Contract Administrator

Getting started →

NBS Contract Administrator Getting Started Guide

Welcome

Thank you for choosing to subscribe to NBS Contract Administrator. This product has been designed to support the decision making, communication and information audit trail that are key to effective administration of construction contracts.

NBS Contract Administrator v2.0 will support JCT 98, IFC 98, MW 98, SBC 05, IC 05/ICD 05, MW 05/MWD 05 forms of contract as well as generic forms of contracts SBC SCOT 05, MW/SCOT 05, MWD SCOT 05. At the heart of the system are the well-known RIBA forms for contract administration.

NBS Contract Administrator has been designed to be simple and intuitive to use. Forms, team details and reports are organised in the panel on the left hand side of the screen. Each job can be simply located, its history reviewed and new forms generated.

The Editor in the centre of the screen is used for editing forms and job details. The Guidance panel on the right hand side of the screen displays contract administration and editorial guidance, which is synchronised with the content of the Editor.

Contents of this guide

This guide covers the four straightforward steps that you need to complete to start using NBS Contract Administrator:

Installation
NBS Contract Administrator can be installed either to a standalone machine or on many machines across a network environment.

Licensing
NBS Contract Administrator must be unlocked by entering a licence code obtained from NBS.

Create a data store
This will store all of the job information and can be located on a standalone machine or shared on a network location.

Set up practice details
These are the 'issuer' details that will appear on all contract administration communications.

Once you have successfully completed these steps you are ready to start using NBS Contract Administrator. You can:

Explore the demo jobs
NBS Contract Administrator is supplied with demo jobs containing examples of completed forms and reports. These allow you to quickly explore and understand the software before creating your own jobs.

Create a new job
It's simple to set up new jobs and quickly start creating contract administration communications.

The guide also contains:

Sources of further help and support
As well as extensive help and guidance within the software, NBS Contract Administrator subscribers benefit from free telephone and online technical support.

Installation

For Windows 2000, XP and Vista; ensure that you are logged on to the machine with an account that has administrator permissions, which are required to install the software. Insert the NBS Contract Administrator CD. If autorun is enabled on your computer, the installation process will begin automatically. Otherwise, browse to the CD and double click on **NBSCA.exe**, the NBS Contract Administrator start-up pages will now display. The startup pages include detailed step-by-step installation instructions. It is essential that Internet Explorer 6 is installed before you install NBS Contract Administrator.

1. Select **Install or upgrade NBS Contract Administrator**.

2. If your computer does not have the Microsoft .NET Framework v2.0 already installed, you will be prompted to install it; select **Yes**. This is required by NBS Contract Administrator. You may be prompted to restart your machine during this process, and you must do so before continuing with the installation.

3. Once the Microsoft .NET Framework v2.0 has been installed the NBS Contract Administrator installation will resume and the installation wizard will appear. Click **Next**.

4. On the next step carefully read the Terms and Conditions and select either **Accept**, continuing onto the next step of the installation, or **Not Accept** and exit the installation wizard. Click **Next**.

5. Enter details of your user name and organisation in the next step of the installation wizard. Select to install the software so that it can be used by any user of the computer or restrict the software to the account that is logged on to the machine at the time of installation. **Please note:** that choosing to allow access only to a single account will prevent other users from accessing the software if they log on with a different account. Click **Next**.

6. You will then be prompted for the location where you wish to install the software. The default location is C:\Program Files\NBS. Click **Next** to accept the default location or click on the **Change** button to browse to a different folder on the local machine. Click **Next** to continue.

7. The installation process is now ready to begin. Click **Install** to begin the installation or use the **Back** button to review or change your installation settings. After the installation has finished, click on **Finish**; there is no need to restart your machine.

8. On completion of the installation process start the software by selecting Start, Programs, NBS and NBS Contract Administrator from the Start Menu, or double click on the desktop shortcut.

9. When you attempt to run NBS Contract Administrator for the first time after installation, the licensing wizard will start to guide you through the steps required to generate a Request Code and unlock the software.

Licensing – Network

When you attempt to run NBS Contract Administrator for the first time, the licensing wizard will start, to guide you through the steps required to generate a Request Code and unlock the software. For network installation, it is essential that NBS Contract Administrator is installed, licensed and data store(s) created for one network machine first. After this, the software can be installed on other network machines which can be licensed and setup by browsing to the licence files and data store(s) created during the first installation; see subsequent installs.

First Install

1. To create a new licence file select New and click Next.

2. Select a location to store your licence file; this can be a UNC path, or a mapped or shared drive, e.g. \\server\LicenceFile.

3. The software will now generate a Request Code and prompt for an Unlock Code. You can obtain your Unlock Code by telephoning NBS Customer Services on 0845 456 9594 and quoting the Request Code. Enter this Unlock Code and the software will be activated for use.

Subsequent Installs

1. Select Existing and browse to the location of your licence file, e.g. \\server\LicenceFile.

2. The software will be activated for use.

Licensing – Standalone

When you attempt to run NBS Contract Administrator for the first time, the licensing wizard will start to guide you through the steps required to generate a Request Code and unlock the software.

1. To create a new licence file select New and click Next.

2. Select a location to store your licence file. NBS recommend that you create a backup of your licence file for future use; select a location to store your licence using the browse icon. The location must be on your machine's local fixed drive.

3. The software will now generate a Request Code and prompt for an Unlock Code. You can obtain your Unlock Code by telephoning NBS Customer Services on 0845 456 9594 and quoting the Request Code. Enter this Unlock Code and the software will be activated for use.

Create a data store using the data store Setup Wizard

Once the software is licensed it will prompt you for a location for the data store in which to store the job information. To offer the maximum flexibility, an office can have one or more data stores and these can be located on individual machines or on a shared drive regardless of whether you are a standalone or network user.

Popular options are:

Individual data stores

Create a data store by selecting Create a new data store option on the data store setup wizard and selecting Next. You can then browse to a location for the data store file to be stored; this should be held locally and therefore will be individual to users on that machine. If you have an existing data store use the Use an existing data store option in the wizard and select Next, you will then be given the option to browse or search for your data store.

Single data store for multiple users

To allow all NBS Contract Administrator users in the office to access the same set of projects: Create a data store on a network locations (UNC, shared or mapped) from the first NBS Contract Administrator installation using the Create a new data store option, select Next and then browse to the desired location. For any subsequent installations, use the

Use an existing data store option and the select Next to browse to the folder that the data store is located in.

Practice information (Issuer Setup)

NBS Contract Administrator automatically completes the information about your office on every form. The software will prompt you to enter this information after you have set up a data store. You can later change this by selecting **Edit Issuer Details** from the **Tools** menu.

NBS Contract Administrator Interface

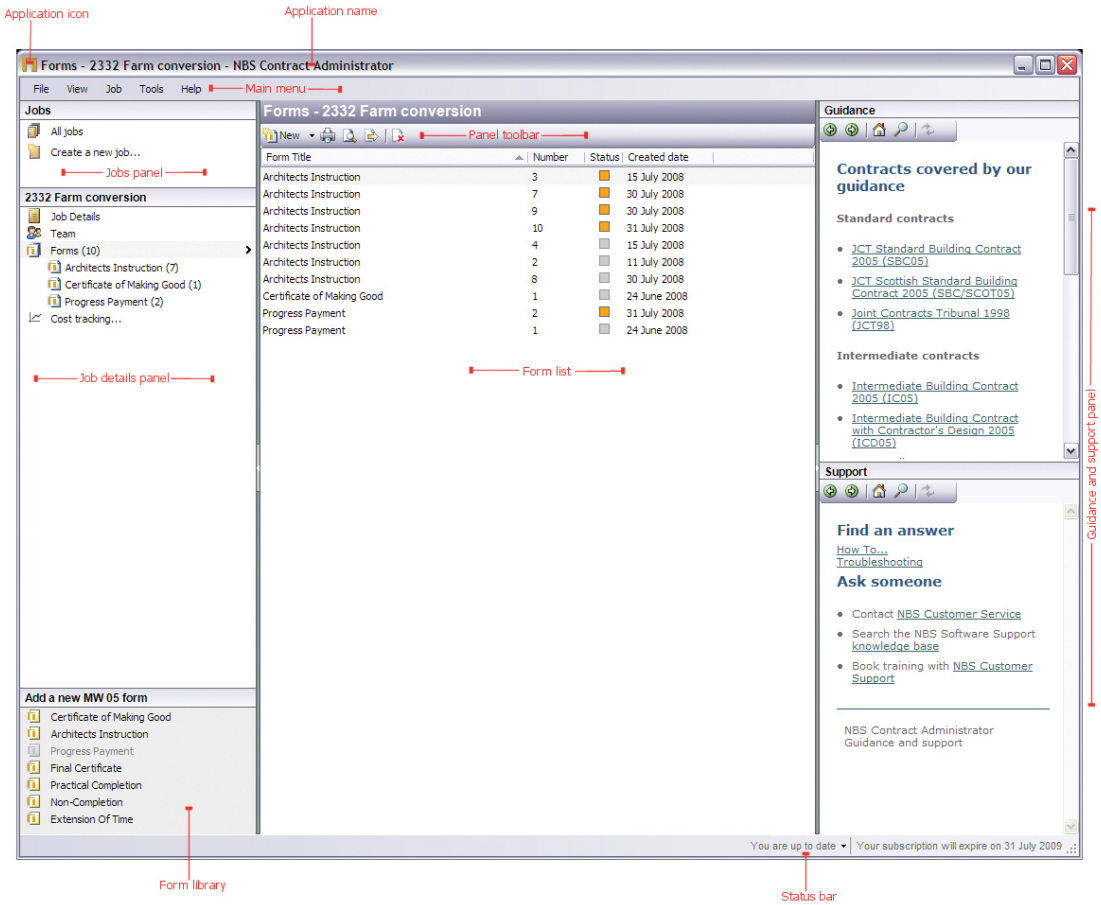
NBS Contract Administrator has been designed to be simple and easy to use. The key parts of the NBS Contract Administrator screen are shown in the illustration overleaf.

Demo jobs

NBS Contract Administrator includes demo projects for a selection of the supported contracts. NBS have authored these to allow users to familiarise themselves with the software and the range of forms available.

Accessing a demo job
To access the demo jobs select **Demo Jobs** from the **View** menu. The demo jobs are listed in the Job panel. Double click on one of the demo jobs to open it. The Job Details will be displayed in the Editor.

Clicking on the tabs at the top of the Editor toggles between Job Details, Team, Nominated Sub Contracts* and Sectional Completion* information. *Displayed only if appropriate to the form of contract.



NBS Contract Administrator - screenshot

Opening forms

The Job Details panel lists all of the draft and issued forms for the job. Click on the headings to expand and collapse the list of individual forms. Double click on a form to open it in the Editor. If the form has previously been issued it will open read-only in the Editor.

Creating a new job

Creating a job

If the job list is displaying the demo jobs, select **Jobs** from the **View** menu. Click on the Create New Job icon.
A new job is created and the Job Details load in the Editor for completion. Enter the job details information. Note that mandatory fields are indicated with an asterisk (*). The Output Location defines where copies of all issued forms and transmittal slips will be created in PDF format. This can be set to any directory on your local machine or network. Click on the button to browse to a different location if required. You can create your own demo jobs by ticking the Demo Job checkbox.

Job team

The companies and staff associated with a job are allocated on the Team tab at the top of the Editor. The roles, such as Employer and Contractor, are listed and once companies have been assigned to them they are automatically entered on every form. To assign companies to a job, click on the Team Member button next to the role and select a company from the drop-down list. If the company is not listed, add it to the Address Book by going to Tools>Address Book and clicking on the New company button.

Adding and editing forms

When creating a job, you specify the desired form of contract. The forms available in the contract will then be displayed in the form library which is located at the bottom of the left hand panel. Click on a form to highlight it and then drag-and-drop to add it to the main pane. The form will be added to the active job and open it for editing. Note that adding forms to a job for the first time will lock the Form of Contract and any Advance Payment. Guidance about the form will automatically open in the Guidance pane together with editorial guidance on how to complete the form.

Address book

Companies and company contacts can be added and edited in the Address Book by going to Tools>Address Book. Adding companies to the Address Book makes them available for all jobs. The companies and their roles for each job are listed and edited in the Team tab of the Job Details.

Reports

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

Issuing forms

Once you have edited the content of a form and are ready to issue it, click on the Distribution List tab at the top of the editor. Tick the checkboxes for the companies who are to receive copies of the forms; this information will appear on the transmittal sheet which is automatically generated when the form is issued.

To issue the form, click on the issue button at the top of the Editor. Note that issuing the first form for a job locks some of the information in the job details for Quality Assurance purposes. It is possible to recall the last issued form for amendments at a later time by opening the form and clicking on the recall button.

You will be prompted to enter an issue reason which will be included on the transmittal sheet. The issued form and transmittal sheet are generated as PDF documents and saved in the Output Location folder. You can either print the forms and post copies to the relevant parties or send the PDF files electronically.

NBS Perspective

NBS Perspective is a new document management and collaboration system designed to make it easier for you and your teams to view, organise and share information and project documentation.

As part of your subscription to NBS Scheduler, you now have access to at least one free licence to the Professional Edition of NBS Perspective.

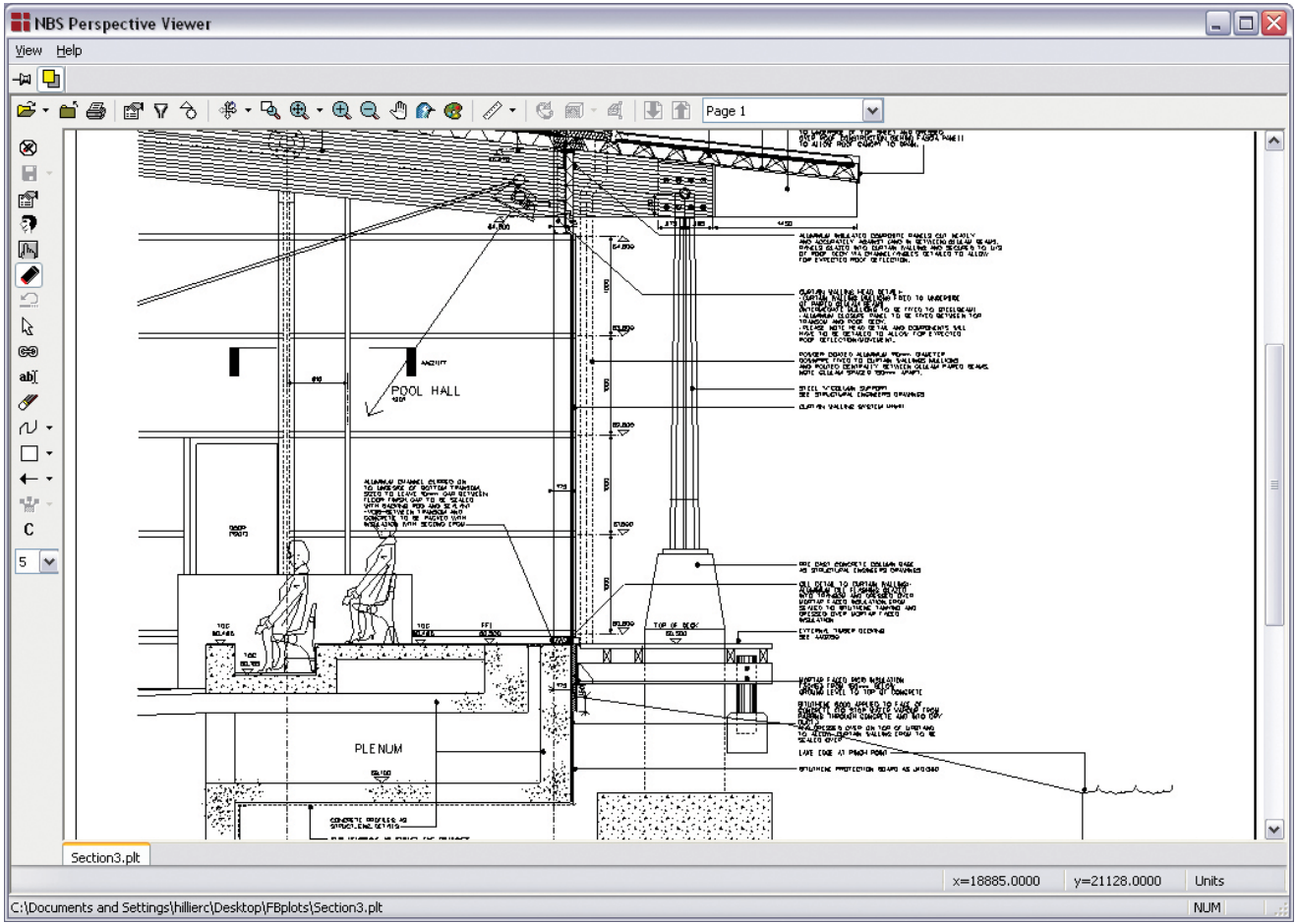
The free of charge licence(s) can be used until your next renewal date plus another 12 months. During this time additional Professional Edition licences can be purchased. After this time you can continue to use the Project Edition free of charge or subscribe to the Professional Edition. For prices or information relating to free of charge licences, please contact the NBS Customer Services team on 0845 456 9594.

View

NBS Perspective has a powerful document viewer that enables you to view and print hundreds of document types, including NBS specifications, without taking time to launch or using a licence of the native software. The Viewer also contains an intuitive tool bar that synchronises to the document type being viewed.

By using the NBS Perspective Viewer, those in your office and wider project teams, that only need to view and print NBS specifications can now do so using NBS Perspective, without needing to launch or use a licence of NBS Scheduler. When viewing an NBS specification, the Viewer toolbar synchronises to provide tools relevant to an NBS specification.

The NBS Perspective Viewer also views AutoCAD and MicroStation drawings, PDFs and Microsoft Office files.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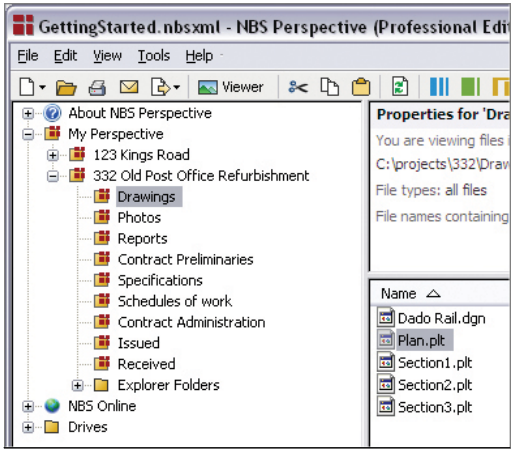
Organise

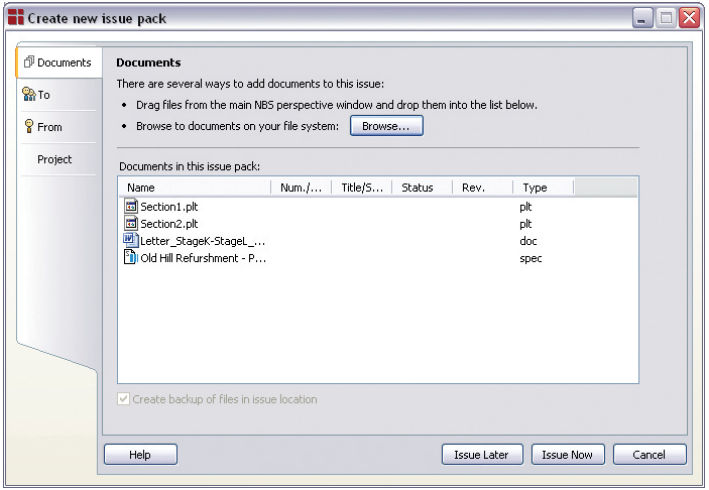
NBS Perspective can help you to quickly organise information and project documentation to suit an individual or office style without the risk of deleting or losing original files. It re-creates existing project folder structures with virtual links back to those folders and their contents. You can add, remove, rename, and change the structure of the folders without changing the existing project folders or their original locations.



Share

NBS Perspective enables you to electronically record and send a complete issue of documents that is too big for email, without spending time splitting the pack into several emails or delaying the issue by sending it by post. Also there is no need to spend time converting files to other formats, as recipients can have free access to the NBS Perspective viewer too.

To get started using NBS Perspective, open the software and follow the on-screen help or consult your NBS Perspective Getting Started guide.



For more information about NBS Perspective visit **www.theNBS.com/NBSPerspective** or call NBS Customer Services on **0845 456 9594**.

Recommended minimum requirements

NBS software requires the following components in order to run:

- Microsoft Internet Explorer 6 (IE6) or Higher – we recommend Internet Explorer 7 which can be downloaded for free from the Microsoft website
- Microsoft .NET framework 2.0 – which is included in the installation of this product

All products require a CD-ROM drive if installing the software from CD.

In addition the software will run on the following platforms:

- Windows Vista 32-bit and 64-bit (SP1)
- Windows XP Professional (SP3)
- Windows XP Home (SP3)
- Windows XP Pro x64 (SP2)
- Windows 2000 (SP4 with Update Rollup 1)
- Windows 2000 Server and above (for Server PCs)

Our software support team can provide assistance, and you can contact them on 0845 456 9594 (+44 191 232 9594 from outside the UK) and at support@theNBS.com.

Please note that the speed of running any software application depends upon several factors. The following specification is an approximate guide only.

Recommended minimum requirements for all NBS software:

- Processor: Pentium III 1.0GHz
- Memory: 256 MB (For Windows 2000/XP) 512Mb (For Windows Vista)
- Free disk space: 1Gb
- Screen resolution: 1024 x 768 in 32 bit colour

Apple Macintosh

We have recently tested the compatibility of NBS software with Apple Boot Camp. The specification of the machine tested on is as follows:

- iMac 1.83GHz Intel Core Duo
- 17-inch widescreen LCD with 1440x900 resolution
- 1.83GHz Intel Core Duo with 2MB shared L2 cache
- 2.0Gb 667MHz DDR2 SDRAM
- 160GB Serial ATA hard drive
- Slot-load 8x double-layer SuperDrive
- ATI Radeon X1600 graphics with 128MB GDDR3 memory
- Built-in AirPort Extreme and Bluetooth 2.0

Please Note: In order to run NBS software using Apple Boot Camp users will require a bona fide full version of Microsoft Windows: XP Home or Professional with Service Pack 3, Windows Vista Home Basic, Home Premium, Business, or Ultimate with Service Pack 1. (No upgrade or multi-disc versions).
Although the software has been successfully tested on this platform we cannot guarantee that the software will react the same with another specification Mac.

Further help and support

NBS is committed to providing excellent customer support. Further help and support for NBS Contract Administrator is available in the following ways:

Software help files
Select **Help Topics** from the **Help** menu for extensive help information about how to use the software.

Contract administration guidance
Detailed information and advice about contract administration and how to complete the forms is provided in the Guidance and Editorial Guidance windows.

NBS Online
The NBS website has a dedicated area for subscribers that includes support information, hints and tips for how to get the most out of the software, technical information and more. Visit www.theNBS.com or click on theNBS.com tab in the startup page of the software for further information.

Customer Services
For general enquiries or to licence the software, telephone NBS Customer Services on 0845 456 9594.

Software Support
For assistance and advice regarding the NBS Contract Administrator software, contact NBS Software Support on 0845 456 9594 or visit www.theNBS.com/support/softwaresupport

Feedback
NBS welcomes feedback about NBS Contract Administrator and other NBS products. Please send any comments and suggestions to Feedback@theNBS.com

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