outputs, print previews, and packaged review documents. Invoices are composed from the CBS-Activity mapping and current progress data.

- Use Print Preview before final PDF issuance to verify layout and calculated amounts.
- CBS invoice templates are customizable to match contract requirements.
- Verify invoice data against the validated progress update before issuing to the client.

Report Preview

Invoice Preview — P777_R010

Documents: 1 | Generated: 06/06/2026 21:18:52

Excel
PDF
Save
Print
Close

BILL WISE INVOICE PROGRESS REPORT

777_R010

Commercial bill structure grouped by Main Bill

Invoice No: INV-20131120-0830

Date: 2013-11-20

Cut-Off / Period: 2013-11-20

Status: DRAFT

A1 — Provision of Performance Bank Guarantee in accordance with the General Conditions of Contract.							
Bill No.	Description	Contract Amt.	Prog %	Prev. Amt.	Curr. Amt.	Cumul. Amt.	Remain. Amt.
1	A1.1	Provision of Performance Bank Guarantee in accordance with the General Conditions of Contract.	1,554,098.00	0.00	0.00	0.00	1,554,098.00
2	A1.2	Provision of Retention Bank Guarantee in accordance with the General Conditions of Contract.	353,206.00	0.00	0.00	0.00	353,206.00
3	A1.3	Provision of Contractor Placed Insurances in accordance with the General Conditions of Contract.	3,009,193.00	0.00	0.00	0.00	3,009,193.00
4	A1.5	Provision of Painting Guarantee in accordance with the General Conditions of Contract.	30,092.00	0.00	0.00	0.00	30,092.00
5	A1.6	Project Management Services (Shall be inclusive all Project control, document control, secretarial services, QA, QC, HSE & administration)	19,741,878.00	0.76	0.00	150,721.92	19,591,156.08
ubtotal — A1			24,688,467.00	0.61	0.00	150,721.92	24,537,745.08

A2 — Carrying out all required Site Surveys/Data collection / verification of existing facilities before commencement of design works and carry out site visits at various stages of Project.							
Bill No.	Description	Contract Amt.	Prog %	Prev. Amt.	Curr. Amt.	Cumul. Amt.	Remain. Amt.
A2.1 — Carrying out all required Site Surveys/Data collection / verification of existing facilities before commencement of design works and carry out site visits at various stages of Project.							
6	A2.1.1	Carrying out all required Site Surveys/Data collection / verification of existing facilities before commencement of design works and carry out site visits at various stages of Project.	2,775,415.00	0.66	0.00	18,426.30	2,756,988.70
A2.2 — PROCESS, STATIC/ROTATING EQUIPMENT (MECHANICAL), PIPING, SUB SEA PIPELINES WITH ALL CROSSINGS (INCLUDING ALL INTERFACE PROJECTS REFERRED IN THIS TENDER DOCUMENT), CONTROL & INSTRUMENTATION, TELECOMMUNICATION, ELECTRICAL, STRUCTURAL / ARCHITECTURAL, SAFETY / HSE, CORROSION & MATERIAL SELECTION, ALL RELEVANT CONSTRUCTION ENGG. & ASSOCIATED COSTS, Providing as-built drawings, design dossier, PDMs and Requirements for Documentation & Registration UTCJ of project as specified in accordance with the Scope of Work., OTHERS (If not listed above)							
7	A2.2.1	PROCESS	1,146,618.00	1.61	0.00	18,450.00	1,128,168.00
8	A2.2.2	STATIC/ROTATING EQUIPMENT (MECHANICAL)	716,248.00	0.00	0.00	0.00	716,248.00
9	A2.2.3	PIPING	4,835,272.00	0.00	0.00	0.00	4,835,272.00
10	A2.2.4	SUB SEA PIPELINES WITH ALL CROSSINGS (INCLUDING ALL INTERFACE PROJECTS REFERRED IN THIS TENDER DOCUMENT)	2,302,370.00	1.20	0.00	27,626.10	2,274,743.90
11	A2.2.5	CONTROL & INSTRUMENTATION, TELECOMMUNICATION	2,933,941.00	0.00	0.00	0.00	2,933,941.00
12	A2.2.6	ELECTRICAL	2,182,735.00	0.00	0.00	0.00	2,182,735.00
13	A2.2.7	STRUCTURAL / ARCHITECTURAL	8,570,195.00	0.06	0.00	5,222.98	8,564,972.02
14	A2.2.8	SAFETY / HSE	435,349.00	0.00	0.00	0.00	435,349.00
15	A2.2.9	CORROSION & MATERIAL SELECTION	159,520.00	0.00	0.00	0.00	159,520.00
16	A2.2.10	ALL RELEVANT CONSTRUCTION ENGG. & ASSOCIATED COSTS	2,267,855.00	0.00	0.00	0.00	2,267,855.00
17	A2.2.11	Providing as-built drawings, design dossier, PDMs and Requirements for Documentation & Registration (UTCJ) of project as specified in accordance with the Scope of Work.	109,535.00	0.00	0.00	0.00	109,535.00
18	A2.2.12	OTHERS (if not listed above)	1,057,768.00	0.58	0.00	6,155.64	1,051,612.36
19	A2.2	SPECIAL STUDIES	224,664.00	2.76	0.00	6,186.13	218,477.87

Generation time: 0ms | File: preview_4f054d26b8d34ceb6140556afcac0e.html

Figure 7.8 — CBS invoice and report screen. Generate, preview, and export formal payment certificate outputs.



8. Progress Update Workflow

The Progress Update module converts the project from baseline-oriented planning into controlled actual progress tracking and period reporting. It manages the full update cycle: linear activity progress, register progress rollup, S-curve update, and P6 write-back.

8.1 Switch to In-Progress Mode

Before the first progress update, an Administrator must switch the project to In-Progress mode. This locks the planning baseline and activates progress workflows.

Step	Action	Expected Result
1	Open Admin Settings.	The administration panel appears.
2	Select the active project.	Mode controls become available for the chosen project.
3	Enable In-Progress Mode.	The planning baseline is locked and progress workflows activate.

IMPORTANT

Only an authorised Administrator should perform the In-Progress mode switch. This action is non-reversible — it permanently locks the planning baseline. Ensure all planning data (P6 import, CBS, Weight Factors, Register setup) is finalised, validated, and backed up before switching. Take a named baseline backup immediately before this action.

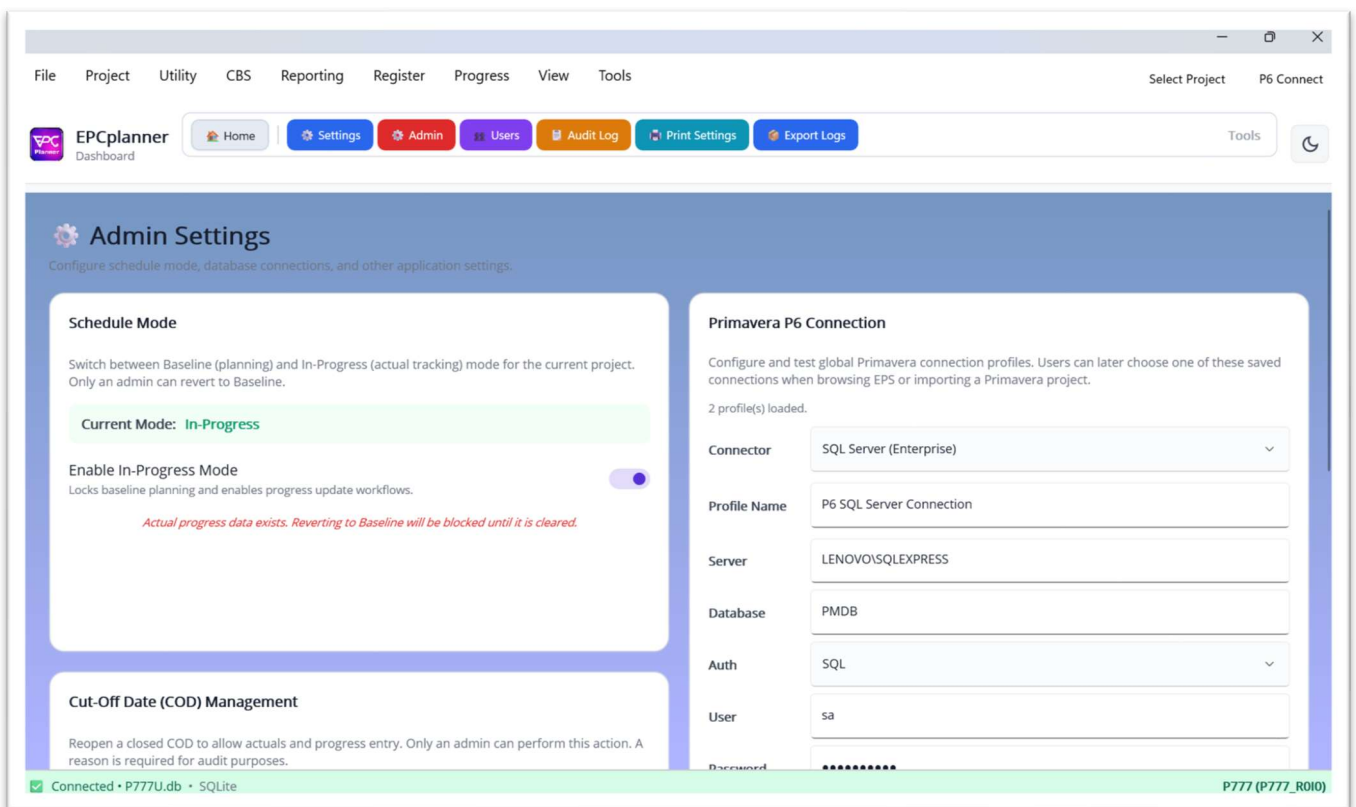


Figure 8.1 — Admin Settings mode switch. Switch from Planning to In-Progress mode to activate progress tracking.



8.2 Open a Cut-Off Date (COD)

Each reporting cycle begins by opening a Cut-Off Date. All progress entries and updates within the cycle are tied to this date. Use one controlled COD per reporting period.

WARNING

Closing a COD is a controlled, irreversible action under normal operations. Once closed, Freeze Guard prevents any retroactive entry of actual dates or stage completions for that period. Reopening a closed COD requires an authorised Administrator action and is logged in the Audit Log. Confirm that all actuals are entered, Reg Rollup and Run Update are complete, and reports have been reviewed before closing the COD.

The screenshot shows the 'Progress Update' dashboard for the project 'REPLACEMENT OF OFFSHORE OIL/WATER PIPELINES'. The dashboard includes a top navigation bar with menus like File, Project, Utility, CBS, Reporting, Register, Progress, View, and Tools. A toolbar contains various action buttons such as 'Home', 'Dashboard', 'Linear Update', 'Reg Update', 'View Reg', 'Import Feedback', 'History', 'Reports', 'Switch Mode', 'Save LW/LM', 'Reg Rollup', 'Run Update', 'S-Curve', 'Close COD', 'P6 Export', and 'Clear'. The main content area displays project status: 'Cut Off Date Status: Ongoing Update', 'ID: P777', and 'Progress COD: 2013-11-20'. It features several performance metrics: Early Plan (0.34%), Late Plan (0.00%), Actual (0.31%), Forecast (0.00%), Variance (Actual - Early) (-0.03%), and Total Weight Factor (100.00). A 'Progress Update Configuration' section is visible, with the 'Cut-Off Date' field set to '2013-11-20' and 'Update Scope' set to 'All'. A 'Run Progress Update' button is located at the bottom right of this section.

This screenshot shows the 'Quick Actions & COD Management' section of the EPCplanner dashboard. It features a 'Cut-Off Date' field with the value '2013-11-20' circled in red. Below this are buttons for 'Save Previous Period', 'Register Rollup', 'S-Curve Update', and 'Close Cut Off Date'. The 'Quick Actions & COD Management' section includes cards for 'Linear Activities' (5435 activities), 'Register Stages' (3648 activities), 'Progress History' (8 snapshots), and 'Export Report' (Excel / PDF). At the bottom, there is an 'Activity Breakdown' table showing 'Update Type Distribution' and 'WBS L1 Summary'.

Update Type	WBS L1 Summary	Percentage	Count
Linear	5435 02	4.31%	3.5
Register	3648 10	0.19%	5.1
S-Curve Plan	15	6.09%	0.0
	20	0.00%	29.4
	22	0.00%	7.3
	27	0.00%	5.2
	37	0.31%	49.5

Figure 8.2 — Progress Update dashboard. Set the cut-off date and select the update mode before entering actuals



8.3 Linear Progress Update

Linear Progress Update is used to enter physical progress, actual start date, actual finish date, and remaining duration for activities that are not linked to Engineering, Procurement, or Subcontractor registers.

- Enter actual progress percentage for each active activity.
- Update actual start and finish dates where applicable.
- Set remaining duration for activities that are started but not complete.

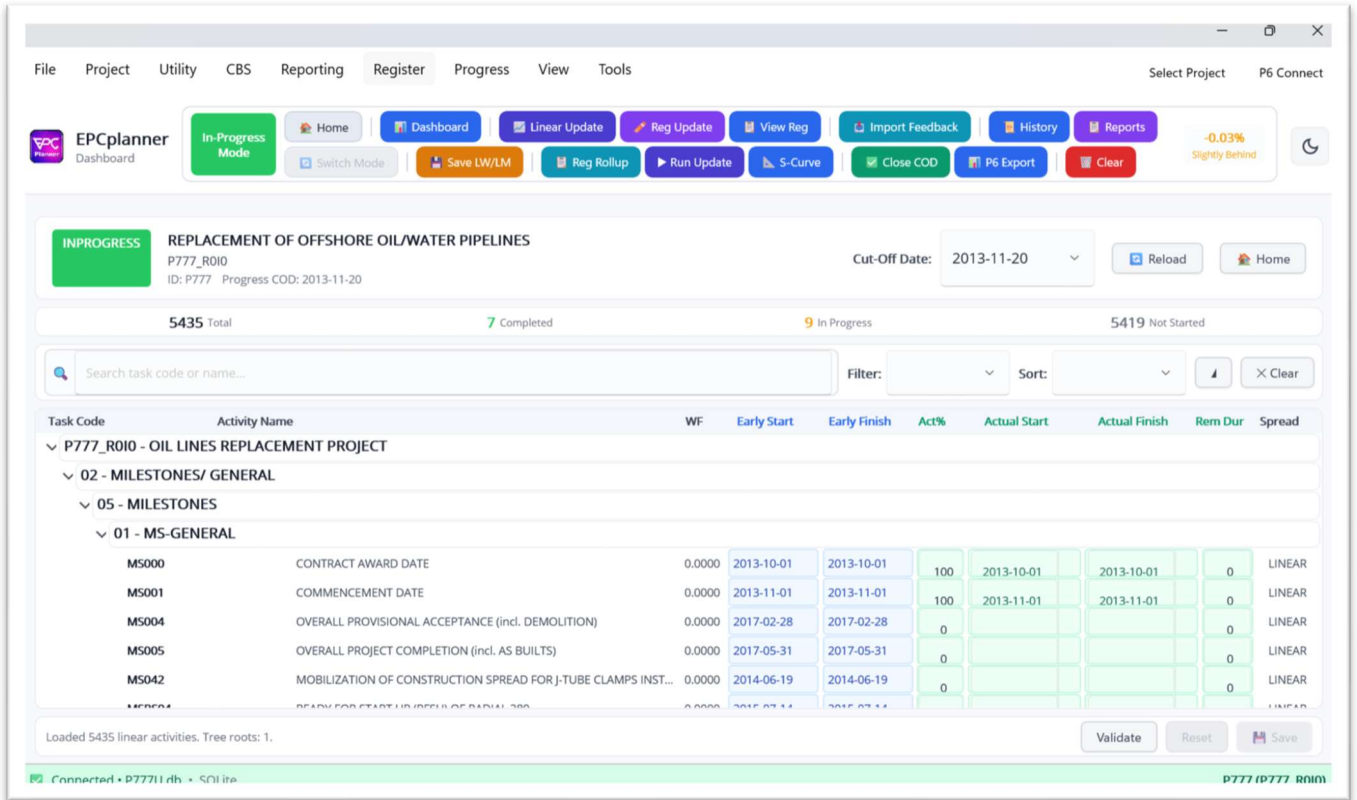


Figure 8.3 — Linear Progress Update screen. Enter physical progress, actual dates, and remaining duration for non-register activities.



8.4 Register Progress Update

Register Progress Update allows actual stage dates to be entered for all register types (Engineering, Procurement, and Subcontractor). Stage completion automatically drives activity progress through the WF-based rollup engine.

NOTE

Entering actual stage dates here records the data but does not yet calculate activity progress. Activity progress percentages are only updated when Reg Rollup is run in Section 8.5. Always complete all stage actuals entry before running Reg Rollup.

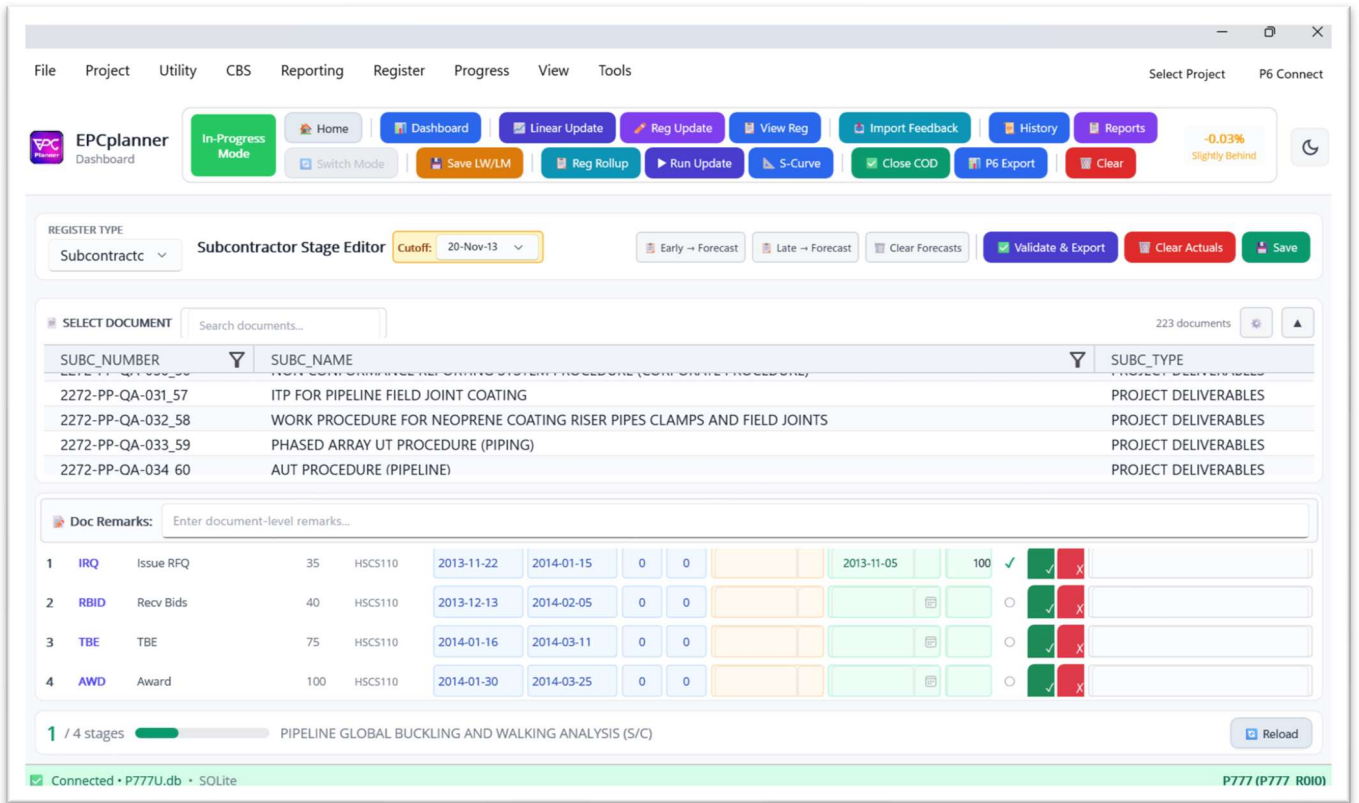


Figure 8.4 — Register Progress Update screen. Enter actual stage dates for ENG, PROC, and SUBC register items.



8.5 Complete the Update Cycle

After all actual inputs are entered, run the update sequence in order to calculate and lock the period results.

Step	Action	Expected Result
1	Click Reg Rollup.	Register progress is calculated as of the Cut-Off Date (COD).
2	Click Run Update.	Activity progress is calculated as of the COD for all linear activities.
3	Click S-Curve.	The S-curve data is updated with the current period actual progress.
4	Click P6 Update.	Actual dates, physical progress %, and remaining duration are pushed to the live Primavera P6 project.
5	Click Close COD.	The period is locked. No further changes can be made retroactively.
6	Before opening a new COD, click Save LW/LM.	Last Week and Last Month values are saved as the reference baseline for the next period.

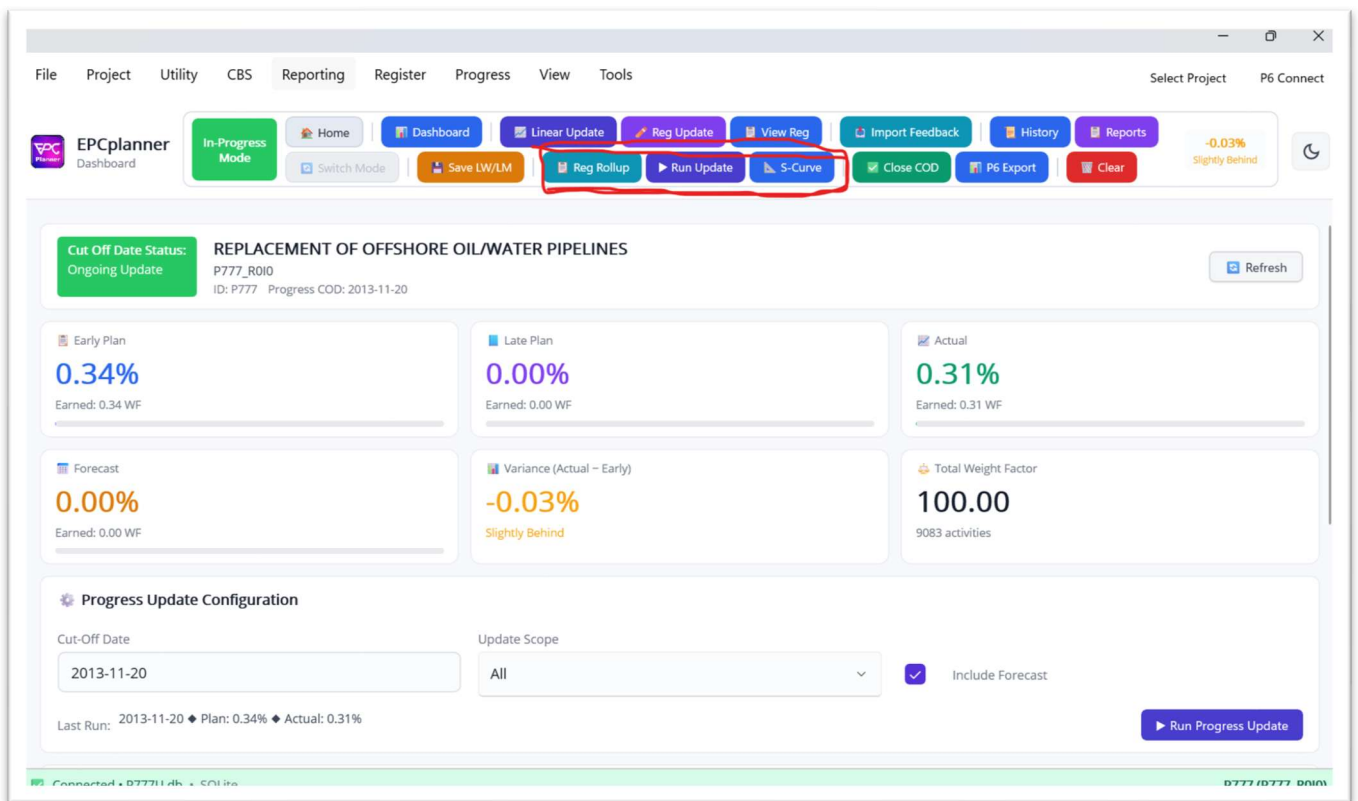


Figure 8.5 — Progress Update toolbar. Complete the full update cycle in sequence before closing the Cut-Off Date.

IMPORTANT

Always run the steps in order: Reg Rollup → Run Update → S-Curve → P6 Update → Close COD. Skipping or reordering steps will produce inconsistent results.



8.6 Historical Reports

The Progress Update module retains a full history of closed cut-off periods. Historical Reports allow review of any previously closed period's progress data including register actuals, activity progress percentages, S-curve data points, and update timestamps. Use historical reporting for trend analysis, audit support, and retrospective review of project performance against the baseline.

Historical Reports
View and rebuild past progress reports from snapshot data.

Total Snapshots: 8
8 snapshot period(s) found.

Cut-Off Date	Early Plan %	Late Plan %	Actual %	Forecast %	Variance	Total WF	Activities	Status	Plan Version
2013-11-20	0.34	0.00	0.31	0.00	-0.03	100.0	9083	Slightly Behind	Original Baseline (BASELINE)
2013-11-13	0.14	0.00	0.11	0.00	-0.03	100.0	9083	Slightly Behind	
2013-11-06	0.03	0.00	0.11	0.00	0.08	100.0	9083	On Track	
2013-10-30	0.00	0.00	0.00	0.00	0.00	100.0	9083	On Track	
2013-10-23	0.00	0.00	0.00	0.00	0.00	100.0	9083	On Track	
2013-10-16	0.00	0.00	0.00	0.00	0.00	100.0	9083	On Track	
2013-10-09	0.00	0.00	0.00	0.00	0.00	100.0	9083	On Track	
2013-10-02	0.00	0.00	0.00	0.00	0.00	100.0	9083	On Track	

Figure 8.6 — Historical Reports screen. Review any previously closed period's progress data for trend analysis, audit support, and retrospective performance review.



9. Register Workflow

The Register module is the core tracking engine for Engineering deliverables, Procurement purchase requests, and Subcontractor work packages. It uses template-driven stage logic to calculate plan dates, late dates, and track actual completion against each gate.

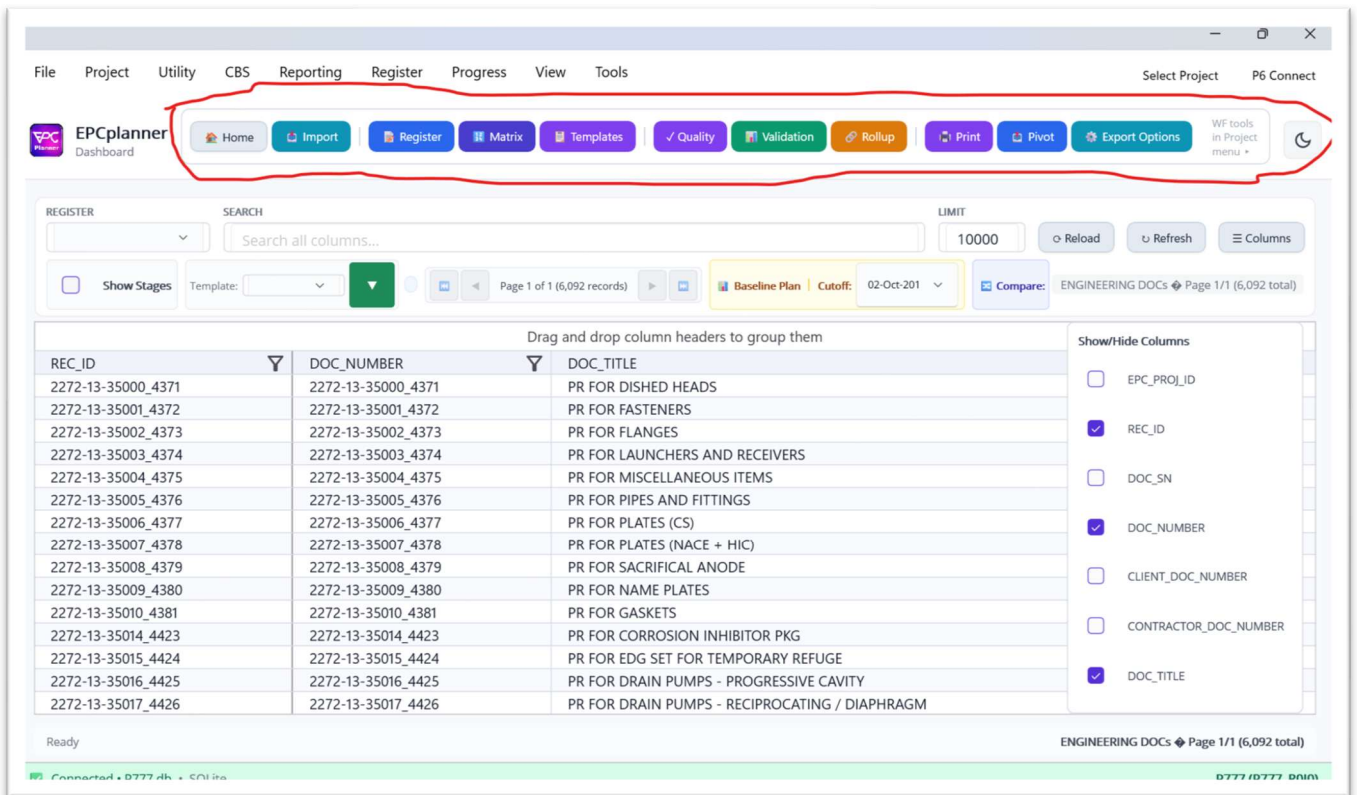


Figure 9.1 — Register grid and toolbar. The main Register workspace showing the item list and workflow controls.

9.1 Register Concept

- ENG register: document-based business key — DOC_NUMBER.
- PROC register: procurement business key — PR_NUMBER.
- SUBC register: subcontract package key — SUBC_NUMBER.
- Business keys must remain stable across revisions to preserve controlled update history and linkage integrity.
- Multiple templates with different stage counts can coexist in the same project — for example: 6 + 5 + 5 + 7 + 3 + 2 stages across different document families.

IMPORTANT

The Register module replaces fragile Excel register networks by making the project database the single source of truth. Excel is used for import/export only — all templates, dates, actuals, and reporting are managed inside EPCplanner.



9.2 Standard Register Sequence

Step	Action	Expected Result
1	Open the Register module and select the register type (ENG / PROC / SUBC).	The register grid and toolbar are available.
2	Import the register from Excel using field mapping and upsert mode.	Items are loaded or updated without creating duplicates.
3	Create, import, or review stage templates.	The stage structure is ready for assignment.
4	Assign template and link task code to each item.	Each item is connected to stage logic and a schedule reference activity.
5	Generate stage dates (plan and late).	Date calculations run with warnings shown for misalignments.
6	Run Quality check.	Template coverage and structural setup issues are identified.
7	Run Validation.	Register-to-schedule alignment gaps are listed with day deltas.
8	Update Actual and Forecast values via the stage edit form.	Stage progress is recorded and outputs update immediately.
9	Generate reports, exports, and stage matrix output.	The register package is ready for review or formal issue.

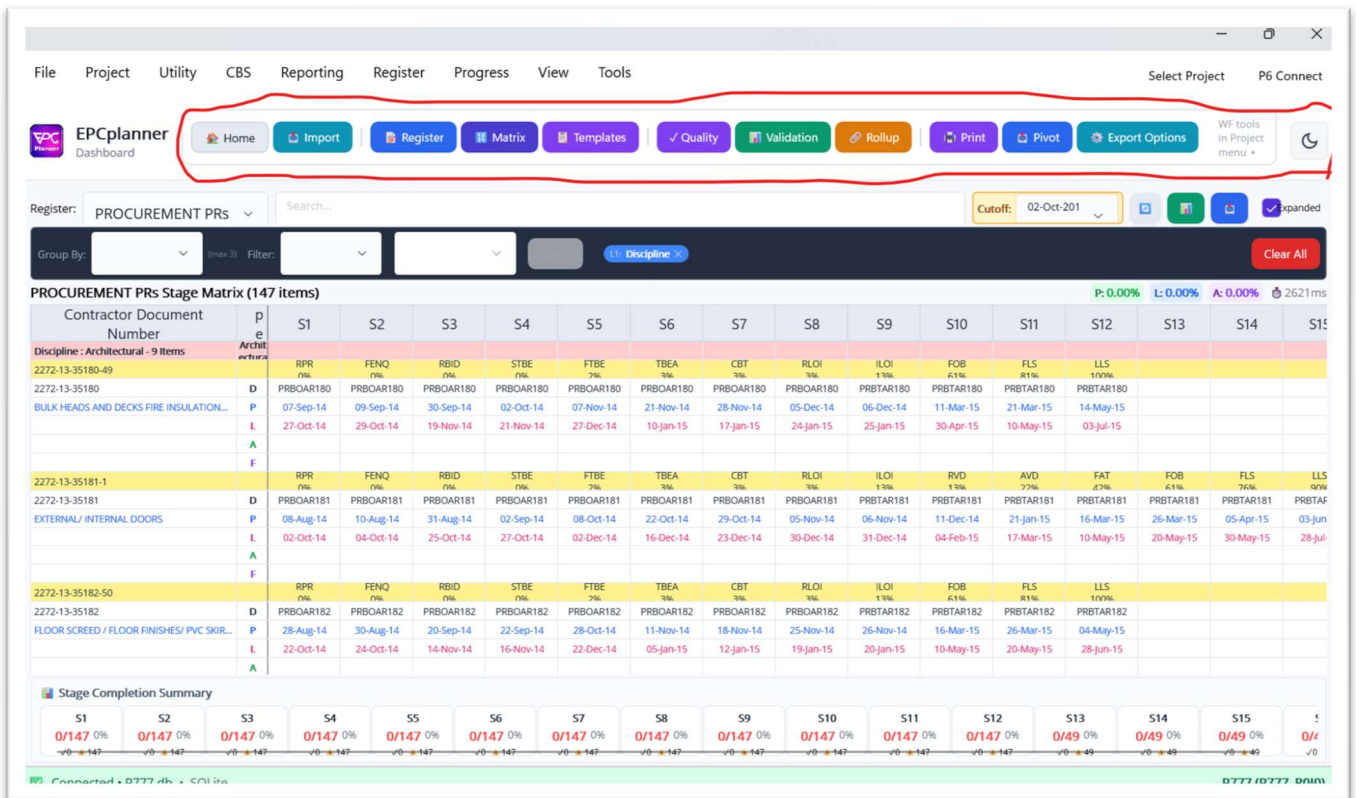


Figure 9.2 — Register workflow toolbar. The toolbar sequence supporting the Standard Register Sequence: Import, Templates, Assign/Link, Generate Dates, Quality, Validation, Actual/Forecast Updates, and Reports.

When more than one plan version exists for the project, a "Compare with..." chip bar appears above the Register grid, adding read-only previous-plan date columns and a colour-coded variance column. See Chapter 14, Plan Versioning, Section 14.6.



9.3 Excel Import and Field Mapping

Register items are imported from Excel using a field mapping interface. Upsert behavior updates existing items based on the business key instead of creating duplicates, preserving all existing linkage and history.

- Map source columns carefully so they land in the correct target fields.
- Always use upsert mode to update items without duplicating records.
- Review imported counts and sample rows before continuing to template assignment.

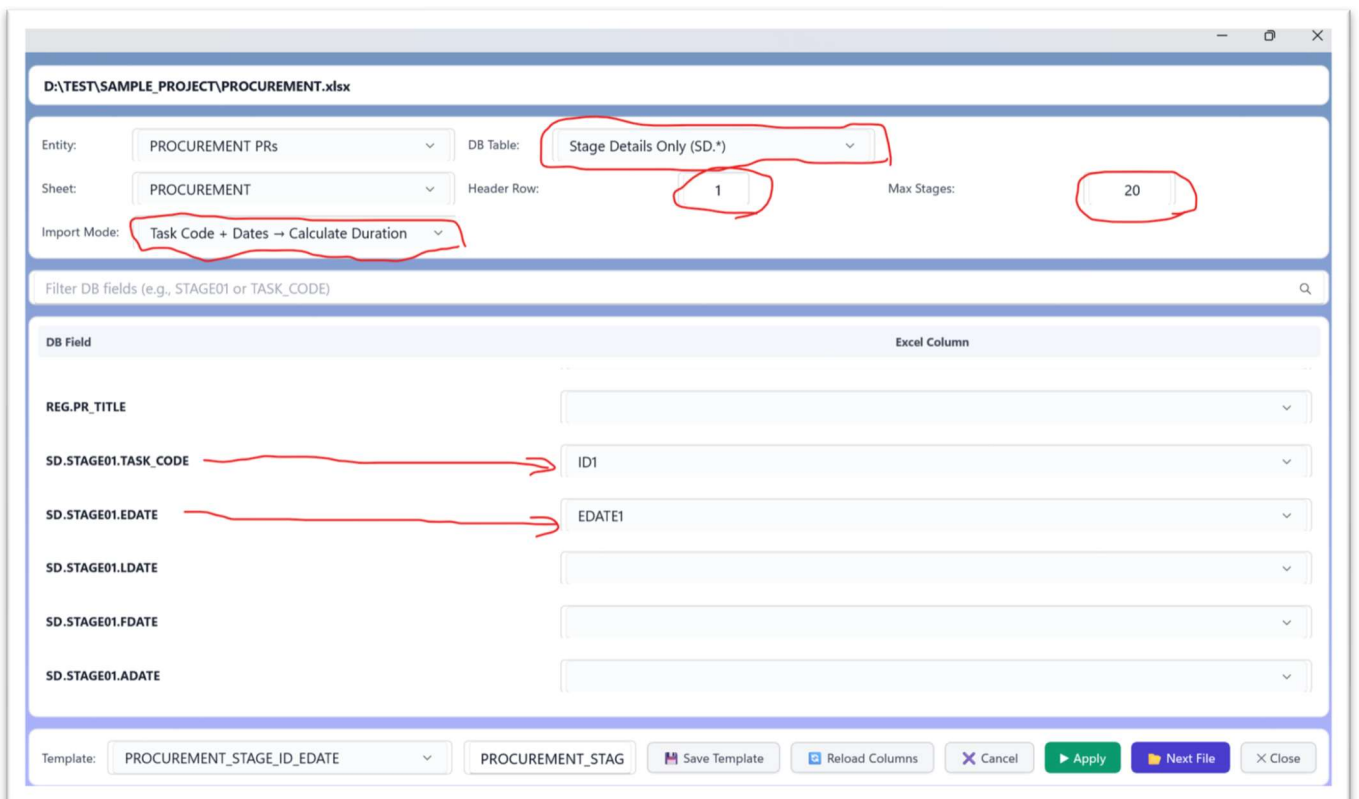
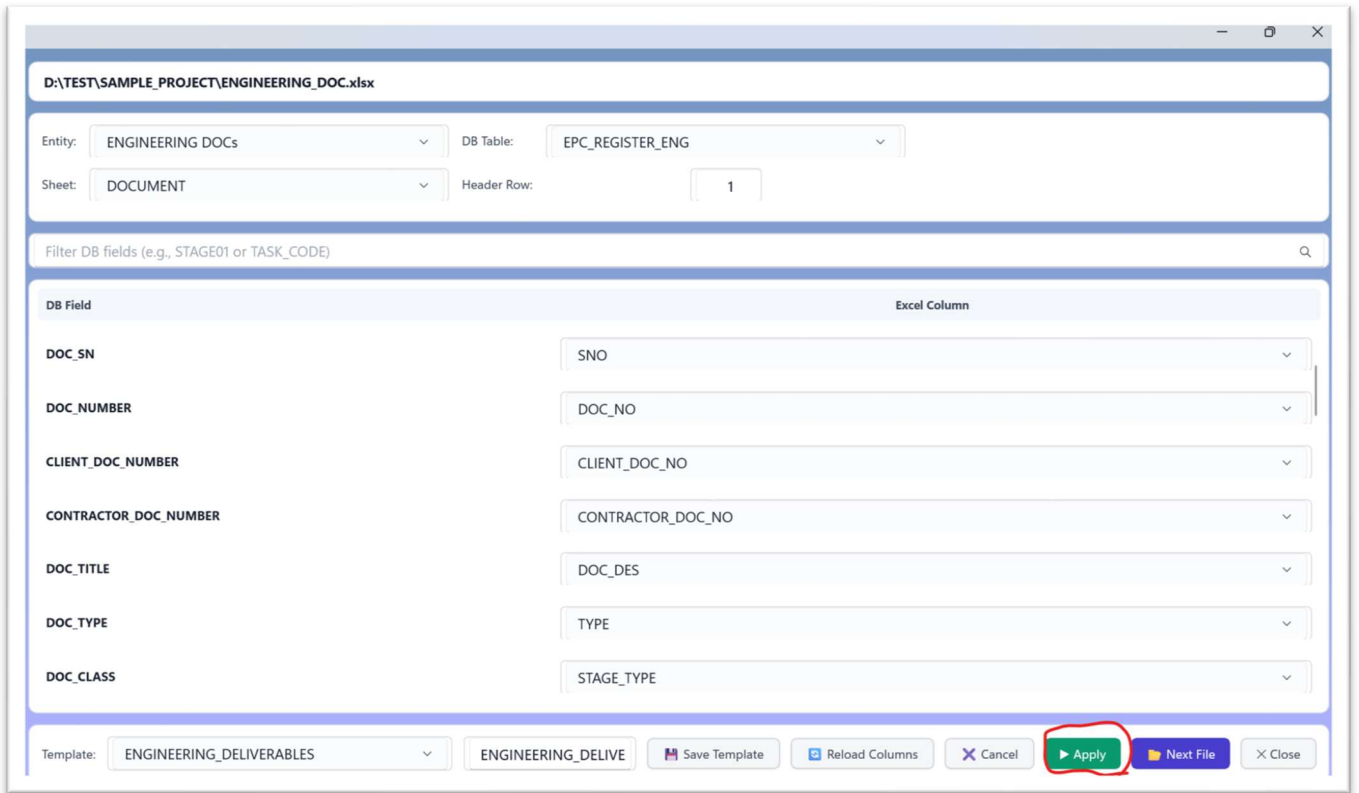


Figure 9.3 — Register import field mapping. Map Excel columns to EPCplanner fields and use upsert mode to preserve existing linkage.



9.4 Stage Templates

Templates define the stage sequence, gate names, default durations, and stage weights used by each item family. Different templates with different stage counts can coexist within the same project.

- Keep template naming clear and consistent so users assign the correct template to each item type.
- Template stage counts are flexible — each template independently defines its own gate sequence.
- Templates can be exported to Excel, modified, and reimported.

The screenshot shows the 'Define Stages & Percentage (Generic Register)' interface. At the top, the 'REGISTER KIND' is set to 'ENG' and the 'TEMPLATE' is 'ENG_C1'. The 'Assigned %' is 100 and 'Balance %' is 0. Below this is a table with columns: #, STAGE_NO, STAGE, STAGE_DES (30 chars), EST_DUR, PERCENTAGE, and Cum %. The table contains five rows of stage data. At the bottom, there are buttons for '+ New', 'Delete', 'Load', 'Dup', 'Import', 'Export', 'All', 'All', 'Blank', '+ Add Stage', and 'Save'.

#	STAGE_NO	STAGE	STAGE_DES (30 chars)	EST_DUR	PERCENTAGE	Cum %
1	1	STRT	Start	7	10	10
2	2	IDC	IDC	14	0.01	10.01
3	3	IFA	IFA	14	49.99	60
4	4	CREC	Comm Recv	14	0.01	60.01
5	5	REIS	Reissue	7	19.99	80

The screenshot shows the 'Define Stages & Percentage (Generic Register)' interface. The 'REGISTER KIND' is 'PROC' and the 'TEMPLATE' is 'PROC_BLK'. The 'Assigned %' is 100 and 'Balance %' is 0. Below this is a table with columns: #, STAGE_NO, STAGE, STAGE_DES (30 chars), EST_DUR, PERCENTAGE, and Cum %. The table contains six rows of stage data. At the bottom, there are buttons for '+ New', 'Delete', 'Load', 'Dup', 'Import', 'Export', 'All', 'All', 'Blank', '+ Add Stage', and 'Save'. Red circles highlight the 'REGISTER KIND' dropdown, the 'Export' button, and the '+ Add Stage' and 'Save' buttons.

#	STAGE_NO	STAGE	STAGE_DES (30 chars)	EST_DUR	PERCENTAGE	Cum %
5	5	FTBE	Final TBE	43	2.083	2.388
6	6	TBEA	TBE Approved	14	0.591	2.979
7	7	CBT	CBT	7	0.003	2.982
8	8	RLOI	Ready for LOI/PO	7	0.003	2.985
9	9	ILOI	Issue LOI/PO	7	9.701	12.686
10	10	FOB	Material FOB	133	48.508	61.194

Figure 9.4 — Template management screen. Create and manage stage templates for ENG, PROC, and SUBC register item families.



9.5 Assign Template and Link Task Code

Template and task code assignment is one of the most critical control steps in the register workflow. It ties each register item to both its stage logic and its Primavera schedule reference activity.

- Assign the correct template based on the document or package family and stage count agreement.
- Link the appropriate Primavera task code (also referred to as Activity ID) to establish date alignment and progress linkage.
- Incorrect assignment at this step will propagate to all downstream date calculations and rollup.

REC_ID	DOC_NUMBER	DOC_TITLE
2272-13-35000_4371	2272-13-35000_4371	PR FOR DISHED HEADS
2272-13-35001_4372	2272-13-35001_4372	PR FOR FASTENERS
2272-13-35002_4373	2272-13-35002_4373	PR FOR FLANGES
2272-13-35003_4374	2272-13-35003_4374	PR FOR LAUNCHERS AND RECEIVERS

#	STAGE	START	FINISH	L_START	L_FINISH	EARLY	LATE	Δ	DUR	TASK
1	STRT Start	04-Jun-14	23-Jun-14	24-Jul-14	12-Aug-14	04-Jun-14	24-Jul-14	1-19d	0	EDBRMS000
2	ISPR Issue PR	04-Jun-14	23-Jun-14	24-Jul-14	12-Aug-14	23-Jun-14	12-Aug-14		19	EDBRMS000
3	STBE Start TBE	19-Jul-14	22-Sep-14	07-Sep-14	11-Nov-14	19-Jul-14	07-Sep-14	1-65d	0	EDBRMS00T

Template	PR_TYPE	PR_CLASS	PR_CATEGORY	DISCIPLINE	DISCIPLINE_SUB	WF
PROC_BLK	Bulk Materials	2		Mechanical - Static		0.11
PROC_BLK	Bulk Materials	2		Mechanical - Static		0.0
PROC_BLK	Bulk Materials	2		Mechanical - Static		0.0
PROC_EQP	Equipment & Packages	1		Mechanical - Static		1.14

#	STAGE	START	FINISH	L_START	L_FINISH	EARLY	LATE	Δ	DUR	TASK
1	RPR Receive PR	07-Sep-14	05-Dec-14	27-Oct-14	24-Jan-15	07-Sep-14	27-Oct-14	1-89d	0	PRBOAR180
2	FENQ Float Enquiry	07-Sep-14	05-Dec-14	27-Oct-14	24-Jan-15	09-Sep-14	29-Oct-14	1-87d	2	PRBOAR180
3	RBID	07-Sep-14	05-Dec-14	27-Oct-14	24-Jan-15	07-Sep-14	19-Nov-14	1-65d		PRBOAR180

Figure 9.5 — Assign template and task code. Link each register item to its stage template and Primavera activity reference.



9.6 Generate Dates, Quality, and Validation

After template assignment, generate plan and late stage dates. Review all warnings before proceeding — they indicate missing inputs, duration gaps, or schedule misalignments.

- Generate dates after template assignment and duration setup are complete.
- Review all warnings - do not ignore them. They typically indicate missing inputs or weak assumptions.
- Quality confirms structural coverage: every item has a valid template and required setup.
- Validation highlights alignment gaps between the register dates and the linked Primavera activity dates, showing day deltas for each discrepancy.

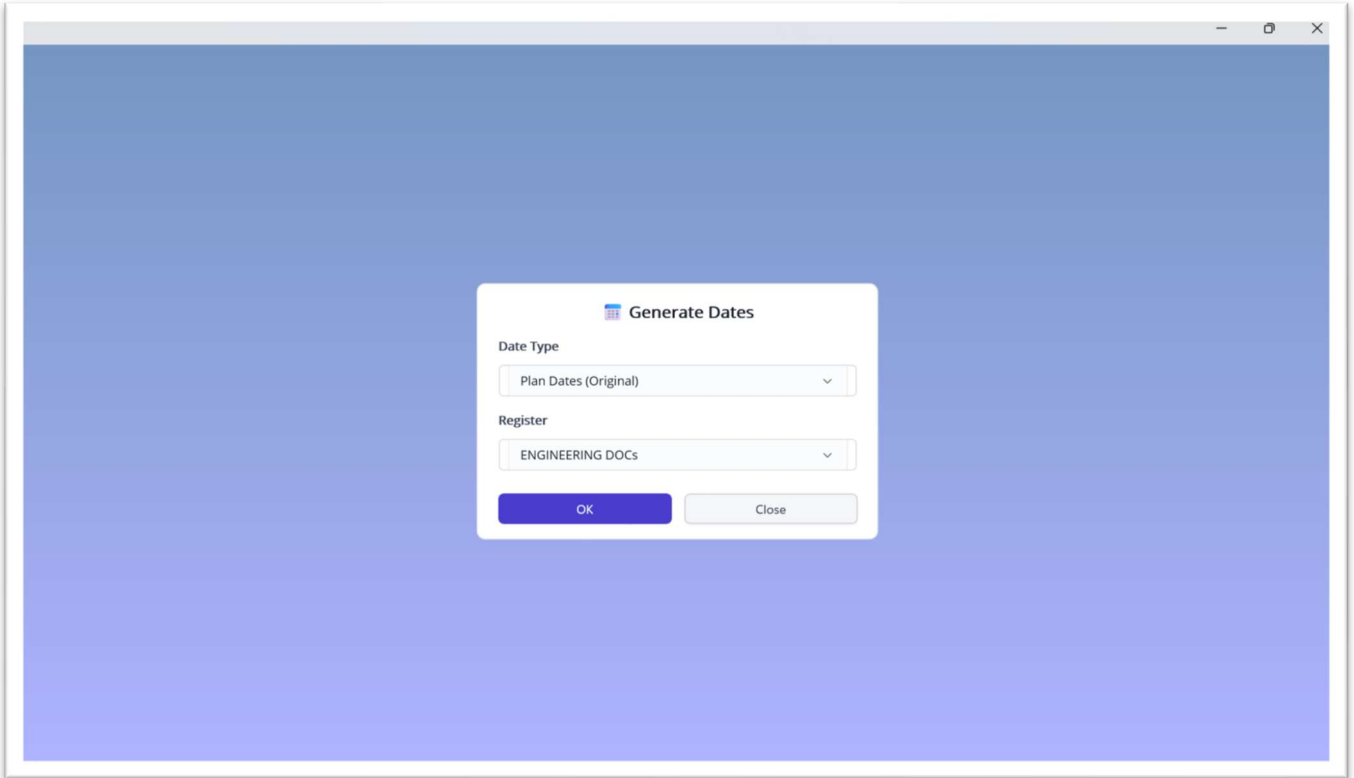


Figure 9.6 — Generate dates and warnings screen. Review all warnings before proceeding to quality and validation.

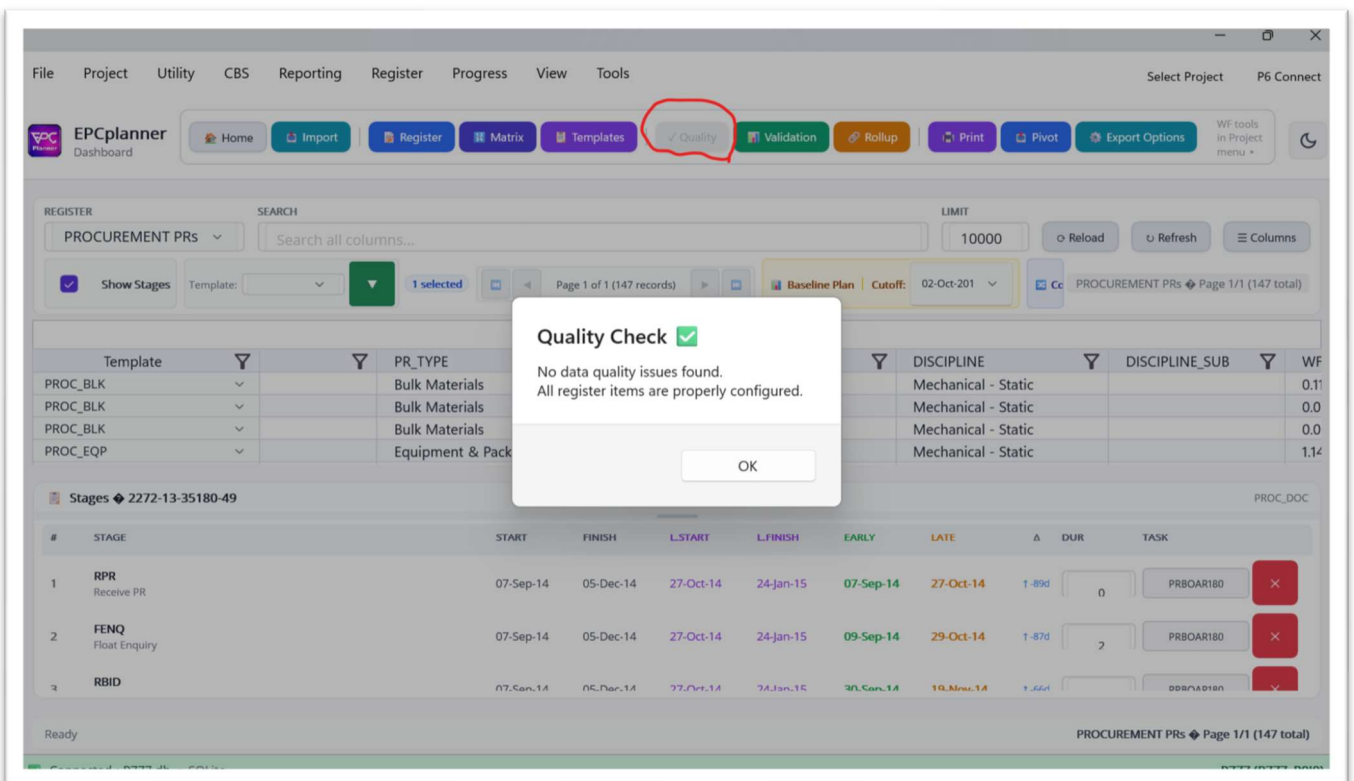


Figure 9.7 — Quality and Validation results. Review all issues before releasing the register for progress update.



9.7 Actual and Forecast Updates

Use the stage edit form to capture actual completion dates and forecast update dates for each gate. This data feeds stage-level progress control, S-curve calculation, and automatic rollup to linked activities.

- Actual dates must be within the open Cut-Off Date period — the Freeze Guard prevents retroactive entries.
- Forecast dates should be maintained for all incomplete stages to keep the completion projection current.
- Stage progress automatically rolls up to the linked activity and contributes to the period progress calculation.

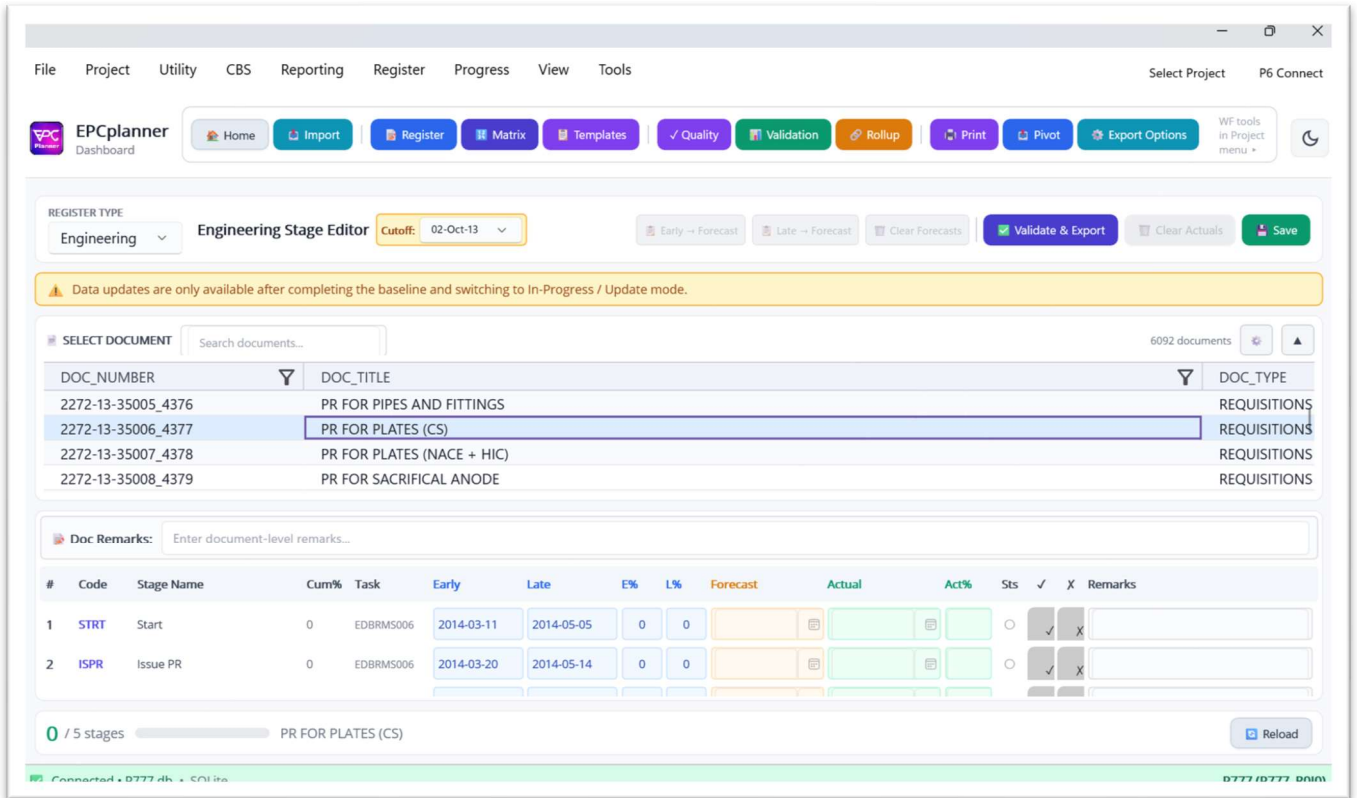


Figure 9.8— Actual and Forecast edit form. Enter actual completion and forecast dates for each stage gate.

TIP

For Third-Party Register Validation (e.g., receiving a Subcontractor engineering register): import the external register, anchor by business key, assign templates, link task codes, then run Validation to generate an acceptance QA exceptions pack.



9.8 Register Reports and Exports

The Register module produces a full suite of output formats for formal issue, review, and analysis.

- Full Register Report (HTML / Excel / PDF): complete issue pack with filters, grouping up to 3 levels, and stage column selection.
- Stage Matrix Export: compact Excel format for stage-by-stage review and pivot analysis.
- Weekly / Monthly Summary: Plan vs Actual comparison for progress reporting periods.
- Rollup to Activities: use only after register content is validated and actuals are current.
- Report Preview: before the Register Summary or Stage Matrix (Pivot) Excel export is written to disk, an HTML preview opens showing the report exactly as it will appear in Excel, including the same header, actual-date, and variance colour formatting. Use the column chips in the preview to confirm the selected pivot columns before confirming the export. If the preview fails to render, the export proceeds directly to Excel without blocking the workflow.

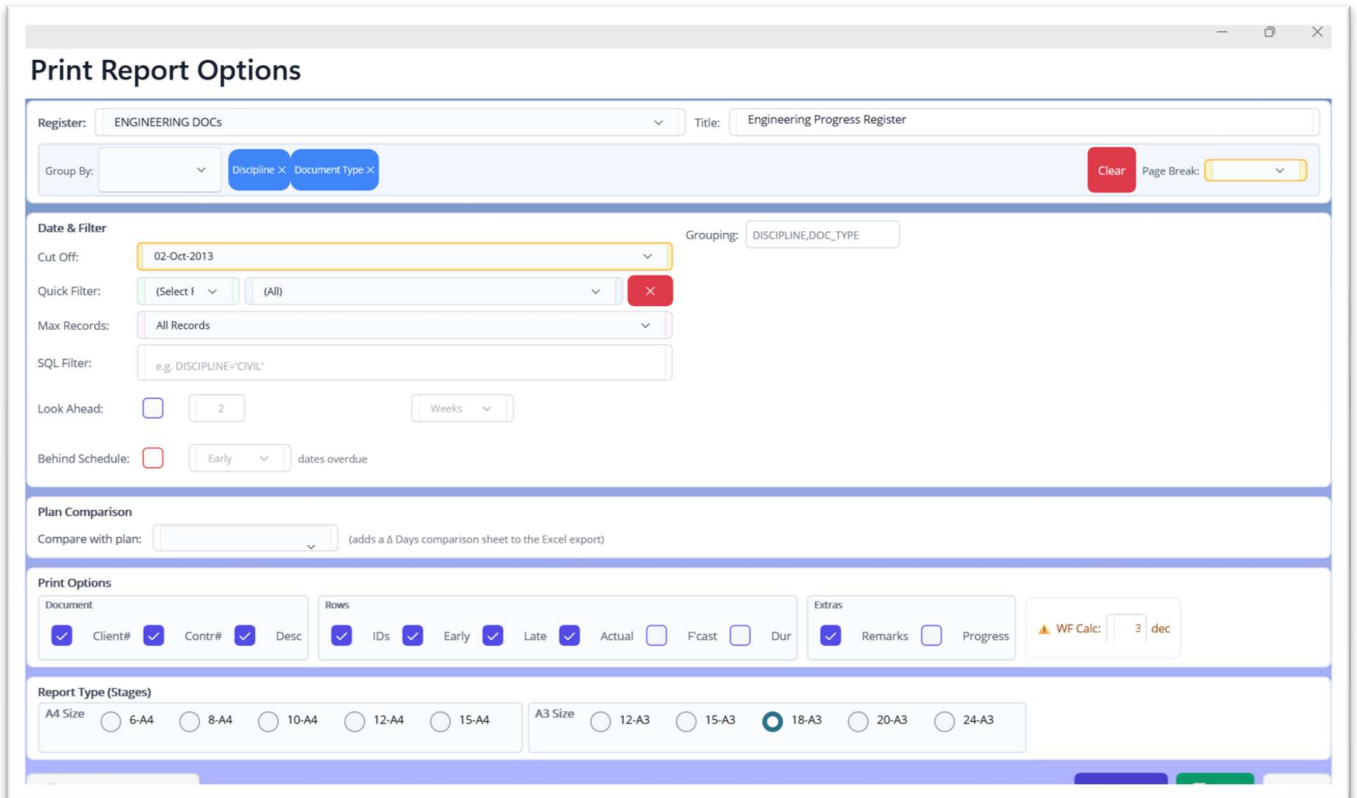


Figure 9.9 — Register report options. Select output format, grouping level, and stage columns before generating the register pack.

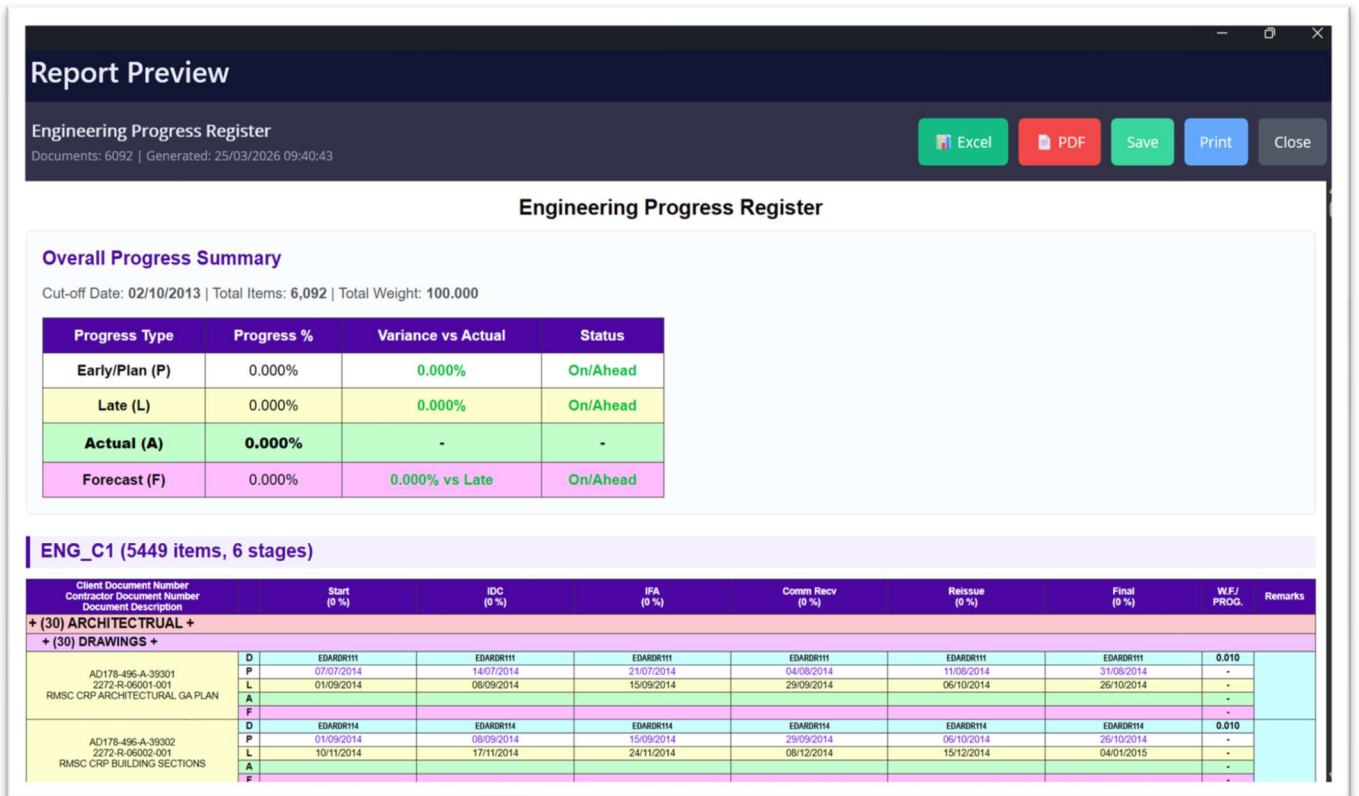


Figure 9.10 — Register report output. Full register report with stage matrix and progress status indicators.



9.9 Register Summary Reports

Register Summary Reports provide period-level plan versus actual comparisons in a condensed format suitable for management review and weekly or monthly progress meetings. The Weekly Summary and Monthly Summary outputs display planned completion counts, actual completion counts, and variance by register type and grouping level. These reports complement the full register pack with a focused view of period performance rather than full item-level detail.

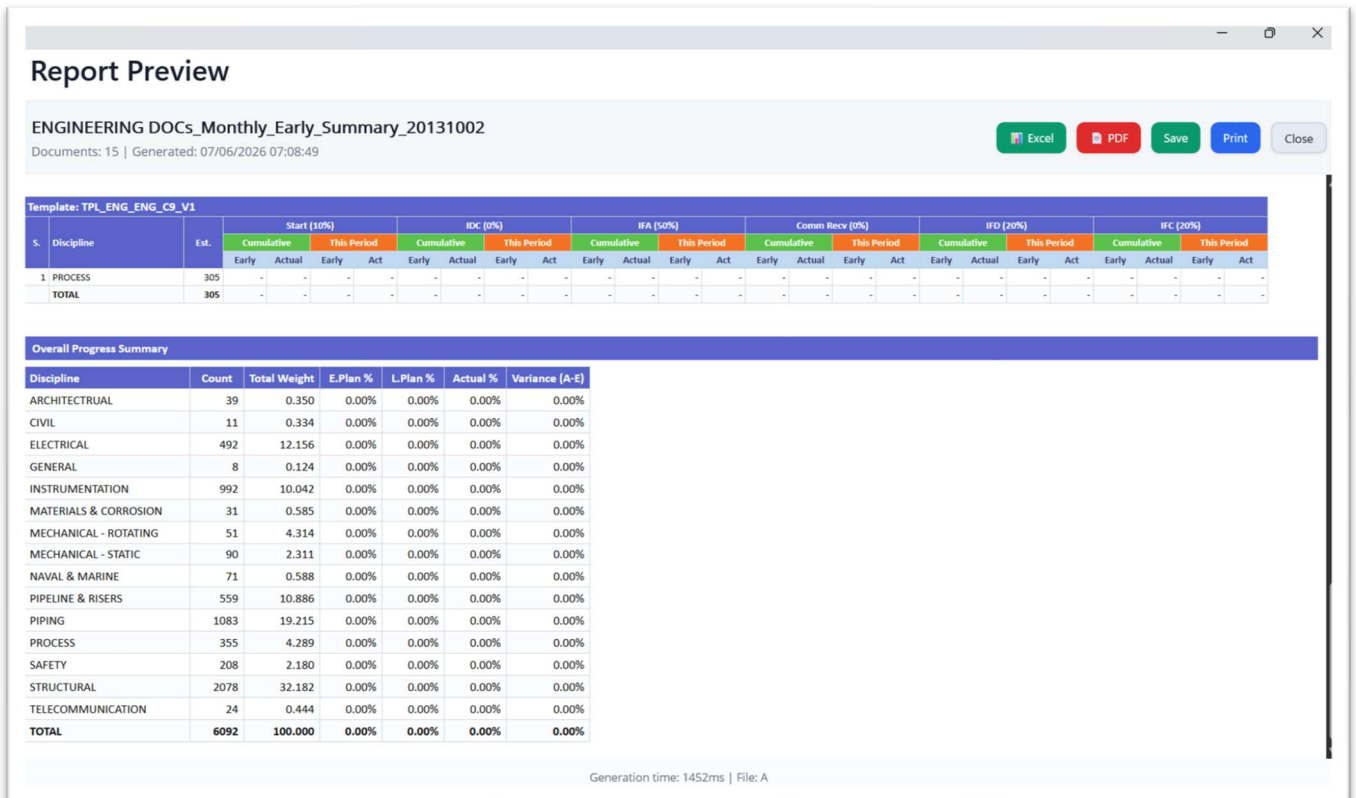
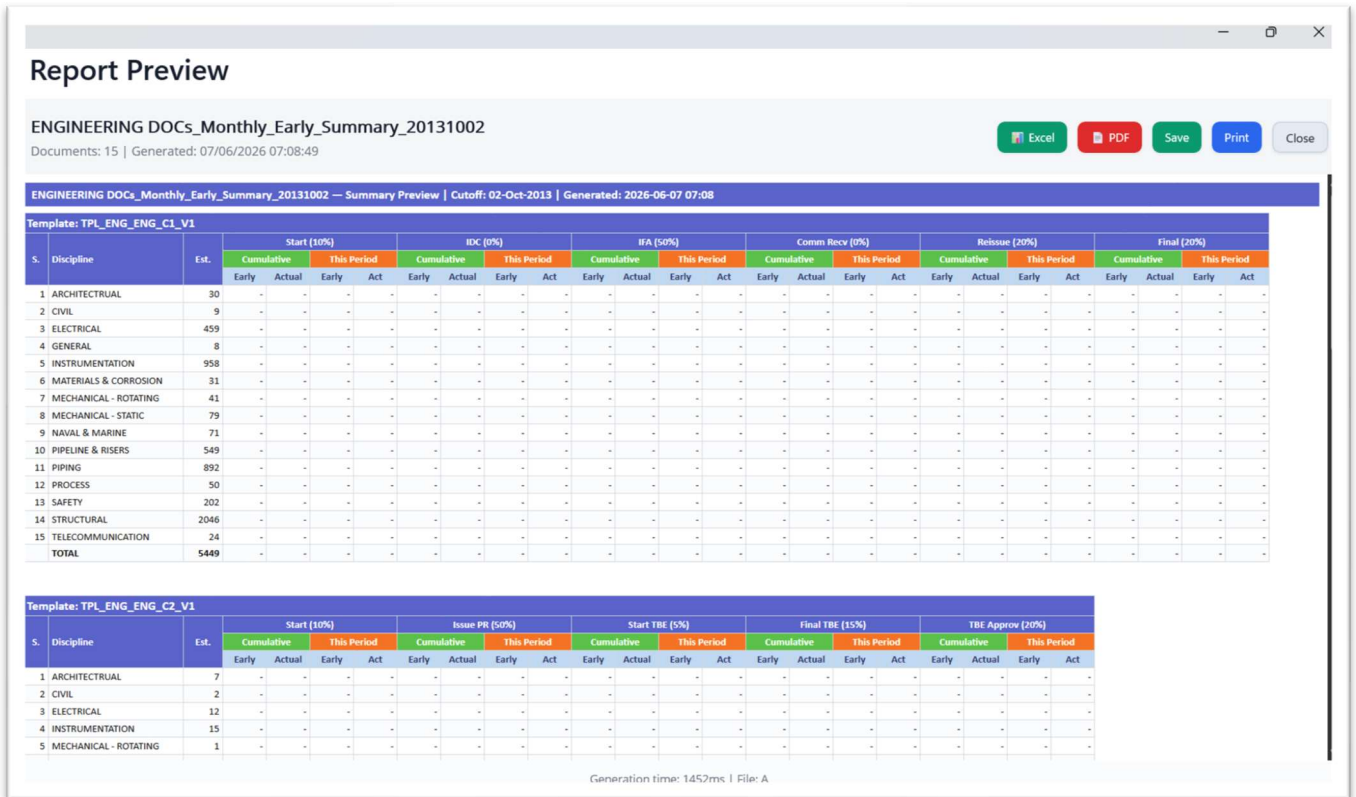


Figure 9.11 — Register Summary Report output. Weekly/Monthly plan versus actual comparison, showing planned and actual completion counts and variance by register type and grouping level.



10. Reports Module

EPCplanner provides a comprehensive reporting suite covering S-curves, tabular progress, resource histograms, behind-schedule analysis, lookahead schedules, and feedback forms. Reports are available in HTML, Excel, and print-optimized PDF formats.

Step	Action	Expected Result
1	Open the required report from the Reports toolbar.	The report setup or generation screen opens.
2	Configure report parameters: grouping, period, page size, stage columns.	The report is configured for the intended audience and purpose.
3	Generate preview or export.	The output is displayed or saved in the selected format.

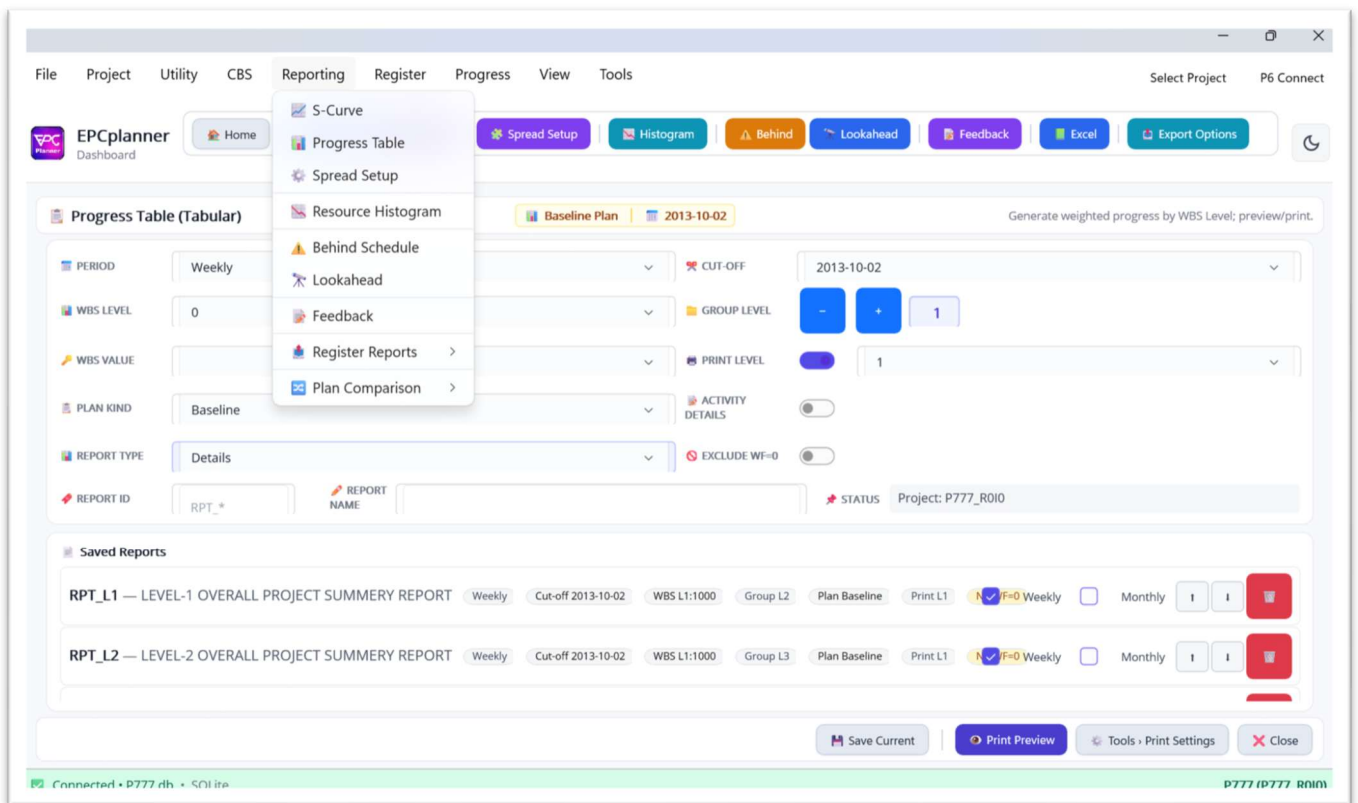


Figure 10.1 — Reports toolbar. Access all report types from the unified Reports module.



10.1 S-Curves

S-curve reports display the cumulative planned progress against actual progress over the project timeline. EPCplanner generates S-curves from the Weight Factor-based rollup engine, supporting both overall project curves and register-specific curves.

Figure 10.2 — S-Curve form inputs. Configure project and date range parameters before generating the curve.

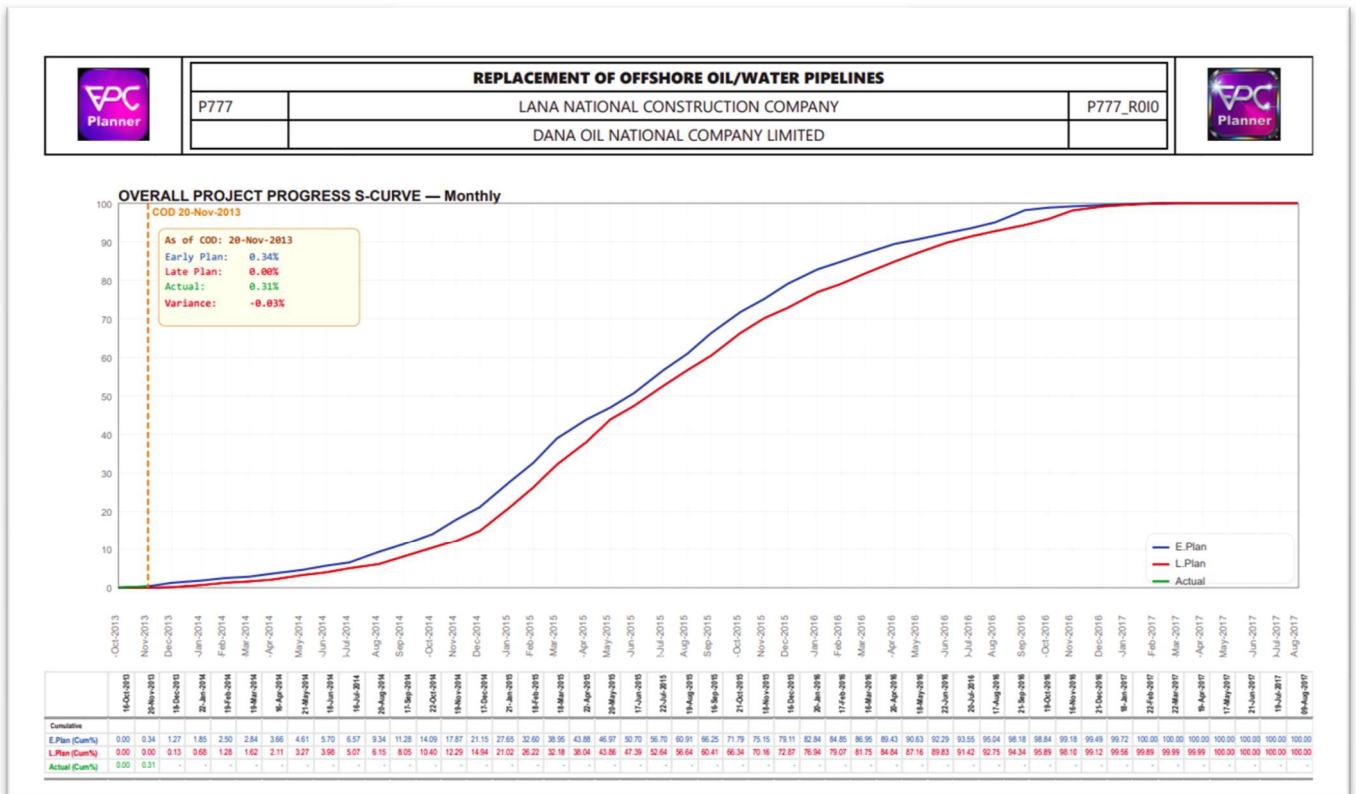


Figure 10.3 — S-Curve report output. Plan vs Actual cumulative progress with period data table.

The S-Curve definition screen includes a Plan Version selector, allowing curves from more than one plan version (for example Baseline and Recovery Plan) to be overlaid on the same chart. See Chapter 14, Plan Versioning, Section 14.6.



10.2 Tabular Progress Report

The Tabular Progress report presents period-by-period planned and actual progress in a structured table format, supporting multi-level WBS grouping and historical period comparison.

Figure 10.4 — Tabular Report form inputs. Configure WBS grouping, date range, and column selection.

Ref.	Description	Weight Factor %		THIS PERIOD			CUMULATIVE				
		Overall	Group	E.Plan%	Actual%	L.Plan%	Var	E.Plan%	Actual%	L.Plan%	Var
+ 1000 - OIL LINES REPLACEMENT PROJECT +											
2000	MILESTONES/ GENERAL	3.483	3.48	1.83	4.11	0.01	2.28	2.73	4.31	0.02	1.57
2001	ENGINEERING	5.145	5.15	0.13	0.07	0.02	-0.07	0.27	0.19	0.03	-0.08
2002	SUB-CONTRACTING SERVICES (SR to SO)	0.005	-	-	3.04	-	3.04	3.04	6.09	-	3.04
2003	PROCUREMENT	29.361	29.36	-	0.00	-	0.00	-	0.00	-	0.00
2004	ONSHORE FABRICATION	7.277	7.28	-	-	-	-	-	-	-	-
2005	LOADOUT, SEAFASTENING & TRANSPORTATION	5.227	5.23	-	-	-	-	-	-	-	-
2006	OFFSHORE WORKS	49.503	49.50	0.27	0.11	-	-0.15	0.47	0.31	-	-0.16
OIL LINES REPLACEMENT PROJECT :		100.000	100.00	0.20	0.20	-	-	0.34	0.31	-	-0.03
OVERALL PROGRESS - "OIL LINES REPLACEMENT PROJECT"		100.000	100.00	0.20	0.20	-	-	0.34	0.31	-	-0.03

Figure 10.5 — Tabular Report output. Period-by-period progress table with plan, actual, and variance columns.



10.3 Spread Setup (Activity Curve)

Spread Setup supports activities whose progress follows a plan/actual curve profile — such as project management activities, supervision, or lump-sum scope items not covered by register deliverables. Select the target activity and configure the spread distribution.

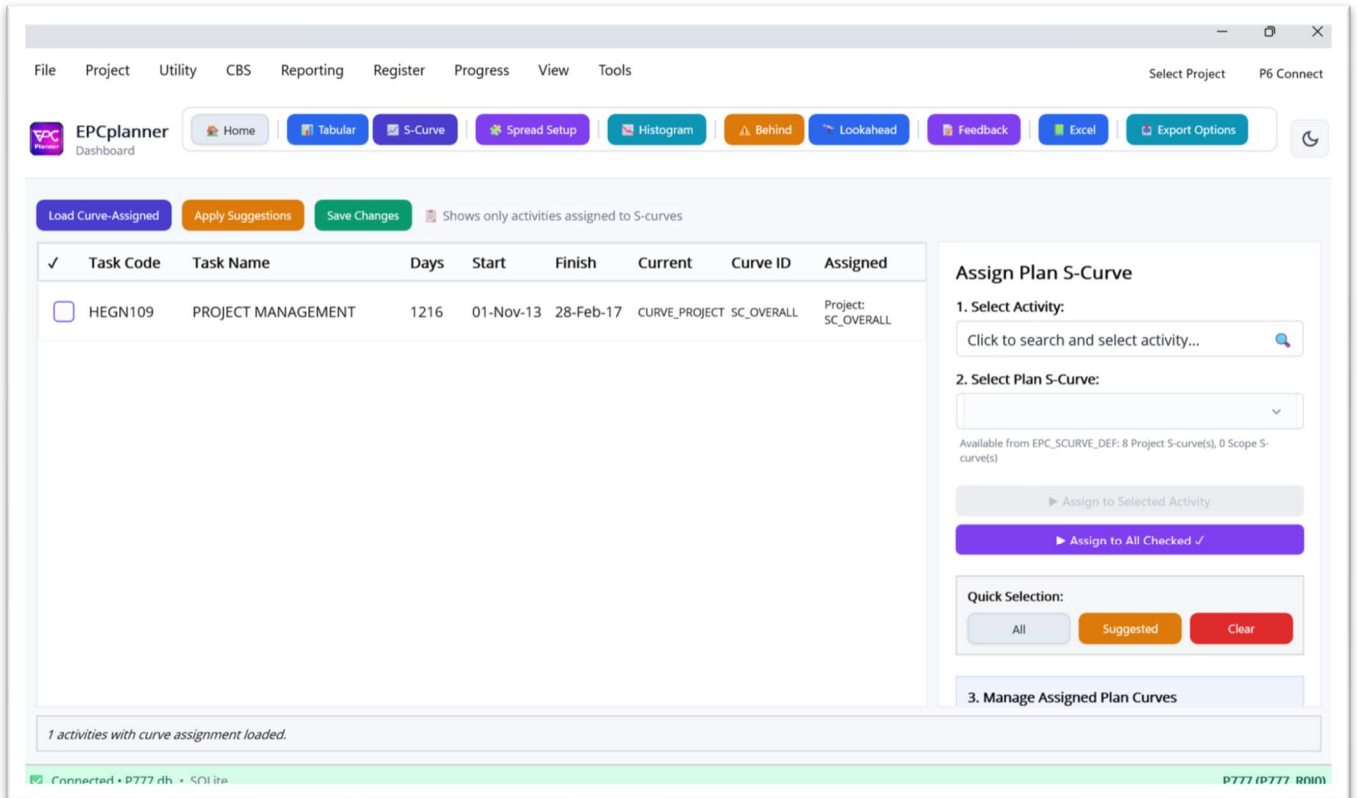


Figure 10.6 — Spread Setup form inputs. Configure spread parameters for activities using curve-based progress tracking.

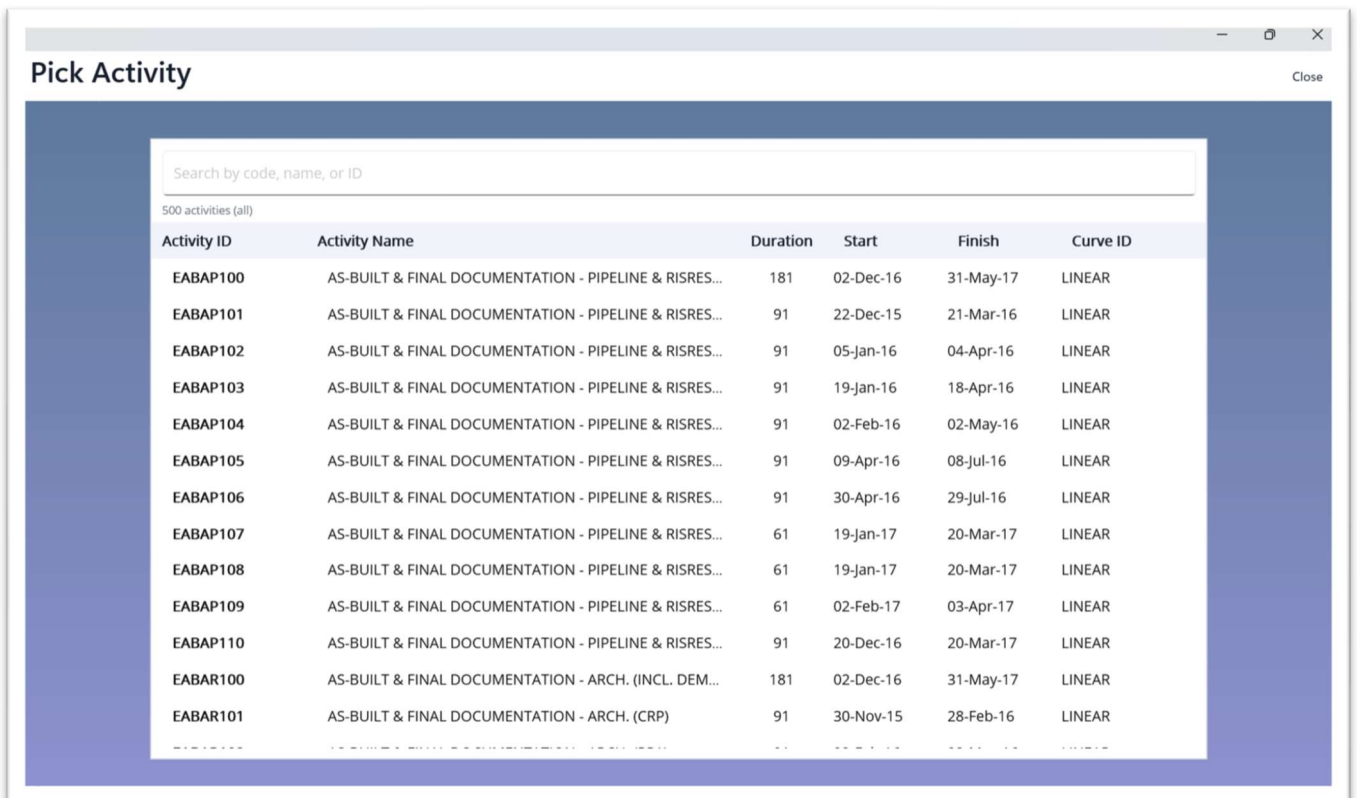


Figure 10.7 — Activity picker for Spread Setup. Select the target activity from the schedule list.



10.5 Behind Schedule Report

The Behind Schedule report identifies register items and activities where actual or forecast dates have slipped past their planned or late dates. Day delta values quantify the severity of each delay for prioritization and corrective action.

Figure 10.10 — Behind Schedule form inputs. Configure filter criteria and threshold for delay reporting.

Behind Schedule Report

Project: P777_R010 Cutoff Date: 27-Nov-2013 Activities: 15 WBS Groups: 1

P777_R010 — OIL LINES REPLACEMENT PR...
15 activities

Behind Schedule Activities

Activity / WBS	Planned Start	Planned Finish	Forecast Finish	Orig Dur (d)	Rem Dur (d)	% Comp	Variance (d)	Float (d)	Status
P777_R010 — OIL LINES REPLACEMENT PROJECT (15)									
10 — ENGINEERING (6)									
10 — DETAILED ENGINEERING (6)									
42 — PIPELINES, RISERS & SUBSEA CABLES (3)									
05 — COMMON - PIPELINES & RISERS (3)									
10 — DOCUMENTS - COMMON PIPELINES & RISERS (3)									
EDPLDC115 — SOW FOR CABLE AND PIPELINE ROUTE SURVEY(INCLUDING CROSSINGS & JACKET FACE)	01-Nov-2013	07-Nov-2013	27-Nov-2013	7d	7d	0.0%	+19d	26d	TK_NotStart
EDPLDC124 — SOW FOR PRE-ENGG. DIVE SURVEY AT CROSSING LOCATIONS & JACKET FACES	01-Nov-2013	07-Nov-2013	27-Nov-2013	7d	7d	0.0%	+19d	74d	TK_NotStart
EDPLDC141 — SIC SOW FOR PIPELINE GLOBAL BUCKLING AND PIPELINE WALKING STUDY	08-Nov-2013	21-Nov-2013	27-Nov-2013	14d	14d	0.0%	+5d	54d	TK_NotStart
20 — PROCESS (1)									
10 — DOCUMENTS - PROCESS (1)									
EDPSC011 — PROCESS SIMULATION REPORT - IFA	01-Nov-2013	25-Nov-2013	27-Nov-2013	25d	25d	0.0%	+1d	8d	TK_NotStart
50 — STRUCTURAL (2)									
05 — COMMON (2)									
10 — DOCUMENTS - COMMON (2)									
EDSTCO100 — SOW FOR GEO-TECHNICAL SURVEY	01-Nov-2013	09-Nov-2013	27-Nov-2013	9d	9d	0.0%	+17d	52d	TK_NotStart
EDSTCO104 — SOW FOR DIVE SURVEY	01-Nov-2013	15-Nov-2013	27-Nov-2013	15d	15d	0.0%	+11d	46d	TK_NotStart
02 — MILESTONES/ GENERAL (5)									
06 — GENERAL (2)									
01 — PROJECT MANAGEMENT (2)									
HGEN101 — RECEIPT OF INPUTS / DISKETTES (NATIVE FILE) FROM CLIENT	01-Nov-2013	05-Nov-2013	27-Nov-2013	5d	5d	0.0%	+21d	64d	TK_NotStart
HGEN102 — RECEIPT OF MPM FINAL SKID DIMENSIONS FROM COMPANY FOR PLOT PLAN FINALIZATION	05-Nov-2013	10-Nov-2013	27-Nov-2013	5d	5d	0.0%	+16d	64d	TK_NotStart
05 — MILESTONES (3)									
02 — MS-ENGINEERING (1)									
MS010 — COMMENCEMENT OF ENGINEERING	01-Nov-2013	01-Nov-2013	27-Nov-2013	0d	0d	0.0%	+26d	8d	TK_NotStart
01 — MS-GENERAL (2)									
MS000 — CONTRACT AWARD DATE	01-Oct-2013	01-Oct-2013	27-Nov-2013	0d	0d	0.0%	+57d	0d	TK_NotStart
MS001 — COMMENCEMENT DATE	01-Nov-2013	01-Nov-2013	27-Nov-2013	0d	0d	0.0%	+26d	0d	TK_NotStart
37 — OFFSHORE WORKS (4)									
10 — OFFSHORE SURVEY WORKS (4)									
10 — CABLE ROUTES, NEW P/L ROUTE SURVEY (2)									
OSEG145 — MOB AND SAIL - SURVEY VESSEL ZAKHER QUEEN OR EQUIVALENT	08-Nov-2013	11-Nov-2013	27-Nov-2013	4d	4d	0.0%	+15d	50d	TK_NotStart
OSEG148 — NEW PIPELINE (RM162-RM153) ROUTE SURVEY	12-Nov-2013	13-Nov-2013	27-Nov-2013	2d	2d	0.0%	+13d	50d	TK_NotStart

Figure 10.11 — Behind Schedule report output. Items sorted by delay severity with day delta values.



10.6 Lookahead Schedule

The Lookahead report presents upcoming register stages and activities due within a configurable forward window (typically 3 to 6 weeks). Use it for weekly coordination meetings and short-interval planning.

The screenshot shows the EPCplanner interface with the 'Lookahead' button circled in red. Below it, the 'Activities Lookahead' section has the 'Weekly' button circled in red. The 'Weeks' dropdown is set to 6. The 'COD' is 20-Nov-2013. The table below shows activities for Week 47: 18 Nov - 24 Nov 2013.

Activity / WBS	Start	Finish	Orig Dur (d)	Rem Dur (d)	% Comp	Float (d)
Week 47: 18 Nov - 24 Nov 2013						
P777_R010 — OIL LINES REPLACEMENT PROJECT						
02 — MILESTONES/ GENERAL						
06 — GENERAL						
01 — PROJECT MANAGEMENT						
HEGN109 — PROJECT MANAGEMENT	01 Nov 13	28 Feb 17	1,216d	1,210d	0.3%	0d
HGEN100 — MOBILIZATION OF HOME OFFICE TEAM	01 Nov 13	30 Jan 14	91d	70d	9.0%	0d
HGEN103 — MOBILIZATION OF OFFICE FACILITIES FOR CLIENT AT HOME OFFICE	11 Nov 13	12 Jan 14	63d	63d	27.0%	169d
HGEN105 — PROJECT KICK OFF MEETING WITH DANA	16 Nov 13	30 Nov 13	15d	15d	76.0%	185d
02 — PROJECT MANAGEMENT KEY DELIVERABLES						
1 — PROJECT MANAGEMENT & PROJECT CONTROL						
HGEN111 — PROJECT EXECUTION PLAN	08 Nov 13	11 Apr 14	155d	155d	10.0%	85d
HGEN119 — PROJECT CONTROL PROCEDURE	01 Nov 13	14 Feb 14	106d	106d	10.0%	165d
HGEN120 — PREPARF AND SI IRRMIT PROJECT DI ANNING PACKAGE	01 Nov 13	30 Mar 14	150d	150d	10.0%	165d

Figure 10.12 — Lookahead Schedule form inputs. Configure the lookahead window and filter criteria.

The screenshot shows the EPCplanner interface with the 'Activities Lookahead' section. The table below displays activities for Week 44: 28 Oct - 03 Nov 2013, Week 45: 04 Nov - 10 Nov 2013, and Week 46: 11 Nov - 17 Nov 2013. The table includes columns for Activity / WBS, Start, Finish, Orig Dur (d), Rem Dur (d), % Comp, WF, Status, and Float (d).

Activity / WBS	Start	Finish	Orig Dur (d)	Rem Dur (d)	% Comp	WF	Status	Float (d)
Week 44: 28 Oct - 03 Nov 2013 (18 activities)								
P777_R010 — OIL LINES REPLACEMENT PROJECT (18)								
10 — ENGINEERING (7)								
10 — DETAILED ENGINEERING (7)								
42 — PIPELINES, RISERS & SUBSEA CABLES (2)								
05 — COMMON - PIPELINES & RISERS (2)								
10 — DOCUMENTS - COMMON PIPELINES & RISERS (2)								
EDPLDC115 — SOW FOR CABLE AND PIPELINE ROUTE SURVEY(INCLUDING CROSSINGS & JACKET FACE)	01-Nov-2013	07-Nov-2013	7d	7d	0.0%	0.002	TK_NotStart	26d
EDPLDC124 — SOW FOR PRE-ENG. DIVE SURVEY AT CROSSING LOCATIONS & JACKET FACES	01-Nov-2013	07-Nov-2013	7d	7d	0.0%	0.001	TK_NotStart	74d
20 — PROCESS (2)								
10 — DOCUMENTS - PROCESS (2)								
EDPSDC101 — PROCESS SIMULATION REPORT - IFA	01-Nov-2013	25-Nov-2013	25d	25d	0.0%	0.000	TK_NotStart	8d
EDPSDC102 — PROCESS DESIGN BASIS	01-Nov-2013	23-Jan-2014	84d	84d	0.0%	0.003	TK_NotStart	8d
30 — SAFETY (1)								
10 — DOCUMENTS - SAFETY (1)								
EDSADC114 — HSE SCOPE OF WORK (SIC)	01-Nov-2013	26-Dec-2013	56d	56d	0.0%	0.001	TK_NotStart	31d
00 — STRUCTURAL (2)								
05 — COMMON (2)								
10 — DOCUMENTS - COMMON (2)								
EDSTCO100 — SOW FOR GEO-TECHNICAL SURVEY	01-Nov-2013	09-Nov-2013	9d	9d	0.0%	0.001	TK_NotStart	52d
EDSTCO104 — SOW FOR DIVE SURVEY	01-Nov-2013	15-Nov-2013	15d	15d	0.0%	0.001	TK_NotStart	46d
02 — MILESTONES/ GENERAL (10)								
06 — GENERAL (5)								
01 — PROJECT MANAGEMENT (3)								
HGEN109 — PROJECT MANAGEMENT	01-Nov-2013	28-Feb-2017	1,216d	1,216d	0.0%	2.330	TK_NotStart	5d
HGEN100 — MOBILIZATION OF HOME OFFICE TEAM	01-Nov-2013	30-Jan-2014	91d	91d	0.0%	0.004	TK_NotStart	5d
HGEN101 — RECEIPT OF INPUTS / DISKETTES (NATIVE FILE) FROM CLIENT	01-Nov-2013	05-Nov-2013	5d	5d	0.0%	0.004	TK_NotStart	64d
02 — PROJECT MANAGEMENT KEY DELIVERABLES (5)								
6 — OFFSHORE WORKS (3)								
HGEN181 — PRE-ENGINEERING DIVE SURVEY PROCEDURES	01-Nov-2013	12-Feb-2014	104d	104d	0.0%	0.000	TK_NotStart	46d
HGEN122 — PRE-ENGINEERING ROV SURVEY PROCEDURE	01-Nov-2013	12-Dec-2013	42d	42d	0.0%	0.000	TK_NotStart	26d
HGEN214 — GEO-PHYSICAL SURVEY PROCEDURE FOR CABLES & NEW P/L	02-Nov-2013	13-Dec-2013	42d	42d	0.0%	0.000	TK_NotStart	51d

Figure 10.13 — Lookahead Schedule output. Upcoming stage gates and activities due within the selected window.



10.7 Feedback Form

The Feedback report exports an Excel form that can be distributed to field teams, engineering leads, or subcontractors to collect actual dates and progress updates. Completed forms are imported back into EPCplanner, eliminating manual re-entry.

- Linear Activities feedback: exports activity progress and actual date fields for field or office-based updates.
- Register feedback: exports stage actual date fields for engineering, procurement, or subcontractor input.
- Both form types support filter facilities to limit the export to relevant scope subsets.

Feedback Linear Activities COD: 20-Nov-2013 WBS Level: 4 All WBS Values

Linear Activities: 5435 Engineering: 6092 Procurement: 147 Subcontract: 223

ID	Code	Description	Type	Start	End	Progress	Task ID
03 - FAB OF J TUBES	NSJTFB101	FABRICATE J TUBES - RM-13	Linear Activity	ES: 2015-05-20	EP: 2015-06-09	Progress: 0	Task ID: 121858
03 - FAB OF J TUBES	NSJTFB102	FABRICATE J TUBES - RM-14	Linear Activity	ES: 2015-05-11	EP: 2015-05-31	Progress: 0	Task ID: 121859
03 - FAB OF J TUBES	NSJTFB103	FABRICATE J TUBES - RM-20	Linear Activity	ES: 2015-05-07	EP: 2015-05-27	Progress: 0	Task ID: 121860
03 - FAB OF J TUBES	NSJTFB104	FABRICATE J TUBES - RM-22	Linear Activity	ES: 2015-05-02		Progress: 0	Task ID: 121861

Figure 10.14 — Feedback form for Linear Activities. Export and distribute for field progress collection.

Feedback Engineering Register

Linear Activities: 5435 Engineering: 6092 Procurement: 147 Subcontract: 223

ID	Code	Description	Start	End	Weight	Client
EngineeringRegister	2272-13-35000_4371	PR FOR DISHED HEADS	S1: Start S2: Issue PR S3: Start TBE S4: Final TBE S5: TBE Approv	Cutoff: 2013-11-20 S1 E: 2014-06-04 A: S2 E: 2014-06-23 A: S3 E: 2014-07-19 A: S4 E: 2014-09-08 A: S5 E: 2014-09-22 A:	S1 Wt: 10 S2 Wt: 50 S3 Wt: 5 S4 Wt: 15 S5 Wt: 20	Client: Contractor: 2272-13-35000 Type/Class: REQUISITIONS / 2 Discipline: MECHANICAL - STATIC Remarks:
EngineeringRegister	2272-13-35001_4372	PR FOR FASTENERS	S1: Start S2: Issue PR S3: Start TBE S4: Final TBE S5: TBE Approv	Cutoff: 2013-11-20 S1 E: 2014-04-30 A: S2 E: 2014-05-09 A: S3 E: 2014-05-31 A: S4 E: 2014-06-15 A: S5 E: 2014-06-29 A:	S1 Wt: 10 S2 Wt: 50 S3 Wt: 5 S4 Wt: 15 S5 Wt: 20	Client: Contractor: 2272-13-35001 Type/Class: REQUISITIONS / 2 Discipline: MECHANICAL - STATIC Remarks:
EngineeringRegister	2272-13-35002_4373	PR FOR FLANGES	S1: Start S2: Issue PR S3: Start TBE S4: Final TBE S5: TBE Approv	Cutoff: 2013-11-20 S1 E: 2014-03-28 A: S2 E: 2014-04-11 A: S3 E: 2014-04-25 A: S4 E: 2014-05-09 A: S5 E: 2014-05-23 A:	S1 Wt: 10 S2 Wt: 50 S3 Wt: 5 S4 Wt: 15 S5 Wt: 20	Client: Contractor: 2272-13-35002 Type/Class: REQUISITIONS / 2 Discipline: MECHANICAL - STATIC Remarks:

Figure 10.15 — Feedback form for Register items. Distribute to engineering and procurement teams for stage actual date input.



11. Print Settings and Export Options

Shared print settings control page orientation, scale, and paper size for all HTML and PDF outputs across all EPCplanner modules.

Step	Action	Expected Result
1	Open Print Settings from the toolbar or module menu.	Shared formatting preferences for all report outputs are available.
2	Set page orientation, scale, and paper size.	All subsequent print and PDF exports use the configured settings.
3	Generate preview or export from the active module.	The output is formatted according to the saved print settings.

- Review output scale and page orientation before large PDF issuance.
- For very large reports, reduce unnecessary columns or split outputs by area when practical.
- HTML export is suitable for browser-based review; PDF export is suitable for formal distribution.

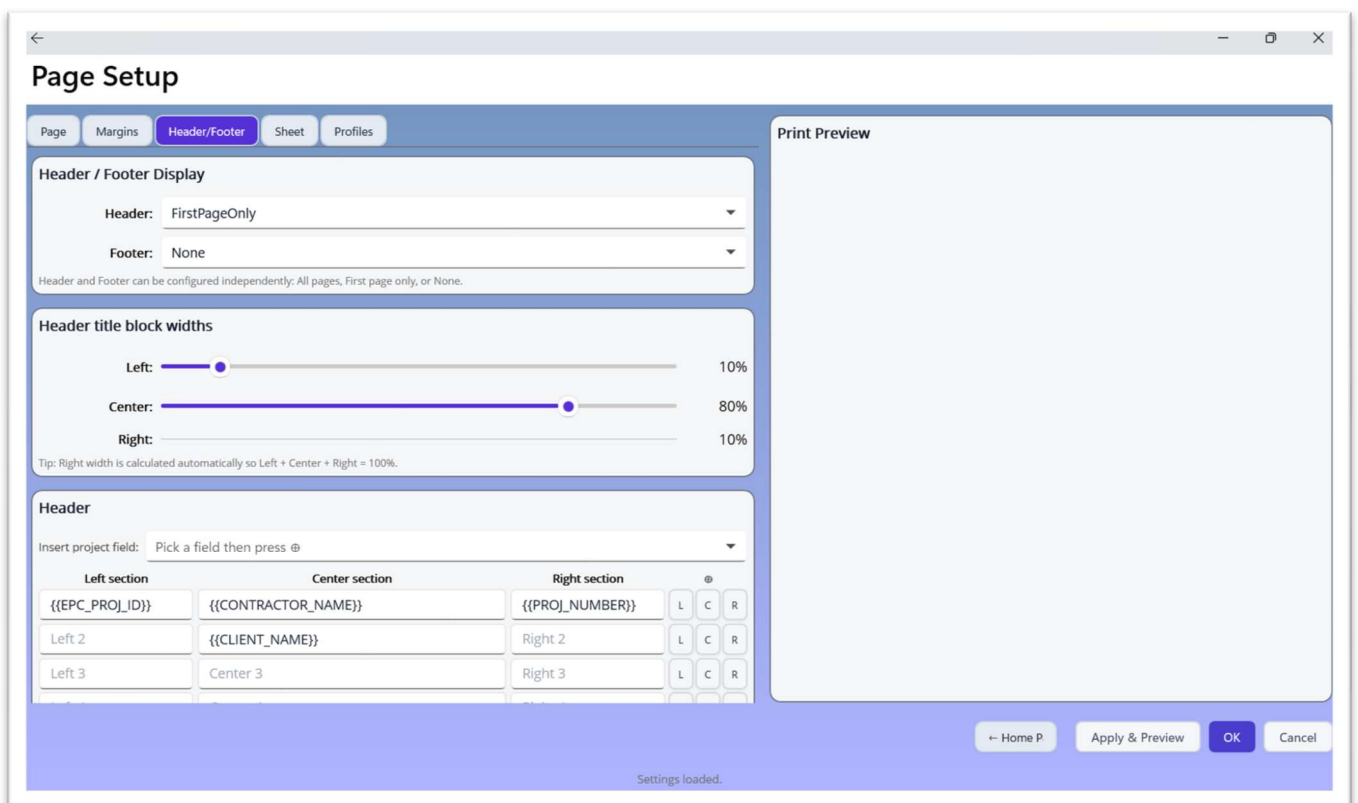


Figure 11.1 — Print settings screen. Configure shared page layout preferences for all print and PDF outputs.



12. User Management and Administration

12.1 User Management

The User Management screen allows Administrators to create, edit, and deactivate user accounts. Each account is assigned a role that controls the permission set within EPCplanner.

Step	Action	Expected Result
1	Open User Management (Admin only).	The user list and selected user panel appear.
2	Select an existing user or click Add New.	The account form opens for editing or creation.
3	Set the role and complete all required fields.	The user profile is configured with the appropriate permissions.
4	Save the user record.	The account is active and available for login.

- A newly added user receives a temporary password (Welcome@12345) and is required to change it on first login.
- Role is the primary access control point — assign the minimum role required for the user's responsibilities.
- Delete a user account only when you are certain it is no longer required; consider deactivating instead to preserve audit trail integrity.

Role	Primary Access Scope
Admin	Full system access — users, settings, mode switch, all data.
Project Controls Manager	Approve, promote, close periods, full reporting access.
Project Controls Engineer	Full planning + CBS read + report generation.
Planner	Register and stage editing, progress entry rights.
Commercial User	CBS import, validate, promote, invoicing, WF management.
Document Controller	Transmittal, distribution management, submittal tracking.
Construction Manager	Site diary, resource management, field progress approval.
Subcontract Coordinator	Package management, subcontractor progress, payment.
QA/QC Engineer	Inspection records, punch items, NCR tracking.
Client	Read-only access to reports and dashboards.
Viewer	Read-only access to views and reports.

Table 12.1 — EPCplanner user roles and primary access scope.



The screenshot shows the 'Users Management' interface in EPCplanner. At the top, there is a navigation menu with options like File, Project, Utility, CBS, Reporting, Register, Progress, View, and Tools. Below this is a dashboard area with buttons for Home, Settings, Admin, Users, Audit Log, Print Settings, and Export Logs. The main section is titled 'Users Management' and includes a sub-header 'Add, delete and assign roles and permissions'. A table lists two users: 'admin' (ID 1) and 'new_user' (ID 2). Below the table is a form for editing the 'admin' user, with fields for Username, Last Name, Email, Job Title, Permissions, First Name, Full Name, Company, Role, and Responsibilities. The Role dropdown is currently set to 'Admin'. At the bottom, there are buttons for Refresh, Save, Add New, Reset Password, and Delete. A status bar at the very bottom indicates 'Connected • P77711 db • SQLite'.

This screenshot is similar to the one above, but with a dropdown menu open for the 'Role' field in the user form. The dropdown lists several roles: Admin, Planner, ProjectControlsEngineer, ProjectControlsManager, CommercialUser, DocumentController, QAQCEngineer (which is highlighted), ConstructionManager, SubcontractCoordinator, Client, and Viewer. The rest of the interface, including the user table and navigation elements, remains the same as in the previous screenshot.

Figure 12.1 — User Management screen. Create and manage user accounts and role assignments.



12.2 Admin Settings

Admin Settings provides mode switching, cut-off date management, and Primavera connection profile control for the active project.

- Use Admin Settings for In-Progress mode switching — this is a one-way, non-reversible action for each project milestone.
- Reopen closed cut-off dates only with a valid documented reason and in accordance with audit discipline.
- Keep all administrator actions controlled and traceable — they affect operational governance and data integrity.

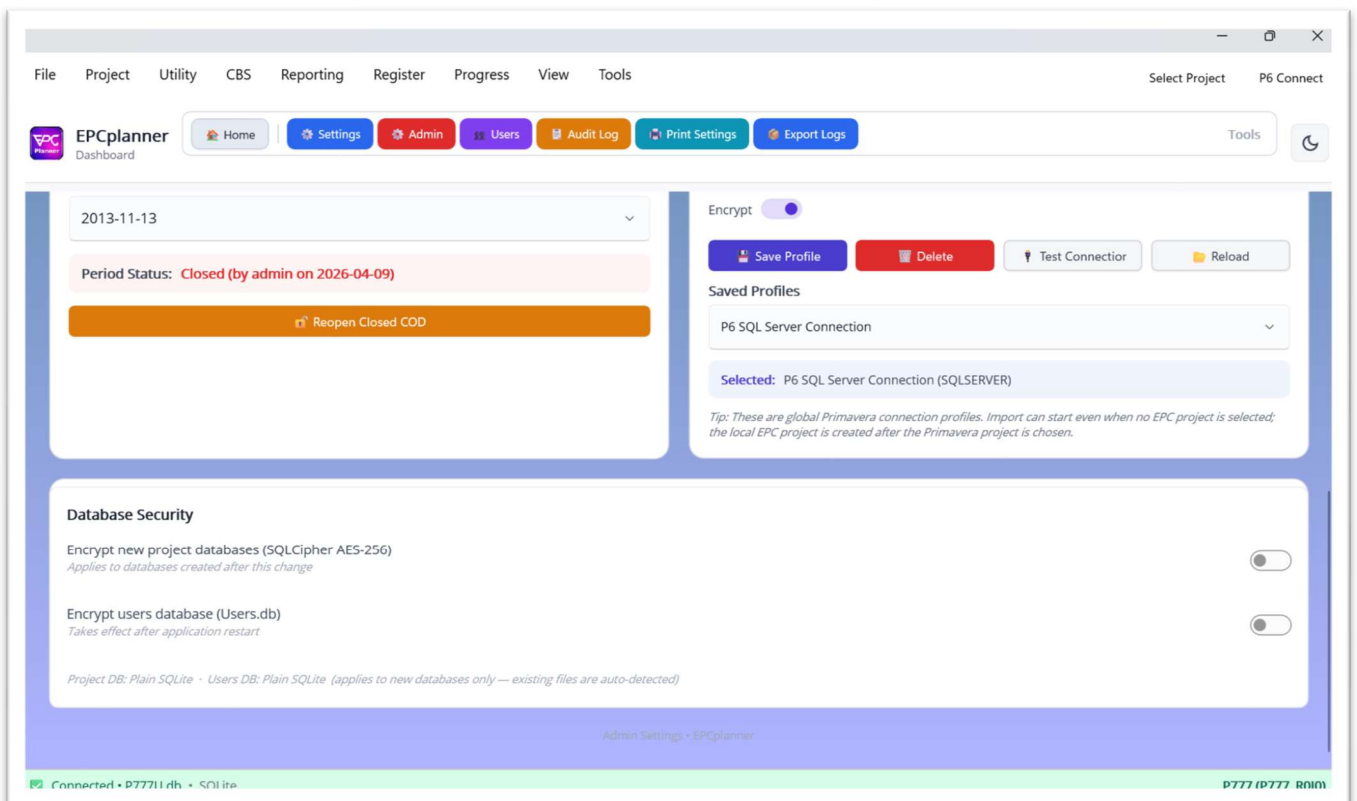
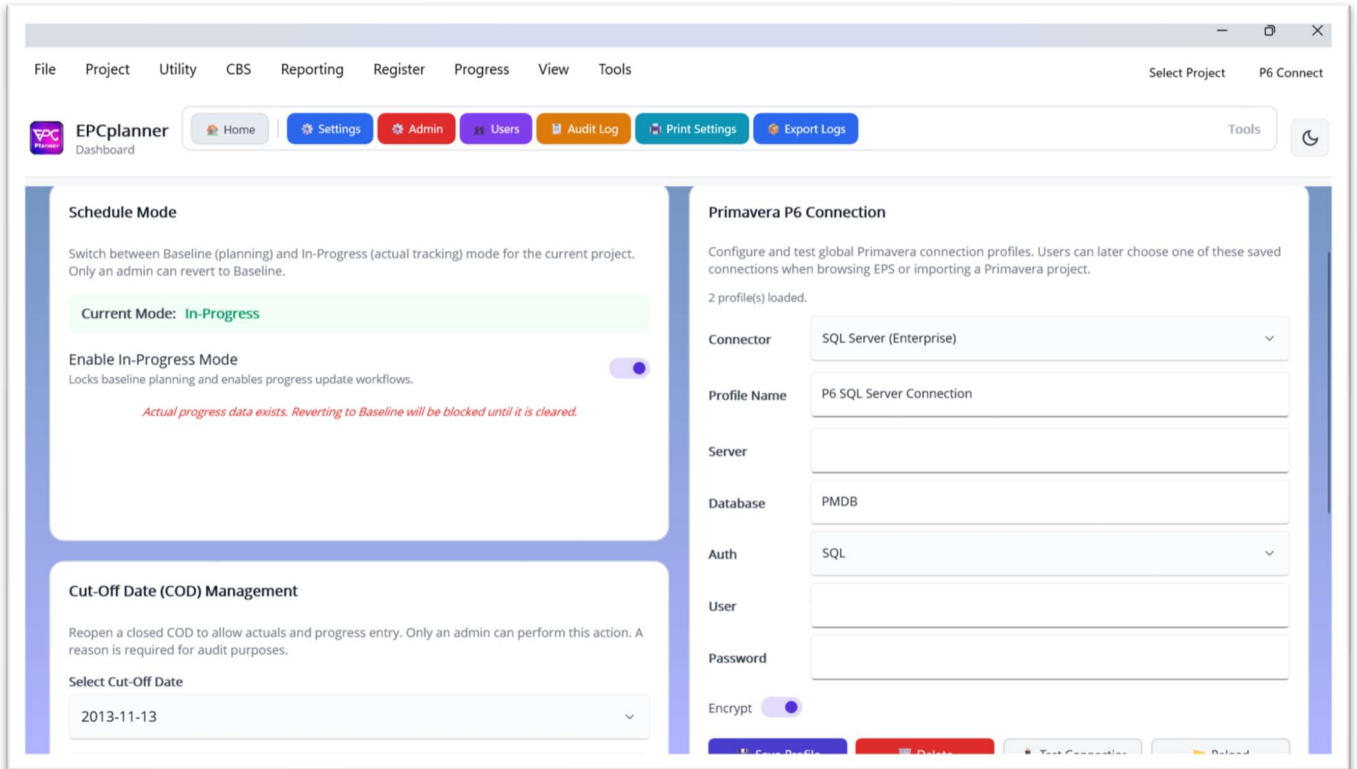


Figure 12.2 — Admin Settings screen. Mode switch, cut-off date management, and Primavera profile controls.



12.3 Audit Log

The Audit Log records all controlled administrative and data actions with timestamp, user identity, and action details. Review it when traceability is required for governance, dispute resolution, or compliance purposes.

Plan version lifecycle events (import, approval, activation, and Revised Cut-Off Date locks) are recorded separately in the Plan Event Log for each plan version. See Chapter 14, Plan Versioning, Section 14.5.

- Audit log entries are immutable — they cannot be edited or deleted by any user including Admin.
- Export the audit log to Excel for formal submission or archiving when required.
- Filter by user, date range, or action type to locate specific events efficiently.

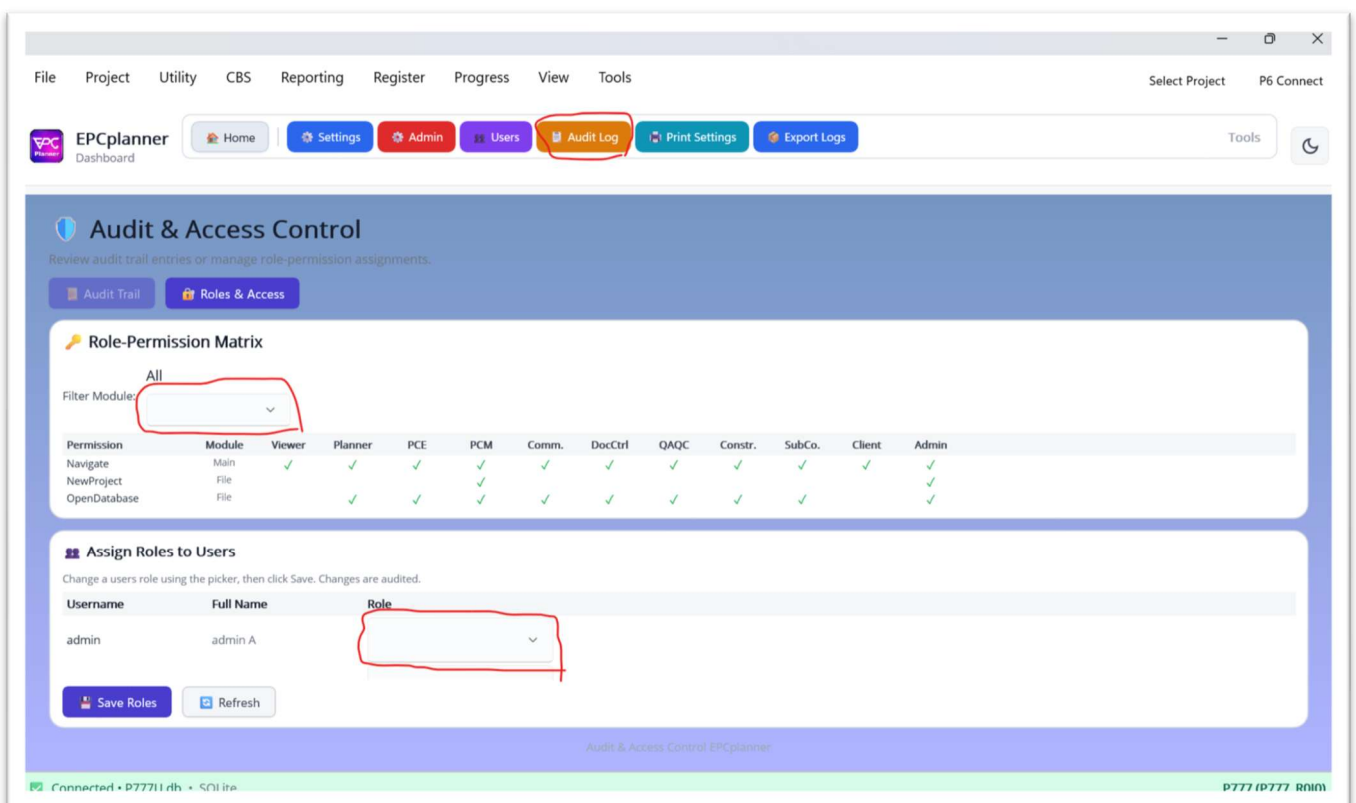
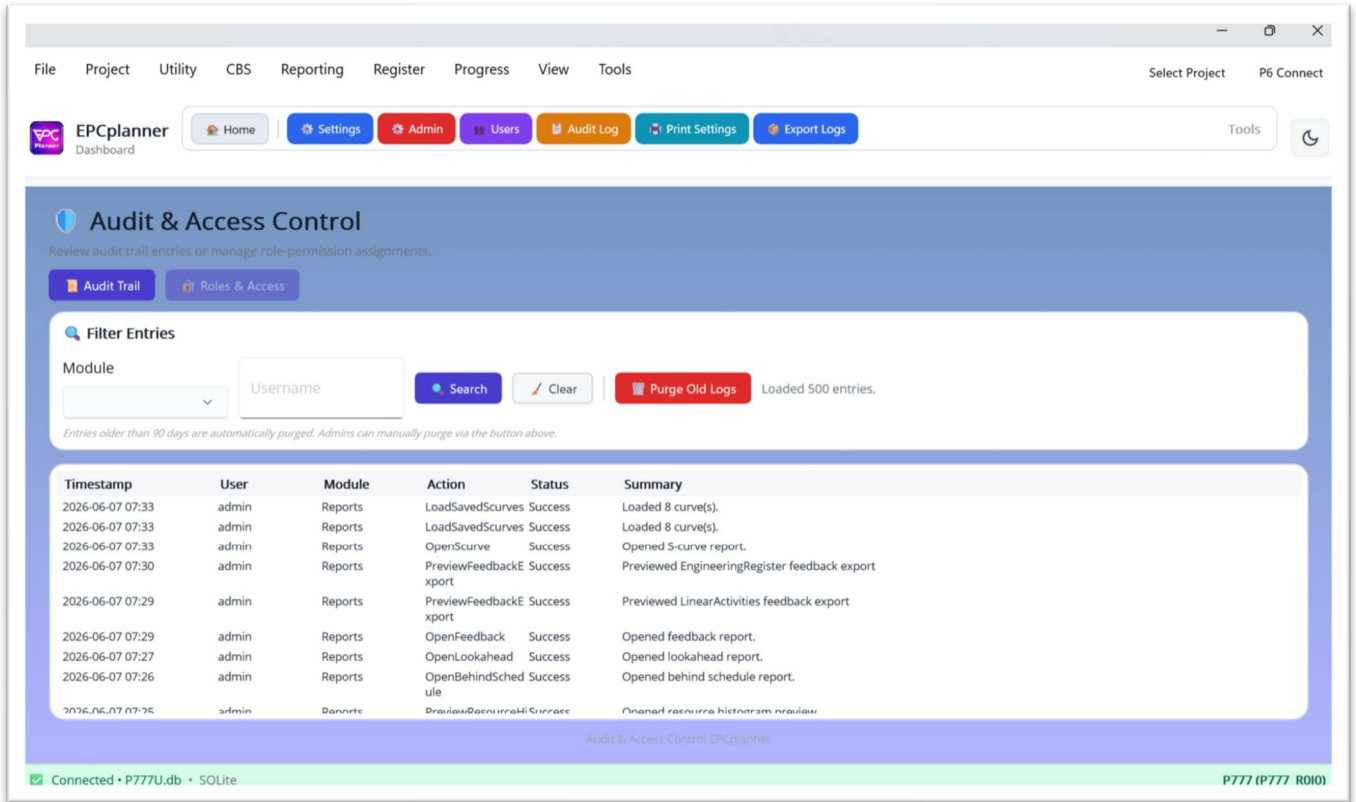


Figure 12.3 — Audit Log screen. Full tamper-proof record of all controlled system and data actions.



13. Settings, Utilities, and Troubleshooting

13.1 General Utilities

- Settings and theme controls: usability preferences that do not affect project data or workflow state.
- Table Viewer: direct tabular inspection of underlying database tables — use for diagnostics and data verification.
- Logout: cleanly closes the active session. Always log out before switching users on a shared workstation.

13.2 Troubleshooting Checklist

#	Symptom	Resolution
A	License activation rejected.	Verify the generated key belongs to the exact machine fingerprint shown on the activation page. Keys are machine-specific and non-transferable.
B	Login fails repeatedly.	Check username, password, account active status. Confirm whether a forced password change is pending.
C	Wrong database opened.	Close the current database and reopen the correct project file before any import or update operation.
D	Register import creates duplicates.	Recheck the business key field mapping and confirm upsert mode was selected during import.
E	High validation issue count.	Review task code links, the quality of the schedule import, and stage-template assignment completeness.
F	P6 connection test fails.	Verify the connection string, network access to the P6 server, and that the Admin profile credentials are correct.
G	S-curve shows no actual line.	Confirm that Reg Rollup and Run Update were completed before the S-Curve step in the progress cycle.
H	PDF report is extremely large.	Export the exceptions-only summary; keep full detail in Excel. Reduce column count or split by area.

13.3 Controlled Operating Routine

Follow this routine discipline to maintain data integrity and report accuracy throughout the project lifecycle.

Before any major import:

- Create a database backup.
- Confirm the correct project database is active.
- Confirm the target project is selected.

After any major import:

- Review imported record counts and sample outputs.
- Run Quality and Validation before proceeding.

Before issuing any report:

- Confirm project setup, cut-off date, and latest import status.
- Verify Validation status is acceptable.
- Review S-curve and tabular outputs against known project milestones.

NOTE

Keep screenshots in this manual current whenever a visible workflow or screen layout changes. An out-of-date manual creates confusion during training and onboarding.



14. Plan Versioning (Revisions, Rebaselines, Recovery Plans, and Forecasts)

EPCplanner maintains a single live working plan (EPC_ACTIVITY and the Register stage dates) at all times — progress, S-curves, WF, and Reg Rollup always run against this active plan. Plan Versioning adds a controlled archive layer on top of this: every time a revised schedule is imported, EPCplanner can record it as a named, typed Plan Version with its own immutable snapshot, approval workflow, and audit trail. The active plan never loses history, and any earlier plan remains available for comparison, recovery, or audit.

This chapter covers the Plan Version types, the approval lifecycle, the import workflow, the Revised Cut-Off Date (“Lock Past”) mechanism used for Recovery and Rebaseline plans, the Plan Version Manager screen, and the comparison views available in the Register, S-Curves, and Reports modules.

14.1 Plan Version Types

Every imported schedule is recorded as one of five Plan Version types:

Type	Purpose
Baseline	The original approved project schedule. Created automatically as the first plan version on the project’s first P6/XER import. Always exists and is never deleted.
Revision	A formally numbered schedule revision issued during execution (Revision 1, Revision 2, etc.), reflecting approved changes to scope or sequence.
Recovery	A recovery plan issued to address schedule slippage. Normally imported with a Revised Cut-Off Date that locks actual progress as of that date (Section 14.4).
Rebaseline	A full schedule reset, formally approved by the Client or PMC, that becomes the new reference plan for future S-curves and reports. Also supports a Revised Cut-Off Date.
Forecast	An analytical “what-if” schedule scenario for reporting and comparison only. A Forecast plan can never be set as the Active plan.

IMPORTANT

A Forecast plan version can never become the Active controlling plan. EPCplanner enforces this at the database level — attempting to activate a Forecast plan is rejected. Use Forecast versions only for comparison overlays in S-Curves, Register, and Reports (Section 14.6).



14.2 Plan Version Lifecycle

Each Plan Version (other than the original Baseline) moves through a controlled approval lifecycle before it can become the Active plan:

Status	Meaning
Draft	Created on import. Snapshot of activity and stage dates has been taken, but the plan is not yet visible outside the Plan Version Manager.
Pending Approval	Submitted for review. The plan is awaiting approval by a Project Controls Manager or Administrator before it can be activated.
Approved	Reviewed and approved. Ready to be set as Active by a Project Controls Manager or Administrator.
Active	The current controlling plan. Progress calculations, S-curves, WF, and Reg Rollup all run against this plan's dates. Only one plan per project can be Active at any time.
Superseded	Was previously Active; replaced when a different plan was activated. Remains available for comparison and audit.
Archived	Retired from active use by a Project Controls Manager or Administrator. Remains available for comparison and audit; cannot be reactivated without Admin intervention.

IMPORTANT

Activating a plan version supersedes the current Active plan and triggers a full rebuild of plan progress, S-curve points, and WF spreads from the newly activated plan's dates. This affects every project report. Activation should only be performed once the new plan has been formally approved.

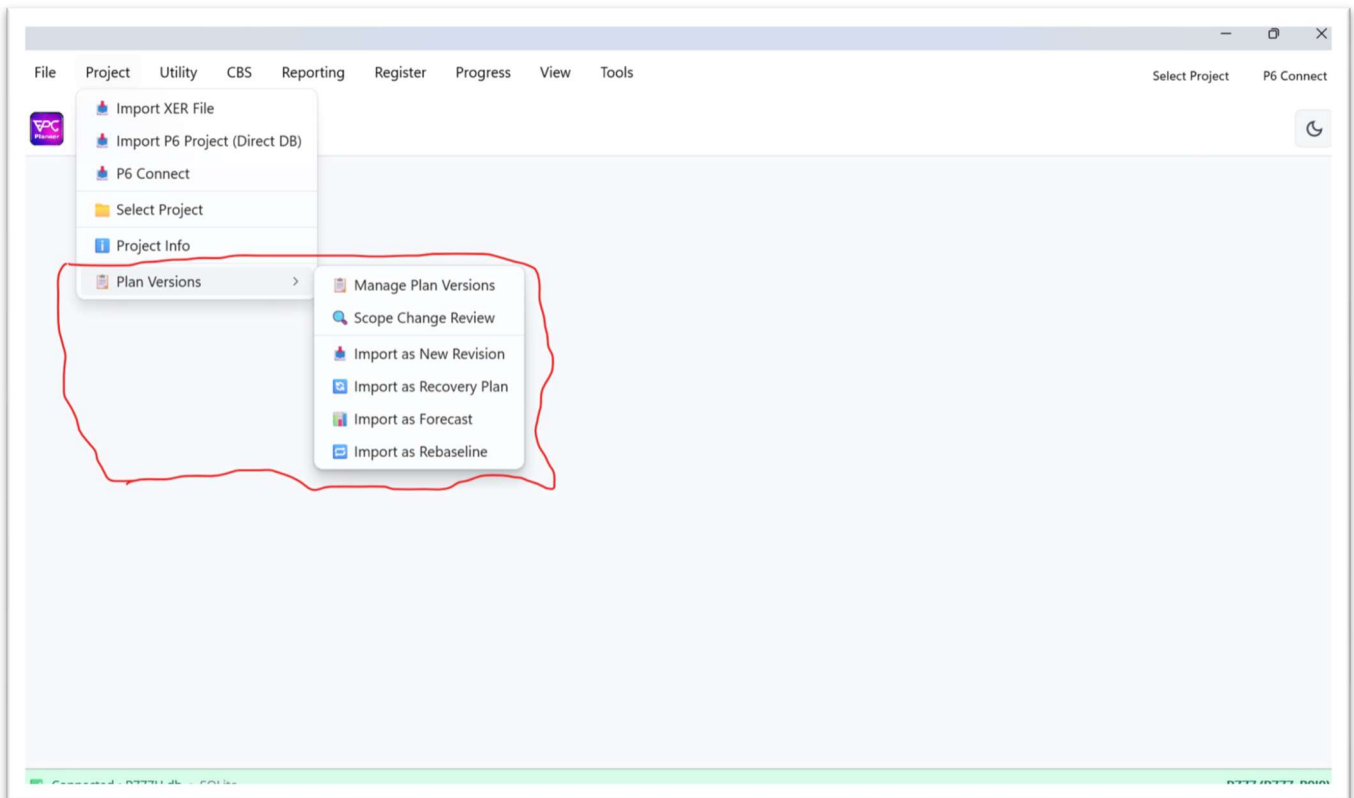


Figure 14.1 — Project menu, Plan Versions submenu. Entry points for Manage Plan Versions, Scope Change Review, and importing a schedule as a new Revision, Recovery Plan, Forecast, or Rebaseline (Section 14.3).



14.3 Importing a New Plan Version

Plan Versioning is integrated into the existing P6/XER import workflow (Section 4) — no separate import process is required.

- First-ever import for a project: EPCplanner automatically creates the Baseline plan version with no additional input required.
- Any subsequent import: the Plan Revision dialog opens before the import proceeds. Select the Plan Type (Revision, Recovery, Rebaseline, or Forecast), enter a Plan Label (e.g. “Revision 1 — May-26”), and add optional Remarks.
- Revised Cut-Off Date: for Revision, Recovery, and Rebaseline types, a date picker is shown, pre-filled with the last closed Cut-Off Date. This date is used to lock past actual progress — see Section 14.4. The picker is hidden for Forecast imports, since Forecast plans do not lock progress.
- After the import completes, the new plan version is created in Draft status, a snapshot of activity dates and Register stage dates is taken, and the plan is automatically moved to Pending Approval — ready for review in the Plan Version Manager (Section 14.5).

NOTE

The existing import pipeline (XER parsing, activity mapping, spread calculation) is unchanged. Plan Versioning adds a snapshot and approval step before and after this pipeline — it does not alter how dates are imported or mapped.

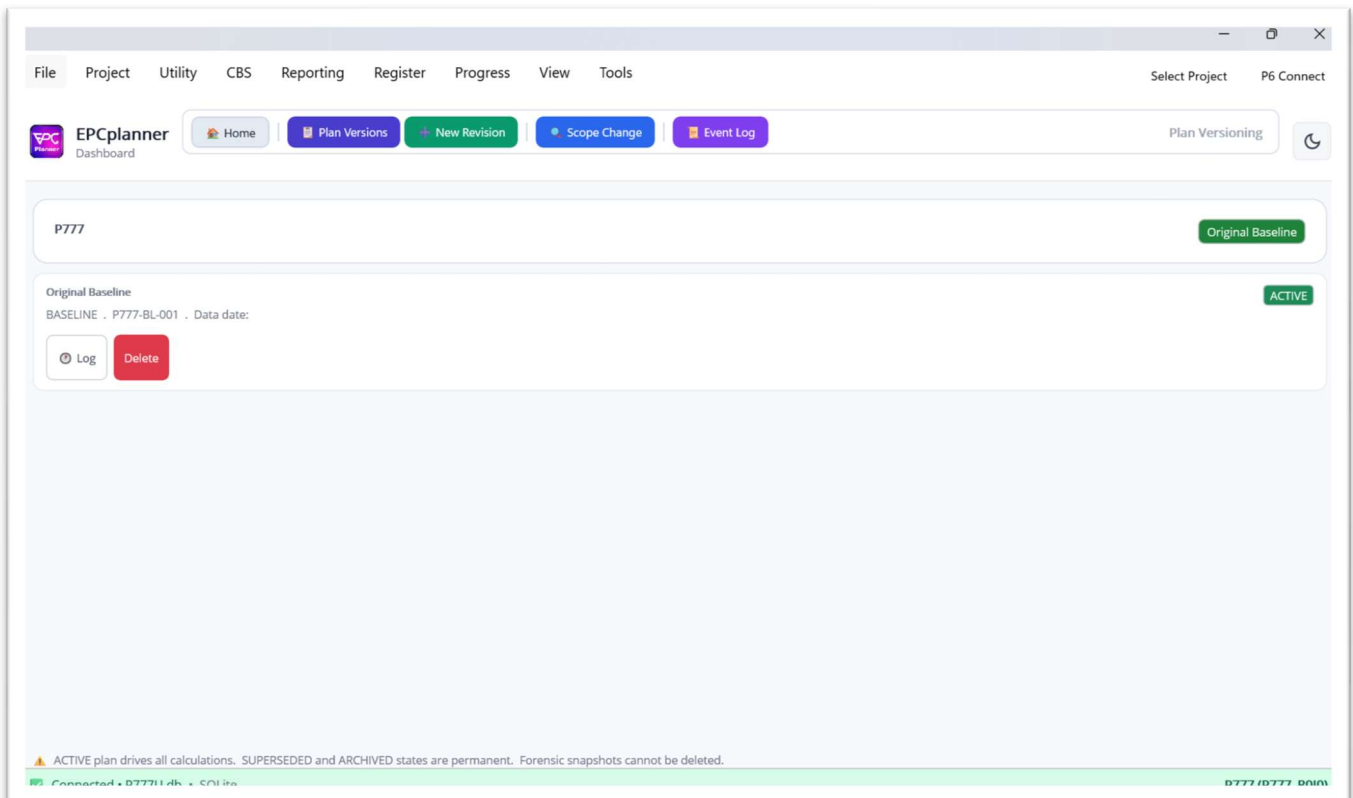


Figure 14.2 — Plan Version Manager screen. The Original Baseline is shown as the Active plan, with Log and Delete actions available for each plan version (Section 14.5).



14.4 Revised Cut-Off Date — Locking the Past

When a Revision, Recovery, or Rebaseline plan is imported with a Revised Cut-Off Date (COD), EPCplanner locks the project’s actual progress as of that date before the new plan dates take effect. This ensures that historical S-curve points and reports remain accurate to what had actually been achieved, while the new schedule governs everything from the Revised COD forward.

The lock is applied per activity, using the actual progress recorded at the closest closed Cut-Off Date on or before the Revised COD:

Activity status at Revised COD	Resulting plan progress
Physically complete (100% complete, or Actual Finish on or before the Revised COD)	Locked at 100%
In progress (Actual Start recorded, percent complete greater than 0)	Locked at its actual percent complete on that date
Not yet started, and Early Start is on or after the Revised COD	Reset to 0% — the new plan dates apply from the Revised COD forward
Early Start before the Revised COD but no Actual Start recorded	Treated as not started (0%) and flagged for review — check this activity’s actual dates before approving the plan

Once the lock is applied, EPCplanner writes a permanent Revision Anchor record — a single immutable entry capturing the Revised COD, the project’s overall actual percent and earned Weight Factor at that date, and the plan that was Active immediately before this one. This anchor is the forensic zero-point for the new plan and is logged in the Plan Event Log as an ANCHOR_LOCKED event (Section 14.5).

WARNING

The Revision Anchor and the underlying activity/stage date snapshots are immutable evidence records — once written, they cannot be edited or deleted by any user, including Administrators. Review the Revised Cut-Off Date and any flagged activities carefully before approving a Recovery or Rebaseline plan, since the anchor cannot be corrected after the fact. If the Revised COD was wrong, raise a new plan version rather than attempting to alter the anchored one.

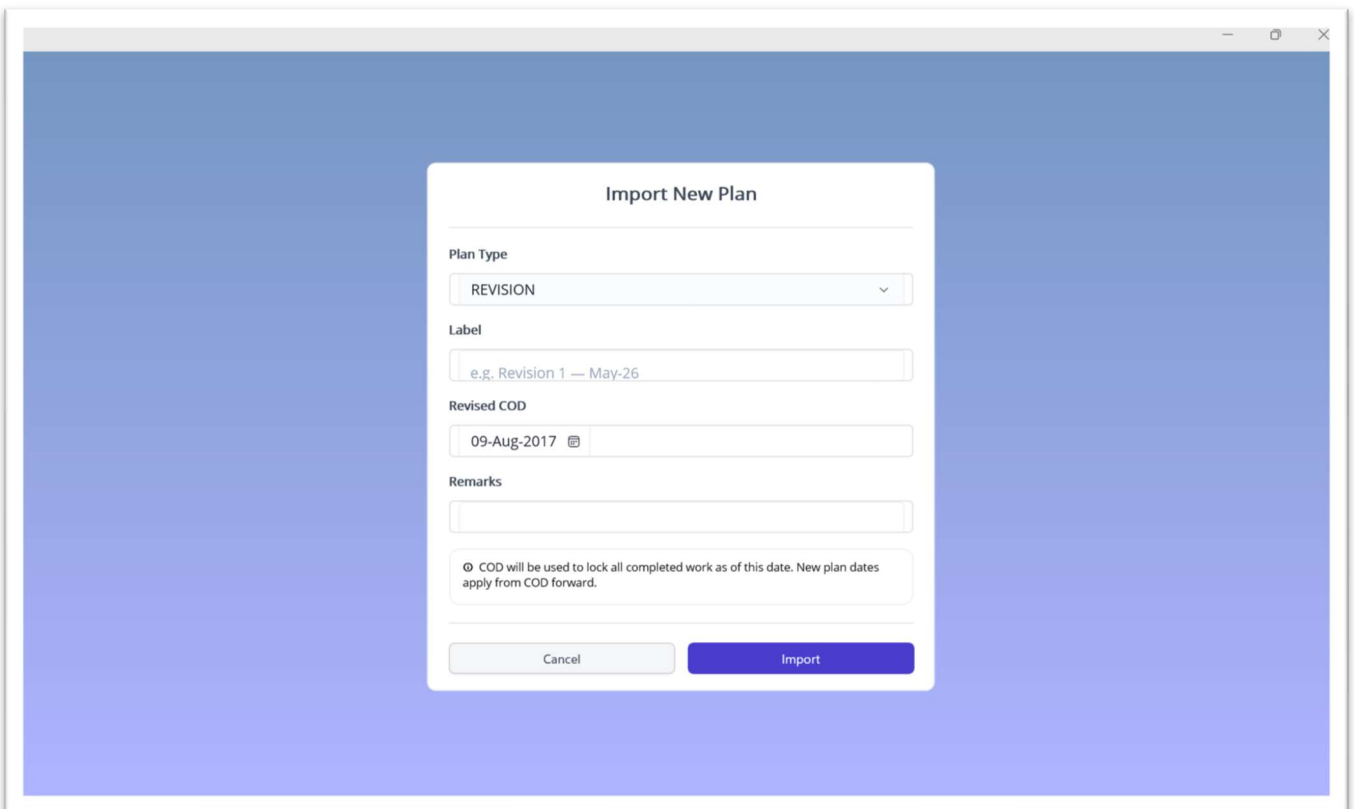


Figure 14.3 — Import New Plan dialog. Select the Plan Type, enter a Label and Remarks, and set the Revised Cut-Off Date used to lock completed work as of that date (Sections 14.3 and 14.4).



14.5 Plan Version Manager

The Plan Version Manager (Project Settings → Plan Versions) lists every plan version for the project and provides the approval and activation controls.

- Header: shows the project name and a badge identifying the current Active plan.
- Plan list: each plan version shows its Label, Type, Plan ID, Data Date, and current Status badge (Draft, Pending Approval, Approved, Active, Superseded, or Archived).
- Submit: moves a Draft plan to Pending Approval, ready for review.
- Approve / Reject: available on Pending Approval plans. Approve moves the plan to Approved status; Reject returns it to Draft for correction.
- Set Active: available on Approved plans (except Forecast). Activating supersedes the current Active plan and triggers the recalculation described in Section 14.2.
- Archive: retires a Draft, Approved, or Superseded plan. This cannot be undone.
- Delete: permanently removes a Draft plan that has not yet been snapshotted. Available to Administrators only.
- View Event Log: opens the Plan Event Log for the selected plan — an immutable, timestamped record of every lifecycle event (Imported, Submitted, Approved, Approval Rejected, Activated, Superseded, Archived, Anchor Locked, Spread Rebuilt, Stage Re-linked, Scope Diff Done, Integrity Checked) with the user who performed each action.

NOTE

The Plan Event Log is part of the project's permanent audit trail and is referenced from the Audit Log (Section 12.3) for governance and dispute resolution.

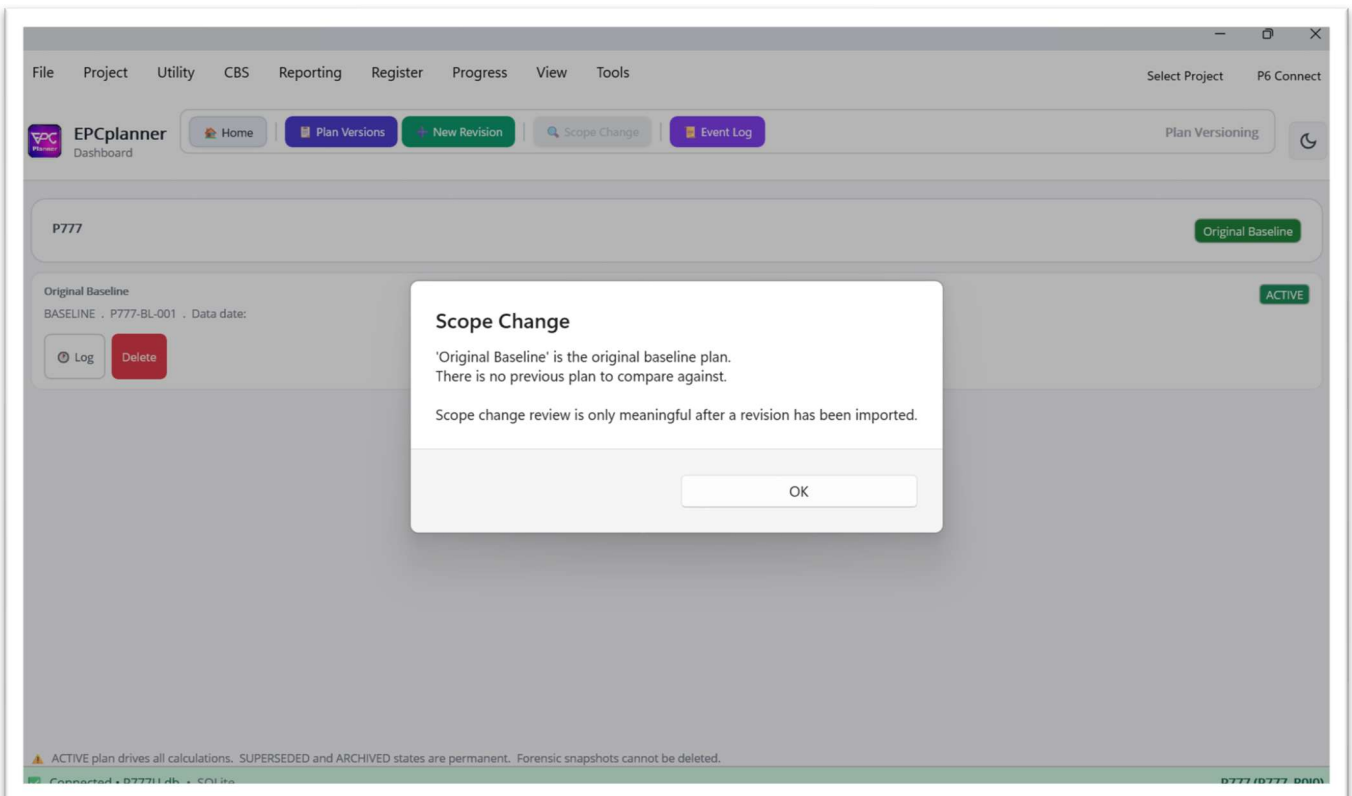


Figure 14.4 — Scope Change Review dialog. Comparison is only available once a revision has been imported — the Original Baseline has no previous plan to compare against (Section 14.6).



14.6 Comparing Plan Versions

Once more than one plan version exists for a project, comparison views become available across the Register, S-Curves, and Reports modules. Comparisons are always read-only — they do not change the Active plan or any live data.

- Register: a “Compare with...” chip bar appears above the Register grid. Selecting an earlier plan version adds read-only Previous E-Date and L-Date columns alongside the active dates, plus a colour-coded Δ Days column showing how many days each stage has moved (amber = later, green = earlier) relative to the selected plan.
- S-Curves: the S-Curve definition screen includes a Plan Version selector, allowing one S-curve per plan version to be overlaid on the same chart — for example, the Baseline curve alongside the Recovery Plan curve.
- Reports: Register Summary and Excel exports accept a comparison plan selection and add an optional PlanComparison sheet showing the planned-date variance per stage between the selected plans. Each report’s header also displays the plan label, type, and data date it was generated against.

TIP

For Third-Party Register Validation involving a revised schedule, import the new XER as a Revision or Recovery plan first, complete the Stage Re-link review for any changed task codes, and only then proceed with Validation (Section 9.6) against the new active dates.

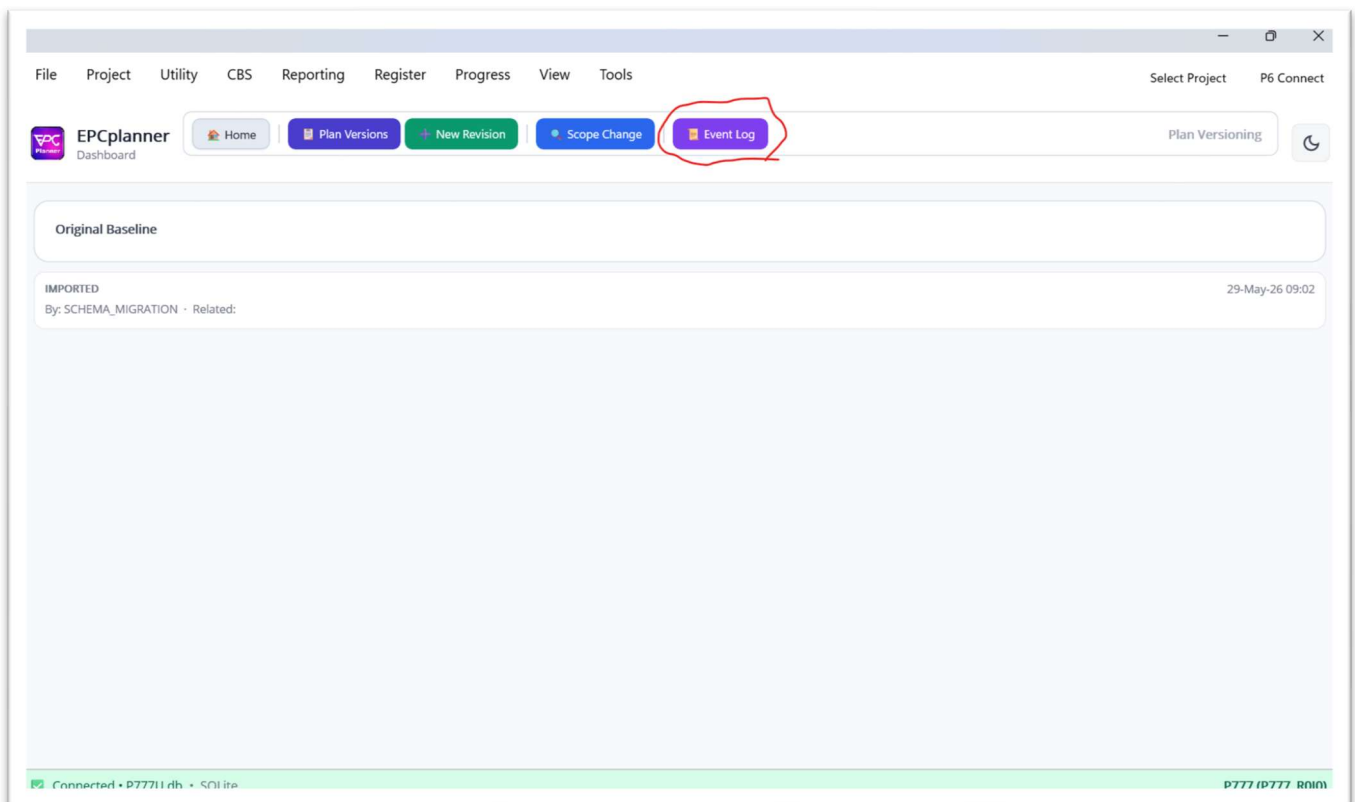


Figure 14.5 — Plan Version Manager, Event Log. Each plan lifecycle event (e.g. Imported) is recorded with its date and responsible user (Section 14.5).



14.7 Roles and Permissions

Action	Required Role
Import a new plan version (Revision, Recovery, Rebaseline, Forecast)	Planner, Project Controls Engineer, Project Controls Manager, or Admin
Submit a plan version for approval	Planner and above
Approve or reject a plan version	Project Controls Manager, Admin
Set a plan version as Active	Project Controls Manager, Admin
Archive a plan version	Project Controls Manager, Admin
Delete a Draft plan version (no snapshot)	Admin only
View the Plan Event Log	Project Controls Engineer and above
View plan comparison in Register, S-Curves, and Reports	All roles with read access to that module

These permissions follow the same 11-role model described in Table 12.1 — no additional roles are required for Plan Versioning.



Appendix – A

Sample Reports Output



1. Tabular Progress Report

LEVEL-1 OVERALL PROJECT SUMMERY REPORT											
Project: P777_R010 Period: Weekly Cut-off: 2013-11-20 Plan: Original Baseline BASELINE											
Ref.	Description	Weight Factor %		THIS PERIOD				CUMULATIVE			
		Overall	Group	E.Plan%	Actual%	L.Plan%	Var	E.Plan%	Actual%	L.Plan%	Var
+ 1000 - OIL LINES REPLACEMENT PROJECT +											
2000	MILESTONES/ GENERAL	3.483	3.48	1.83	4.11	0.01	2.28	2.73	4.31	0.02	1.57
2001	ENGINEERING	5.145	5.15	0.13	0.07	0.02	-0.07	0.27	0.19	0.03	-0.08
2002	SUB-CONTRACTING SERVICES (SR to SO)	0.005	-	-	3.04	-	3.04	3.04	6.09	-	3.04
2003	PROCUREMENT	29.361	29.36	-	0.00	-	0.00	-	0.00	-	0.00
2004	ONSHORE FABRICATION	7.277	7.28	-	-	-	-	-	-	-	-
2005	LOADOUT, SEAFASTENING & TRANSPORTATION	5.227	5.23	-	-	-	-	-	-	-	-
2006	OFFSHORE WORKS	49.503	49.50	0.27	0.11	-	-0.15	0.47	0.31	-	-0.16
OIL LINES REPLACEMENT PROJECT :		100.000	100.00	0.20	0.20	-	-	0.34	0.31	-	-0.03
OVERALL PROGRESS - "OIL LINES REPLACEMENT PROJECT"		100.000	100.00	0.20	0.20	-	-	0.34	0.31	-	-0.03

LEVEL-2 OVERALL PROJECT SUMMERY REPORT											
Project: P777_R010 Period: Weekly Cut-off: 2013-11-20 Plan: Original Baseline BASELINE											
Ref.	Description	Weight Factor %		THIS PERIOD				CUMULATIVE			
		Overall	Group	E.Plan%	Actual%	L.Plan%	Var	E.Plan%	Actual%	L.Plan%	Var
+ 1000 - OIL LINES REPLACEMENT PROJECT +											
+ 2000 - MILESTONES/ GENERAL +											
3000	MILESTONES	-	-	-	-	-	-	-	-	-	-
3001	GENERAL	3.483	100.00	1.83	4.11	0.01	2.28	2.73	4.31	0.02	1.57
MILESTONES/ GENERAL :		3.483	100.00	1.83	4.11	0.01	2.28	2.73	4.31	0.02	1.57
+ 2001 - ENGINEERING +											
3002	DETAILED ENGINEERING	4.713	91.60	0.15	0.07	0.02	-0.07	0.29	0.21	0.03	-0.09
3003	CONSTRUCTION ENGINEERING	0.413	8.02	-	-	-	-	-	-	-	-
3004	AS-BUILTS	0.019	0.38	-	-	-	-	-	-	-	-
ENGINEERING :		5.145	100.00	0.13	0.07	0.02	0.07	0.27	0.19	0.03	-0.08
+ 2002 - SUB-CONTRACTING SERVICES (SR to SO) +											
3005	ENGINEERING S/C SERVICES (SR to SO)	0.001	17.39	-	-	-	-	-	17.50	-	17.50
3006	CONSTRUCTION S/C SERVICES (SR to SO)	0.004	82.61	-	3.68	-	3.68	3.68	3.68	-	-
SUB-CONTRACTING SERVICES (SR to SO) :		0.005	100.00	-	3.68	-	3.68	3.68	6.09	-	3.04
+ 2003 - PROCUREMENT +											
3007	PROCUREMENT SERVICES	0.876	2.98	-	0.00	-	0.00	-	0.00	-	0.00
3008	PO TO SITE DELIVERY INCL DOCUMENTATION	28.484	97.02	-	-	-	-	-	-	-	-
PROCUREMENT :		29.361	100.00	-	-	-	-	-	-	-	-
+ 2004 - ONSHORE FABRICATION +											
3009	FAB - SUBSEA PIPELINES & RISERS	1.045	14.36	-	-	-	-	-	-	-	-
3010	FAB - TOPSIDE MODIFICATIONS	2.255	30.98	-	-	-	-	-	-	-	-
3011	FAB - J TUBE, J TUBE CLAMPS & SUBSEA CABLE	0.575	7.90	-	-	-	-	-	-	-	-
3012	FAB - NEW STRUCTURE PLATFORMS	3.403	46.76	-	-	-	-	-	-	-	-
ONSHORE FABRICATION :		7.277	100.00	-	-	-	-	-	-	-	-
+ 2005 - LOADOUT, SEAFASTENING & TRANSPORTATION +											
3013	LOADOUT & SEAFASTENING	1.508	28.86	-	-	-	-	-	-	-	-
3014	TRANSPORTATION	3.719	71.14	-	-	-	-	-	-	-	-
LOADOUT, SEAFASTENING & TRANSPORTATION :		5.227	100.00	-	-	-	-	-	-	-	-
+ 2006 - OFFSHORE WORKS +											
3015	OFFSHORE SURVEY WORKS	2.455	4.96	5.41	2.30	-	-3.11	9.39	6.23	-	-3.17
3016	INSTALLATION OF SUBSEA PIPELINES & RISERS	10.016	20.23	-	-	-	-	-	-	-	-
3017	TOPSIDE MOD, TIE IN, PRE-COMM & COMM INCL SOLAR SYSTEM DEMOLITION	19.993	40.39	-	-	-	-	-	-	-	-
3018	INSTALLATION OF J TUBE, J TUBE CLAMPS & SUBSEA CABLE	9.963	20.13	-	-	-	-	-	-	-	-
3019	DEMOLITION OF OAP & INSTALLATION OF NEW STRUCTURE PLATFORMS	4.861	9.82	-	-	-	-	-	-	-	-
OVERALL PROGRESS - "OIL LINES REPLACEMENT PROJECT"											
OVERALL PROGRESS - "OIL LINES REPLACEMENT PROJECT"		100.000	100.00	0.20	0.20	-	-	0.34	0.31	-	-0.03



3. Activities Behind Schedule Report

Behind Schedule Report

Project: PTTT_R03 Cutoff Date: 25-Nov-2013 Model: Program-Build Activities: 25 WBS Group: 1

PTTT_R03 - OIL LINES REPLACEMENT PHASE
25 activities

Behind Schedule Activities

Activity / WBS	Planned Start	Planned Finish	Actual Start	Forecast Finish	Orig Dur (D)	Rem Dur (D)	Slippage (D)	Float (D)	E Plan %	L Plan %	Actual %	Prog Var %	Status
02 - MILESTONES GENERAL													
01 - GENERAL													
01 - PROJECT MANAGEMENT													
HSD103 - PROJECT MANAGEMENT	01-Nov-2013	25-Feb-2017	01-Nov-2013		1,216	1,216	0	0	0.0%	0.0%	0.0%	0.0%	Td_Active
HSD105 - MOBILIZATION OF HOME OFFICE TEAM	01-Nov-2013	30-Jan-2014	01-Nov-2013		91	79	0	0	22.0%	22.0%	8.0%	+13.6%	Td_Active
02 - PROJECT MANAGEMENT KEY DELIVERABLES													
1 - PROJECT MANAGEMENT & PROJECT CONTROL													
HSD2011 - PROJECT EXECUTION PLAN	01-Nov-2013	15-Apr-2014			154	154	0	0	0.0%	0.0%	0.0%	+15.6%	Td_Active
HSD2012 - PROJECT CONTROL PROCEDURE	01-Nov-2013	15-Apr-2014			154	154	0	0	0.0%	0.0%	0.0%	+15.6%	Td_Active
HSD2013 - PREPARE AND SUBMIT PROJECT PLANNING PACKAGE	01-Nov-2013	30-Jun-2014			154	154	0	0	0.0%	0.0%	0.0%	+15.6%	Td_Active
2 - OFFSHORE WORKS													
HSD3011 - PRE-ENGINEERING ONE SURVEY PROCEDURES	01-Nov-2013	13-Feb-2014			154	154	0	0	0.0%	0.0%	0.0%	+15.6%	Td_Active
HSD3012 - PRE-ENGINEERING SURVEY PROCEDURE	01-Nov-2013	13-Feb-2014			154	154	0	0	0.0%	0.0%	0.0%	+15.6%	Td_Active
HSD3014 - GEO-PHYSICAL SURVEY PROCEDURE FOR CABLES & NEW P/L	01-Nov-2013	15-Oct-2013			43	43	0	0	100.0%	100.0%	100.0%	-48.6%	Td_Active
HSD3015 - PRE-ENGINEERING SURVEY REPORT FOR CABLES CROSSINGS	01-Nov-2013	30-Jan-2014			200	200	0	0	0.0%	0.0%	0.0%	+15.6%	Td_Active
10 - ENGINEERING													
10 - DETAILED ENGINEERING													
10 - GENERAL													
EDG101 - ENGINEERING NUMBERING PROCEDURE	01-Nov-2013	01-Jan-2014			56	56	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDG102 - ENGINEERING DELIVERABLES REGISTER	01-Nov-2013	01-Jan-2014			56	56	0	0	0.0%	0.0%	0.0%	+15.6%	Td_Active
10 - DOCUMENTS - PROCESS													
ESDPC101 - PROCESS SIMULATION REPORT - I/A	01-Nov-2013	25-Nov-2013			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
ESDPC102 - PROCESS DESIGN BASIS	01-Nov-2013	25-Nov-2013			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
ESDPC103 - SITE VISIT PROCESS SURVEY REPORT FOR MOD WORKS ON W/P'S & BRIDGES	01-Nov-2013	15-Jan-2014			56	56	0	0	0.0%	0.0%	0.0%	+15.6%	Td_Active
ESDPC107 - FLUID LIFT	01-Nov-2013	15-Jan-2014			56	56	0	0	0.0%	0.0%	0.0%	+15.6%	Td_Active
20 - DRAWINGS - PROCESS													
EDP2010 - PROCESS FLOW DIAGRAM - I/A	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2011 - PROCESS FLOW DIAGRAM - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2012 - HEAT & MATERIAL BALANCE - I/A	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2013 - HEAT & MATERIAL BALANCE - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2014 - P/L - PROCESS - I/A	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2015 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2016 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2017 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2018 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2019 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2020 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2021 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2022 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2023 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2024 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2025 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2026 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2027 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2028 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2029 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2030 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2031 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2032 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2033 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2034 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2035 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2036 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2037 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2038 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2039 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2040 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2041 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2042 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2043 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2044 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2045 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2046 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2047 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2048 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2049 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2050 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2051 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2052 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2053 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2054 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2055 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2056 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2057 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2058 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2059 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2060 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2061 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2062 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2063 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2064 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2065 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2066 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	01-Jan-2014			25	25	0	0	100.0%	100.0%	100.0%	-15.6%	Td_Active
EDP2067 - P/L - PROCESS - I/A (RMWD)	01-Nov-2013	0											



7. Register Reports

Engineering Progress Register

Overall Progress Summary

Cut-off Date: 20/11/2013 | Total Items: 6,092 | Total Weight: 100.000

Progress Type	Progress %	Variance vs Actual	Status
Early/Plan (P)	0.292%	-0.085%	Behind
Late (L)	0.033%	+0.174%	On/Ahead
Actual (A)	0.207%	-	-

ENG_C1 (5449 items, 6 stages)

Client Document Number Contractor Document Number Document Description	Start (10 %)	IDC (10 %)	IFA (60 %)	Comm Recv (60 %)	Reissue (80 %)	Final (100 %)	W.F/ PROG.	Remarks
+ (30) ARCHITECTURAL +								
+ (30) DRAWINGS +								
AD178-496-A-39301 2272-R-08001-001 RMSC CRP ARCHITECTURAL GA PLAN	D	EDARDR111	EDARDR111	EDARDR111	EDARDR111	EDARDR111	EDARDR111	0.010
	P	07/07/2014	14/07/2014	21/07/2014	04/08/2014	11/08/2014	31/08/2014	-
	L	01/09/2014	08/09/2014	15/09/2014	29/09/2014	06/10/2014	26/10/2014	-
	A							-
AD178-496-A-39302 2272-R-08002-001 RMSC CRP BUILDING SECTIONS	D	EDARDR114	EDARDR114	EDARDR114	EDARDR114	EDARDR114	EDARDR114	0.010
	P	01/09/2014	08/09/2014	15/09/2014	29/09/2014	06/10/2014	26/10/2014	-
	L	10/11/2014	17/11/2014	24/11/2014	08/12/2014	15/12/2014	04/01/2015	-
	A							-
AD178-496-A-39303 2272-R-08003-001 RMSC CRP BUILDING ELEVATIONS	D	EDARDR112	EDARDR112	EDARDR112	EDARDR112	EDARDR112	EDARDR112	0.010
	P	04/08/2014	11/08/2014	18/08/2014	01/09/2014	08/09/2014	28/09/2014	-
	L	29/09/2014	06/10/2014	13/10/2014	27/10/2014	03/11/2014	23/11/2014	-
	A							-
AD178-496-A-39304 2272-R-08004-001 RMSC CRP FLOOR FINISHES LAYOUT	D	EDARDR116	EDARDR116	EDARDR116	EDARDR116	EDARDR116	EDARDR116	0.010
	P	29/09/2014	06/10/2014	13/10/2014	27/10/2014	03/11/2014	23/11/2014	-
	L	08/12/2014	15/12/2014	22/12/2014	05/01/2015	12/01/2015	01/02/2015	-
	A							-
AD178-496-A-39305 2272-R-08005-001 RMSC CRP FALSE CEILING LAYOUT & DETAILS	D	EDARDR118	EDARDR118	EDARDR118	EDARDR118	EDARDR118	EDARDR118	0.010
	P	13/10/2014	20/10/2014	27/10/2014	10/11/2014	17/11/2014	07/12/2014	-
	L	22/12/2014	29/12/2014	05/01/2015	19/01/2015	26/01/2015	15/02/2015	-
	A							-
AD178-496-A-39306 2272-R-08006-001 RMSC CRP FURNITURE PLAN & SCHEDULE	D	EDARDR120	EDARDR120	EDARDR120	EDARDR120	EDARDR120	EDARDR120	0.010
	P	03/11/2014	10/11/2014	17/11/2014	01/12/2014	08/12/2014	28/12/2014	-
	L	12/01/2015	19/01/2015	26/01/2015	09/02/2015	16/02/2015	08/03/2015	-
	A							-
AD178-496-A-39307 2272-R-08007-001 RMSC CRP WALL & DECK INSULATION DETAILS	D	EDARDR124	EDARDR124	EDARDR124	EDARDR124	EDARDR124	EDARDR124	0.010
	P	17/11/2014	24/11/2014	01/12/2014	15/12/2014	22/12/2014	11/01/2015	-
	L	26/01/2015	02/02/2015	09/02/2015	23/02/2015	02/03/2015	22/03/2015	-
	A							-
AD178-496-A-39308 2272-R-08008-001 RMSC CRP EXTERNAL DOORS DETAILS & SCHEDULE	D	EDARDR122	EDARDR122	EDARDR122	EDARDR122	EDARDR122	EDARDR122	0.010
	P	20/10/2014	26/10/2014	01/11/2014	15/11/2014	21/11/2014	07/12/2014	-
	L	15/12/2014	21/12/2014	27/12/2014	10/01/2015	16/01/2015	01/02/2015	-
	A							-
AD178-496-A-39309 2272-R-08009-001 RMSC CRP INTERNAL DOORS DETAILS & SCHEDULE	D	EDARDR122	EDARDR122	EDARDR122	EDARDR122	EDARDR122	EDARDR122	0.010
	P	24/10/2014	30/10/2014	05/11/2014	19/11/2014	25/11/2014	11/12/2014	-
	L	19/12/2014	25/12/2014	31/12/2014	14/01/2015	20/01/2015	05/02/2015	-
	A							-
AD178-496-A-39310 2272-R-08010-001 RMSC CRP EXTERNAL WINDOWS DETAILS & SCHEDULE	D	EDARDR122	EDARDR122	EDARDR122	EDARDR122	EDARDR122	EDARDR122	0.010
	P	27/10/2014	02/11/2014	08/11/2014	22/11/2014	28/11/2014	14/12/2014	-
	L	22/12/2014	28/12/2014	03/01/2015	17/01/2015	23/01/2015	08/02/2015	-
	A							-
AD178-496-A-39311 2272-R-08011-001 RMSC CRP M&E SUPPORT DETAILS	D	EDARDR126	EDARDR126	EDARDR126	EDARDR126	EDARDR126	EDARDR126	0.013
	P	10/11/2014	17/11/2014	24/11/2014	08/12/2014	15/12/2014	04/01/2015	-
	L	05/01/2015	12/01/2015	19/01/2015	02/02/2015	09/02/2015	01/03/2015	-
	A							-



Procurement Progress Register

Overall Progress Summary

Cut-off Date: 20/11/2013 | Total Items: 147 | Total Weight: 100.000

Progress Type	Progress %	Variance vs Actual	Status
Early/Plan (P)	0.000%	0.000%	On/Ahead
Late (L)	0.000%	0.000%	On/Ahead
Actual (A)	0.000%	-	-

Procurement: Bulk Materials (Detailed) (98 items, 12 stages)

Client Document Number Contractor Document Number Document Description	Receive PR (%)	Float Equity (%)	Receive Bids (%)	Start TBE (%)	Final TBE (%)	TBE Approved (%)	CRF (%)	Ready for LOUPO (%)	Issue LOUPO (%)	Material FOB (%)	1st Lot of Site (%)	Last Lot of Site (%)	W.F. PROG.	Remarks	
+ (98) Bulk Materials +															
+ (7) Architectural +															
2272-13-35150-49 2272-13-35150 BULK HEADS AND DECKS FIRE INSULATION MATERIALS	D	PRBCAR180	PRBCAR180	PRBCAR180	PRBCAR180	PRBCAR180	PRBCAR180	PRBCAR180	PRBCAR180	PRBCAR180	PRBCAR180	PRBCAR180	PRBCAR180	0.212	
	P	07/09/2014	09/09/2014	30/09/2014	02/10/2014	07/10/2014	21/11/2014	28/11/2014	05/12/2014	05/12/2014	11/03/2015	21/03/2015	14/05/2015	-	
	L	27/10/2014	29/10/2014	19/11/2014	21/11/2014	27/12/2014	10/01/2015	17/01/2015	24/01/2015	25/01/2015	30/04/2015	10/05/2015	03/07/2015	-	
2272-13-35152-50 2272-13-35152 FLOOR SCREED / FLOOR FINISHES/ PVC SKIRTING	D	PRBCAR182	PRBCAR182	PRBCAR182	PRBCAR182	PRBCAR182	PRBCAR182	PRBCAR182	PRBCAR182	PRBCAR182	PRBCAR182	PRBCAR182	PRBCAR182	0.318	
	P	28/08/2014	30/09/2014	20/09/2014	22/09/2014	28/10/2014	11/11/2014	18/11/2014	25/11/2014	26/11/2014	16/03/2015	26/03/2015	04/05/2015	-	
	L	22/10/2014	24/10/2014	14/11/2014	16/11/2014	22/12/2014	05/01/2015	12/01/2015	19/01/2015	20/01/2015	10/05/2015	20/05/2015	28/06/2015	-	
2272-13-35153-51 2272-13-35153 LINER PANELS & FALSE CEILING	D	PRBCAR183	PRBCAR183	PRBCAR183	PRBCAR183	PRBCAR183	PRBCAR183	PRBCAR183	PRBCAR183	PRBCAR183	PRBCAR183	PRBCAR183	PRBCAR183	0.212	
	P	17/09/2014	18/09/2014	19/10/2014	12/10/2014	17/11/2014	01/12/2014	05/12/2014	15/12/2014	16/12/2014	21/03/2015	31/03/2015	24/05/2015	-	
	L	06/11/2014	09/11/2014	29/11/2014	01/12/2014	06/01/2015	20/01/2015	27/01/2015	03/02/2015	04/02/2015	10/05/2015	20/05/2015	13/07/2015	-	
2272-13-35154-52 2272-13-35154 MSE SUPPORT GRID SYSTEM	D	PRBCAR184	PRBCAR184	PRBCAR184	PRBCAR184	PRBCAR184	PRBCAR184	PRBCAR184	PRBCAR184	PRBCAR184	PRBCAR184	PRBCAR184	PRBCAR184	0.053	
	P	15/09/2014	21/09/2014	12/10/2014	14/10/2014	19/11/2014	03/12/2014	10/12/2014	17/12/2014	18/12/2014	23/03/2015	02/04/2015	26/05/2015	-	
	L	08/11/2014	10/11/2014	01/12/2014	03/12/2014	08/01/2015	22/01/2015	29/01/2015	05/02/2015	06/02/2015	12/05/2015	22/05/2015	15/07/2015	-	
2272-13-35155-53 2272-13-35155 PENETRATION SEALING SYSTEM (BULKHEAD AND DECK)	D	PRBCAR185	PRBCAR185	PRBCAR185	PRBCAR185	PRBCAR185	PRBCAR185	PRBCAR185	PRBCAR185	PRBCAR185	PRBCAR185	PRBCAR185	PRBCAR185	0.053	
	P	22/09/2014	24/09/2014	15/10/2014	17/10/2014	22/11/2014	06/12/2014	13/12/2014	20/12/2014	21/12/2014	26/03/2015	05/04/2015	29/05/2015	-	
	L	06/11/2014	09/11/2014	29/11/2014	01/12/2014	06/01/2015	20/01/2015	27/01/2015	03/02/2015	04/02/2015	10/05/2015	20/05/2015	13/07/2015	-	
2272-13-35155-54 2272-13-35156 SECONDARY STR. STEEL MEMBERS	D	PRBCAR186	PRBCAR186	PRBCAR186	PRBCAR186	PRBCAR186	PRBCAR186	PRBCAR186	PRBCAR186	PRBCAR186	PRBCAR186	PRBCAR186	PRBCAR186	0.053	
	P	02/09/2014	04/09/2014	25/09/2014	27/09/2014	02/10/2014	19/11/2014	23/11/2014	30/11/2014	01/12/2014	06/03/2015	16/03/2015	09/05/2015	-	
	L	27/10/2014	29/10/2014	19/11/2014	21/11/2014	27/12/2014	10/01/2015	17/01/2015	24/01/2015	25/01/2015	30/04/2015	10/05/2015	03/07/2015	-	
2272-13-35155-55 2272-13-35155 TOILET AND SANITARY FITTINGS	D	PRBCAR188	PRBCAR188	PRBCAR188	PRBCAR188	PRBCAR188	PRBCAR188	PRBCAR188	PRBCAR188	PRBCAR188	PRBCAR188	PRBCAR188	PRBCAR188	0.159	
	P	27/09/2014	29/09/2014	20/10/2014	22/10/2014	27/11/2014	11/12/2014	18/12/2014	25/12/2014	26/12/2014	31/03/2015	10/04/2015	03/06/2015	-	
	L	11/11/2014	13/11/2014	04/12/2014	06/12/2014	11/01/2015	25/01/2015	01/02/2015	08/02/2015	09/02/2015	15/05/2015	25/05/2015	19/07/2015	-	
+ (2) Civil +															
2272-13-35174-56 2272-13-35174 ANCHORING MATERIALS FOR OFFSHORE SLEEPERS	D	PRBCOV174	PRBCOV174	PRBCOV174	PRBCOV174	PRBCOV174	PRBCOV174	PRBCOV174	PRBCOV174	PRBCOV174	PRBCOV174	PRBCOV174	PRBCOV174	0.346	
	P	27/10/2014	29/10/2014	19/11/2014	21/11/2014	27/12/2014	10/01/2015	18/01/2015	24/01/2015	25/01/2015	15/04/2015	25/04/2015	12/06/2015	-	
	L	15/12/2014	17/12/2014	07/01/2015	09/01/2015	14/02/2015	28/02/2015	06/03/2015	14/03/2015	15/03/2015	03/05/2015	13/05/2015	30/05/2015	-	
2272-13-35175-57 2272-13-35175 STEEL SECTION & PLATE FOR LUGG PADDEYS (CIVIL)	D	PRBCOV175	PRBCOV175	PRBCOV175	PRBCOV175	PRBCOV175	PRBCOV175	PRBCOV175	PRBCOV175	PRBCOV175	PRBCOV175	PRBCOV175	PRBCOV175	0.405	
	P	06/12/2013	08/12/2013	29/12/2013	31/12/2013	05/02/2014	19/02/2014	26/02/2014	05/03/2014	06/03/2014	22/06/2014	03/08/2014	23/01/2015	-	
	L	18/01/2014	20/01/2014	10/02/2014	12/02/2014	20/03/2014	03/04/2014	10/04/2014	17/04/2014	18/04/2014	04/05/2014	15/09/2014	07/05/2015	-	
+ (12) Electrical +															
2272-13-35147-58 2272-13-35147 ELECTRICAL CABLE LEADERS & TRAYS	D	PRBOEL147	PRBOEL147	PRBOEL147	PRBOEL147	PRBOEL147	PRBOEL147	PRBOEL147	PRBOEL147	PRBOEL147	PRBOEL147	PRBOEL147	PRBOEL147	0.130	
	P	21/07/2014	23/07/2014	13/08/2014	15/08/2014	20/09/2014	04/10/2014	11/10/2014	18/10/2014	19/10/2014	26/02/2015	08/03/2015	14/05/2015	-	
	L	28/09/2014	30/09/2014	20/09/2014	22/09/2014	28/10/2014	11/11/2014	18/11/2014	25/11/2014	26/11/2014	05/04/2015	15/04/2015	21/05/2015	-	
2272-13-35149-59 2272-13-35149 EARTHING MATERIAL	D	PRBOEL148	PRBOEL148	PRBOEL148	PRBOEL148	PRBOEL148	PRBOEL148	PRBOEL148	PRBOEL148	PRBOEL148	PRBOEL148	PRBOEL148	PRBOEL148	0.065	
	P	15/07/2014	21/07/2014	11/08/2014	13/08/2014	18/09/2014	02/10/2014	09/10/2014	16/10/2014	17/10/2014	17/10/2014	16/03/2015	12/04/2015	-	
	L	18/08/2014	20/08/2014	10/09/2014	12/09/2014	18/10/2014	01/11/2014	08/11/2014	15/11/2014	16/11/2014	05/04/2015	15/04/2015	11/05/2015	-	
2272-13-35151-60 2272-13-35151 ELECTRICAL CABLE GLANDS	D	PRBOEL151	PRBOEL151	PRBOEL151	PRBOEL151	PRBOEL151	PRBOEL151	PRBOEL151	PRBOEL151	PRBOEL151	PRBOEL151	PRBOEL151	PRBOEL151	0.078	
	P	28/09/2014	30/09/2014	18/10/2014	18/10/2014	29/11/2014	23/12/2014	30/12/2014	07/12/2014	08/12/2014	25/01/2015	08/02/2015	03/05/2015	-	
	L	16/11/2014	18/11/2014	02/12/2014	04/12/2014	28/12/2014	11/01/2015	18/01/2015	25/01/2015	26/01/2015	15/03/2015	26/04/2015	22/10/2015	-	
2272-13-35152-61 2272-13-35152 HV POWER CABLES	D	PRBOEL152	PRBOEL152	PRBOEL152	PRBOEL152	PRBOEL152	PRBOEL152	PRBOEL152	PRBOEL152	PRBOEL152	PRBOEL152	PRBOEL152	PRBOEL152	0.260	
	P	01/06/2014	03/06/2014	24/06/2014	26/06/2014	18/08/2014	30/08/2014	06/09/2014	13/09/2014	14/09/2014	30/10/2014	13/03/2015	09/10/2015	-	
	L	04/07/2014	06/07/2014	27/07/2014	29/07/2014	18/09/2014	02/10/2014	09/10/2014	16/10/2014	17/10/2014	04/03/2015	15/04/2015	10/11/2015	-	
2272-13-35153-62 2272-13-35153 ELECTRICAL JUNCTION BOXES	D	PRBOEL153	PRBOEL153	PRBOEL153	PRBOEL153	PRBOEL153	PRBOEL153	PRBOEL153	PRBOEL153	PRBOEL153	PRBOEL153	PRBOEL153	PRBOEL153	0.104	
	P	30/07/2014	01/08/2014	22/08/2014	24/08/2014	28/09/2014	13/10/2014	20/10/2014	27/10/2014	28/10/2014	29/10/2014	19/02/2015	01/04/2015	14/05/2015	-
	L	30/08/2014	01/09/2014	22/09/2014	24/09/2014	30/10/2014	13/11/2014	20/11/2014	27/11/2014	28/11/2014	21/03/2015	02/05/2015	15/07/2015	-	
2272-13-35154-63 2272-13-35154 LIGHTING FIXTURES	D	PRBOEL154	PRBOEL154	PRBOEL154	PRBOEL154	PRBOEL154	PRBOEL154	PRBOEL154	PRBOEL154	PRBOEL154	PRBOEL154	PRBOEL154	PRBOEL154	0.091	
	P	02/08/2014	04/08/2014	19/08/2014	20/08/2014	02/10/2014	16/10/2014	23/10/2014	30/10/2014	31/10/2014	28/03/2015	09/05/2015	27/07/2015	-	
	L	04/09/2014	06/09/2014	20/09/2014	22/09/2014	04/11/2014	19/11/2014	25/11/2014	02/12/2014	03/12/2014	30/04/2015	11/05/2015	29/05/2015	-	
2272-13-35155-64 2272-13-35155 LOCAL CONTROL STATIONS	D	PRBOEL155	PRBOEL155	PRBOEL155	PRBOEL155	PRBOEL155	PRBOEL155	PRBOEL155	PRBOEL155	PRBOEL155	PRBOEL155	PRBOEL155	PRBOEL155	0.078	
	P	05/07/2014	10/07/2014	31/07/2014	02/08/2014	07/08/2014	21/09/2014	28/09/2014	05/10/2014	06/10/2014	21/02/2015	04/04/2015	12/07/2015	-	
	L	21/08/2014	23/08/2014	13/09/2014	15/09/2014	21/10/2014	04/11/2014	11/11/2014	18/11/2014	19/11/2014	06/04/2015	16/05/2015	25/06/2015	-	



8. Register Lookahead Reports

ENG_C1 (34 items, 6 stages)

Client Document Number Contractor Document Number Document Description		Start (10 %)	IDC (10 %)	IFA (60 %)	Comm Recv (60 %)	Reissue (80 %)	Final (100 %)	W.F/ PROG.	Remarks
+ (3) ELECTRICAL +									
+ (3) DOCUMENTS +									
AD178-27/216-G-04031 2272-P-LI-0002 RMS ELECTRICAL LOAD LIST	D	EDELWH398	EDELWH398	EDELWH398	EDELWH398	EDELWH398	EDELWH398	0.013	
	P	30/11/2013	07/12/2013	14/12/2013	28/12/2013	04/01/2014	24/01/2014	-	
	L	20/12/2013	27/12/2013	03/01/2014	17/01/2014	24/01/2014	13/02/2014	-	
	A							-	
AD178-27/216-G-04103 2272-P-PP-0001 ELECTRICAL DESIGN BASIS	D	EDELCO101	EDELCO101	EDELCO101	EDELCO101	EDELCO101	EDELCO101	0.108	
	P	15/11/2013	29/11/2013	13/12/2013	27/12/2013	30/01/2014	27/02/2014	10.000	
	L	23/11/2013	07/12/2013	21/12/2013	04/01/2014	07/02/2014	07/03/2014	-	
	A							-	
AD178-27/216-G-04113 2272-P-SP-0002 SPECIFICATION FOR ELECTRICAL REQUIREMENT FOR PACKAGED EQUIPMENT	D	EDELCO102	EDELCO102	EDELCO102	EDELCO102	EDELCO102	EDELCO102	0.009	
	P	25/11/2013	02/12/2013	09/12/2013	23/12/2013	30/12/2013	19/01/2014	-	
	L	17/12/2013	24/12/2013	31/12/2013	14/01/2014	21/01/2014	10/02/2014	-	
	A							-	
+ (3) GENERAL +									
+ (3) DOCUMENTS +									
AD178-27/216-G-00002 2272-A-PD-0001 ENGINEERING NUMBERING PROCEDURE	D	EDGR106	EDGR106	EDGR106	EDGR106	EDGR106	EDGR106	0.009	
	P	08/11/2013	15/11/2013	22/11/2013	06/12/2013	13/12/2013	02/01/2014	10.010	
	L	22/01/2014	29/01/2014	05/02/2014	19/02/2014	26/02/2014	18/03/2014	-	
	A	10/11/2013	20/11/2013					10.010	
AD178-27/216-G-00003 2272-A-PP-0002 ENGINEERING EXECUTION PLAN	D	EDGR101	EDGR101	EDGR101	EDGR101	EDGR101	EDGR101	0.029	
	P	01/12/2013	15/12/2013	29/12/2013	12/01/2014	01/02/2014	01/03/2014	-	
	L	01/02/2014	15/02/2014	01/03/2014	15/03/2014	04/04/2014	02/05/2014	-	
	A							-	
AD178-27/216-G-00005 2272-A-PR-0001 ENGINEERING DOCUMENT AND DRAWING REGISTER	D	EDGR108	EDGR108	EDGR108	EDGR108	EDGR108	EDGR108	0.019	
	P	22/11/2013	29/11/2013	06/12/2013	20/12/2013	27/12/2013	16/01/2014	-	
	L	05/02/2014	12/02/2014	19/02/2014	05/03/2014	12/03/2014	01/04/2014	-	
	A							-	
+ (4) INSTRUMENTATION +									
+ (4) DOCUMENTS +									
AD178-27/216-G-05536 2272-J-SP-0001 INSTRUMENTATION AND CONTROL DESIGN BASIS	D	EDINCO101	EDINCO101	EDINCO101	EDINCO101	EDINCO101	EDINCO101	0.006	
	P	15/11/2013	29/11/2013	13/12/2013	27/12/2013	30/01/2014	27/02/2014	10.000	
	L	03/12/2013	17/12/2013	31/12/2013	14/01/2014	17/02/2014	17/03/2014	-	
	A							-	
AD178-27/216-G-05545 2272-J-SP-0002 INSTRUMENTATION & CONTROL SYSTEM PHILOSOPHY	D	EDINCO102	EDINCO102	EDINCO102	EDINCO102	EDINCO102	EDINCO102	0.006	
	P	22/11/2013	06/12/2013	20/12/2013	03/01/2014	06/02/2014	06/03/2014	-	
	L	25/12/2013	08/01/2014	22/01/2014	05/02/2014	11/03/2014	08/04/2014	-	
	A							-	
AD178-27/216-G-05547 2272-J-SP-0004 INSTRUMENT TAGGING PHILOSOPHY	D	EDINCO155	EDINCO155	EDINCO155	EDINCO155	EDINCO155	EDINCO155	0.006	
	P	29/11/2013	13/12/2013	27/12/2013	10/01/2014	24/01/2014	20/02/2014	-	
	L	23/01/2014	06/02/2014	20/02/2014	06/03/2014	20/03/2014	16/04/2014	-	
	A							-	



9. Register Behind Schedule Reports

ENG_C1 (10 items, 6 stages)									
Client Document Number Contractor Document Number Document Description		Start (10 %)	IDC (10 %)	IFA (60 %)	Comm Rev (60 %)	Reissue (80 %)	Final (100 %)	W/FJ PROG.	Remarks
+ (1) ELECTRICAL +									
+ (1) DOCUMENTS +									
AD178-27/216-G-04103 2272-P-RP-0001 ELECTRICAL DESIGN BASIS	D	EDELCO#1	EDELCO#1	EDELCO#1	EDELCO#1	EDELCO#1	EDELCO#1	0.108	
	P	19/11/2013	28/11/2013	13/12/2013	27/12/2013	30/01/2014	27/02/2014	10.000	
	L	23/11/2013	07/12/2013	21/12/2013	04/01/2014	07/02/2014	07/03/2014	-	
	A							-	
+ (1) INSTRUMENTATION +									
+ (1) DOCUMENTS +									
AD178-27/216-G-05538 2272-S-RP-0001 INSTRUMENTATION AND CONTROL DESIGN BASIS	D	EDINCO#1	EDINCO#1	EDINCO#1	EDINCO#1	EDINCO#1	EDINCO#1	0.006	
	P	19/11/2013	28/11/2013	13/12/2013	27/12/2013	30/01/2014	27/02/2014	10.000	
	L	03/12/2013	17/12/2013	31/12/2013	14/01/2014	17/02/2014	17/03/2014	-	
	A							-	
+ (1) NAVAL & MARINE +									
+ (1) DOCUMENTS +									
AD178-27/216-G-03856 2272-Z-RP-0001 NAVAL ARCHITECTURAL DESIGN BASIS	D	EDNA#1#1	EDNA#1#1	EDNA#1#1	EDNA#1#1	EDNA#1#1	EDNA#1#1	0.008	
	P	16/11/2013	30/11/2013	07/12/2013	21/12/2013	29/12/2013	24/01/2014	10.000	
	L	05/01/2014	19/01/2014	28/01/2014	09/02/2014	16/02/2014	15/03/2014	-	
	A							-	
+ (2) PIPELINE & RISER +									
+ (2) DOCUMENTS +									
AD178-27/216-G-06000 2272-N-RP-0001 PIPELINE & RISER DESIGN BASIS	D	EDPLDC#1	EDPLDC#1	EDPLDC#1	EDPLDC#1	EDPLDC#1	EDPLDC#1	0.104	
	P	08/11/2013	22/11/2013	09/12/2013	20/12/2013	09/01/2014	08/02/2014	10.000	
	L	01/12/2013	15/12/2013	29/12/2013	12/01/2014	01/02/2014	01/03/2014	-	
	A							-	
AD178-27/216-G-06004 2272-N-RP-0005 PIPELINE ON-BOTTOM STABILITY DESIGN REPORT (FOR RMS)	D	EDPLDC#2	EDPLDC#2	EDPLDC#2	EDPLDC#2	EDPLDC#2	EDPLDC#2	0.130	
	P	15/11/2013	13/12/2013	10/01/2014	24/01/2014	12/07/2014	10/09/2014	10.000	
	L	08/12/2013	05/01/2014	02/02/2014	16/02/2014	04/08/2014	03/10/2014	-	
	A							-	
+ (1) PIPING +									
+ (1) DOCUMENTS +									
AD178-27/216-G-02690 2272-A-RP-0037 PIPING DESIGN BASIS (AMENDMENT TO SP-1050 PART-1)	D	EDPCO#1	EDPCO#1	EDPCO#1	EDPCO#1	EDPCO#1	EDPCO#1	0.062	
	P	15/11/2013	22/11/2013	29/11/2013	13/12/2013	20/12/2013	09/01/2014	10.000	
	L	08/12/2013	15/12/2013	22/12/2013	05/01/2014	12/01/2014	01/02/2014	-	
	A							-	
+ (4) PROCESS +									
+ (1) DOCUMENTS +									
AD178-27/216-G-01067 2272-B-L-1067 FLUID LIST	D	EDPSDC#7	EDPSDC#7	EDPSDC#7	EDPSDC#7	EDPSDC#7	EDPSDC#7	0.014	
	P	19/11/2013	29/11/2013	03/12/2013	17/12/2013	24/12/2013	13/01/2014	10.000	
	L	26/12/2013	02/01/2014	09/01/2014	23/01/2014	30/01/2014	19/02/2014	-	
	A							-	
+ (3) DRAWINGS +									
AD178-27/216-D-10292 2272-B-10292-001 P&ID INSTRUMENT IDENTIFICATION AND SYMBOLS	D	EDPSDR#9	EDPSDR#9	EDPSDR#9	EDPSDR#9	EDPSDR#9	EDPSDR#9	0.010	
	P	13/11/2013	19/11/2013	25/11/2013	09/12/2013	15/12/2013	31/12/2013	10.010	
	L	11/12/2013	17/12/2013	23/12/2013	05/01/2014	12/01/2014	28/01/2014	-	
	A	17/11/2013						10.000	
AD178-27/216-D-11001 2272-B-11001-001 PFD AND H&MB DRAWING INDEX	D	EDPSDR#6	EDPSDR#6	EDPSDR#6	EDPSDR#6	EDPSDR#6	EDPSDR#6	0.011	
	P	09/11/2013	15/11/2013	22/11/2013	06/12/2013	13/12/2013	02/01/2014	10.010	
	L	09/12/2013	16/12/2013	23/12/2013	06/01/2014	13/01/2014	02/02/2014	-	
	A	20/11/2013						10.000	
AD178-27/216-D-11004 2272-B-11004-001 P&ID DRAWINGS INDEX SHT. 3 OF 3	D	EDPSDR#8	EDPSDR#8	EDPSDR#8	EDPSDR#8	EDPSDR#8	EDPSDR#8	0.010	
	P	18/11/2013	24/11/2013	30/11/2013	14/12/2013	20/12/2013	05/01/2014	10.000	
	L	16/12/2013	22/12/2013	29/12/2013	11/01/2014	17/01/2014	02/02/2014	-	
	A							-	



10. Bill Wise Invoice Progress Report (Summary/Details)

BILL WISE INVOICE PROGRESS REPORT — Summary							Invoice No: INV-20131120-0830	
P777_ROIO							Date: 2013-11-20	
Commercial bill structure grouped by Main Bill							Cut-Off / Period: 2013-11	
							Status: DRAFT	
SUMMARY BY MAIN BILL								
#	Main Bill	Description	Contract Amt.	Prog %	Prev. Amt.	Curr. Amt.	Cumul. Amt.	Remain. Amt.
1	A1	Provision of Performance Bank Guarantee in accordance with the General Conditions of Contract.	24,688,467.00	0.61	0.00	150,721.92	150,721.92	24,537,745.08
2	A2	Carrying out all required Site Surveys/Data collection / verification of existing facilities before commencement of design works and carry out site visits at various stages of Project.	30,045,696.00	0.29	0.00	86,618.87	86,618.87	29,959,077.13
3	A3	Miscellaneous Items - Flanges, bolts/nuts, gaskets, insulation joint, anchor flanges, etc	186,131,432.00	0.00	0.00	106.89	106.89	186,131,325.11
4	A4	Anti corrosion coating	8,611,586.00	0.00	0.00	0.00	0.00	8,611,586.00
5	A5	Deck Extension / Structure	16,346,706.00	0.00	0.00	0.00	0.00	16,346,706.00
6	A6	Piles Fabrication	23,210,230.00	0.00	0.00	0.00	0.00	23,210,230.00
7	A7	Testing of Valves as per the Scope of Work (including Free-Issue items by Company)	892,794.00	0.00	0.00	0.00	0.00	892,794.00
8	A8	Load out, sea fastening & transportation of Jacket including appurtenances & Piles for CRP	34,242,448.00	0.00	0.00	0.00	0.00	34,242,448.00
9	A9	Site Survey - Pre Engineering (For all 10 Radials) *Mobilisation	96,162,044.00	0.59	0.00	567,964.04	567,964.04	95,594,079.96
10	A10	NEW PLATFORMS INSTALLATION - GENERAL- *Mobilisation	25,376,432.00	0.00	0.00	0.00	0.00	25,376,432.00
11	A11	TOPSIDE MODIFICATIONS AT WELLHEAD TOWERS - GENERAL (For entire Top sides)- *Mobilisation	152,378,393.00	0.00	0.00	0.00	0.00	152,378,393.00
12	A12	DECOMMISSION, DEMOLITION AND REMOVAL OF REDUNDANT PIPELINE WORKS - GENERAL- *Mobilisation	23,194,072.00	0.00	0.00	0.00	0.00	23,194,072.00
13	A13	Drain Sump Pump	233,726.00	0.00	0.00	0.00	0.00	233,726.00
14	A14	CONTRACTOR provision for COMPANY requirements at HOME OFFICE	4,029,362.00	27.00	0.00	1,087,927.70	1,087,927.70	2,941,434.30
15	A15	PROCESS	17,132,104.00	0.17	0.00	28,901.94	28,901.94	17,103,202.06
16	A16	PROCESS	18,653,895.00	0.02	0.00	4,355.18	4,355.18	18,649,539.82
17	A17	ELECTRICAL	152,348,104.00	0.44	0.00	664,115.59	664,115.59	151,683,988.41
18	BB	Complete Detail engineering	9,718,389.00	0.01	0.00	548.36	548.36	9,717,840.64
GRAND TOTAL			823,395,880.00	0.31	0.00	2,591,260.50	2,591,260.50	820,804,619.50

Prepared By	Reviewed By	Approved By
_____	_____	_____
Name: _____	Name: _____	Name: _____
Date: _____	Date: _____	Date: _____

BILL WISE INVOICE PROGRESS REPORT							Invoice No: INV-20131120-0830	
P777_ROIO							Date: 2013-11-20	
Commercial bill structure grouped by Main Bill							Cut-Off / Period: 2013-11	
							Status: DRAFT	
A1 — Provision of Performance Bank Guarantee in accordance with the General Conditions of Contract.								
#	Bill No.	Description	Contract Amt.	Prog %	Prev. Amt.	Curr. Amt.	Cumul. Amt.	Remain. Amt.
1	A1.1	Provision of Performance Bank Guarantee in accordance with the General Conditions of Contract.	1,554,098.00	0.00	0.00	0.00	0.00	1,554,098.00
2	A1.2	Provision of Retention Bank Guarantee in accordance with the General Conditions of Contract.	353,206.00	0.00	0.00	0.00	0.00	353,206.00
3	A1.3	Provision of Contractor Placed Insurances in accordance with the General Conditions of Contract.	3,009,193.00	0.00	0.00	0.00	0.00	3,009,193.00
4	A1.5	Provision of Painting Guarantee in accordance with the General Conditions of Contract.	30,092.00	0.00	0.00	0.00	0.00	30,092.00
5	A1.6	Project Management Services (Shall be inclusive all Project control, document control, secretarial services, QA, QC, HSE & administration)	19,741,878.00	0.76	0.00	150,721.92	150,721.92	19,591,156.08
Subtotal — A1			24,688,467.00	0.61	0.00	150,721.92	150,721.92	24,537,745.08
A2 — Carrying out all required Site Surveys/Data collection / verification of existing facilities before commencement of design works and carry out site visits at various stages of Project.								
#	Bill No.	Description	Contract Amt.	Prog %	Prev. Amt.	Curr. Amt.	Cumul. Amt.	Remain. Amt.
A2.1 — Carrying out all required Site Surveys/Data collection / verification of existing facilities before commencement of design works and carry out site visits at various stages of Project.								
6	A2.1.1	Carrying out all required Site Surveys/Data collection / verification of existing facilities before commencement of design works and carry out site visits at various stages of Project.	2,775,415.00	0.66	0.00	18,426.30	18,426.30	2,756,988.70
A2.2 — PROCESS, STATIC/ROTATING EQUIPMENT (MECHANICAL), PIPING, SUB SEA PIPELINES WITH ALL CROSSINGS (INCLUDING ALL INTERFACE PROJECTS REFERRED IN THIS TENDER DOCUMENT), CONTROL & INSTRUMENTATION, TELECOMMUNICATION, ELECTRICAL, STRUCTURAL / ARCHITECTURAL, SAFETY / HSE, CORROSION & MATERIAL SELECTION, ALL RELEVANT CONSTRUCTION ENGG. & ASSOCIATED COSTS, Providing as-built drawings, design dossier, PDMS and Requirements for Documentation & Registration (UTC) of project as specified in accordance with the Scope of Work., OTHERS (If not listed above)								
7	A2.2.1	PROCESS	1,146,618.00	1.61	0.00	18,450.00	18,450.00	1,128,168.00
8	A2.2.2	STATIC/ROTATING EQUIPMENT (MECHANICAL)	716,248.00	0.00	0.00	0.00	0.00	716,248.00
9	A2.2.3	PIPING	4,835,272.00	0.00	0.00	0.00	0.00	4,835,272.00
10	A2.2.4	SUB SEA PIPELINES WITH ALL CROSSINGS (INCLUDING ALL INTERFACE PROJECTS REFERRED IN THIS TENDER DOCUMENT)	2,302,370.00	1.20	0.00	27,626.10	27,626.10	2,274,743.90
11	A2.2.5	CONTROL & INSTRUMENTATION, TELECOMMUNICATION	2,933,941.00	0.00	0.00	0.00	0.00	2,933,941.00
12	A2.2.6	ELECTRICAL	2,182,735.00	0.00	0.00	0.00	0.00	2,182,735.00
13	A2.2.7	STRUCTURAL / ARCHITECTURAL	8,570,195.00	0.06	0.00	5,222.98	5,222.98	8,564,972.02
14	A2.2.8	SAFETY / HSE	435,349.00	0.00	0.00	0.00	0.00	435,349.00
15	A2.2.9	CORROSION & MATERIAL SELECTION	159,520.00	0.00	0.00	0.00	0.00	159,520.00
16	A2.2.10	ALL RELEVANT CONSTRUCTION ENGG. & ASSOCIATED COSTS	2,267,855.00	0.00	0.00	0.00	0.00	2,267,855.00
17	A2.2.11	Providing as-built drawings, design dossier, PDMS and Requirements for Documentation & Registration (UTC) of project as specified in accordance with the Scope of Work.	109,535.00	0.00	0.00	0.00	0.00	109,535.00
18	A2.2.12	OTHERS (If not listed above)	1,057,768.00	0.58	0.00	6,155.64	6,155.64	1,051,612.36
19	A2.3	SPECIAL STUDIES	224,664.00	2.76	0.00	6,196.13	6,196.13	218,467.87
20	A2.4	OTHERS (General Expenditures etc.)	328,211.00	1.38	0.00	4,541.72	4,541.72	323,669.28



11. CBS Reports

6/15/26, 11:30 AM CBS Weight Factor Report — P777

CBS Weight Factor Report — P777

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CBS Item	Description	Cost	Manhours	Cost Ratio %	MH Ratio %	Final WF %
A1.1	Provision of Performance Bank Guarantee in accordance with the General Conditions of Contract.	1554098	0	0.1887	0	0.1887
A1.2	Provision of Retention Bank Guarantee in accordance with the General Conditions of Contract.	353206	0	0.0429	0	0.0429
A1.3	Provision of Contractor Placed Insurances in accordance with the General Conditions of Contract.	3009193	0	0.3655	0	0.3655
A1.5	Provision of Painting Guarantee in accordance with the General Conditions of Contract.	30092	0	0.0037	0	0.0037
A1.6	Project Management Services (Shall be inclusive all Project control, document control, secretarial services, QA, QC, HSE & administration)	19741878	46104	2.3976	1.3123	2.3976
A2.1.1	Carrying out all required Site Surveys/Data collection / verification of existing facilities before commencement of design works and carry out site visits at various stages of Project.	2775415	1852.19	0.3371	0.0527	0.3371
A2.2.1	PROCESS	1146618	21762.19047954406	0.1393	0.6194	0.1393
A2.2.2	STATIC/ROTATING EQUIPMENT (MECHANICAL)	716248	4586.091810088345	0.087	0.1305	0.087
A2.2.3	PIPING	4835272	106236.41302008514	0.5872	3.0238	0.5872
A2.2.4	SUB SEA PIPELINES WITH ALL CROSSINGS (INCLUDING ALL INTERFACE PROJECTS REFERRED IN THIS TENDER DOCUMENT)	2302370	48235.76076868061	0.2796	1.3729	0.2796
A2.2.5	CONTROL & INSTRUMENTATION, TELECOMMUNICATION	2933941	61477.84635315543	0.3563	1.7498	0.3563
A2.2.6	ELECTRICAL	2182735	37627.89296186821	0.2651	1.071	0.2651
A2.2.7	STRUCTURAL / ARCHITECTURAL	8570195	98078.68670433348	1.0408	2.7916	1.0408
A2.2.8	SAFETY / HSE	435349	7296.601911911004	0.0529	0.2077	0.0529
A2.2.9	CORROSION & MATERIAL SELECTION	159520	1689.2517906311032	0.0194	0.0481	0.0194
A2.2.10	All RELEVANT CONSTRUCTION ENGG. & ASSOCIATED COSTS	2267855	157260.92000000173	0.2754	4.4761	0.2754
A2.2.11	Providing as-built drawings, design dossier, PDMS and Requirements for Documentation & Registration (UTC) of project as specified in accordance with the Scope of Work.	109535	15237.025157777389	0.0133	0.4337	0.0133
A2.2.12	OTHERS (if not listed above)	1057768	21472.709973532157	0.1285	0.6112	0.1285

6/15/26, 11:32 AM CBS Validation Report — P777

CBS Validation Report — P777

Severity	Source	Item	Message
Warning	Distribution	A1.1	Rounding difference
Warning	Distribution	A1.2	Rounding difference
Warning	Distribution	A1.3	Rounding difference
Warning	Distribution	A1.6	Rounding difference
Warning	Distribution	A14.1	Rounding difference
Warning	Distribution	A15.1.2.4	Rounding difference
Warning	Distribution	A15.1.2.6	Rounding difference
Warning	Distribution	A15.1.2.9	Rounding difference
Warning	Distribution	A15.1.3	Amount mismatch
Warning	Distribution	A15.1.4	Rounding difference
Warning	Distribution	A15.4.2.1	Rounding difference
Warning	Distribution	A16.1.2.11	Rounding difference
Warning	Distribution	A16.1.2.2	Rounding difference
Warning	Distribution	A16.1.2.6	Rounding difference
Warning	Distribution	A16.1.2.8	Rounding difference
Warning	Distribution	A16.1.2.9	Rounding difference
Warning	Distribution	A16.1.3	Amount mismatch
Warning	Distribution	A16.1.4	Rounding difference
Warning	Distribution	A16.3.1	Rounding difference
Warning	Distribution	A16.3.7	Rounding difference
Warning	Distribution	A17.1.2.5	Rounding difference



6/15/26, 11:35 AM

Activity Distribution Report — P777

Activity Distribution Report — P777

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CBS Item	CBS Description	Activity ID	Task Code	Activity Name	Dist %	Amount Dist	WF Dist	Actual Progress %	Earned Amount	Remarks
A1.1	Provision of Performance Bank Guarantee in accordance with the General Conditions of Contract.	HGEN104	HGEN104	PERFORMANCE BANK GUARANTEE	100	1554097.968809	0.1887	0	0	Imported from Inv_Act-BillNo.xlsx
A1.2	Provision of Retention Bank Guarantee in accordance with the General Conditions of Contract.	HGEN106	HGEN106	RETENTION BANK GUARANTEE	100	353206.037514088	0.0429	0	0	Imported from Inv_Act-BillNo.xlsx
A1.3	Provision of Contractor Placed Insurances in accordance with the General Conditions of Contract.	HGEN107	HGEN107	CONTRACTOR PLACED INSURANCE	100	3009193.28719444	0.3655	0	0	Imported from Inv_Act-BillNo.xlsx
A1.5	Provision of Painting Guarantee in accordance with the General Conditions of Contract.	HGEN108	HGEN108	PAINTING GUARANTEE	100	30092.0069775736	0.0037	0	0	Imported from Inv_Act-BillNo.xlsx
A1.6	Project Management Services (Shall be inclusive all Project control, document control, secretarial services, QA, QC, HSE & administration)	HEGN109	HEGN109	PROJECT MANAGEMENT	100	19189104.7113819	2.3976	0.31	59486.2246052839	Imported from Inv_Act-BillNo.xlsx
A1.6	Project Management Services (Shall be inclusive all Project control, document	HGEN100	HGEN100	MOBILIZATION OF HOME	100	29612.8235112488	2.3976	9	2665.1541160123916	Imported from

6/15/26, 11:42 AM

CBS Tree Report — P777

CBS Tree Report — P777

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Description	Item	Amount
A1	A1	0
A10	A10	0
A10.1	A10.1	0
NEW PLATFORMS INSTALLATION - GENERAL - 'Mobilisation	A10.1.1	1731993
NEW PLATFORMS INSTALLATION - GENERAL - Demobilisation	A10.1.2	929744
A10.2	A10.2	0
Jacket Installation for CRP including Riser Fenders and Boat Fenders	A10.2.1	2310579
Jacket Installation for Bridge Support of CRP	A10.2.2	1379654
Deck Installation for CRP	A10.2.3	1574701
Helideck Installation for CRP	A10.2.4	314940
Bridge Installation for CRP	A10.2.6	209961
Tie-Ins of CRP	A10.2.7	2342501
Commissioning / Start-up of CRP	A10.2.9	840669
A10.3	A10.3	0
Jacket Installation for RP1 including Riser Fenders and Boat Fenders	A10.3.1	1932914
Jacket Installation for Bridges Support of RP1	A10.3.2	2783692
Deck Installation for RP1	A10.3.3	1562128
Bridges Installation for RP1	A10.3.5	1249704
Tie-Ins of RP1	A10.3.6	5652806
Commissioning / Start-up of RP1	A10.3.8	560446
A11	A11	0



Appendix - B



Glossary

The following terms are used throughout this manual and within the EPCplanner application.

Term / Abbreviation	Definition
Activity	A schedule element imported from Primavera P6 representing a discrete unit of work. Activities are the primary linkage point between Register items and the project schedule.
Anchor (Revision Anchor)	An immutable record created when a Revised Cut-Off Date is applied to a Revision, Recovery, or Rebaseline plan. Captures the project's overall actual percent complete and earned Weight Factor as of that date, plus the plan that was previously Active. Cannot be edited or deleted (Section 14.4).
Baseline	The approved original plan (dates, durations, weights) against which actual progress is measured. The baseline is locked when the project switches to In-Progress mode.
CBS	Cost Breakdown Structure. The lump-sum price schedule that maps contract line items to WBS/Activities for commercial progress measurement and invoice generation.
COD	Cut-Off Date. The reference date for a reporting period. All actual progress and stage dates entered within a period are validated against the open COD. The COD is locked (closed) at the end of each reporting cycle.
ENG	Engineering Register. Tracks document deliverables (drawings, datasheets, specifications) through a configured multi-stage review and approval workflow.
EPC	Engineering, Procurement and Construction. The project delivery model for which EPCplanner is purpose-built.
EPS	Enterprise Project Structure. The hierarchical project grouping in Primavera P6 used to organise and navigate projects when connecting EPCplanner to a live P6 database.
Forecast (Plan Version)	An analytical plan version type used for what-if scheduling and comparison only. A Forecast plan version can never be set as the Active controlling plan (Section 14.1).
Freeze Guard	An application control that prevents actual dates being entered outside the open COD window, protecting closed period data integrity.
In-Progress Mode	The operational state of a project in which the planning baseline is locked and actual progress tracking is active. Switched by an Administrator; a one-way action per project milestone.
P6 / EPPM	Oracle Primavera P6 Enterprise Project Portfolio Management. The industry-standard CPM scheduling tool with which EPCplanner integrates for schedule import and progress push-back.
Plan Event Log	An immutable, timestamped record of every lifecycle event for a plan version — import, approval, activation, supersession, archiving, and Revised Cut-Off Date locks. Viewed from the Plan Version Manager (Section 14.5).
Plan Version	A named, typed snapshot of the project schedule — Baseline, Revision, Recovery, Rebaseline, or Forecast — with its own approval lifecycle and date snapshot. Exactly one plan version is Active per project at any time (Chapter 14).
PMC	Project Management Consultant. An organisation engaged by the Client to oversee and audit EPC contractor performance. May be granted read-only or Client role access in EPCplanner.
PROC	Procurement Register. Tracks purchase requests and procurement packages through their lifecycle stages from requisition to delivery.
Quality (Register)	A structural check run on register items confirming that every item has a valid stage template and the required setup fields completed. Run as part of Section 9.6, before Validation.



Rebaseline	A plan version type representing a full schedule reset, formally approved by the Client or PMC, that becomes the new reference plan for future S-curves and reports (Section 14.1).
Recovery Plan	A plan version type issued to address schedule slippage, typically imported with a Revised Cut-Off Date that locks actual progress as of that date (Sections 14.1 and 14.4).
Reg Rollup	Register Rollup. The process that calculates physical progress for all register-linked activities from completed stage actuals, using the WF distribution. Must be run before Run Update in each progress cycle.
Revised Cut-Off Date (Revised COD)	The date used when importing a Revision, Recovery, or Rebaseline plan to lock actual progress before the new plan dates take effect. Triggers an ANCHOR_LOCKED Plan Event Log entry (Section 14.4).
Revision (Plan Version)	A plan version type representing a formally numbered schedule revision (Revision 1, Revision 2, etc.) issued during project execution (Section 14.1).
Run Update	The action that calculates overall Activity progress as of the COD, combining linear progress and Reg Rollup results. Run after Reg Rollup and before S-Curve in the update cycle (Section 8.5).
S-Curve	A cumulative progress curve showing planned versus actual progress over time. Generated by EPCplanner from WF-based rollup data after each reporting period.
SUBC	Subcontractor Register. Tracks subcontract work packages and deliverables through configurable stage gates agreed in the subcontract terms.
Upsert	Update-or-Insert. An import mode that updates an existing record if its business key already exists, or inserts it as a new record if it does not. Prevents duplicate creation during repeat imports.
Validation (Register)	A check run on register items that compares each item's generated stage dates against its linked Primavera activity dates, reporting any misalignment as a day-delta. Run as part of Section 9.6, after Quality.
WBS	Work Breakdown Structure. The hierarchical decomposition of project scope imported from Primavera P6 and used as the primary organising structure for CBS, Register, and progress reporting.
WF / Weight Factor	A numerical weight assigned to an activity or stage gate that represents its proportional contribution to overall project progress. WF values sum to 100% across the defined scope and drive S-curve generation, rollup, and progress reporting.
XER	The native Primavera P6 export format. EPCplanner accepts XER files directly for schedule import, supporting all P6 versions that produce a standard XER export.



Recommended Implementation Sequence

This sequence represents the recommended order for configuring and activating EPCplanner on a new project. Follow these phases in order to ensure each module has its prerequisite data in place before use.

Phase	Task	Notes
1	Licensing & Installation	Install EPCplanner on the designated workstation. Activate the machine licence. Confirm the Admin account is operational before any other user access is granted.
2	User Accounts	Create all required user accounts with appropriate roles (see Table 12.1). Distribute credentials to each user and confirm first-login password change is completed.
3	Create Project Database	Create the project database via File → New Project. Name the file clearly using project code and revision. Store in a managed shared folder or secure local directory.
4	Project Setup	Complete all Project Setup fields (Section 5): project name, client/company numbers, revision, cut-off logic. This metadata appears on all generated reports.
5	P6 Import (XER)	Import the approved baseline XER (Section 4.1). Review WBS structure, activity IDs, calendars, and relationships. Back up the database after a successful import.
6	CBS Setup	Import and promote the contract CBS (Section 7.1–7.5). Map CBS items to WBS/Activities via CBS Distribution (Section 7.6). Generate WF from CBS (Section 7.7).
7	Weight Factors	Import or generate WF data (Section 6). Validate total distribution = 100%. Run Transfer WF to align register and activity WF. Verify WF Alignment before proceeding.
8	Register Setup	Import ENG, PROC, and SUBC register items (Section 9.3). Create or import stage templates (Section 9.4). Assign templates and link task codes (Section 9.5). Generate dates, run Quality and Validation (Section 9.6).
9	Baseline Verification	Review all S-curve planned data, register planned dates, and WF totals against the approved baseline. Obtain formal sign-off before switching to In-Progress mode. Back up the database.
10	Switch to In-Progress	Admin switches the project to In-Progress mode (Section 8.1). Open the first COD and begin the reporting cycle. The project is now live.



Administrator Pre-Deployment Checklist

Complete all items in this checklist before granting operational access to project team members. Each item must be confirmed by the system administrator and documented with date of completion

#	Checklist Item	Verified By	Date
1	EPCplanner installed on target workstation(s). Version confirmed: 2026.1.0 or later.		
2	Machine licence key generated, activated, and validated on the target machine. Licence fingerprint recorded.		
3	Admin account default password changed. Admin credentials stored securely (not distributed to general users).		
4	All user accounts created with correct role assignments. Temporary passwords distributed individually. First-login password change confirmed for all active users.		
5	Project database created and stored in a managed directory. File naming convention applied (project code + date).		
6	Backup folder created and backup routine confirmed. At minimum one manual backup taken and verified as restorable.		
7	Project Setup fully completed: all identity fields, cut-off logic, and reporting parameters. Reviewed against project master document register and contract data.		
8	P6 XER import completed and reviewed. WBS, activity counts, calendars, and relationships verified against the source P6 schedule.		
9	CBS import, validation, and promotion complete. CBS Distribution mapping verified. CBS WF generated and total distribution confirmed = 100%.		
10	Register import, template assignment, and date generation complete. Quality confirmed $\geq 90\%$ coverage. Validation issues reviewed and either resolved or documented with justification.		
11	S-curve planned data reviewed and confirmed against the project baseline. Print settings configured. Sample report generated in HTML and PDF and reviewed for layout and correctness.		
12	Baseline database backup taken after all setup is complete and verified. Backup labelled as "[ProjectCode]_Baseline_[Date]" and stored in a secure off-machine location.		
13	All key users trained or briefed on their module responsibilities. Controlled Operating Routine (Section 13.3) shared with all users and acknowledged.		
14	In-Progress mode switched by Administrator. First Cut-Off Date opened. Project team authorised to begin operational use.		



Enterprise Release Improvement Notes

This section records known limitations, planned enhancements, and release improvements noted during the Pilot Phase. Items are categorised by priority. The Pilot Phase is the primary mechanism for collecting field feedback that shapes the General Availability (GA) release.

Confirmed for GA Release (Roadmap)

#	Area	Planned Enhancement	Target
1	Project Dashboard	Consolidated project health dashboard aggregating progress, CBS, and Register KPIs in a single view with export to PDF.	GA Release
2	Session Timeout	Auto-logout after configurable inactivity period to meet enterprise security policy requirements.	GA Release
3	Code Signing	Installer and executable signing with a recognised EV certificate to eliminate Windows SmartScreen warnings in enterprise deployment environments.	GA Release
4	Long-Run Stability	Planned 6–12 hour endurance test covering import cycles, report generation, navigation, and concurrent P6 synchronisation to validate memory stability under continuous use.	Post-Pilot

Pilot Phase Feedback Mechanism

Pilot organisations are requested to report issues and improvement suggestions using the following categories to assist prioritisation:

P1 — Critical: Data loss, calculation error, or blocking defect that prevents productive use.

P2 — High: Workflow disruption or incorrect output that requires a workaround.

P3 — Enhancement: Feature request or usability improvement that would improve productivity but does not block current work.

All feedback should include: the module name, a description of the observed behaviour, expected behaviour, and the steps to reproduce. Submit to the EPCplanner product team via the contact provided with your pilot agreement.



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