

Stages 700-800 Tools

Version V3.10.32: 27 March 2012

Stages 700-800 tools overview

ProForm tools first used in Stage 7 (Delivery) and Stage 8 (Completion) are:

- PF71 Request for Substitution
- PF72 Request for Substitution Log
- PF73 RFI Log
- PF74 Construction Variation
- PF75 Construction Variation Log
- PF76 Samples Log
- PF77 Shop Drawings Log
- PF81 Defects Remediation List
- PF82 Lessons Learned
- PF83 Post-occupancy Evaluation

iProjects ProForm tools are listed under the Stage where they are first needed. Typically, tools started in one Stage are used in subsequent Stages, often acquiring more information input as the project moves along. Exceptions are Common tools (see UserGuide 3.4.1) and Management tools (see UserGuide 3.4.6).

Features common to most **iProjects** ProForm tools

Typically, ProForm tools have one or more of three types of on-screen help, as indicated below.

- ❖ **Control panel:** Upper right, just outside the form printable area, is a graphic that contains three to seven standard commands, appropriate to the ProForm function. For details on how to use this control panel, refer UserGuide **1.1: Login & Navigation**. “Dupe” means “duplicate this record”.
- ❖ **Margin UserGuides:** On many ProForm templates, there are notes – always in green text, providing advice in using the ProForm. An example is shown right.
- ❖ **On-form User Notes:** Many templates include notes within the printable area of the template, as shown right.

These notes mean that most templates will be self-explanatory, particularly as they are designed to “mirror” the way most practices operate. For inexperienced users, the following details will help explain the use of the Stage templates listed.

- [Email](#)
- [Preview](#)
- [Print](#)
- [Save As PDF](#)
- [Zoom](#)
- [New](#)
- [Dupe](#)

NOTE: This form is designed to be partially completed digitally (first 3 columns), then printed as a blank distribution template for multiple issues of documents.

USER NOTES:

1. You must have completed Task level pricing on PF18 in order to use this form.
2. Entry earned value data at the Task level, not the Stage level.
3. Obtain “Allowance used to date” values from accounting (hours used x charge rate).
4. All values on this form **EXCLUDE GST or other sales taxes.**

Special features of particular ProForm templates

PF71 Request for Substitution

This *fabulous* tool was invented years ago by Tulsa, Oklahoma-based architect Charles Chief Boyd, and is used with his permission.

It really stops frivolous contractor substitution requests dead in their tracks, reducing risk and saving time that is hard to be compensated for. Review it and you will see why. We've added **PF72: Request for Substitution Log** to record and retrieve request records – see below.

This RFS form should be included in your contract documentation as an annexure to the specification. However, you will need some standard language in your *General Conditions* (“*Preliminaries*” in Australia) to establish its use as a contract document. We suggest the following text, preferably to be part of the Quality Control / Quality Management part of your specification (you can number it any way that suits):

105 SUBSTITUTIONS

- A The Contract Documents are intended to produce a building of consistent character and quality of design. All components of the building including visible items of mechanical and electrical equipment have been selected to have a coordinated design in relation to the overall appearance of the building. The Architect will judge overall design of the work, as well as for the intrinsic merits of the proposed substitution. The Architect will not permit as equal to materials specified proposed substitutes that, in the Architect's opinion, would be out of character, obtrusive or otherwise inconsistent with the character or quality of design of the work.
- B Requests for substitutions: The Builder may request permission for a substitution of any item, subject to the following conditions:
 - 1 Submit requests in writing to the Architect, on a form supplied by the Architect, fully completed. A sample copy of this form is included as an Annexure to this Section.
 - 2 State whether the use of the substitution will require alteration to any part of the Works. If the substitution is adopted, carry out any such alteration without extra charge. In the case where the affected works are part of another subcontract, obtain cost from the other sub-contractor for such alteration and include it in the cost of the substitution.
 - 3 No claim shall arise from any rejection, nor, unless otherwise agreed, shall adoption of a substitution be ground for any claim for variation to cost or time.
- C Conditions: Builder's request for substitutions will be received and considered when extensive revisions to Contract Documents are not required and changes are in keeping with general intent of contract documents, and when timely, fully documented and properly submitted, all as judged by Architect.
- D Approval: No work involving any request for substitution shall be commenced, or materials ordered, until the Builder has received written evidence of the approval of the request by the Architect (if for building works) or the Consulting Engineer (if for building services).

PF72 Request for Substitution Log

This ProForm template organizes and tracks *Request for Substitution* documents. Use should be obvious.

PF73 RFI Log

RFIs (Requests for Information) are a legitimate form of communication between building contractors and design professionals, but are in some cases have been subject to abuse, where the contractor is attempting to create an ambit claim for delay, and literally floods the designer with huge numbers of “frivolous” RFIs. The sole purpose of these is to

create a backlog of unanswered requests, leading to claims of project delay and consequential costs by the contractor – all blamed on the designer, of course.

There are several strategies that designers can use to manage the “frivolous RFI” problem, which we will cover in an article on the website – but the first thing all design professionals must do is record, track and monitor **ALL** RFIs – frivolous or not. PF73 does that for you.

No.	Date received	From	Question	Reason	CF03 Info No.	Response date
					View CF03	

As shown above, this list-view document provides the record you need. It includes an editable drop-down selection menu to help categorize the RFIs. It also includes a hot-link to the Communication Form CF03 document that you create to respond to the RFI, so you can instantly see the detail of any response. (See UserGuide 3.4.1 for more info on the CF form suite).

PF74 Construction Variation

All construction projects involve Variations (“Change Orders” in the USA). The concept is simple enough – a contractual change of scope in the built work – but the detail is often quite involved:

- ❖ The change request may involve cost change time change, or both.
- ❖ The change request may or may not be approved, but needs to be tracked in either case. Sometimes, one is approved, but not the other.
- ❖ Most changes involve other suppliers and/or subcontractors, whose work may also be affected by the change.
- ❖ Both cost and time changes can be negotiated.
- ❖ Contractual changes are not necessarily approved in the order submitted.
- ❖ Traditionally, changes are first negotiated by the designer, but are often subject to review and further negotiation by the Owner.
- ❖ Construction changes often require changes to the construction documents, which in turn require a change to the designer’s scope of services.

One of the endemic problems with construction variations is that nobody tracks the totality of consequential change in other parts of the work, which can be seriously affected by a change somewhere else in the project, and which if not managed holistically, not infrequently leads to client dissatisfaction and project stress.

At one level, these issues are really “communication” problems – but at a deeper level they occur because nobody on the project team has assumed responsibility for managing a comprehensive view of change.

Indeed, the widespread retreat from any position of legal liability tends to move professionals toward a position where they “own” only their own part of the project. Understandably, clients respond badly to this fragmentation of responsibility, and demand singular accountability for outcomes.

We had not meant to get into a philosophical discussion of project leadership here, but the issues canvassed above are directly responsible for the unique way in which we've built the PF74 template. This ProForm document deals with the above issues as follows:

1. It is addressed to the client, and contains all the relevant information about the change (or group of changes);
2. Variations can be tracked against multiple contracts for the same project;
3. It provides for aggregation of more than one change (up to six changes) into a single Variation;
4. Items can be any mix of increase or decrease of either time or cost or both;
5. Maximum time change is limited to the longest delay required by any single subcontractor; and
6. The usual revisions and signoff provisions to the original construction contract are included.

Note that there are toggle just below the control panel (upper right) that facilitate switching back and forth between the Variation records and the Variation Log.

PF75 Construction Variation Log

This ProForm template keeps track of all construction variations. A partially completed sample is shown below.

VR No. Date	Variation description	Previous compl. date	Sched. delay (days)	New compl. date	Previous lump sum	Variation amount	Revised lump sum	Status
Contract A - VR1 27/09/2010								Approved
		Contract For: Contract A						
		Contract A - V1.2						
Contract B - VR1 28/09/2010								Approved
		Contract For: Contract B						
		Contract B - V1.1						

Default sorting is by [Date](#), and you can always click the [Date](#) title to restore chronological sorting.

Note the extended Control Panel outside the right page margin (shown right). First, you can toggle back and forth to any Variation record using the [View PF74](#) button below the trashcan.

[PF74](#) [PF75](#)

[All](#) [Pending](#)
[Not Approved](#) [Approved](#)

Contract For:


[View PF74](#)

When a Variation is approved, or not approved (see bottom of PF74) it will show as **Approved** or **Not Approved** in the PF75 [Status](#) field. Until it is either approved, or not approved, it will show as **Pending** in the Status field on PF75. You can view [All](#) variations, [Pending](#) variations, [Not Approved](#) variations and [Approved](#) variations using the buttons indicated. The active list will change the button from blue to black text.

To sort Variations by contract, simply select one of the Contracts in the drop-down box **Contract For:**. When you select a contract and display the variations against it, a [Clear](#) button will appear next to the Contract box. Click this button to restore the complete Variation list.

PF76 Samples Log

PF76 is a straightforward list of project samples, providing all the information, in 12 fields, that you need to track and manage project samples.

Firm Prepared by:	Date received:	Description / Product name:	CF01 No.
Submitted by:	Submittal date:	Model or product code:	Return date:
Of Firm:	Submittal No.	Color / finish / type:	Action:
			View CF01
			View CF01

Two key features of this template are, first, that you can select Action on the sample from a drop-down list (shown right).

And second, you can toggle back and forth to the CF01 record of your communication with the contractor, using the [View CF01](#) button provided that you have entered the CF01 number in the upper right field.

CF01 No.
Return date:
Action:

[View CF01](#)

Approved

Revise & resubmit

Not approved

Edit...

PF77 Shop Drawings Log

This template works exactly the same as PF76 **Samples Log**.

PF81 Defects Remediation List

This template is a straightforward list-view record of construction defects (“punch list” in US terminology). It includes an editable drop-down selection field for status, as indicated below right.

ID	Date noted	Defect location	Defect description	Trades involved	Defect status
Noted by:					
					<div style="border: 1px solid black; padding: 5px;"> <p>URGENT</p> <p>Open</p> <p>Resolved</p> <p>Edit...</p> </div>

PF82 Lessons Learned

PF82, a straightforward list of project lessons learned, is an important component of the overall iProjects Corporate Memory program.

ID	Date noted	Issue source	Issue description	Suggestion for action	Suggested Action by
Noted by:					

As noted in the title User Guide, the user is asked to forward a copy of the form to the Project Manager, the Project Director and the Quality Manager.

PF83 Post-occupancy Evaluation

PF83 is structured similarly to PF82, and is also a part of the overall iProjects Corporate Memory program, through the user forwarding a copy of the form to the Project Manager, the Project Director and the Quality Manager.

ID	Date noted	Conditions noted:	Action suggestion / Lesson learned	Suggested Action by