



CMCS INSIGHTS · CONTRACTS · RICS

PMWEB for RICS Contract Administration

Ten articles on how capital project owners and contract administrators turn the RICS guidance on contract administration into a digital practice in PMWEB 2026: commencement, records and notices, change control, valuations and certificates, extensions of time, the final account, ICMS 3 cost reporting, DoA compliance and reporting.

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From RICS Guidance to a Digital Contract Administration Practice with PMWEB 2026

Why capital project owners and contract administration consultants need the RICS standard of care held as structured, enforced and auditable processes, and how PMWEB 2026 covers every block of the RICS contract administration services

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RICS tells the contract administrator how to behave. It asks for every instruction in writing, every certificate on time, a running estimate of the final account, and a complete record of "the life of the building contract from inception to completion". Guidance does not enforce itself. A project management information system that holds every contract process in structured form does.

Every capital project owner appoints someone to administer the building contract. Sometimes it is the architect or engineer, sometimes a quantity surveying practice or a project management consultant, and sometimes an in-house team. Whoever holds the role, the Royal Institution of Chartered Surveyors (RICS) has set out what good practice looks like, in its guidance note Contract administration and, more recently, in the contract administration schedule of its Standard Form of Consultant's Appointment.

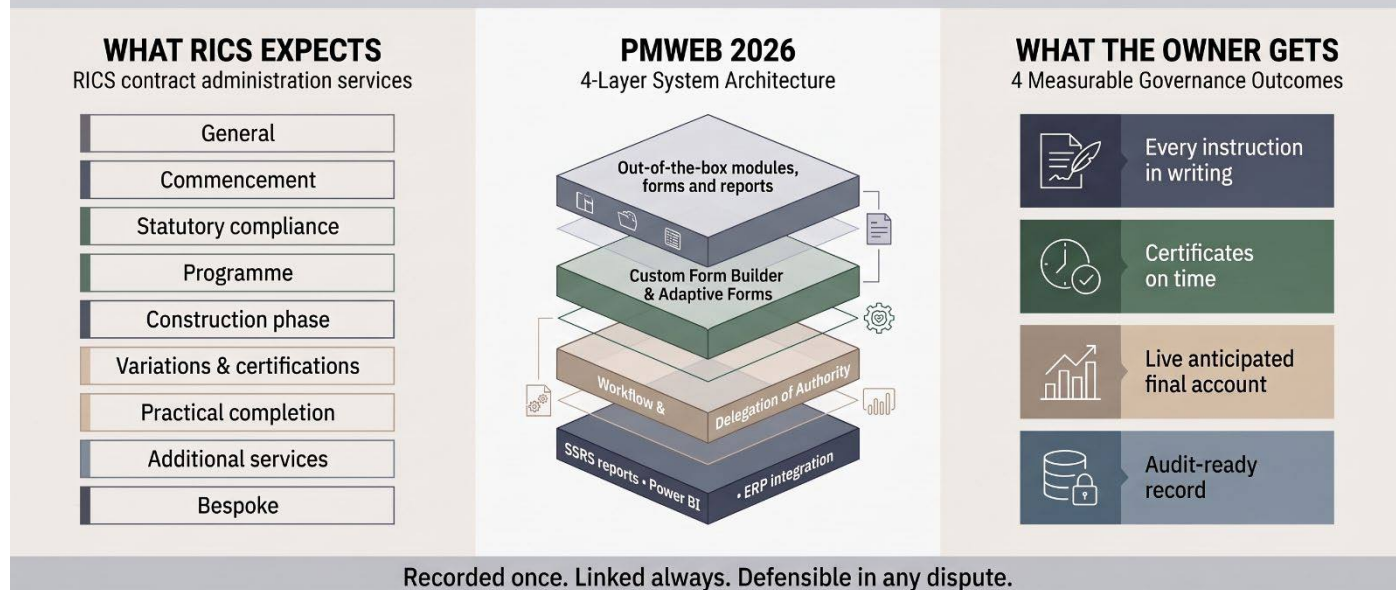
The practical difficulty is not knowing what RICS expects. Most experienced contract administrators know it well. The difficulty is doing it consistently across dozens of contracts, hundreds of instructions and thousands of documents, and being able to prove afterwards that it was done. Decisions sit in e-mails. Valuations sit in spreadsheets. Notices sit in the inbox of whoever happened to receive them. When the contractor challenges a determination, or an auditor asks how a change was approved, the evidence has to be reconstructed.

This series shows how PMWEB 2026 closes that gap. Over ten articles it walks through the RICS contract administration services, from commencement to the final account, and shows for each one what PMWEB delivers out of the box, where a Custom Form Builder form or an Adaptive Form completes the picture, how workflows enforce the employer's Delegation of Authority (DoA), and how SSRS reports, Power BI dashboards and ERP integration turn the record into management information.

Why this matters to you

- **Commercial Directors:** one live anticipated final account per contract, built from approved records rather than monthly spreadsheets, so commercial exposure is visible before it becomes a dispute.
- **Contract Administrators:** every instruction, certificate and determination captured with its evidence and approval trail, so the RICS standard of care can be demonstrated in minutes, not weeks.
- **Cost Managers:** budget, commitments, change, valuations and forecasts in one cost structure, ready for ICMS reporting and benchmarking.
- **Project Directors and owners:** a record that belongs to the organisation and outlives every consultant appointment.

RICS Sets the Standard of Care; PMWEB 2026 Makes It the Way the Work Is Done



RICS guidance is the standard of care. PMWEB is the evidence you met it.

Figure 1: RICS sets the standard of care; PMWEB 2026 makes it the way the work is done

What RICS Asks of the Contract Administrator

The most detailed RICS description of the role is the 2011 guidance note Contract administration (GN 69/2011). RICS archived it in May 2022 and retains it for information, so this series treats it as a practical reference rather than a current requirement. It starts from a simple position: the contract administrator (CA) administers the terms of the building contract between employer and contractor. It then draws a distinction that shapes everything that follows. The CA has two functions.

- **An agency function**, in which the CA acts on behalf of the employer: advising, reporting and, within agreed limits, instructing.
- **A decision-making function**, in which the CA must act impartially between employer and contractor. Either party may challenge a decision, and that right is a benefit of the impartiality.

The guidance lists the key tasks that the standard forms of building contract generally give the CA:

- chairing meetings
- periodically inspecting the works
- giving instructions, including variations or change orders
- determining applications for extensions of time
- authorising interim payments
- certifying the date of completion
- settling the adjusted contract sum, the final account

It also lists the qualities required: knowledge of the contract provisions, independence and fairness, construction knowledge sufficient to trace the impact of change, the ability to set up "appropriate office procedures and record keeping", and familiarity with critical path programming.

The contract administration services schedule

RICS turned these tasks into a schedule that the employer ticks when appointing the CA. The Contract Administration Services schedule of the RICS Standard Form of Consultant's Appointment (May 2022 edition) has nine blocks.

Block	RICS service heading	What the CA undertakes
1	General	Attend and chair project meetings; prepare regular quality, progress and cost reports and obtain the client's decisions; set up and implement change control procedures; comply with health and safety regulations
2	Commencement	Collect background information; agree an appropriate level of authority to instruct works; clarify team roles; confirm professional indemnity insurance; advise on project insurance; establish the procurement route
3	Statutory compliance	Establish listed status, conservation area restrictions, and planning and building regulation obligations
4	Programme	Prepare an initial programme; obtain and monitor the contractor's programme; advise on delay risk, progress and expected completion
5	Construction phase	Administer the building contract; visit site; record meetings; inspect site management; advise on utilities and on client liability for contractor claims
6	Contract variations / certifications	Prepare interim valuations; certify interim payments; send adjusted contract sum computations
7	Practical completion	Assess and certify completion; manage defects schedules; agree the final account and obtain the client's authorisation
8	Additional services	Loss and expense; extensions of time; acceleration; support in adjudication, mediation, arbitration or litigation; monitor KPIs; maintain a secure project document website
9	Bespoke additional services	Anything else agreed with the client

Two features of the schedule matter for digitalisation. First, any service not ticked becomes an additional service, so the scope of the CA's role varies from appointment to appointment. A digital platform has to switch processes on and off per contract, not impose one fixed model. Second, block 8 includes setting up and maintaining a secure project and document management website as a service in its own right. RICS already recognises that the record needs a platform.

The RICS documents behind this series

Readers who hold RICS qualifications will rightly ask which documents are current. The series is anchored on the current RICS Contract Administration Services schedule and current RICS practice documents, and uses the archived 2011 guidance note only for its practical checklists.

RICS document	Edition and type	Status	Used for
Contract Administration Services, RICS Standard Form of Consultant's Appointment	May 2022 schedule (England and Wales version cited)	Current	The scope of CA services and the structure of this series
Final account procedures	1st edition, practice information (reissued 2024; text first published 2015)	Current	Change control, rolling final accounts, statement of final account
ICMS: International Cost Management Standard	3rd edition (2021; published by RICS June 2022)	Current	Cost classification and reporting
Black Book titles by topic: Interim valuations and payment; Extensions of time; Ascertaining loss and expense (2nd ed.); Change control and management; Valuing change; Acceleration (2nd ed.); Defining completion of construction works; Construction security and performance documents; Defects and rectifications (2nd ed.); Damages for delay to completion (2nd ed.); Retention; Conflict avoidance and dispute resolution in construction; Cost reporting; Cost analysis and benchmarking (2nd ed.)	As listed in the RICS Black Book	Current	Topic references in each article
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022, retained for information	Practical checklists and descriptions of CA duties only

RICS Black Book documents are written for the UK and, as RICS notes, have not been updated for the UK Building Safety Act 2022. RICS has announced new UK practice guidance, including Construction project administration, expected in 2027. In the GCC, the principles apply subject to the governing law and the form of contract in use.

A note for FIDIC users in the GCC

The RICS guidance note is written around JCT contracts, while most GCC capital projects use FIDIC or bespoke forms. The principles carry across directly; only the vocabulary changes. Some RICS references, such as retention "held in trust" and the UK Construction Act, are UK-specific and depend on the governing law.

RICS / JCT term	Typical FIDIC 2017 equivalent
Contract administrator (CA)	The Engineer
Practical completion	Taking-over (Taking-Over Certificate)
Rectification / defects period	Defects Notification Period
Loss and expense	Cost, or Cost Plus Profit, under the claims procedure
Final certificate	Performance Certificate and Final Payment Certificate
Contract instruction / variation	Engineer's instruction / Variation

Why the Standard of Care Depends on the Record

RICS guidance documents have long carried a clear statement of their weight: when an allegation of professional negligence is made against a surveyor, a court or tribunal may take account of relevant RICS guidance in deciding whether the surveyor acted with reasonable competence, and a member who followed it should have at least a partial defence. Departing from recommended practice is allowed, but only for good reason, and the member may have to explain why.

That makes the record the CA's real protection. GN 69/2011 §4.1.4 described what the record must be. It asked for accurate and accessible records, because on a long project "more than one person will act in the role of CA". Records should be identifiable to the contract, dated, attributed to their author and, wherever possible, agreed between the parties so that there is no dispute about their accuracy or authenticity.

Appendix B of the same guidance names the threats. E-mail makes it easy to send more information than anyone needs, and leaves it "sitting on one computer and not accessible to others in the office". Archived electronic data "becomes unusable without active management". In other words, the very tools most CA practices still rely on, e-mail and personal file stores, work against the record RICS expects.

The test a contract administrator should apply: if the person who issued an instruction, valued a variation or determined an extension of time left the project tomorrow, could their successor find the decision, the reasons, the evidence and the approvals in under five minutes?

What Changes When the Process Lives in PMWEB

PMWEB is an enterprise, web-based capital project management platform built on Microsoft .NET with a dedicated Microsoft SQL Server database for each client, deployed as SaaS, hosted by PMWEB (including in-Kingdom options) or on the owner's premises. For contract administration, four characteristics matter more than any individual feature.

One structured record per transaction

Every instruction, RFI, potential change, change order, interim valuation, certificate, notice and claim is a numbered PMWEB record with defined fields, attachments and links. It is not an e-mail thread or a spreadsheet tab. Because the fields are defined, the same question can be asked of every record: when was it received, when was it answered, what did it cost, who approved it?

A workflow on every record

Each record type carries a business process. Each step names a role rather than a person, an allowed duration, the actions available (approve, return, reject, submit) and conditions that add or skip steps. The workflow captures who acted, when and with what comment, automatically. That is the RICS record of decisions, created as a by-product of making them.

Linked evidence

A change order links back to the contract instruction, RFI, drawings and meeting minutes that caused it, and forward to the budget transfer that funded it and the interim valuation that paid for it. When a decision is challenged, the chain is already assembled.

Data that belongs to the owner

Because each owner has its own dedicated PMWEB database, the record outlives any consultant's appointment. When a CA firm changes, the new firm inherits a working system, not a box of files.

How PMWEB 2026 Covers the Nine RICS Service Blocks

The table below maps each RICS block to the PMWEB modules that deliver it out of the box, and to the extensions CMCS typically configures. The articles that follow take each row in turn.

RICS block	PMWEB 2026 out of the box	Extend with	Article
1 General	Meeting Minutes, Action Items, Business Process designer, report and dashboard library	—	2, 3, 4, 8, 9, 10
2 Commencement	Procurement, Commitments, Companies and contacts, roles and security, Word letter templates	Adaptive Forms: pre-commencement checklist; insurances and securities register	2
3 Statutory compliance	Document Manager, Issues, Action Items	Custom Form: permits and consents register	2
4 Programme	Scheduling with Primavera P6 and Microsoft Project import, baselines, Claim Analysis and schedule reports	Custom Form: programme review checklist	6
5 Construction phase	Daily Reports, Inspections, Punch Lists, Safety, RFIs, Submittals, Correspondence, Transmittals	Adaptive Form: site direction and contract instruction; Custom Form: notices register	3
6 Variations / certifications	Change Events, Potential Change Orders, Budget Requests, Commitment Change Orders, Progress Invoices, Cost Worksheet	Custom Form: daywork sheet	4, 5
7 Practical completion	Punch Lists, retention release in Progress Invoices, Archive	Adaptive Forms: completion certificates; statement of final account	6, 7
8 Additional services	Scheduling, Document Manager, dashboards, Power BI integration	Adaptive Forms: extension of time application; loss and expense claim; acceleration	4, 6, 7, 10
9 Bespoke	Custom Form Builder and Adaptive Forms	—	All

Most of what RICS describes is already a PMWEB module with its own forms and SSRS reports. An implementation therefore configures rather than develops. The gaps are mostly checklists, registers, notices and letters that each form of contract words differently, which is exactly what PMWEB's two form-building tools are for.

Custom Form Builder or Adaptive Form?

Throughout the series, each extension is assigned to one of the two tools.

Use the Custom Form Builder when	Use an Adaptive Form when
The process is a header plus one detail table: a register, a checklist, a log or a letter	The record needs several sections or grids, for example a header, a checklist and an itemised valuation
Fields are mainly text, dates, lookups and attachments	Fields need calculation, conditional visibility or validation
Output is a printed form and a register report	The record must link to and act on cost, schedule or other module records
Examples: notices and time-bar register, daywork sheet, permits register	Examples: contract instruction, extension of time application, statement of final account

Both tools produce first-class PMWEB records: numbered, secured by role, carrying attachments, linked to other records, routed through workflow and reportable in SSRS and Power BI. An Adaptive Form record opens with the common Main, Notes, Attachments and Workflow tabs, so users meet the same layout whatever the process.

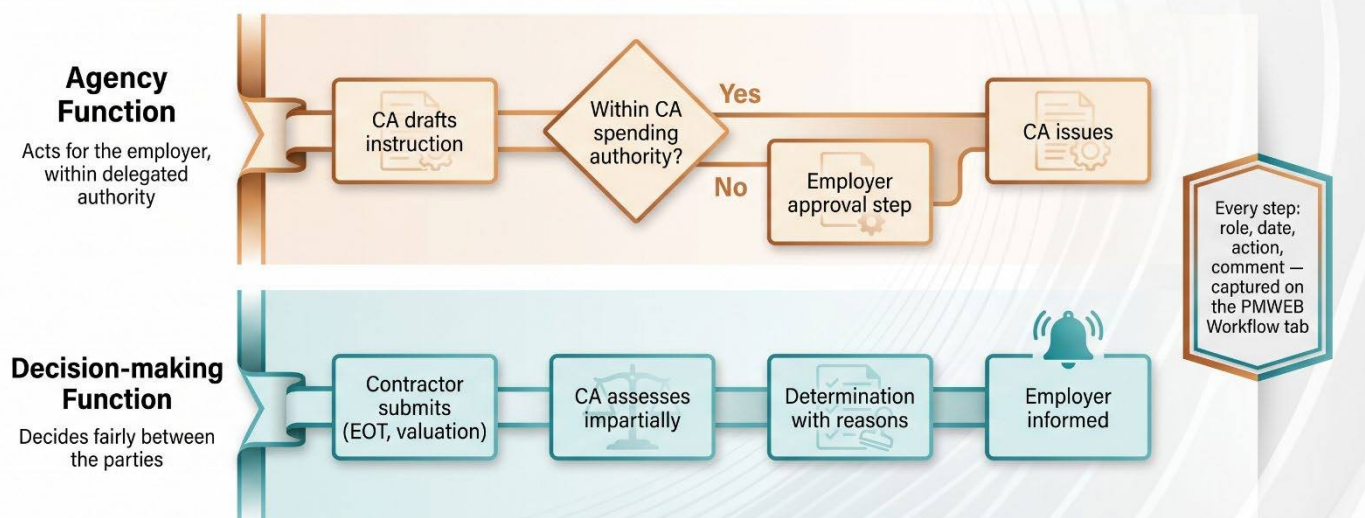
The Agency and Decision-Making Functions, Built into the Workflow

The CA's dual role is the most delicate part of RICS practice, and PMWEB's workflow handles it explicitly.

In the **agency function**, the CA acts within the authority the employer has delegated. PMWEB holds that authority as workflow conditions. An instruction within the CA's spending authority is issued by the CA; above it, the workflow inserts the employer's approval before issue. GN 69/2011 §3.1.5 asks for the CA's authority over contingency, provisional sums and unforeseen work to be confirmed at appointment. In PMWEB it is confirmed in the configuration and enforced on every record.

In the **decision-making function**, the CA must be seen to decide impartially. The workflow records the contractor's submission, the CA's assessment and reasons, and the date the decision was issued, in a sequence neither party can rewrite. Where the employer is informed of a determination rather than asked to approve it, the workflow sends a notification instead of an approval step. Where the particular conditions require the employer's approval before the CA acts, as many GCC contracts do for extensions of time or variations above set limits, PMWEB adds that approval step by condition. The distinction RICS draws is visible in the process design.

The CA's Two Functions as PMWEB Workflow Paths



Approve where RICS says approve. Inform where RICS says inform.

Based on RICS GN 69/2011 §2.2 (archived 2022)

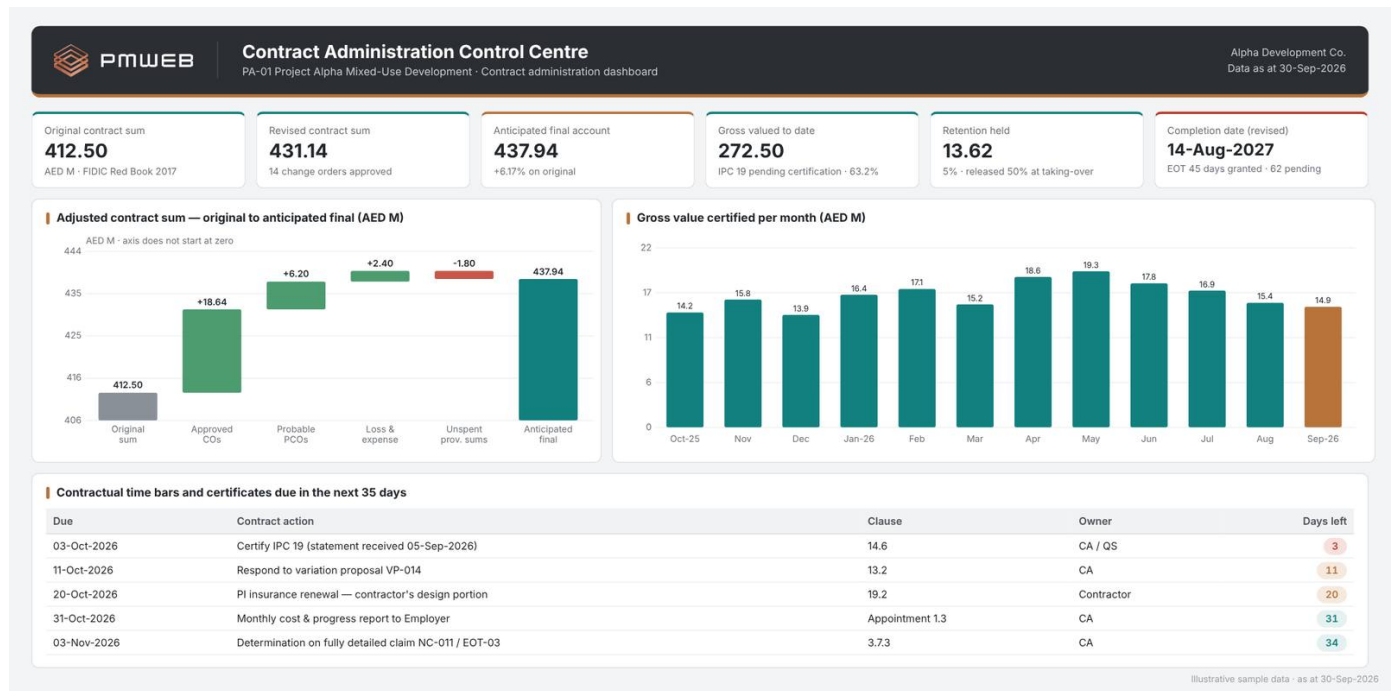
Gemini Notebook

Figure 2: The CA's two functions, agency within delegated authority and impartial decision-making, as PMWEB workflow paths

The Control Centre the Employer Actually Sees

GN 69/2011 §4.1.7 asks the CA to keep the employer informed generally, to identify the employer's obligations and risks at appropriate times, and to keep "a running record of the estimated final adjusted contract sum". It lists what that running record must include: preliminaries, specified works, unspent provisional and contingency sums, additions, omissions, employer variations, anticipated variations, loss and expense, prolongation costs and potential contractor claims.

When every one of those items already exists as a PMWEB record, the report stops being a monthly compilation and becomes a live view. Screenshot S1 shows a Power BI report embedded in the PMWEB dashboards area, reading directly from the PMWEB records for one contract.



Screenshot S1: Contract Administration Control Centre: a Power BI report embedded in PMWEB showing the adjusted contract sum, certification and contractual time bars for contract MC-001

The waterfall moves from the original contract sum of AED 412.50 million to an anticipated final account of AED 437.94 million. Each step is a set of PMWEB records the employer can drill into: approved change orders, probable potential change orders, assessed loss and expense, and unspent provisional sums. The bar chart shows gross value certified each month. The table lists every certificate and contractual time bar falling due in the next 31 days, drawn from the notices register described in Article 3.

What the Rest of the Series Covers

Article	Subject
2	Commencement: contract set-up, the CA's authority, insurances and securities
3	Records, site inspections, meetings, instructions and notices
4	Change control and variations
5	Interim valuations and payment certification
6	Programme, extensions of time, partial possession and practical completion
7	Loss and expense, disputes and the final account
8	Cost reporting to ICMS 3, the International Cost Management Standard
9	Workflow and Delegation of Authority compliance
10	ERP integration, SSRS reporting and Power BI

Every article uses the same sample contract, MC-001 Main Construction Works on the Project Alpha Mixed-Use Development, so that figures can be followed from one article to the next.

What Changes for Your Organisation

Without a PMIS	With PMWEB 2026
Instructions, notices and decisions scattered across e-mail	One numbered, linked record per transaction
Monthly report compiled from several spreadsheets	Live control centre read from approved records
Approval limits held in a PDF	DoA enforced as workflow conditions on every record
Evidence assembled after a dispute starts	Evidence linked as the work happens

Without a PMIS	With PMWEB 2026
Record lost when the consultant changes	Record held in the owner's own PMWEB database

What the Owner and the CA Must Put in Place

- 1. **Agree the RICS scope per contract.** Tick the services schedule and switch on the matching PMWEB processes, so the system reflects the appointment.
- 2. **Write the DoA once, as configuration.** Spending authority, approval limits and notification rules belong in workflow conditions, not in a PDF.
- 3. **Decide the record structure before the first instruction.** Folder structure, numbering, cost breakdown and form designs are set at commencement.
- 4. **Make PMWEB the only channel for contractual communications.** An instruction, notice or certificate that exists only in e-mail is outside the record.
- 5. **Report from the record.** Monthly reports, dashboards and the final account are generated from PMWEB, never re-keyed.

RICS references for this article

RICS document	Edition and type	Status
Contract Administration Services (RICS Standard Form of Consultant's Appointment)	May 2022	Current
Final account procedures	1st edition, practice information (reissued 2024; first published 2015)	Current
ICMS: International Cost Management Standard	3rd edition (2021; RICS June 2022)	Current
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022; cited for practical content only

RICS documents are UK-based; apply them in the GCC subject to the governing law and the form of contract.

See it with your own contract. CMCS can walk your commercial, contract administration and cost teams through these processes in PMWEB 2026, configured to your form of contract and your Delegation of Authority. Write to info@CMCS-MENA.com.

When your contract administrator is asked to prove that a certificate, an instruction or an extension of time followed RICS practice, how long does it take to assemble the evidence?

Talk to us: info@CMCS-MENA.com

#CMCS #PMWEB #RICS #ContractAdministration #ContractManagement #QuantitySurveying #ProjectControls #CapitalProjects #PMIS #GCC

About the Author

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Bassam has over four decades of experience providing project management, project controls services and project management information systems to more than two hundred capital projects with a combined value exceeding one hundred billion US dollars.

He is the author of four published books on project management digitalisation and has lectured at more than three hundred and fifty international events. He holds a Master's degree in Engineering Administration (Construction Management), with Faculty Commendation, from George Washington University and a Bachelor's degree in Civil Engineering from Kuwait University, with executive education at Harvard Business School and London Business School.

About PMWEB

PMWEB is an enterprise-class, web-based capital construction project management platform trusted by organisations worldwide including Harvard University, the United Nations, and Atlanta Airport. Built on Microsoft .NET technology, PMWEB manages the entire project lifecycle within a single integrated platform, from portfolio planning and cost management through document control, procurement, scheduling, asset management, and business intelligence. With 150+ pre-configured SSRS reports, drag-and-drop dashboard design, multi-currency support, and open REST/SOAP API integration, PMWEB delivers enterprise capability with implementation timelines measured in months, not years.

About CMCS

CMCS (Collaboration, Management and Control Solutions) is the PMWEB Authorised Implementation Partner for the GCC and MENA regions, awarded PMWEB Global Partner of the Year 2025. CMCS markets, implements and supports PMWEB for more than 60 enterprise clients across the UAE, Saudi Arabia, Qatar and Kuwait, helping capital project owners, PMC firms and contractors digitalise their project management processes on a single, governed platform. Contact: info@CMCS-MENA.com

Commencement Done Right: Contract Set-Up, the CA's Authority, Insurances and Securities in PMWEB

How capital project owners and contract administrators turn the RICS commencement services and the Appendix A pre-commencement checklist into records that must be complete before a contract goes live

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Most contract administration disputes are seeded before the first excavator arrives on site: a spending authority nobody wrote down, a performance bond that quietly expired, a verbal understanding about who may instruct the contractor. RICS puts these items at the start of the contract administrator's services for that reason. PMWEB 2026 turns them into records that have to be complete before the contract is administered.

The first article in this series mapped the nine blocks of the RICS Contract Administration Services schedule to PMWEB 2026. This article takes the blocks that come first in time: block 2 (Commencement), block 3 (Statutory compliance) and service 1.4 in block 1, "set up and implement change control procedures". Together with the pre-commencement checklist in Appendix A of the RICS 2011 guidance note Contract administration (GN 69/2011, archived by RICS in 2022 but still a sound practical checklist), they define what must be true on the day the contract starts.

The theme is simple. Everything the CA will do for the next two or three years depends on decisions made in the first thirty days: what the contract says, who may instruct, how much they may spend without asking, and what security the employer holds if things go wrong. If those decisions live in a PMIS, every later process can test itself against them.

Why this matters to you

- **Commercial Directors:** no contract goes live without evidenced securities, insurances and a written spending authority, closing the gaps that most often expose the employer.
- **Contract Administrators:** the RICS Appendix A checklist as one approved record, and an authority you can point to every time an instruction is challenged.
- **Cost Managers:** a schedule of values coded to the cost structure from award, so nothing has to be re-coded later.
- **Risk and insurance teams:** expiry alerts at 90, 45 and 21 days on every bond and policy.

Day One Decides Year Three: Five Commencement Records in PMWEB

Contract administration disputes are frequently seeded on day one due to unrecorded spending authorities, expired securities, or ambiguous verbal instructions. By requiring five structured PMWEB records to be fully evidenced and approved prior to contract activation, project owners ensure complete auditability, financial control, and operational alignment across the project lifecycle.

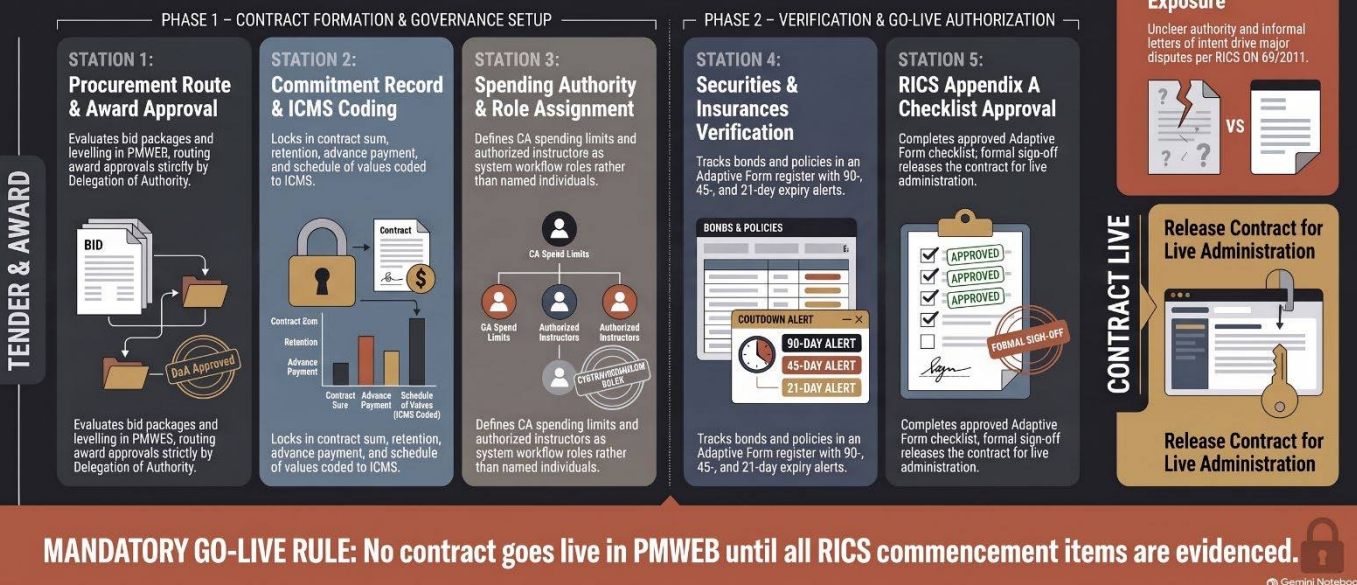


Figure 1: Day one decides year three: the five commencement records that must exist in PMWEB before a contract goes live

What RICS Requires at Commencement

The commencement services

The RICS services schedule lists six commencement services.

Service	RICS requirement	Why it matters later
2.1	Collect background information from the client, including any limitations	Constraints shape the programme, instructions and reports
2.2	Agree with the client an appropriate level of authority to instruct works	Decides which instructions the CA may issue alone
2.3	Clarify the terms and roles of each professional team member	Decides who reviews, advises and approves in each workflow
2.4	Confirm each team member's professional indemnity insurance	Protects the employer if advice proves negligent
2.5	Advise generally on project insurance	Prevents gaps between the contractor's and the employer's cover
2.6	Establish the procurement route	Decides the contract form, risk allocation and change mechanism

Block 1 adds service 1.4, "set up and implement change control procedures", and block 3 covers statutory compliance: whether the property is listed or in a conservation area, and what planning and building regulation obligations apply. In the GCC the equivalent obligations come from municipalities, master developers, civil defence and utility authorities, but the principle is identical: consents carry conditions, and conditions carry dates.

What GN 69/2011 adds

The guidance note turns the schedule into practice. Three passages are particularly relevant.

- **Authority (§3.1.5).** The extent of the CA's authority over contingency monies, provisional sums and additional or unforeseen works "should be confirmed within the appointment agreement".
- **Insurance (§4.3.7).** The CA should check that all appropriate insurances are in place when the building contract is signed, and should recommend that the employer takes specialist advice on cover.
- **Letters of intent (§4.3.8).** Letters of intent "give rise to a substantial number of construction contract disputes" and should be handled with great care, ideally by the employer's legal advisers.

The Appendix A pre-commencement checklist

Appendix A of GN 69/2011 gives the CA a pre-commencement checklist in three parts.

- **(a) Obtain from the employer and be satisfied that all is in order:** written authority accepting the tender, written authority to commence, planning and building approvals, licences, notices about asbestos, live services and similar site matters.
- **(b) Obtain from the contractor:** tax and VAT certificates, bank details, insurance certificates approved by the employer's broker with their renewal dates, health and safety notifications, the performance bond, parent company guarantee, warranties and the master programme.
- **(c) Agree and confirm in writing:** the persons authorised to issue instructions, the system for issuing and confirming instructions, the employer's approval procedure for instructions and changes, key personnel, the drawing approval procedure, site boundaries and restrictions, the sub-letting approval procedure and the insurance claims procedure.

Part (c) is the most important and the most often neglected. It is effectively the contract administration manual for the project, agreed between the parties before the first instruction is given.

PMWEB Out of the Box: From Tender to a Live Commitment

Procurement keeps the award rationale

The contract is born in PMWEB's **Procurement** module. Bid packages hold the tender documents and invited bidders; pre-bid records hold clarifications and addenda; online bidding receives priced submissions; bid levelling compares them line by line. Award approval is routed through a workflow that follows the employer's DoA by contract value.

This matters for RICS service 2.6. The procurement route, the tender evaluation and the award rationale are documented in the same system that will administer the contract, so the CA who later interprets the contract can see how and why it was let.

The Commitment becomes the contract record

On award the package becomes a **Commitment**, the record from which every later contract administration process hangs. Its header holds:

- contractor (from the Companies register), contract number and title
- contract type and form of contract
- original contract sum, currency and tax treatment
- retention percentage and any retention limit
- advance payment amount and recovery rule
- key dates: award, commencement, completion and sectional completion dates

Its line items form the schedule of values. Each line carries a cost code from the cost breakdown structure, which Article 8 sets up to ICMS 3, the International Cost Management Standard, so that budget, commitment, change and payment all report against the same structure from day one. Provisional sums are held as separate lines so that their expenditure and omission can be tracked by instruction, as Article 4 explains.

Companies, contacts and roles

The contractor, consultants and the employer's team are held in PMWEB's **Companies** and contacts registers. In an ERP-integrated deployment the contractor record is synchronised with the ERP vendor master, so bank details and tax registration are maintained once. Each person is assigned roles per project, such as Contract Administrator, Employer's QS, Project Director or Contractor's Representative. Workflows route to roles, not names. When a person changes, the role is reassigned and every open workflow follows.

Standard outputs and letters

At this stage PMWEB's out-of-the-box SSRS library already provides the Contracts Log, Contract Details, the Subcontract forms in long and short versions, Purchase Order forms, and the Commitment Log grouped by vendor, by cost code or by project.

Letters of acceptance, notices to commence and, where unavoidable, letters of intent are generated from **PMWEB Word templates** that merge fields from the commitment record. Given RICS's warning about letters of intent, generating them only from templates approved by the employer's legal advisers is itself a control: no one drafts a letter of intent from a blank page.

Extend: The Pre-Commencement Checklist as a Custom Form

Appendix A is a checklist with evidence behind every line, and that evidence lives in different places: a bank guarantee in the securities register, a permit in the Document Manager, a baseline in Scheduling, a DoA matrix in the workflow configuration. A **Custom Form** is the right tool because one record can hold the contract header, a checklist grid, a status per line and a live link to the record or document that proves it.



Pre-commencement Checklist

Contract MC-001 - output form generated from the Contract Commencement Custom Form record

Alpha Development Co.

PA-01 Project Alpha Mixed-Use Development

Report date 30-Sep-2026 - Page 1 of 1

CHECKLIST NO. CCK-001	CONTRACT MC-001 Main Construction Works	CONTRACTOR Sample Contracting LLC	FORM OF CONTRACT FIDIC Red Book 2017 + Particular Conditions
CONTRACT ADMINISTRATOR Sample CA Consultants	COMMENCEMENT DATE 03-Mar-2025	TIME FOR COMPLETION 30-Jun-2027	CA AUTHORITY TO INSTRUCT AED 250,000 per instruction

#	Checklist Item	Evidence reference	Date	Status
(a) Obtained from the Employer				
1	Written employer authority accepting tender	Letter of Acceptance LA-001	12-Feb-2025	✓ Verified
2	Written employer authority to commence works	Notice to Commence NTC-001	24-Feb-2025	✓ Verified
3	Planning permission and building permit	Municipality permit BP-2025-1187	18-Feb-2025	✓ Verified
(b) Obtained from the Contractor				
4	Performance security (10%)	Bank guarantee PG-44871	20-Feb-2025	✓ Verified
5	Advance payment guarantee	Bank guarantee APG-44872	20-Feb-2025	✓ Verified
6	Parent company guarantee	PCG-SC-01	21-Feb-2025	✓ Verified
7	Insurance certificates (CAR, TPL, EL), approved by the Employer's broker	INS-01 to INS-03	25-Feb-2025	✓ Verified
8	Master programme (baseline)	Schedule PA-01 BL-00	27-Feb-2025	✓ Accepted
9	Tax / VAT registration certificate	TRN certificate on file	19-Feb-2025	✓ Verified
(c) Agreed and confirmed in writing				
10	Persons authorised to issue instructions	DoA matrix rev. 1	26-Feb-2025	✓ Agreed
11	System for issuing and confirming instructions	Contract instruction procedure	26-Feb-2025	✓ Agreed
12	Employer's approval procedure for instructions and changes	Change workflow BP-11	26-Feb-2025	✓ Agreed
13	Sub-letting approval procedure	Sub-contract consent procedure	26-Feb-2025	✓ Agreed
14	Insurance claims notification procedure	Procedure CA-PR-07	27-Feb-2025	✓ Agreed

PREPARED BY

Contract Administrator

Sample CA Consultants

✓ Approved in PMWEB workflow - 27-Feb-2025

REVIEWED BY

Employer's Project Manager

Alpha Development Co.

✓ Approved in PMWEB workflow - 27-Feb-2025

APPROVED BY

Employer's Representative

Alpha Development Co.

✓ Approved in PMWEB workflow - 28-Feb-2025

Status: **Approved** — contract released for administration · 14 of 14 items evidenced · supporting documents held as attachments and linked records on CCK-001

Illustrative sample data

Screenshot S1: Pre-commencement checklist built as a PMWEB Custom Form following RICS GN 69/2011 Appendix A parts (a), (b) and (c)

Screenshot S1 shows the record for contract MC-001. The header names the CA as a firm rather than an individual, as GN 69/2011 §2.4.2 recommends, and records the CA's spending authority per instruction (AED 250,000). That figure is not decoration: Article 9 shows how it becomes a workflow condition that decides whether an instruction needs the employer's prior approval. Each checklist line names its evidence and where it is held, so a reviewer can click through to it.

Recommended design

Section	Fields and behaviour
Header	Contract (linked commitment), contractor, form of contract, named CA firm, commencement date, date for completion, CA spending authority per instruction, aggregate authority, checklist completion date
Checklist grid	Appendix A part (a, b or c), item, evidence reference, date obtained, PMWEB location, status: open, verified, agreed, or waived with reason
Validation	The record cannot be approved while any mandatory line is open; a waiver requires a reason and the employer's approval

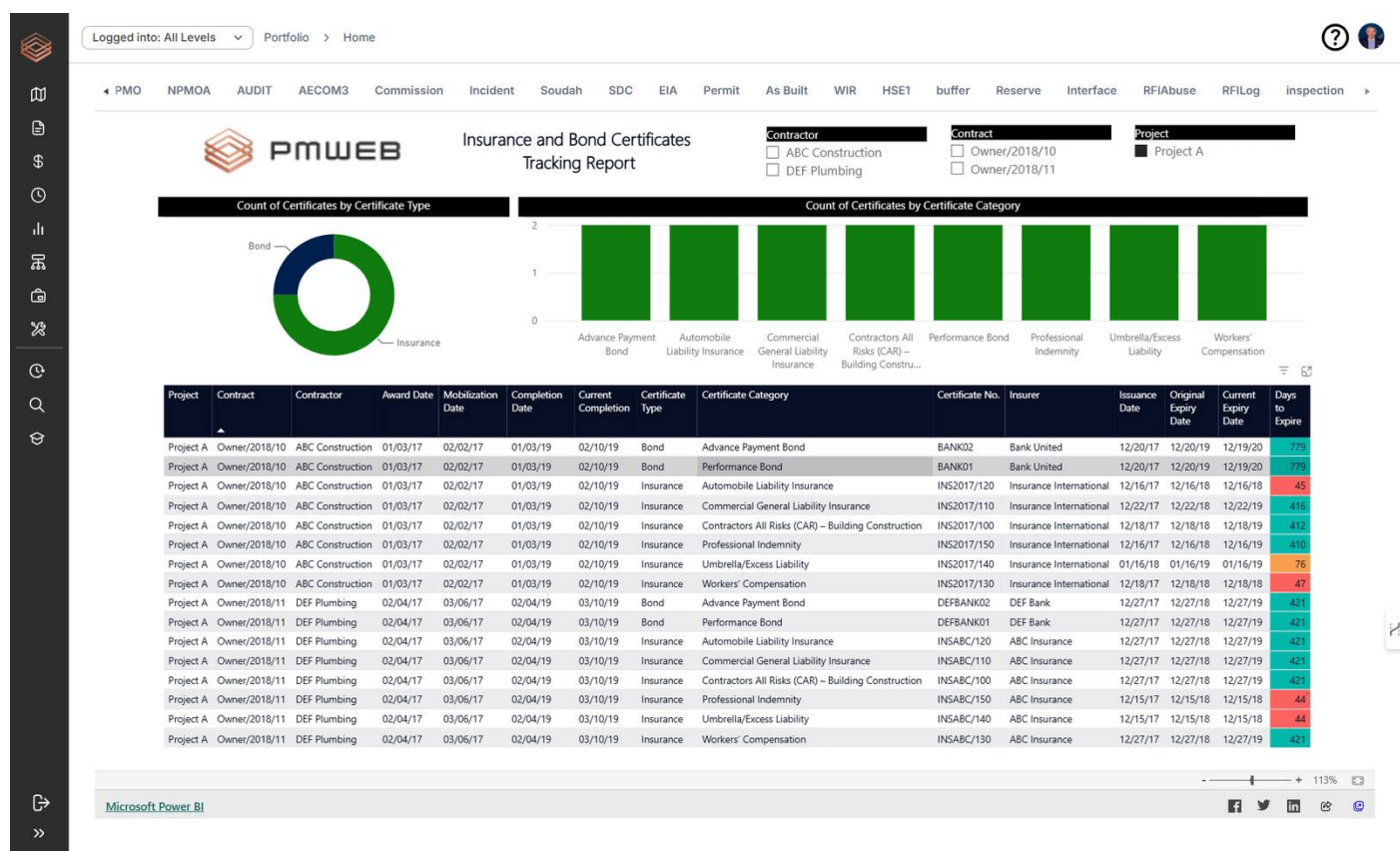
Section	Fields and behaviour
Links	Commitment, securities and insurance records, baseline schedule, DoA matrix, Notice to Commence, permits
Workflow	CA prepares, Employer's Representative reviews, approval releases the contract for administration and notifies the project team

Because the checklist is an Adaptive Form record, it also becomes a template. The next contract starts from the same item list, adjusted for its form of contract, and the owner gets the same commencement discipline on every project in the portfolio.

Extend: The Insurances and Securities Register

Appendix A part (b) asks for insurance certificates with their renewal dates, and part (e) of the construction phase checklist asks for "new insurance certificate at renewal date". GN 69/2011 §4.3.7 makes the CA responsible for checking that cover is in place. In practice, expiries are where owners are most exposed: a professional indemnity policy for the contractor's design portion lapses, or a performance security expires before the defects period ends, and nobody notices until a claim is made.

A second **Adaptive Form** holds one record per instrument: performance security, advance payment guarantee, parent company guarantee, contractor's all risks, third party liability, employer's liability and professional indemnity. Each carries the issuer, amount, effective date, expiry date, the required validity under the contract, and the document itself.



Screenshot S2: Insurances and Securities Register: an SSRS report over the Adaptive Form records with expiry alerts

Three behaviours make the register useful rather than merely complete.

- **Expiry alerts.** Workflow notifications at 90, 45 and 21 days before expiry go to the CA, the employer's insurance broker and the contractor. In Screenshot S2 the professional indemnity policy for the design portion expires in 20 days and is flagged as urgent.
- **Validity checks.** Each instrument carries the date it must remain valid until, for example the issue of the performance certificate. If the expiry is earlier, the register flags an extension requirement.
- **Reducing guarantees.** The advance payment guarantee reduces as the advance is recovered through interim valuations (Article 5). The register shows the current required amount alongside the face value, so the employer neither releases too early nor holds more than the contract allows.

Statutory compliance with the Custom Form Builder

For block 3 the **Custom Form Builder** is sufficient: a permits and consents register with one header per consent (authority, reference, scope, date granted, expiry, responsible party) and one detail table of conditions to discharge, each with a due date and status. The register feeds the action items report, and conditions that must be discharged before occupation are linked to the practical completion checklist in Article 6.

Setting Up Change Control on Day One

RICS service 1.4 asks the CA to "set up and implement change control procedures", and RICS Final account procedures (1st edition, now practice information) adds that the project execution plan should include the change control mechanism and the procedure for contract instructions, because that "helps to provide a framework for auditability".

In PMWEB, that procedure is not a document in a binder. It is a set of configured business processes:

Process	Configured at commencement
Contract instruction	Who may issue each instruction type, and the value above which the employer's prior approval step is inserted
Potential change order	Who prices, who values, allowed durations, link to the originating instruction or RFI
Budget request	Who may transfer contingency, and at what value each approver is required
Change order	Approval route by net value through the DoA matrix
Interim valuation	Review, certification and payment approval steps, with the contractual certification period

Part (c) of the Appendix A checklist, "employer's approval procedure for instructions/changes", is therefore evidenced by a link to the live workflow configuration rather than a description of it.

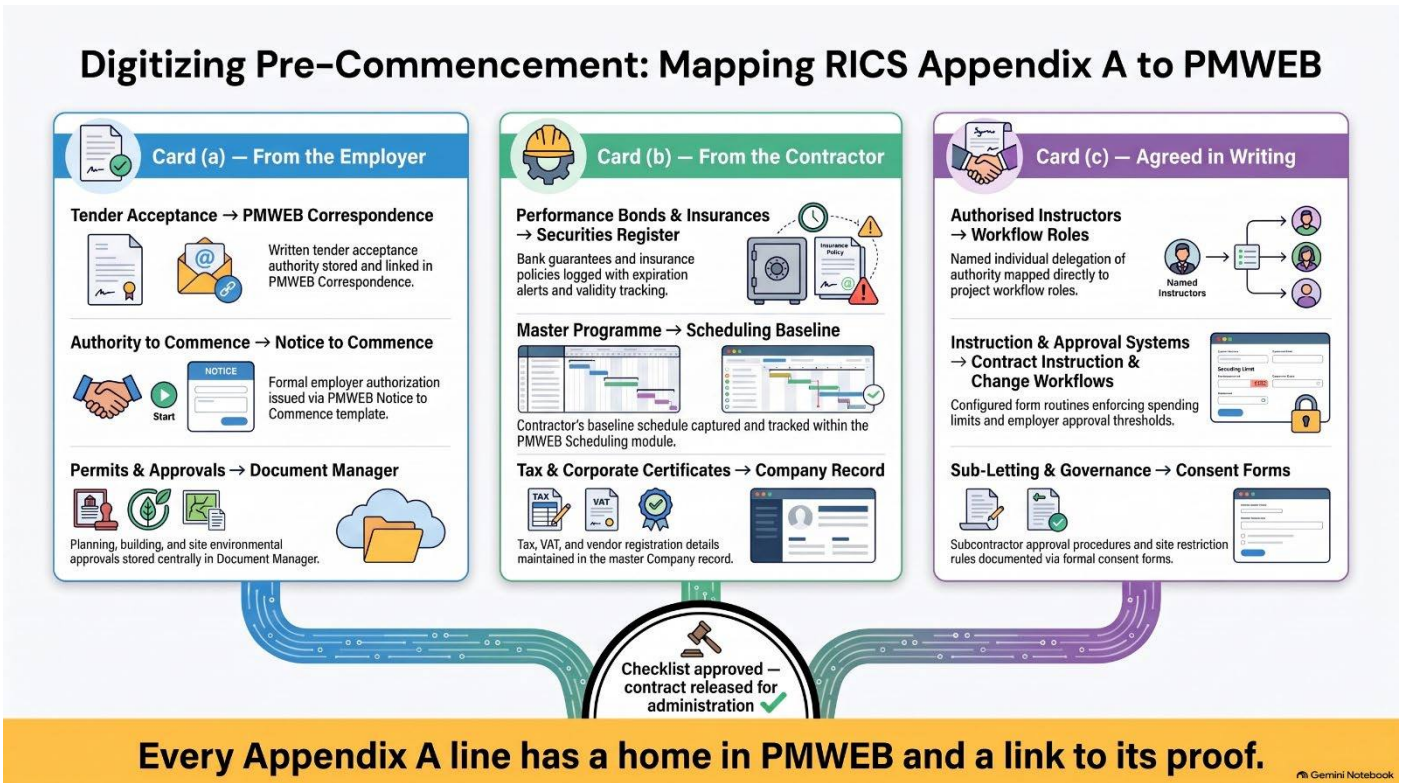


Figure 2: The RICS Appendix A checklist parts (a), (b) and (c) mapped to the PMWEB records that evidence each line

Workflow and DoA at Commencement

Three approvals are configured before day one, and each one follows the employer's DoA.

- 1. **Contract award.** The procurement award routes by contract value: for example, a Project Director up to AED 1 million, a Commercial Director up to AED 5 million, the Chief Executive up to AED 25 million, and a tender committee above that.

2. **Pre-commencement checklist.** The CA prepares and the Employer's Representative approves. Approval releases the contract for administration.
3. **Change control processes.** The configured business processes themselves are reviewed and approved as part of the project execution plan, so that the procedure the parties agreed is the procedure the system enforces.

ERP Touchpoint

An approved commitment creates or updates the purchase order in the owner's ERP, whether SAP, Oracle Fusion, Oracle E-Business Suite or Microsoft Dynamics 365. The vendor, cost codes, value, retention and advance payment terms travel with it. From that point both systems share one contract number, and Article 10 explains how later transactions keep them in step.

What Changes for Your Organisation

Without a PMIS	With PMWEB 2026
Spending authority agreed verbally or buried in the appointment	Authority recorded as numbers and enforced by workflow
Bond and policy expiries tracked in a personal spreadsheet	Securities register with automatic expiry alerts
Pre-commencement items checked from memory	RICS Appendix A checklist approved before go-live
Letters of intent drafted from blank pages	Letters generated only from approved templates
Contract re-keyed into the ERP	Approved commitment creates the purchase order

What the Owner and the CA Must Put in Place

1. **Name the CA as a firm, with individuals in the appointment.** Record both in PMWEB so that roles survive staff changes.
2. **Write the spending authority as numbers.** Per instruction, cumulative and per category, so that it can become a workflow condition.
3. **Adopt one pre-commencement Adaptive Form across the portfolio.** Adjust items per form of contract, but keep the structure.
4. **Hold every bond and policy in the securities register with its required validity date.** Expiry alerts are only as good as the dates entered.
5. **Approve the change control workflows before the first instruction.** The procedure the parties agree should be the procedure PMWEB runs.
6. **Never issue a letter of intent outside an approved template.** RICS is explicit about the dispute risk.

RICS references for this article

RICS document	Edition and type	Status
Contract Administration Services (RICS Standard Form of Consultant's Appointment)	May 2022	Current
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022; cited for practical content only
Final account procedures	1st edition, practice information (reissued 2024; first published 2015)	Current
Construction security and performance documents	1st edition, practice information (RICS Black Book)	Current
Developing a construction procurement strategy and selecting an appropriate route	Practice information (RICS Black Book)	Current

RICS documents are UK-based; apply them in the GCC subject to the governing law and the form of contract.

See it with your own contract. CMCS can walk your commercial, contract administration and cost teams through these processes in PMWEB 2026, configured to your form of contract and your Delegation of Authority. Write to info@CMCS-MENA.com.

Could your contract administrator show you today, for every live contract, the CA's spending authority, the persons authorised to instruct, and the expiry date of every bond and insurance policy?

Talk to us: info@CMCS-MENA.com

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#CapitalProjects #GCC

About the Author

Bassam Samman, PMP, PSP, EVP, GPM is the Chairman and Chief Executive Officer of CMCS FZ-LLC, the PMWEB Authorised Implementation Partner for the Gulf Cooperation Council and broader Middle East and North Africa region. CMCS holds the PMWEB Global Partner of the Year 2025 designation and serves capital project owners, contractors and consultants across the UAE, Saudi Arabia, Qatar and Kuwait.

Bassam has over four decades of experience providing project management, project controls services and project management information systems to more than two hundred capital projects with a combined value exceeding one hundred billion US dollars. He is the author of four published books on project management digitalisation and has lectured at more than three hundred and fifty international events. He holds a Master's degree in Engineering Administration (Construction Management), with Faculty Commendation, from George Washington University and a Bachelor's degree in Civil Engineering from Kuwait University, with executive education at Harvard Business School and London Business School.

About PMWEB

PMWEB is an enterprise-class, web-based capital construction project management platform trusted by organisations worldwide including Harvard University, the United Nations, and Atlanta Airport. Built on Microsoft .NET technology, PMWEB manages the entire project lifecycle within a single integrated platform, from portfolio planning and cost management through document control, procurement, scheduling, asset management, and business intelligence. With 150+ pre-configured SSRS reports, drag-and-drop dashboard design, multi-currency support, and open REST/SOAP API integration, PMWEB delivers enterprise capability with implementation timelines measured in months, not years.

About CMCS

CMCS (Collaboration, Management and Control Solutions) is the PMWEB Authorised Implementation Partner for the GCC and MENA regions, awarded PMWEB Global Partner of the Year 2025. CMCS markets, implements and supports PMWEB for more than 60 enterprise clients across the UAE, Saudi Arabia, Qatar and Kuwait, helping capital project owners, PMC firms and contractors digitalise their project management processes on a single, governed platform. Contact: info@CMCS-MENA.com

If It Isn't Recorded, It Didn't Happen:

Records, Inspections, Meetings,

Instructions and Notices in PMWEB

How PMWEB 2026 captures the day-to-day contract administration record RICS expects, and why every instruction and notice should live in a structured, workflow-driven record rather than an e-mail

Bassam Samman, PMP, PSP, EVP, GPM | Chairman & CEO, CMCS FZ-LLC | PMWEB Authorised Implementation Partner, GCC & MENA

RICS asks the contract administrator to make sure that "the life of the building contract from inception to completion is accurately and completely recorded". On most projects that record is assembled after the event, from e-mails, site diaries and photographs on personal phones. In PMWEB it is the by-product of doing the work.

The construction phase is where the contract administrator spends most of the appointment, and where most of the evidence that will later decide claims, extensions of time and the final account is created. It is also where the record is most fragile. Site directions are given verbally and never confirmed. Meeting actions are minuted but never closed. A notice of claim arrives by e-mail to someone on leave, and the contractual period runs out unnoticed.

This article covers RICS services 1.1 and 1.2 (attend and chair meetings), 5.1 to 5.5 (administer the contract, visit site, record meetings, inspect site management) and the guidance on records, site inspections, meetings, instructions and notices in the RICS 2011 guidance note Contract administration (GN 69/2011), which RICS archived in May 2022 and retains for information. It remains the most detailed RICS description of the CA's day-to-day duties, and this series cites it for that practical content alongside the current RICS documents. It shows what PMWEB delivers out of the box and the two extensions CMCS adds for instructions and notices.

Why this matters to you

- **Commercial Directors:** fewer unpriced instructions and missed time bars, which are among the most expensive surprises in any final account.
- **Contract Administrators:** site directions confirmed in writing, notices logged on receipt and deadlines escalated before they expire.
- **Cost Managers:** every cost-bearing instruction opens a potential change order automatically, so the forecast is never behind the site.
- **Project Directors:** daily reports, inspections and minutes that stand up as contemporaneous evidence.

Connected Contract Administration in PMWEB 2026

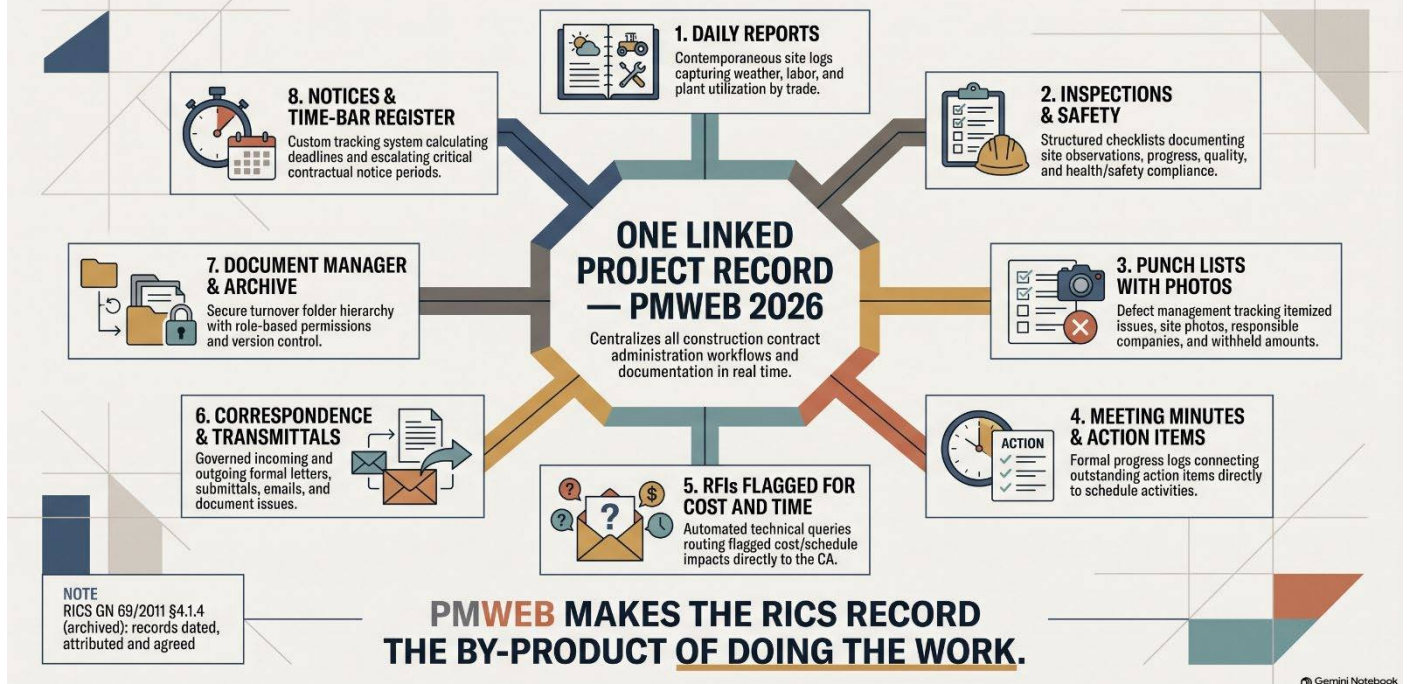


Figure 1: One linked project record in PMWEB: the eight record types RICS expects the CA to keep, and how they connect

What RICS Requires

Records (GN 69/2011 §4.1.4)

The CA should keep accurate and accessible records, because on a longer project more than one person may act as CA. The guidance names three kinds:

- **Notes of site inspections**, recording the date, time and duration of the visit, the weather, persons on site, progress and status of the works, defects and the action taken, and instructions given, "particularly if verbal".
- **Office files**, collated so that letters, e-mails, notices, telephone notes, instructions and drawings can easily be found and tracked.
- **Photographs**, filed so that the location and date taken can easily be identified.

Records should be identifiable to the contract, dated, attributed to their author and, wherever possible, agreed between the parties. Appendix A adds the construction phase records to be agreed by all parties: weekly site staff, labour and plant; daily weather and its effect on progress; the as-built programme; progress photographs; test results and certificates; sub-contractors employed; and major material suppliers.

Site inspections (§4.1.5)

Inspections should be frequent enough for the CA to discharge the role, determined by project complexity, the calibre of the contractor, progress and predetermined stages, not by the value of the works. The inspection should cover progress against the programme, workmanship, materials, conformity with drawings and specification, measurement of work that will be covered up before valuation, and a general awareness of health and safety. The outcome should be confirmed in writing, ideally as a "site direction" that is later converted into a formal contract instruction.

GN 69/2011 §2.3.3 adds an important boundary: the CA's inspections are for reporting on progress and quality, and the CA should not allow them to become responsibility for checking that the works comply with the design. That obligation stays with the employer and is usually delegated to the design or supervision team.

Meetings (§4.1.6)

Meetings, formal or informal, should be recorded, particularly where actions follow. Formal progress meetings should be minuted and issued soon afterwards. Typical agenda items include progress and expected completion, delays, health and safety, contract instructions, information required, drawing queries, extensions of time, loss and expense, valuation of instructions, payments and dayworks. A pre-commencement meeting should "set the scene".

Instructions (§4.1.11)

It is solely the CA's responsibility to issue instructions, in writing and promptly. Verbal instructions are not effective until confirmed in writing. Where an instruction issues drawings, it should itemise the variations shown on them so that cost and time can be considered. Confirmations of verbal instructions (CVIs) issued by the contractor are "not recognised by most forms of building contract"; if the CA issues site directions, "there should be no need for CVIs".

Notices (§4.1.3)

Notices and certificates must be issued by the correct party, sent to the correct party and follow the procedure the contract specifies. If a notice must be issued by the employer, it must not be issued by the CA, although the CA will usually advise on its form and timing.

PMWEB Out of the Box: The Construction-Phase Record

PMWEB 2026 already provides a native module for almost every record RICS describes. Each one has defined fields, attachments, links to other records, a workflow and standard SSRS outputs.

RICS record	PMWEB 2026 module	Standard outputs
Office files, drawings, photographs	Document Manager with a folder structure that mirrors the turnover format; Drawings; Archive	Drawing lists and details, Transmittals log and form, archive export
Daily records: weather, labour, plant	Daily Reports	Daily report form and log
Site inspection notes	Inspections, built on checklists	Inspection form and log
Health and safety observations	Safety	Safety form and log
Defects found on inspection	Punch Lists with photographs, responsible company, due dates and amounts withheld	Punch Lists, Punch List Details, Punch Lists by Company
Meeting minutes and actions	Meeting Minutes with action items	Minutes form, due actions report
Actions arising	Action Items, each linkable to a schedule activity	Action Items form and log
Contractor queries	RFIs	RFI Details, RFIs Summary Log, RFI Summary Workflow Dates
Letters and e-mails	Correspondence, with e-mails filed to the relevant records	Correspondences report
Submissions for review	Submittals and submittal sets	Submittal form, Submittal Items log

Document Manager and the turnover structure

RICS Appendix A lists what must be archived at the end of the contract, from the signed contract and certificates to as-built drawings, test results and technical queries. CMCS recommends setting up the PMWEB Document Manager folder structure at commencement so that it already mirrors that turnover format. Documents uploaded during the project land in the folder they will be handed over in, and the Archive module exports the structure at close-out. Version control and access by role are built in.

Daily Reports, Inspections and Punch Lists

The daily report captures exactly what Appendix A asks the parties to agree: weather, labour and plant by trade and company, work in progress, visitors and incidents. Because each daily report is a dated, approved record, it becomes contemporaneous evidence for extensions of time and loss and expense (Articles 6 and 7).

Inspection checklists can be configured per work type. Defects found during the CA's periodic inspection are logged in Punch Lists with photographs, location, responsible company, due date and, where the contract allows, an amount to be withheld. The CA's inspection report to the employer is generated from these records rather than written from memory.

Meeting Minutes and Action Items

Each meeting record holds attendees, agenda items, decisions and actions. Each action carries a category, responsible person, due date, actual completion date and, importantly, the first schedule activity it could affect. The due actions report shows what is outstanding before the next meeting, so the CA chairs from the record rather than from the previous minutes.

RFIs that route themselves to the CA

The RFI module shows how workflow enforces the CA's involvement. Each RFI carries fields indicating whether the response could result in work outside the scope, additional cost or additional time. The RFI business process includes a conditional step: when any of those flags is set, the CA is added to the review. Nobody has to remember to copy the CA. The record routes itself.

Extend: Site Directions and Contract Instructions as a Custom Form

No standard module enforces the RICS instruction discipline, so CMCS builds it as a **Custom Form** with two linked record types: the site direction, issued on site at the end of an inspection, and the formal contract instruction that confirms it.

The screenshot shows a web application interface for a 'Contract Instruction'. The top navigation bar includes a user profile and a breadcrumb trail: 'Logged into: All Levels > Schedules > Site Work Instruction (SWI) > Manager Page > 1 - Car Park Ramp Slope'. The main content area is divided into a left sidebar with icons and a central form. The form has tabs for 'Main', 'Notes', 'Attachments (4)', and 'Workflow (1/5)'. The 'Main' tab is active, showing a form with the following fields: Date (17-Mar-2019 12:00:00 AM), Subject (Car Park Ramp Slope), Project* (RV50104 - Boston Medical Center), Record #* (1), Reference, Category, Status (Submitted), Budget Total (\$0.00), Created By (Bassam Samman), Record Date (17-Mar-2019 12:00:00 AM), Revision (0), Vendor (Boston Contractors), and Type. Below these is a section titled 'CUSTOM FORM FIELDS' containing a table with the following rows: 'SWI Detail' (text area), 'Action Required By' (text area), 'Disclaimer' (text area with a disclaimer text), 'Contractor Acceptance of No Extra Cost' (Yes/No dropdown), 'Contractor Acceptance of No Extra Time' (Yes/No dropdown), 'Work will Commence On' (date field), 'Estimated Duration' (0), 'Does it affect other activities or work elements' (No dropdown), and 'If Yes, Provide Details' (text area).

Screenshot S1: Contract Instruction CI-047 as a PMWEB Custom Form: confirmation of a site direction, variations itemised per drawing, and the employer's authority above the CA's limit

Screenshot S1 shows instruction CI-047 for contract MC-001. It confirms site direction SD-112 in writing two days after it was given. Because the estimate of AED 386,000 exceeds the CA's spending authority of AED 250,000, the form records the employer's prior authority (EA-031) before issue. The grid itemises the three variations shown on the drawings, each with its drawing revision, estimate and cost code, exactly as GN 69/2011 §4.1.11 asks.

Recommended design

Section	Fields and behaviour
Header	Instruction number, title, instruction type, contract clause, date verbal direction given, date confirmed in writing, issued to, reason for instruction
Impact	Cost impact (yes, no, to be assessed) with estimate; time impact with CA assessment; whether the value exceeds the CA's spending authority; employer's prior authority reference
Variations grid	One line per variation shown on drawings: description, drawing and revision, estimate, cost code
Instruction types	Site direction confirmation, CA instruction, expenditure of provisional sum, opening up for inspection, postponement, removal of defective work
Automation	When cost impact is yes, approval creates a linked Potential Change Order; when the confirmation date is more than the agreed period after the verbal direction, the record is flagged

Section	Fields and behaviour
Workflow	CA drafts; employer approval step inserted only when the value exceeds the CA's authority; CA issues; contractor acknowledges

Two consequences follow. First, with every instruction issued this way there is nothing for a CVI to fill, so the register of instructions is complete by construction. Second, because a cost-bearing instruction automatically opens a Potential Change Order, nothing instructed is left unvalued. Both points matter at the final account, where RICS Final account procedures identifies items "not formally instructed" as one of the commonest reasons accounts cannot be agreed.

Extend: The Notices and Time-Bar Register with the Custom Form Builder

Notices are short records with a fixed shape: who gave notice to whom, under which clause, when it was received, and the contractual period that starts running. The **Custom Form Builder** handles this well.

- The notice type and clause come from a lookup that also holds the contractual period, for example 28 days for a notice of claim or 28 days for certification after a statement.
- The deadline is calculated from the received date.
- The workflow escalates to the CA seven and two days before expiry.
- Workflow roles restrict who may issue each notice type, so a notice reserved to the employer cannot be issued under the CA's name, which is precisely the point GN 69/2011 §4.1.3 makes.



PMWEB

Notices and Time-Bar Register

Contract MC-001 · all contractual notices with statutory/contractual periods · data date 30-Sep-2026

Alpha Development Co.
PA-01 Project Alpha Mixed-Use Development
Report date 30-Sep-2026 · Page 1 of 3

Ref	Notice	Direction	Clause	Received	Contractual period	Deadline	Days	Status
IPC-S19	Statement for IPC 19 (period to 31-Aug-2026)	Contractor → CA	14.6	05-Sep-2026	28 days to certify	03-Oct-2026	3	Due
NC-011	Fully detailed claim — utility diversion (notice 08-Sep)	Contractor → CA	3.7.3 / 20.2.5	22-Sep-2026	42 days for the Engineer's response	03-Nov-2026	34	Monitor
EW-027	Advance warning — façade panel lead time	Contractor → CA	8.4	21-Sep-2026	Promptly / reply	—	—	Logged
NC-012	Notice of claim — adverse weather (Aug-2026)	Contractor → CA	20.2.1	15-Sep-2026	Fully detailed claim within 84 days	08-Dec-2026	69	Monitor
VP-014	Variation proposal — basement waterproofing	Contractor → CA	13.2	11-Sep-2026	CA response	11-Oct-2026	11	Open
NOD-02	Notice of dissatisfaction — EOT-02 determination	Contractor → CA	3.7.5	04-Aug-2026	28 days from determination	01-Sep-2026	closed	Received
NC-010	Notice of claim — late access Plot B	Contractor → CA	20.2.1	12-Jun-2025	Within 28 days of awareness	met	—	Compliant

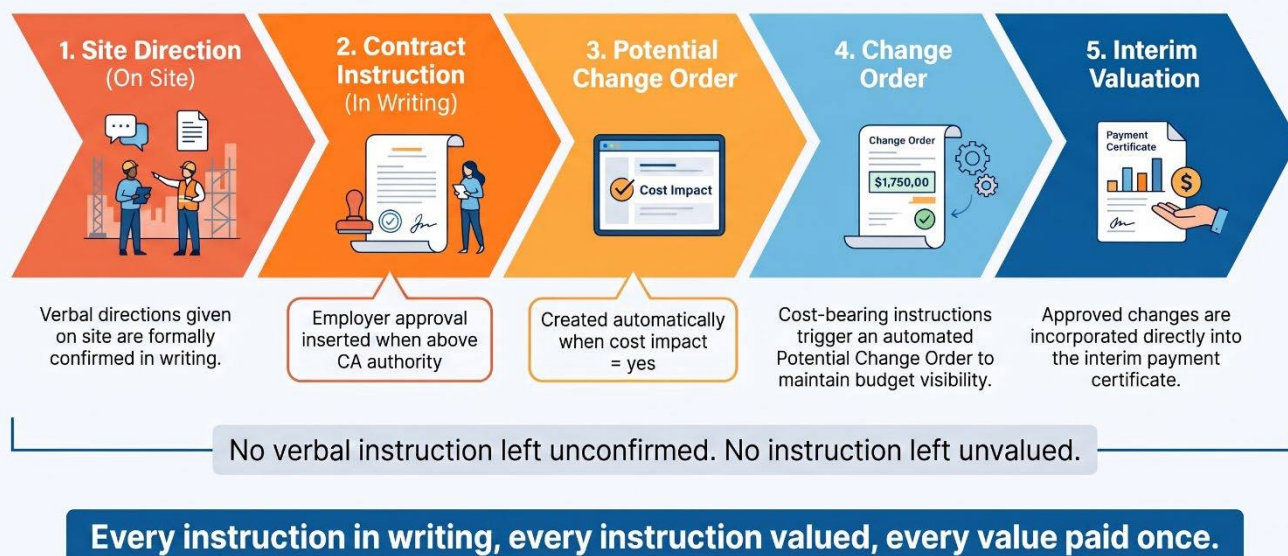
Built with the PMWEB Custom Form Builder: one header per notice, the clause and period chosen from a lookup, the deadline calculated from the received date, and a workflow that escalates to the CA at 7 and 2 days before expiry.

Illustrative sample data

Screenshot S2: Notices and Time-Bar Register: an SSRS report over a Custom Form Builder form with contractual periods, deadlines and days remaining

In Screenshot S2, the statement for interim payment certificate 19 must be certified within three days, and the CA's response to the fully detailed claim under NC-011 falls due on 3 November. The same deadlines feed the time-bar table on the contract administration control centre shown in Article 1, so the CA and the employer see the same dates.

From Site Direction to Interim Valuation: The Complete Instruction Lifecycle



Gemini Notebook

Figure 2: From site direction to interim valuation: how a verbal direction becomes a written, valued and paid instruction in PMWEB

Workflow and DoA

Instructions route by value. Within the CA's authority, the CA issues directly. Above it, the workflow inserts the employer's approval step before the instruction can be issued, and the approval reference is stored on the record. RFIs, submittals and inspections carry allowed durations per step, so response times against contractual periods become measurable rather than argued. The RFI Summary Workflow Dates report and the workflow task dashboard show who is holding which record, and for how long.

Reports the CA and Employer Use Every Week

Need	Output
What did the CA see on site this week?	Daily reports and inspection forms for the period
Which defects remain open, and with whom?	Punch Lists by Company, Punch List Details
What was decided and what is still due?	Meeting minutes, due actions report
Which queries could cost money or time?	RFIs Summary Log filtered on cost and time flags
Which instructions were issued, and were they confirmed in time?	Contract instruction register (Adaptive Form report)
Which contractual periods expire soon?	Notices and Time-Bar Register

What Changes for Your Organisation

Without a PMIS	With PMWEB 2026
Verbal site instructions, confirmed late or never	Site direction confirmed as a written contract instruction
Contractor's CVIs define what was instructed	The CA's instruction register is complete by construction
Notices of claim missed in someone's inbox	Notices register with deadlines and escalation
RFIs with cost or time impact bypass the CA	Flagged RFIs route to the CA automatically
Photographs and diaries on personal devices	Dated, attributed records in the Document Manager

What the Owner and the CA Must Put in Place

1. **Set up the Document Manager in the turnover structure on day one.** Filing at the end of the project is too late.
2. **Make Daily Reports compulsory and approved.** They are the contemporaneous record that later decides time and money.
3. **Issue every instruction through the instruction form.** Site directions on site, confirmed as contract instructions within the agreed period.
4. **Refuse CVIs as a contractual channel.** If an instruction exists, it exists in PMWEB.
5. **Log every notice on receipt.** The time-bar register is only as good as the date received.
6. **Keep the CA's inspection role clear.** Configure CA inspections for progress and quality reporting, and supervision inspections for design compliance.

RICS references for this article

RICS document	Edition and type	Status
Contract Administration Services (RICS Standard Form of Consultant's Appointment)	May 2022	Current
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022; cited for practical content only
Final account procedures	1st edition, practice information (reissued 2024; first published 2015)	Current

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See it with your own contract. CMCS can walk your commercial, contract administration and cost teams through these processes in PMWEB 2026, configured to your form of contract and your Delegation of Authority. Write to info@CMCS-MENA.com.

How many of the instructions on your projects last month started as a verbal direction on site, and how many of those were confirmed in writing within the contractual period?

Talk to us: info@CMCS-MENA.com
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About the Author

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Bassam has over four decades of experience providing project management, project controls services and project management information systems to more than two hundred capital projects with a combined value exceeding one hundred billion US dollars. He is the author of four published books on project management digitalisation and has lectured at more than three hundred and fifty international events. He holds a Master's degree in Engineering Administration (Construction Management), with Faculty Commendation, from George Washington University and a Bachelor's degree in Civil Engineering from Kuwait University, with executive education at Harvard Business School and London Business School.

About PMWEB

PMWEB is an enterprise-class, web-based capital construction project management platform trusted by organisations worldwide including Harvard University, the United Nations, and Atlanta Airport. Built on Microsoft .NET technology, PMWEB manages the entire project lifecycle within a single integrated platform, from portfolio planning and cost management through document control, procurement, scheduling, asset management, and business intelligence. With 150+ pre-configured SSRS reports, drag-and-drop dashboard design, multi-currency support, and open REST/SOAP API integration, PMWEB delivers enterprise capability with implementation timelines measured in months, not years.

About CMCS

CMCS (Collaboration, Management and Control Solutions) is the PMWEB Authorised Implementation Partner for the GCC and MENA regions, awarded PMWEB Global Partner of the Year 2025. CMCS markets, implements and supports PMWEB for more than 60 enterprise clients across the UAE, Saudi Arabia, Qatar and Kuwait, helping capital project owners, PMC firms and contractors digitalise their project management processes on a single, governed platform. Contact: info@CMCS-MENA.com

One Change, One Chain: RICS Change

Control and Variations in PMWEB

How the PMWEB change event, potential change order, budget request and change order modules give the contract administrator the change control RICS describes, with every saving, addition and provisional sum traceable to the final account

Bassam Samman, PMP, PSP, EVP, GPM | Chairman & CEO, CMCS FZ-LLC | PMWEB Authorised Implementation Partner, GCC & MENA

RICS treats change control as the backbone of a defensible final account: "Any potential changes should go through this process before an instruction is given so that the employer feels they are able to make informed decisions." PMWEB 2026 ships that process as connected native modules, so the contract administrator configures change control rather than building it.

Change is where a building contract either stays under control or drifts. Every instruction that adds, omits or alters work changes the contract sum, often the programme, and sometimes the contractor's entitlement to loss and expense. RICS expects the contract administrator to value change by the contract rules, to keep the employer informed of its consequences before committing, and to keep a running record of where the adjusted contract sum is heading.

This article covers RICS services 1.4 (set up change control procedures), 6.2 (certify interim payments and send the adjusted contract sum computations) and 8.3 (advise on acceleration), the change control principles in RICS Final account procedures (1st edition, practice information), and the guidance on employer's instructions and contract instructions in the RICS 2011 guidance note Contract administration (GN 69/2011, archived in 2022 and cited for its practical content). The current RICS Black Book titles Change control and management, Valuing change and Acceleration (2nd edition) cover the same ground in more depth. It shows the four-record change chain PMWEB provides out of the box and how it enforces the money rules RICS sets.

Why this matters to you

- **Commercial Directors:** the probable value of change, not only the submitted value, so the anticipated final account can be trusted.
- **Contract Administrators:** one chain from change event to change order, with employer approval enforced above your authority.
- **Cost Managers:** contingency drawdowns through approved budget requests, and omissions that genuinely reduce the contract sum.
- **Finance teams:** purchase orders updated automatically when change orders are approved.

ONE CHANGE, ONE CHAIN: RICS-COMPLIANT CHANGE CONTROL PROCESS

Connected step-by-step change management workflow ensuring transparency, proper authority, and full traceability for capital projects in the GCC.

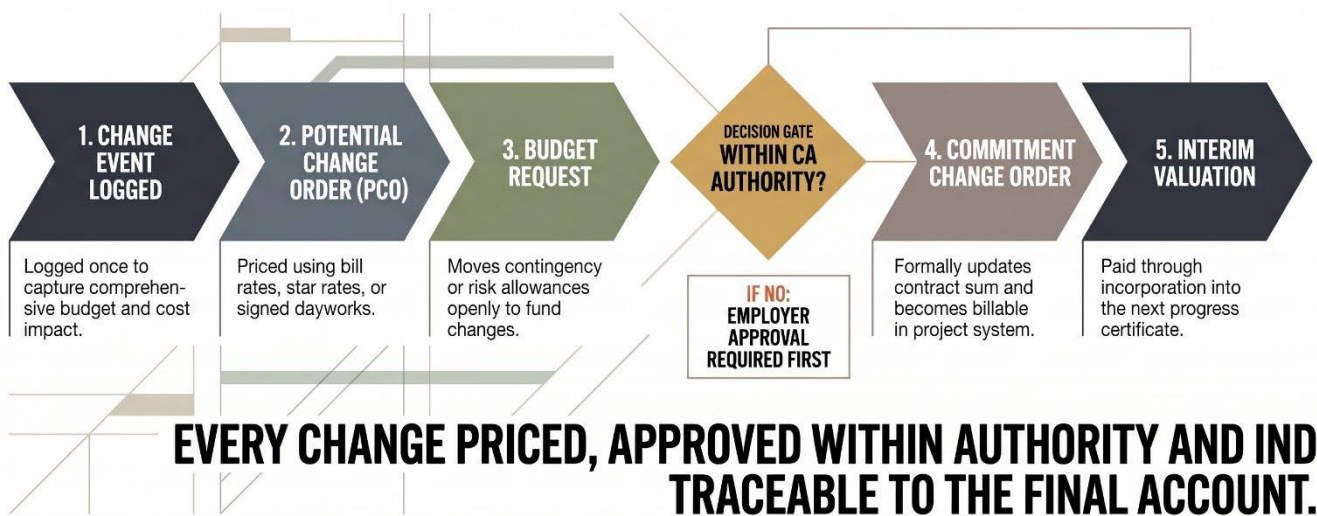


Figure 1: One change, one chain: change event, potential change order, budget request, change order, interim valuation

What RICS Requires

Change control as a process, not a document

RICS Final account procedures §3.3 defines change control as "the administrative process that implements the contract mechanisms for instructing change". It must adhere to the contract's requirements for notification and approval, and it is "a critical part of a well-run and audited project". Two warnings follow:

- Potential changes should go through the process before an instruction is given, so the employer can make informed decisions and the contractor does not act on changes it believes were instructed but were never communicated to the employer.
- The system "should not be too cumbersome so that it deters the project team from using it". All parties should want to use it because it provides security, auditability and clarity.

The guidance adds that the final account meeting should never be the first time the parties see each other's positions. Article 7 returns to that point.

Valuing change

GN 69/2011 §4.1.11 says the cost of instructions must be calculated in accordance with the rules in the building contract. Final account procedures adds that variations "should be calculated using bill rates and star rates wherever possible", with daywork used where valuing by contract rates would be inappropriate, and only on daywork sheets signed off by the contract administrator.

The employer's money rules (GN 69/2011 §4.1.8)

- **Cost savings.** Where works are omitted or varied to give a saving, "the monies released are not available to spend on other works and therefore the 'notional' contract sum is reduced by the sum saved".
- **Additional costs.** An addition should be added to the contract sum, not taken out of other omissions or of contingencies intended for the works in general.
- **Authority.** Where an instruction would cost more than the building contract or the CA's appointment allows, the employer's approval must be sought before the instruction is given.

Provisional sums

RICS distinguishes defined and undefined provisional sums (now set out in NRM 2). A defined provisional sum assumes the contractor has allowed for it in programming and preliminaries; an undefined one does not. Provisional sums can only be spent by instruction, and any unused sums "should be formally omitted by instruction". Good practice is to agree design deliverable dates so provisional sums are converted into fixed prices during the contract.

PMWEB Out of the Box: One Chain, Four Records

PMWEB 2026 implements change as four connected record types. Each has its own fields, workflow and SSRS outputs, and each links to the one before and after it.

Step	PMWEB record	What it does for the CA	Key outputs
1 Identify	Change Event	Logs the event once and carries its budget impact on the owner's side and its cost impact on each affected commitment	Change Events log, Change Event form, Change Events Log (budget and cost)
2 Price	Potential Change Order (PCO)	Early warning and pricing against a commitment: proposed and assessed values, time impact, cost lines by cost code, basis of valuation	PCO form and log
3 Fund	Budget Request	Moves money from contingency or risk allowance to the cost group that will carry the change, with its own approval	Budget Request form, Budget Request log, Budget Requests Analysis
4 Commit	Commitment Change Order	The formal contract amendment: updates the revised contract sum and becomes billable in the next progress invoice	Commitment Change Order form and log, Contract Change Order form, Change Orders Not Executed letter

Every record carries attachments and links. The change order points back to the contract instruction, RFI, drawings and meeting minute that caused it (Article 3), and forward to the budget transfer that funded it and the interim valuation that paid for it (Article 5).

Logged into: All Levels > Costs > Online Change Requests / طلبات التغيير عبر الإنترنت > Manager Page > 003 - New Design Request

RV50104 - Boston Medical Center (Draft)

Online Change Requests / 003 - طلبات التغيير عبر الإنترنت - New Design Request

Main | Additional Information | Checklists | Clauses | Notes | Attachments

Header Fields

Vendor / بائع Rockwell Architects	Project* / مشروع* RV50104 - Boston Medical Center	Commitment* / التزام* 001 - Design Services	Claim No / رقم المطالبة* 003
Subject / موضوع New Design Request	Currency* USD - Dollar (United States of Am...	Action Before Next Month / إجراء قبل الشهر المقبل	WBS / جول تقديم العمل
Type / يكتب RFC Request for Change	Category / فئة	Post As / القرار باسم Revised Scope	RFC / مطلب تلميذات (RFC)
Risk Analysis / تخطيط المخاطر 3 - Bassam Samman Risk Register	AVI 001 - Design Changes	Status / حالة Draft	Revision / مراجعة 0
Vendor aware of the issue / المورد على دراية بالمشكلة 19-Nov-2020 12:00:00 tt	Date	Cause / سبب	Contact / اتصال

Remarks / ملاحظات

☐ Use Units / استخدام الوحدات

User Defined Fields

☐ In Scope	Cost	Time	Activity Impacted
Days 0	Reason for Variation	Profit	Bried Description of Instruction

Screenshot S1: Potential Change Order PCO-063 in PMWEB: proposed versus assessed value, cost lines valued by contract rules, linked to the change event, contract instruction and RFI

Screenshot S1 shows PCO-063, created automatically from instruction CI-047 in Article 3. The contractor proposed AED 386,000. The employer's QS assessed AED 352,400, valuing each line by the contract rules: a star rate built from a bill rate

for the timber baffle ceiling, an adjusted bill rate for the lighting, and signed daywork sheets for the sprinkler relocation. The time impact is assessed as nil. The banner states what approval will trigger: conversion to a commitment change order, a budget transfer from owner contingency, and inclusion in the next interim valuation.

Why the Change Event matters to owners

A single event often affects more than one contract and more than one budget line. A client brief change might affect the main contractor, a nominated façade contractor and an FF&E supplier, and might need budget moved from contingency to three cost groups. The Change Event holds that whole picture in one record, so the employer sees the full consequence of a decision before it is made, which is the informed decision RICS asks for.

How PMWEB Enforces the RICS Money Rules

RICS rule	How PMWEB enforces it
Savings reduce the notional contract sum	An omission is a negative change order line. It lowers the revised contract sum. Released budget returns to contingency only through an approved Budget Request, never by silent re-use on other work
Additions are added, not absorbed	Every addition is its own change order line against its own cost code, never netted against a contingency line, so the Change Control Register shows additions and omissions separately
Employer approval before costly instructions	A PCO or instruction above the CA's authority cannot be issued until the employer's approval step in the workflow is complete
Value by contract rules	Each PCO line records its basis of valuation (bill rate, star rate, daywork, quotation) alongside proposed and assessed values
Dayworks only on signed sheets	A Custom Form Builder daywork sheet (labour, plant, materials, CA signature) is linked to the PCO; only approved sheets are valued
Provisional sums spent only by instruction	Provisional sums are separate commitment lines; spending moves value from the provisional line to measured work by change order, and unspent balances are omitted the same way

The daywork sheet

The daywork sheet is a good example of where the **Custom Form Builder** is enough. The header holds the date, location, instruction reference and the CA's signature; one detail table lists labour, plant and materials with hours, quantities and rates. Approved sheets are linked to the PCO that values them. Final account procedures says it "would not be acceptable to reach final account stage and only then be presented with the extent of the day worksheets", and with this form the daywork position is visible every month.

The Register the Employer Reads

GN 69/2011 §4.1.7 asks the CA to keep a running record of the estimated final adjusted contract sum, including additions, omissions, employer variations and anticipated variations. The Change Control Register gives the employer that view from the PMWEB records.



Change Control Register

Contract MC-001 · approved change orders and pending potential change orders · cumulative to 30-Sep-2026

Alpha Development Co.

PA-01 Project Alpha Mixed-Use Development

Report date 30-Sep-2026 · Page 1 of 2

CO	Description	Category	Net AED	EOT days	Status	Summary	AED
CCO-001	Additional piling — Plot B ground conditions	Site condition	2,840,000	—	Approved	Original contract sum	412,500,000
CCO-002	Omit basement car-park ventilation fans (value engineering)	Omission	(1,120,000)	—	Approved	Approved additions	24,910,000
CCO-003	Revised podium transfer slab	Design change	3,460,000	—	Approved	Approved omissions	(6,270,000)
CCO-004	Tenant fit-out allowance — retail units	Employer change	4,100,000	—	Approved	Revised contract sum	431,140,000
CCO-005	Omit feature water wall	Omission	(2,350,000)	—	Approved	Pending PCOs (9) — as submitted	9,350,000
CCO-006	Tower B layout change — floors 18-24	Employer change	5,920,000	24	Approved	Pending PCOs — probable value (QS)	6,200,000
CCO-007...013	Seven further instructions (net)	Various	8,590,000	—	Approved		
CCO-014	Omit roof-top amenity pavilion	Omission	(2,800,000)	—	Approved		
Net approved change			18,640,000	24			

Illustrative sample data

Screenshot S2: Change Control Register: approved change orders by category, net value and EOT days, with the summary from original to revised contract sum and pending PCOs

In Screenshot S2, fourteen approved change orders take contract MC-001 from AED 412.50 million to AED 431.14 million. Additions and omissions are shown separately. Nine pending PCOs are carried at their probable value of AED 6.2 million as

assessed by the QS, not at the AED 9.35 million the contractor submitted. That distinction between submitted and probable value is what makes the anticipated final account in Article 1 credible.

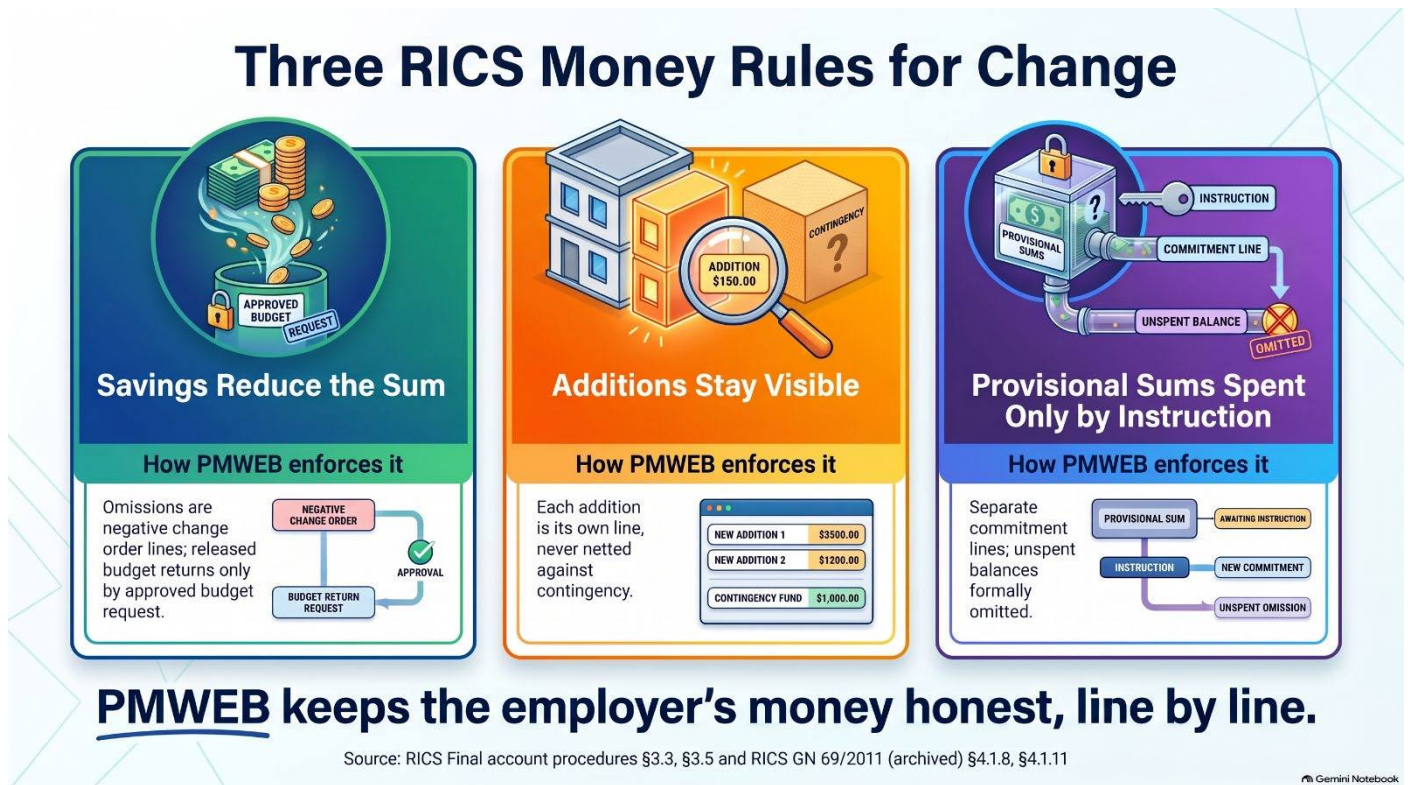


Figure 2: The three RICS money rules for change: savings reduce the sum, additions stay visible, provisional sums are spent only by instruction

Extend Only Where the Contract Demands It

The native chain covers most forms of contract. Two extensions are common.

Variation proposals and value engineering

Many contracts, including FIDIC's value engineering and variation-by-request procedures, let the contractor or the employer propose a change before it is instructed. An **Adaptive Form** holds the proposal, the CA's technical and commercial evaluation, the programme effect and the employer's decision. Only an accepted proposal creates a PCO, so rejected ideas do not clutter the commercial record but remain on file.

Acceleration

RICS service 8.3 asks the CA to advise on the cost and contractual effect of an acceleration instruction. An **Adaptive Form** records the target dates, the contractor's quotation, the schedule fragnet showing how the dates will be achieved, the CA's advice on cost and contractual effect, and any interaction with pending extension of time applications. On approval it creates a change order and a revised schedule baseline request.

Workflow and DoA

The change order business process routes by net value through the employer's DoA matrix: CA technical review, QS valuation, then the approver whose limit covers the amount, with the higher levels added automatically by condition (Article 9 shows the configuration). Budget Requests route separately by the value of the transfer, so the authority to spend contingency and the authority to vary the contract are controlled independently, as they should be.

ERP Touchpoint

An approved commitment change order updates the purchase order value in the ERP, and an approved budget request updates the ERP budget. Finance and the CA therefore never hold different contract sums or different budgets, and the ERP will not accept an invoice above the revised commitment value.

What Changes for Your Organisation

Without a PMIS	With PMWEB 2026
Change tracked in a spreadsheet log	Change event, PCO, budget request and change order linked
Savings silently re-used elsewhere	Omissions reduce the sum; budget returns only by approval
Submitted values reported as the forecast	Probable values assessed by the QS reported
Dayworks discovered at the final account	Signed daywork sheets linked to each PCO monthly
ERP purchase order out of date	Approved change order updates the PO

What the Owner and the CA Must Put in Place

1. **Configure the four-record chain on every contract.** Change Event, PCO, Budget Request and Change Order, with links enforced.
2. **Record the basis of valuation on every PCO line.** It is what the final account negotiation will turn on.
3. **Report probable values, not submitted values.** The employer needs the QS's view of where change is heading.
4. **Keep omissions out of contingency.** Released budget returns only through an approved budget request.
5. **Track provisional sums and dayworks monthly.** RICS expects both to be visible long before the final account.
6. **Keep the process light.** Configure only the steps the DoA requires, so the team uses the system rather than working around it.

RICS references for this article

RICS document	Edition and type	Status
Contract Administration Services (RICS Standard Form of Consultant's Appointment)	May 2022	Current
Final account procedures	1st edition, practice information (reissued 2024; first published 2015)	Current
Change control and management	1st edition (RICS Black Book)	Current
Valuing change	1st edition, practice information (RICS Black Book)	Current
Acceleration	2nd edition (RICS Black Book)	Current
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022; cited for practical content only

RICS documents are UK-based; apply them in the GCC subject to the governing law and the form of contract.

See it with your own contract. CMCS can walk your commercial, contract administration and cost teams through these processes in PMWEB 2026, configured to your form of contract and your Delegation of Authority. Write to info@CMCS-MENA.com.

On your projects, can every change order be traced back to the instruction that caused it and forward to the budget that funded it and the certificate that paid it?

Talk to us: info@CMCS-MENA.com

#CMCS #PMWEB #RICS #ChangeControl #Variations #ContractAdministration #QuantitySurveying #CostManagement #CapitalProjects #GCC

About the Author

Bassam Samman, PMP, PSP, EVP, GPM is the Chairman and Chief Executive Officer of CMCS FZ-LLC, the PMWEB Authorised Implementation Partner for the Gulf Cooperation Council and broader Middle East and North Africa region. CMCS holds the PMWEB Global Partner of the Year 2025 designation and serves capital project owners, contractors and consultants across the UAE, Saudi Arabia, Qatar and Kuwait.

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Certify on Time, Certify Fairly: Interim Valuations and Payment Certificates in PMWEB

How the PMWEB progress invoice turns the RICS guidance on interim valuations, retention, materials on site, advance payment recovery, VAT and liquidated damages into a calculated, workflow-controlled certificate that the ERP can pay

Bassam Samman, PMP, PSP, EVP, GPM | Chairman & CEO, CMCS FZ-LLC | PMWEB Authorised Implementation Partner, GCC & MENA

Few things damage the relationship between employer and contractor faster than a late or unexplained payment certificate. RICS asks the contract administrator to prepare valuations "impartially and fairly", to follow the valuation intervals in the contract and to specify what the certified amount relates to and how it was calculated. PMWEB 2026 makes the calculation, the review and the timing visible on every certificate.

Interim valuation is the most repetitive task in contract administration and one of the most consequential. On a two-year contract the CA will certify twenty or more times, and each certificate builds on the last: work done to date, materials on site, retention, advance payment recovery, previous certificates, tax. An error in one carries into the next. A late certificate can breach the contract and, under many legal systems, entitle the contractor to suspend work or claim interest.

This article covers RICS services 6.1 (prepare periodic interim valuations) and 6.2 (certify interim payments and send the adjusted contract sum computations), the practical guidance in §4.1.10 and the Appendix A financial checklist of the RICS 2011 guidance note Contract administration (GN 69/2011, archived in 2022 and cited for its practical content). The current RICS Black Book titles Interim valuations and payment and Retention treat the subject in more depth. It shows how the PMWEB progress invoice handles each element of the valuation and how the certificate reaches the employer's ERP for payment.

Why this matters to you

- **Commercial Directors:** certificates issued on time, with a clear basis of calculation, reducing payment disputes and interest exposure.
- **Contract Administrators:** the valuation assembled automatically from the contract, change orders and previous certificates, so your time goes on assessment.
- **Cost Managers:** retention, advance recovery and materials on site tracked on every certificate, ready for cash flow forecasting.
- **Finance teams:** certified amounts posted to the ERP once, with payment status returned to the contract record.

Anatomy of an Interim Payment Certificate

1. Work Executed to Date

Method recorded per line using quantities, schedule percentage, or QS assessment.

+ Materials on Site

Title must be evidenced with receipted invoices seen and goods physically checked.

= Gross Valuation

Combines total work executed in place and verified stored site materials.

– Retention

Contract percentages applied; retention is halved at practical completion.

– Advance Payment Recovery

= Net Valuation

– Previously Certified

= Amount Due

Deducts prior progress invoices; applicable VAT is shown separately for information.

VAT shown for information



Certified within the contractual period – deadline held on the record.

Liquidated Damages Exclusion

Liquidated damages are never deducted by the Contract Administrator on the certificate.

**Fair, explained and on time:
the RICS certificate, calculated in PMWEB.**

Figure 1: Anatomy of an interim payment certificate: from work executed to amount due, line by line

Gemini Notebook

What RICS Requires

The core obligations

GN 69/2011 §4.1.10 stated that the CA is required, under the contract and case law, to ensure that all valuations are carried out impartially and fairly, following the arrangements in the form of building contract. The contract will state the basis of valuation, what sums are included, against what elements retention is held, and the intervals at which valuations are made. The CA should adhere to those intervals, and where none are stated and statute applies, the statutory intervals must not be exceeded.

GN 69/2011 §4.1.2, citing JCT clause 4.6, adds that the CA should certify the amount of interim payments "while specifying to what the amount relates and the basis on which that amount was calculated", and that certificates are issued to the employer with a copy to the contractor. Where someone other than the CA prepares the valuation, typically the QS, "it is important that the CA is satisfied with the amount being certified".

The elements of the valuation

Element	RICS guidance (GN 69/2011 §4.1.10)
Specialist works	Where the CA cannot judge whether complex M&E or structural works are properly executed, seek the advice of the relevant consultant
Materials on and off site	Include only where the contract allows; be certain that legal title passes; see receipted invoices and check the goods physically exist; materials brought to site long before they are needed may not qualify
VAT	Does not form part of the valuation; rates advised by the contractor may be shown for information
Retention	Deducted at the contract percentage; some items may be excluded; normally halved after practical completion; held in trust for the contractor
Loss and expense	When ascertained, even in part, include it in the next interim certificate
Preliminaries	A breakdown of preliminaries should be obtained before work starts; it helps valuations and claim assessment
Liquidated damages	The CA must not adjust the valuation or the adjusted contract sum; the employer makes any deduction when paying, usually after giving notice
Payment time limits	The CA may need to remind the employer of the time limits for payment when issuing the certificate

Appendix A financial matters

The construction-phase checklist adds the practical controls: certificates issued in the time stated in the building contract; procedures during holiday and sickness periods; valuation dates; the employer's payment procedures and payment dates; and an indemnity for payment of materials off site.

PMWEB Out of the Box: The Progress Invoice

In PMWEB the interim valuation is a **Progress Invoice** raised against the commitment. Because the commitment already holds the schedule of values, retention terms and advance payment terms (Article 2), and approved change orders are already lines on the commitment (Article 4), most of the valuation is assembled automatically. The CA and QS concentrate on assessment, not arithmetic.

Logged into: All Levels

Costs > Progress Invoices / فواتير مرحلية > Manager Page > 6 - Progress Invoice #6

RV50104 - Boston Medical Center Approved

Progress Invoices / 6 فواتير مرحلية - Progress Invoice #6

New Record Print Recap

Main Adjustments Additional Information Checklists 43 Clauses Payments Notes Attachments 1 Workflow Notifications

Header Fields

Details

Group by: None Layout: Progress Invoice Preview Conversions

Line # / ...	Attach...	Cost Co...	Description / وصف	Currency / عملة	Sched...	Prior I...	Curren...	Total T...	Total I...	Total S...	Total ...	Balanc...	Prior
1	(0)	02-010002	General Conditions	USD - Dollar (Unit...	\$415,000.00	\$186,750.00	\$41,500.00	\$41,500.00	\$228,250.00	\$228,250.00	55 %	\$186,750.00	
2	(0)	02-020000	Existing Conditions	USD - Dollar (Unit...	\$1,000,000.00	\$700,000.00	\$200,000.00	\$200,000.00	\$900,000.00	\$900,000.00	90 %	\$100,000.00	
3	(0)	02-030000	Concrete	USD - Dollar (Unit...	\$850,000.00	\$510,000.00	\$255,000.00	\$255,000.00	\$765,000.00	\$765,000.00	90 %	\$85,000.00	
4	(0)	02-050000	Metals	USD - Dollar (Unit...	\$825,000.00	\$412,500.00	\$82,500.00	\$82,500.00	\$495,000.00	\$495,000.00	60 %	\$330,000.00	
5	(0)	02-061000	Rough Carpentry	USD - Dollar (Unit...	\$165,000.00	\$82,500.00	\$16,500.00	\$16,500.00	\$99,000.00	\$99,000.00	60 %	\$66,000.00	
6	(0)	02-099000	Painting and Coating	USD - Dollar (Unit...	\$250,000.00	\$62,500.00	\$37,500.00	\$37,500.00	\$100,000.00	\$100,000.00	40 %	\$150,000.00	
7	(0)	02-210000	Fire Suppression	USD - Dollar (Unit...	\$425,000.00	\$85,000.00	\$85,000.00	\$85,000.00	\$170,000.00	\$170,000.00	40 %	\$255,000.00	
8	(0)	02-220000	Plumbing	USD - Dollar (Unit...	\$400,000.00	\$0.00	\$100,000.00	\$100,000.00	\$100,000.00	\$100,000.00	25 %	\$300,000.00	
9	(0)	02-230000	HVAC	USD - Dollar (Unit...	\$400,000.00	\$0.00	\$100,000.00	\$100,000.00	\$100,000.00	\$100,000.00	25 %	\$300,000.00	
10	(0)	02-260000	Electrical	USD - Dollar (Unit...	\$500,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0 %	\$500,000.00	
11	(0)	02-310000	Earthwork	USD - Dollar (Unit...	\$480,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0 %	\$480,000.00	
					\$5,710,000.00	\$2,039,250.00	\$918,000.00	\$918,000.00	\$2,957,250.00	\$2,957,250.00		\$2,752,750.00	

Screenshot S1: Progress invoice IPC-19 for contract MC-001: schedule of values with previous, this period and to-date values, and the valuation summary

Screenshot S1 shows interim certificate 19 for contract MC-001. Each line of the schedule of values shows its scheduled value, the amount valued previously, the amount this period and the value to date. Approved change orders and expended provisional sums appear as their own lines, so the employer can see that changes are being paid only once and only when executed.

How each RICS element is handled

RICS element	PMWEB progress invoice behaviour
Measure of work done	Percent complete per line, entered from approved quantities, taken from the percent complete of the linked schedule activity, or assessed by the QS, with the method recorded
Specialist works	A conditional review step for the relevant consultant is added to the workflow when the valuation includes M&E or structural work
Materials on site	Stored materials are valued separately from work in place, with their own retention treatment; evidence of title is attached
Retention	Calculated at the commitment's percentage on work in place and on stored materials, with any retention limit applied; reduced at practical completion
Advance payment	Recovered at the contract rate on each certificate; cumulative recovery feeds the reducing advance payment guarantee in the securities register
Previous certificates	Brought forward automatically from the last approved progress invoice

RICS element	PMWEB progress invoice behaviour
VAT and other taxes	Calculated on the amount due and shown separately, for information on the certificate
Change orders	Approved commitment change orders appear as billable lines; pending PCOs do not

The valuation summary in Screenshot S1 reads exactly as RICS expects: work executed to date of AED 268.40 million, plus materials on site of AED 4.10 million, gives a gross valuation of AED 272.50 million. Deducting retention at 5% and advance payment recovery at 10% leaves a net valuation of AED 231.63 million. Less AED 218.94 million previously certified, AED 12.69 million is due, with VAT at 5% shown separately.

Materials on and off site: a small Custom Form

RICS is specific about the evidence needed before materials are paid for. A **Custom Form Builder** form, "Materials on site evidence", holds one header per claim (location, supplier, invoice reference, insurance, title confirmation) and one detail table of items with quantities and values, plus a checklist: receipted invoice seen, goods physically checked, goods reasonably brought to site, title passes to the employer. The form is linked to the progress invoice line, so the certificate shows why the materials were included.

The Certificate the Employer Receives

The progress invoice produces the formal certificate through PMWEB's SSRS library. The out-of-the-box Application and Certificate for Payment and Progress Invoice Form outputs can be used as they are, or CMCS configures the certificate wording to the form of contract in use.

PMWEB

Progress Invoice Form - Payment

TO OWNER

Universal Corporation
PO BOX 2333
Dubai, 06000

PROJECT

W. Turner Construction

FROM CONTRACTOR

Boston Contractors
1 CentreStreet Avenue
Boston, MA 01011

VIA ARCHITECT

Wagner & Williams
1234 W. 41st St.
New York, NY 11100

CONTRACT FOR

GMP Contract

APPLICATION NO

006

PERIOD TO

30-Jun-2011
12:00:00 AM

PROJECT NOS

RVSD104

CONTRACT DATE

30-Sep-2011
12:00:00 AM

CONTRACTOR'S APPLICATION FOR PAYMENT

Application is made for payment as shown below, in connection with the Contract. Continuation Sheet is attached.

1. ORIGINAL CONTRACT SUM.....

\$7,135,000.00

2. Net change by Change Order.....

\$0.00

3. CONTRACT SUM TO DATE.....

\$7,135,000.00

4. TOTAL COMPLETED & STORED TO DATE.....

\$2,957,250.00

5. RETAINAGE.....

a. Completed Work..... \$295,725.00

b. Stored Material..... \$0.00

c. Total Retainage..... \$295,725.00

6. TOTAL EARNED LESS RETAINAGE.....

\$2,661,525.00

7. LESS PREVIOUS CERTIFICATES FOR PAYMENT.....

\$1,635,325.00

8. CURRENT PAYMENT DUE.....

\$826,200.00

9. BALANCE TO FINISH, INCLUDING RETAINAGE.....

\$4,473,475.00

CHARGE ORDER SUMMARY

ADDITIONS

DEDUCTIONS

Total charges approved in previous months by Owner

\$0.00

\$0.00

Total approved this month

\$0.00

\$0.00

TOTALS

\$0.00

\$0.00

NET CHARGES by Change Order

\$0.00

Click to see the continuation sheet

1 of 1

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PMWEB

Continuation Sheet

Click to go back

APPLICATION AND CERTIFICATE FOR PAYMENT, containing Contractor's signed Certification, is attached.

APPLICATION NO

006

APPLICATION DATE

27-Sep-2011
12:00:00 AM

PERIOD TO

30-Jun-2011
12:00:00 AM

ARCHITECT'S PROJECT NO

In tabulations below, amounts are stated to the nearest dollar.

Use Column I on Contracts where variable retainage for line items may apply.

A	B	C	D	E	F	G	H	I	
Item NO.	Description of Work	Scheduled Value	Work Completed From Prev.	This Period	Materials Curr. Stored (NOT IN D OR E)	Total Completed & Stored to Date (D + E + F)	% (G / C)	Balance to Finish (C - G)	Retainage
001	General Conditions	\$415,000.00	\$186,750.00	\$415,000.00	\$0.00	\$228,250.00	55.00%	\$186,750.00	\$22,825.00
002	Existing Conditions	\$1,000,000.00	\$700,000.00	\$200,000.00	\$0.00	\$900,000.00	90.00%	\$100,000.00	\$90,000.00
003	Concrete	\$850,000.00	\$510,000.00	\$235,000.00	\$0.00	\$745,000.00	87.65%	\$135,000.00	\$76,500.00
004	Metals	\$625,000.00	\$412,500.00	\$62,500.00	\$0.00	\$475,000.00	76.00%	\$150,000.00	\$49,500.00
005	Rough Carpentry	\$185,000.00	\$82,500.00	\$16,500.00	\$0.00	\$99,000.00	53.51%	\$95,500.00	\$9,900.00
006	Painting and Coating	\$250,000.00	\$62,500.00	\$37,500.00	\$0.00	\$100,000.00	40.00%	\$147,500.00	\$10,000.00
007	Fire Suppression	\$425,000.00	\$95,000.00	\$85,000.00	\$0.00	\$170,000.00	40.00%	\$255,000.00	\$17,000.00
008	Plumbing	\$400,000.00	\$0.00	\$100,000.00	\$0.00	\$100,000.00	25.00%	\$300,000.00	\$10,000.00
009	HVAC	\$400,000.00	\$0.00	\$100,000.00	\$0.00	\$100,000.00	25.00%	\$300,000.00	\$10,000.00
010	Electrical	\$500,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$500,000.00	\$0.00
011	Earthwork	\$480,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$480,000.00	\$0.00
Cumulative Totals		\$5,710,000.00	\$2,039,250.00	\$918,000.00	\$0.00	\$2,957,250.00	51.79%	\$2,752,750.00	\$295,725.00

1 of 1

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Screenshot S2: Interim Payment Certificate No. 19: issued to the employer with a copy to the contractor, showing the computation and the basis of calculation

Screenshot S2 follows the RICS points closely. The computation is shown in full. The text states that the basis of calculation is set out in the attached valuation. It records that liquidated damages are not deducted in the certificate, because any deduction is the employer's decision and notice. The certificate is addressed to the employer with a copy to the contractor, and is shown here as a draft awaiting the CA's certification step, due by 3 October.

Bassam Samman | CMCS | PMWEB Authorised Implementation Partner, GCC & MENA

Who Does What in an Interim Valuation



Figure 2: Who does what in an interim valuation: contractor statement, QS valuation, CA certification, employer payment, ERP posting

Certifying on Time: Workflow, Delegation and Deadlines

The commonest failure in payment certification is not the amount but the date. PMWEB addresses the Appendix A controls directly.

- **Certification deadline.** The progress invoice holds the date the contractor's statement was received and calculates the date by which the certificate must be issued under the contract. The same date appears in the notices and time-bar register (Article 3) and on the control centre dashboard.
- **Allowed step durations.** Each workflow step has an allowed number of days, and overdue steps are visible on the workflow dashboard (Article 9).
- **Holiday and sickness.** Workflow delegation lets the CA or an approver delegate to a named alternate for a defined period, so certificates are not held up because someone is away, which is exactly the "procedures during holiday and sickness periods" Appendix A asks for.

A typical certification workflow for MC-001:

1. Contractor submits its statement (online, through the contractor's PMWEB access, or uploaded by the CA).
2. QS values each line, attaches measurement and photographs, and records the method.
3. Specialist consultant reviews M&E and structural lines where needed.
4. CA reviews, is satisfied with the amount, and certifies.
5. Employer's finance approves for payment within its DoA limit, and the certificate is posted to the ERP.

Other Costs: Miscellaneous Invoices and Payments

Not every cost on a project passes through a commitment. PMWEB's **Miscellaneous Invoices** capture other actual costs, such as authority fees or utility connection charges, against the cost breakdown structure, with their own workflow and attachments. **Payments** record amounts paid against progress and miscellaneous invoices, either entered in PMWEB or received from the ERP. Out-of-the-box outputs include the Commitment Invoices log, payment forms and logs for accounts payable and receivable, invoice detail reports and aging reports. Together they give the CA the "employer latest payment dates" and payment status that Appendix A asks the CA to know.

ERP Touchpoint

On approval for payment, the certificate is posted to the ERP as an accounts payable invoice against the purchase order created at commencement, with retention and advance recovery carried as separate amounts. The ERP returns payment status and payment date to PMWEB, so the CA can see whether the employer paid within the contractual period without asking finance. Article 10 covers the integration patterns for SAP, Oracle and Microsoft Dynamics.

What Changes for Your Organisation

Without a PMIS	With PMWEB 2026
Valuation rebuilt in a spreadsheet every month	Progress invoice calculated from the commitment
Certification deadline tracked informally	Deadline held on the record and on the dashboard
Materials on site paid without evidence	Evidence form linked to the valuation line
Approvals stall when someone is on leave	Workflow delegation with end dates
Certificate re-keyed into the ERP	Approved certificate creates the AP invoice

What the Owner and the CA Must Put in Place

1. **Load the schedule of values and preliminaries breakdown at commencement.** RICS recommends the preliminaries breakdown before works start.
2. **Record the method of measurement on every line.** Quantities, schedule percent complete or assessment.
3. **Pay materials on site only with evidence attached.** Use the materials evidence form.
4. **Never deduct liquidated damages in the certificate.** Configure the certificate so it cannot.
5. **Hold the certification deadline on the record.** And show it on the dashboards the CA and employer both use.
6. **Set up delegation before the first holiday.** Certificates must not wait for one person.

RICS references for this article

RICS document	Edition and type	Status
Contract Administration Services (RICS Standard Form of Consultant's Appointment)	May 2022	Current
Interim valuations and payment	1st edition (RICS Black Book)	Current
Retention	1st edition (RICS Black Book)	Current
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022; cited for practical content only

RICS documents are UK-based; apply them in the GCC subject to the governing law and the form of contract.

See it with your own contract. CMCS can walk your commercial, contract administration and cost teams through these processes in PMWEB 2026, configured to your form of contract and your Delegation of Authority. Write to info@CMCS-MENA.com.

If the contractor disputed last month's certificate, could your contract administrator show line by line how the amount was calculated, who reviewed it and when it was issued?

Talk to us: info@CMCS-MENA.com

#CMCS #PMWEB #RICS #InterimPayments #PaymentCertificate #ContractAdministration #QuantitySurveying #CashFlow #CapitalProjects #GCC

About the Author

Bassam Samman, PMP, PSP, EVP, GPM is the Chairman and Chief Executive Officer of CMCS FZ-LLC, the PMWEB Authorised Implementation Partner for the Gulf Cooperation Council and broader Middle East and North Africa region. CMCS holds the PMWEB Global Partner of the Year 2025 designation and serves capital project owners, contractors and consultants across the UAE, Saudi Arabia, Qatar and Kuwait.

Bassam has over four decades of experience providing project management, project controls services and project management information systems to more than two hundred capital projects with a combined value exceeding one hundred billion US dollars. He is the author of four published books on project management digitalisation and has lectured at more than three hundred and fifty international events. He holds a Master's degree in Engineering Administration (Construction Management), with Faculty Commendation, from George Washington University and a Bachelor's degree in Civil Engineering from Kuwait University, with executive education at Harvard Business School and London Business School.

About PMWEB

PMWEB is an enterprise-class, web-based capital construction project management platform trusted by organisations worldwide including Harvard University, the United Nations, and Atlanta Airport. Built on Microsoft .NET technology, PMWEB manages the entire project lifecycle within a single integrated platform, from portfolio planning and cost management through document control, procurement, scheduling, asset management, and business intelligence. With 150+ pre-configured SSRS reports, drag-and-drop dashboard design, multi-currency support, and open REST/SOAP API integration, PMWEB delivers enterprise capability with implementation timelines measured in months, not years.

About CMCS

CMCS (Collaboration, Management and Control Solutions) is the PMWEB Authorised Implementation Partner for the GCC and MENA regions, awarded PMWEB Global Partner of the Year 2025. CMCS markets, implements and supports PMWEB for more than 60 enterprise clients across the UAE, Saudi Arabia, Qatar and Kuwait, helping capital project owners, PMC firms and contractors digitalise their project management processes on a single, governed platform. Contact: info@CMCS-MENA.com

Time Is the Contract: Programme, Extensions of Time and Practical Completion in PMWEB

How PMWEB 2026 supports the contract administrator's RICS duties on programme monitoring, extension of time determinations, non-completion, partial possession, practical completion and defects, with every decision tied to the schedule and the evidence

Bassam Samman, PMP, PSP, EVP, GPM | Chairman & CEO, CMCS FZ-LLC | PMWEB Authorised Implementation Partner, GCC & MENA

RICS guidance has long reminded contract administrators that without proper extension of time and liquidated damages procedures, time can become "at large" and liquidated damages unenforceable. Every determination, every certificate of non-completion and every completion certificate is a contractual act with money attached. PMWEB 2026 ties each of them to the approved schedule, the site record and a workflow that keeps the employer informed.

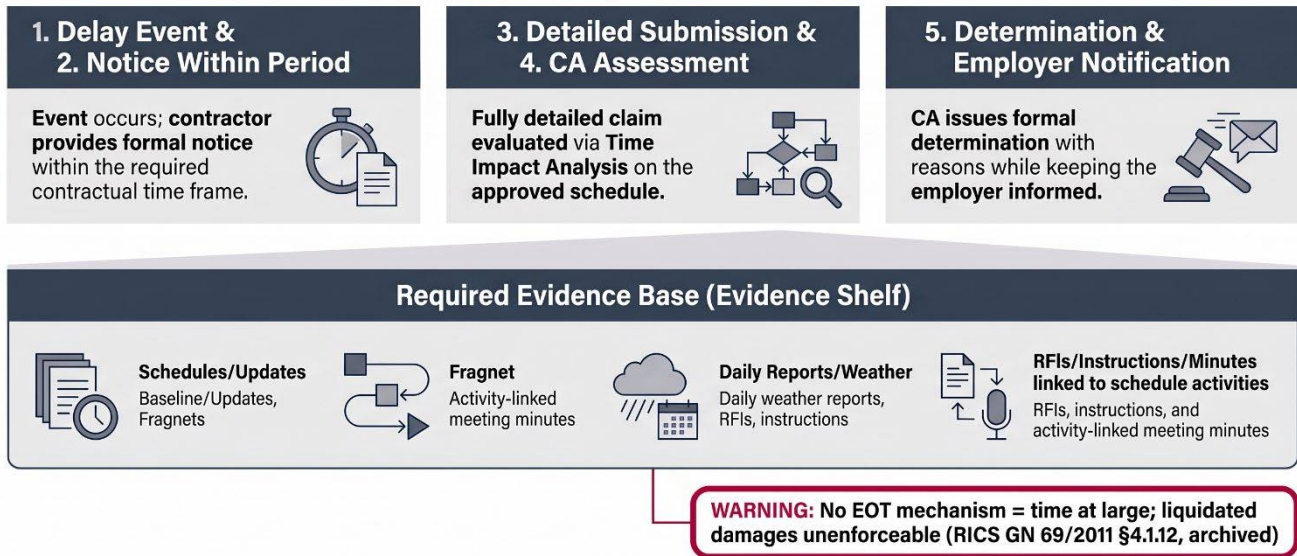
Time is where contract administration and project controls meet. The CA must monitor progress against the contractor's programme, warn the employer of delay risk, determine extensions of time fairly and in writing, issue the notices that preserve the employer's right to liquidated damages, and certify completion, sometimes section by section. Each of those duties needs a reliable schedule and contemporaneous records, and each produces a decision that may later be tested in adjudication.

This article covers RICS services 4.1 to 4.4 (programme), 7.1 and 7.2 (practical completion and certification obligations) and 8.2 (extensions of time), the practical guidance in §4.1.9 and §4.1.12 and the Appendix A post-construction checklist of the RICS 2011 guidance note Contract administration (GN 69/2011, archived in 2022 and cited for its practical content). The current RICS Black Book titles Extensions of time, Defining completion of construction works, Damages for delay to completion and Defects and rectifications cover these topics in more depth.

Why this matters to you

- **Commercial Directors:** liquidated damages rights preserved by timely notices, and extension of time exposure visible before it is conceded.
- **Contract Administrators:** determinations built on the approved schedule, linked site records and a documented method.
- **Planning and controls teams:** baselines, updates and fragnets in one place, linked to the records that explain delay.
- **Project Directors:** practical completion certified only when the prerequisites are met, with notifications sent automatically.

From Delay Event to Determination



Every extension of time decided on the schedule and the evidence, not the narrative.

Figure 1: From delay event to determination: notice, records, fragnet, assessment and decision in PMWEB

Gemini Notebook

What RICS Requires

Programme and progress (services 4.1 to 4.4, GN 69/2011 §4.1.9)

The CA should obtain and monitor the contractor's construction programme and its revisions, advise the employer of any risk of delay "at the earliest opportunity", and advise on progress, expected completion and risks. The CA should review the programme to make sure all major elements are included and sensibly sequenced, and should use it "as an active document recording how each element of the project progresses".

The guidance lists the ways progress can be monitored, including the contractor's programme, the portion of the works valued to date and "bespoke project planning computer software". It asks the CA to consider weather, the effect of contract instructions, and the timing of instructions in relation to progress, and to keep weather records where weather may be a concern.

Extensions of time (GN 69/2011 §4.1.12)

- Without extension of time and liquidated damages provisions, if the contractor is prevented from completing for reasons beyond its control, time would become at large and liquidated damages unenforceable. The standard forms therefore give the CA power to extend time.
- The CA assesses whether a delay has affected the contract completion date and by how much. The assessment must be "reasonable", recognising it "is not an exact science".
- The CA should check the contract for the eligible reasons ("relevant events"), which fall broadly into circumstances beyond either party's control and delays caused by the employer or the CA.
- The CA should identify the time limits in the process and "if necessary set up a system to ensure that the time limits imposed by the building contract are met".
- The employer must be kept informed of extensions and of further delays that are the contractor's responsibility.
- Some building contracts require a certificate of non-completion to preserve the employer's right to liquidated damages, and its time limits must be met.

Partial possession and practical completion

If the employer takes partial possession, the CA must issue a certificate of practical completion for that part. Practical completion may have pre-requisites, such as sufficient information for the health and safety file and the testing and commissioning certificates that show the premises are safe to occupy. The CA should distinguish "outstanding" works from

"snagging" items: if works are outstanding, it is worth considering seriously whether practical completion can be granted. Certification transfers responsibility for insurance and maintenance to the employer, and the CA must advise the employer in good time.

Appendix A post-construction checklist

At practical completion the CA notifies the employer's insurers, utilities, the local authority and funders, and sets a date for inspection before the end of the rectification period. When the contractor leaves site, the CA records contact details and the procedure for dealing with defects. The CA then archives the signed contract information, including the certificates of practical completion, sectional completion, partial possession, revisions to the date for completion, completion of making good defects and the final certificate.

PMWEB Out of the Box: Scheduling

PMWEB's **Scheduling** module imports the contractor's programme from Primavera P6 or Microsoft Project, or builds it natively. Each submission is kept as a revision, and accepted programmes are saved as baselines, so the CA always knows which programme the contract is measured against. Schedules can be cost-loaded from the commitment's schedule of values, linking time and money for earned value.

The out-of-the-box scheduling outputs give the CA the views RICS describes:

CA need	PMWEB 2026 output
Is the programme complete and logical?	Predecessors and Successors report, Schedule Barchart
Where is the project against plan?	Projects Behind/Ahead Schedule, Gantt Chart by Months, Scheduling Dashboard
What does the delay analysis show?	Claim Analysis report on the imported baseline and updates; the analysis itself is run in the planning tool
Is the work valued keeping pace with time?	Schedule Earned Value, Schedule Cash Flow (cost-loaded), Cash Flow Comparison

Other PMWEB records link to schedule activities: meeting actions, RFIs, submittals and daily reports. That link is what lets the CA show that a late response or a late instruction affected a particular activity, which GN 69/2011 asks the CA to consider.

Extend: a programme review checklist

RICS asks the CA to review each programme for completeness and sequencing. A **Custom Form Builder** checklist does this consistently: header for the programme submission and revision, and one table of checks (all contract sections and milestones present, logic complete, no open ends, calendars and weather allowances stated, resources and cost loading consistent, interfaces with other contracts shown), each with a finding and status. The workflow returns the programme to the contractor or recommends acceptance as a baseline.

Extend: The Extension of Time Application as a Custom Form

An extension of time application has more structure than any native module provides: the relevant event, the notice and its timing, the contractor's submission, a checklist of supporting evidence, the delay analysis, the CA's assessment and the determination. CMCS builds it as a **Custom Form**, with view and edit rights to the assessment sections limited to the employer and the CA.

Logged into: All Levels Schedules > EOT Request > Manager Page > 1-

Subject: []

Project*: RV50104 - Boston Medical Center

Record #: 1

Reference: []

Category: []

Status: Submitted

Budget Total: \$0.00

Created By: Bassam Samman

Record Date: 16-Feb-2019 12:00:00 AM

Revision: 0

Vendor: Boston Contractors

Type: []

CUSTOM FORM FIELDS

Contract No.	GGF/20091
Contract Title	BP01 Enabling Works
Details of Delay	Rocks were encountered while excavating for foundations at Zone A. Work had to be stopped from 1/10/2017 to 1/20/2017 to decide on what options available to remove the rocks. It was agreed with the client and consultant to retain the services of an explosives subcontractor to remove the rocks. Work was completed on 1/27/2017
Reason To Ask for EOT	Sub-surface conditions differing from the plans are encountered
Reason EOT could be Denied	[]
Total Work Days Requested	18
Total Compensable WD	18
Total Non Compensable WD	0
Total Critical	18
Total Non Critical	0
Total Awarded With Compensation	18
Total Awarded Without Compensation	0
Compensation Requested	\$650,000.00
Compensation Awarded	\$400,000.00
Extended Completion Date	18-Jan-2019 12:00:00 AM

SUPPORTING DOCUMENTS DURING THE CLAIM PROCESS

Screenshot S1: Extension of time application EOT-03 as a PMWEB Adaptive Form: relevant event, notice, delay analysis method, fragnet and the submission checklist

Screenshot S1 shows EOT-03 on contract MC-001: a delay in utility diversion caused by the authority (FIDIC 2017 sub-clause 8.6), notified within 28 days through notice NC-011, with 38 days claimed. The fully detailed claim arrived on 22 September, so the CA's determination is due by 3 November. The contractor's time impact analysis was prepared in Primavera P6 on update UP-18 with fragnet FN-03, and the planning review checks it against the imported schedule. The checklist shows what the contractor has provided and what the CA has verified, including 46 contemporaneous records linked from daily reports and correspondence, and flags that the statement of mitigation measures is missing.

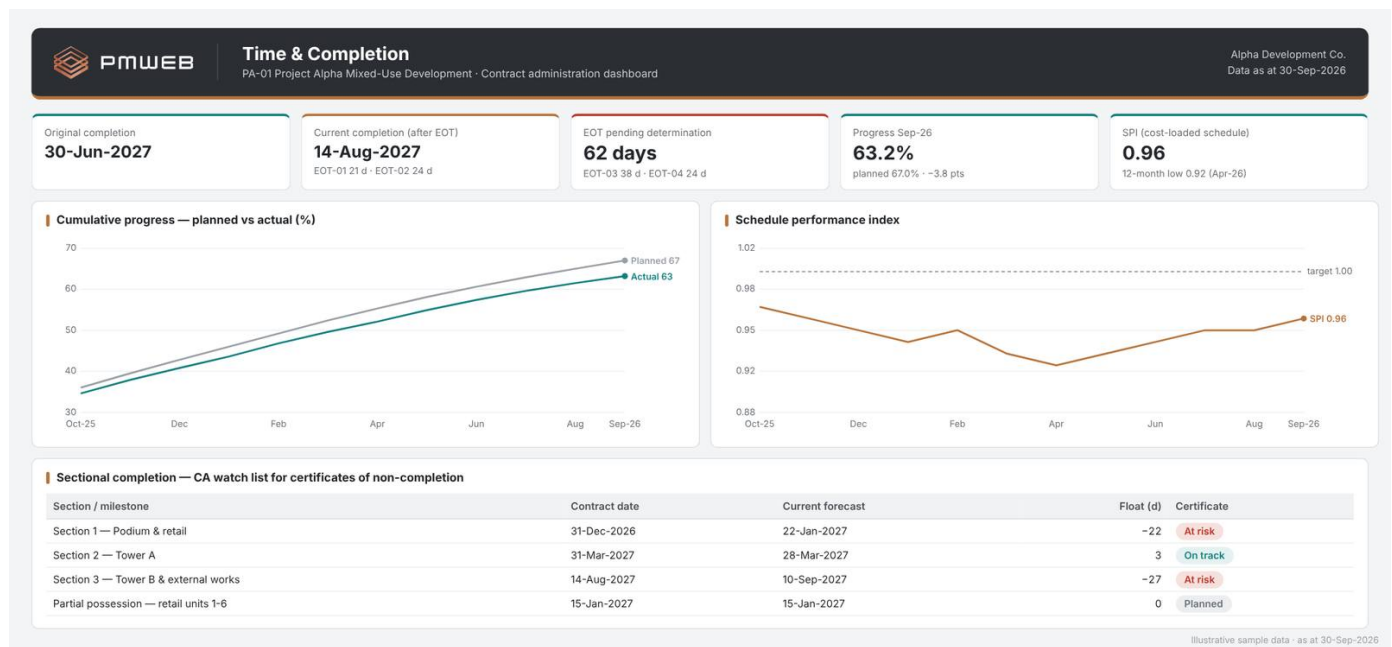
Recommended design

Section	Fields and behaviour
Event	Relevant event, contract clause, category (neutral event or employer risk), location and affected section
Notice	Linked notice from the time-bar register, date of awareness, date notified, compliance with the notice period
Submission	Days claimed, date of fully detailed submission, narrative, linked schedule update and fragnet
Evidence checklist	Notice timing, event description, contemporary records, updated programme, critical path demonstration, concurrency statement, mitigation
Assessment	Method (for example time impact or windows analysis), CA assessed days, reasons, concurrency findings
Determination	Days granted, revised completion date, issue date; link to any loss and expense claim (Article 7)
Workflow	Contractor submits; planning review; CA assessment; employer informed (approval only where the contract or DoA requires it); determination issued

The determination updates the contract completion date on the commitment, and the EOT log on the record keeps the cumulative position: original completion, each extension granted and the current date.

The Time and Completion Dashboard

GN 69/2011 asks the CA to warn the employer of delay at the earliest opportunity and to keep the employer informed of extensions and contractor delays. A Power BI dashboard inside PMWEB gives the employer that view from the schedule and EOT records.



Screenshot S2: Time and Completion dashboard: completion dates, EOT position, planned versus actual progress, schedule performance and the sectional completion watch list

In Screenshot S2, contract MC-001 has moved from an original completion date of 30 June 2027 to 14 August 2027 after two extensions of 21 and 24 days, with 62 days pending determination. Progress is 63.2% against a planned 67.0%. The sectional completion table is the CA's watch list for certificates of non-completion: sections 1 and 3 are forecast to miss their contract dates, so the CA can prepare the notices that preserve the employer's right to liquidated damages before the dates pass.

Practical Completion in PMWEB

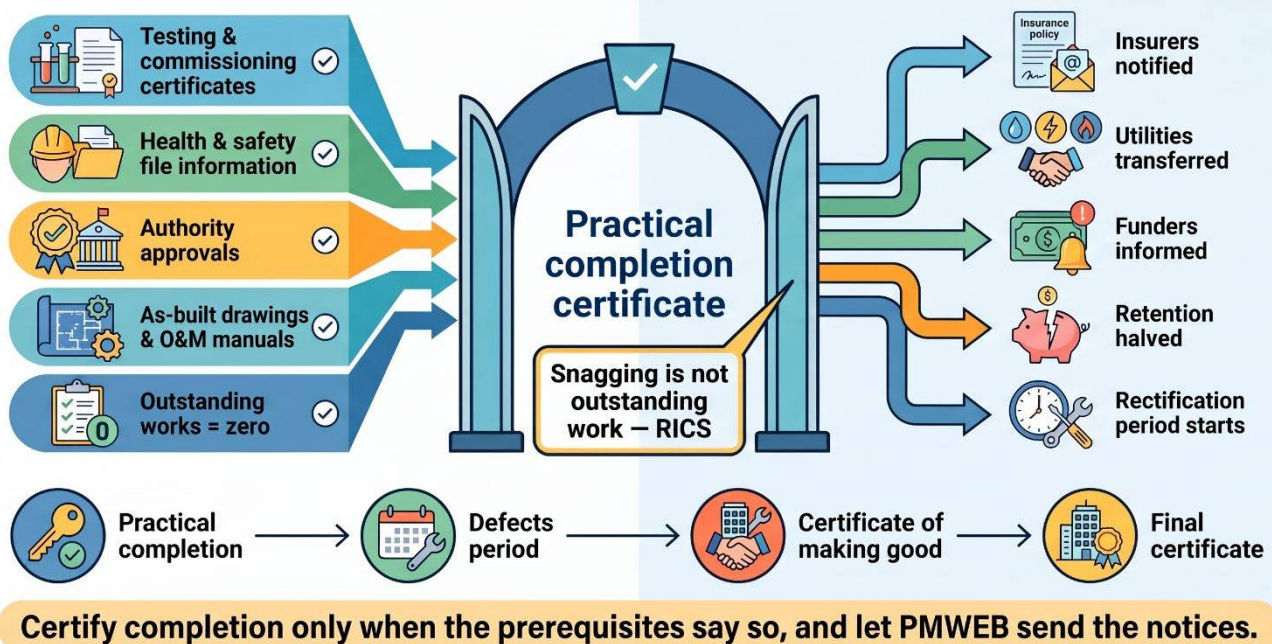


Figure 2: Practical completion in PMWEB: prerequisites, outstanding versus snagging, certificate, notifications and retention release

Completion, Partial Possession and Defects

Completion certificates as an Adaptive Form

Practical completion, sectional completion, partial possession and the certificate of non-completion share a pattern: a checklist of pre-requisites, a decision and a formal certificate. CMCS configures one **Adaptive Form** with a certificate type field.

- Header:** contract, section or part, certificate type, proposed date, inspection date.

- **Pre-requisites grid:** testing and commissioning certificates, health and safety file information, authority approvals and occupancy permits, as-built drawings and O&M manuals, insurance arrangements, each linked to its document or record.
- **Outstanding works test:** a count of punch list items classified as "outstanding works" rather than "snagging". If any outstanding works remain, the workflow requires the CA to record why completion can still be certified.
- **Notifications:** on approval, the workflow notifies the employer's insurers, the facilities team for utilities, and funders, reflecting the Appendix A post-construction list.
- **Letter:** the certificate itself is generated from a PMWEB Word template.

Punch lists: snagging, outstanding works and defects

PMWEB **Punch Lists** already hold location, description, photographs, responsible company, due date and status. Adding a classification field (outstanding works, snagging, defect during rectification period) lets one module support all three stages RICS distinguishes. During the rectification period, the same module records defects notified to the contractor, the period allowed and whether they were made good. The inspection before the end of the period, which Appendix A asks the CA to schedule, is a dated action linked to the punch list.

Retention release

At practical completion the progress invoice applies the contract's retention release, typically halving the retention held, and the balance is released at the end of the rectification period when the certificate of making good defects is issued. Because retention has been calculated on every certificate (Article 5), the release amount is already known.

Workflow and DoA

Extension of time determinations are decisions in the CA's impartial function, so under the standard forms the workflow informs the employer rather than asking for approval. Many GCC particular conditions, however, require the employer's prior approval before the Engineer grants an extension above set limits; PMWEB adds that approval step by condition, for example above 30 days, so the contract as amended is the contract the workflow runs. Completion certificates route to the employer for acknowledgement because they transfer insurance and maintenance responsibility. Each step's allowed duration reflects the contractual period for the determination.

What Changes for Your Organisation

Without a PMIS	With PMWEB 2026
EOT decided on the contractor's narrative	EOT assessed on the approved schedule and linked evidence
Sectional dates missed without notice	Watch list for certificates of non-completion
Completion certified with works outstanding	Prerequisites and outstanding-works test before certification
Insurers and utilities notified late	Notifications triggered by the completion workflow
Defects tracked on paper	Punch lists for snagging, outstanding works and defects

What the Owner and the CA Must Put in Place

1. **Baseline the accepted programme in PMWEB.** Every later assessment is measured against it.
2. **Link records to activities.** Actions, RFIs, submittals and daily reports linked to activities are the evidence base for any delay analysis.
3. **Use one EOT Adaptive Form per application.** With the notice, evidence checklist, method and determination in one record.
4. **Watch sectional dates, not just the final date.** Certificates of non-completion have their own time limits.
5. **Classify punch list items.** Outstanding works and snagging are not the same, and RICS says the difference decides whether completion can be certified.

6. **Trigger the Appendix A notifications from the completion workflow.** Insurers, utilities and funders should not depend on someone's memory.

RICS references for this article

RICS document	Edition and type	Status
Contract Administration Services (RICS Standard Form of Consultant's Appointment)	May 2022	Current
Extensions of time	1st edition (RICS Black Book)	Current
Defining completion of construction works	1st edition, practice information (RICS Black Book)	Current
Damages for delay to completion	2nd edition, practice information (RICS Black Book)	Current
Defects and rectifications	2nd edition, practice information (RICS Black Book)	Current
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022; cited for practical content only

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When your contract administrator determines an extension of time, is the decision built on the approved schedule, contemporaneous site records and a documented method, or on the contractor's narrative?

Talk to us: info@CMCS-MENA.com

#CMCS #PMWEB #RICS #ExtensionOfTime #DelayAnalysis #PracticalCompletion #ContractAdministration #Scheduling #CapitalProjects #GCC

About the Author

Bassam Samman, PMP, PSP, EVP, GPM is the Chairman and Chief Executive Officer of CMCS FZ-LLC, the PMWEB Authorised Implementation Partner for the Gulf Cooperation Council and broader Middle East and North Africa region. CMCS holds the PMWEB Global Partner of the Year 2025 designation and serves capital project owners, contractors and consultants across the UAE, Saudi Arabia, Qatar and Kuwait.

Bassam has over four decades of experience providing project management, project controls services and project management information systems to more than two hundred capital projects with a combined value exceeding one hundred billion US dollars. He is the author of four published books on project management digitalisation and has lectured at more than three hundred and fifty international events. He holds a Master's degree in Engineering Administration (Construction Management), with Faculty Commendation, from George Washington University and a Bachelor's degree in Civil Engineering from Kuwait University, with executive education at Harvard Business School and London Business School.

About PMWEB

PMWEB is an enterprise-class, web-based capital construction project management platform trusted by organisations worldwide including Harvard University, the United Nations, and Atlanta Airport. Built on Microsoft .NET technology, PMWEB manages the entire project lifecycle within a single integrated platform, from portfolio planning and cost management through document control, procurement, scheduling, asset management, and business intelligence. With 150+ pre-configured SSRS reports, drag-and-drop dashboard design, multi-currency support, and open REST/SOAP API integration, PMWEB delivers enterprise capability with implementation timelines measured in months, not years.

About CMCS

CMCS (Collaboration, Management and Control Solutions) is the PMWEB Authorised Implementation Partner for the GCC and MENA regions, awarded PMWEB Global Partner of the Year 2025. CMCS markets, implements and supports PMWEB for more than 60 enterprise clients across the UAE, Saudi Arabia, Qatar and Kuwait, helping capital project owners, PMC firms and contractors digitalise their project management processes on a single, governed platform. Contact: info@CMCS-MENA.com

No Surprises at the End: Loss and Expense, Disputes and the Rolling Final Account in PMWEB

How PMWEB 2026 helps contract administrators and quantity surveyors follow RICS final account procedures, keeping the account agreed as the project proceeds and the evidence audit-ready for any dispute

Bassam Samman, PMP, PSP, EVP, GPM | Chairman & CEO, CMCS FZ-LLC | PMWEB Authorised Implementation Partner, GCC & MENA

RICS describes the final account as the conclusion of the contract sum and the line drawn under both parties' financial obligations. It also says that if the final account meeting is the first time the parties see each other's positions, "the change control process has not been working properly". In PMWEB the final account is not prepared at the end; it accumulates, item by item, from the first instruction.

The final account is where every weakness in contract administration surfaces at once. Instructions that were never formalised, dayworks nobody signed, loss and expense claims parked until the end, extensions of time with no agreed quantum, contra charges with no notice. Each one turns a calculation into a negotiation, and some turn negotiations into disputes.

This article covers RICS services 5.7 (preliminary advice on client liability for contractor claims), 7.3 (agree the final account and obtain the client's authorisation) and 8.1 and 8.4 to 8.6 (loss and expense, and support in adjudication, mediation, arbitration or litigation), RICS Final account procedures, 1st edition (first published as a guidance note in 2015 and reissued as practice information in 2024 without material change to the text), and the practical guidance in §4.1.13 and §4.1.14 of the RICS 2011 guidance note Contract administration (GN 69/2011, archived in 2022). The current RICS Black Book titles Ascertaining loss and expense (2nd edition) and Conflict avoidance and dispute resolution in construction go further on those subjects.

Why this matters to you

- **Commercial Directors:** a final account that is largely agreed by practical completion, and a defensible position on loss and expense.
- **Contract Administrators and QSs:** a statement of final account generated from records, with items not formally instructed visible every month.
- **Cost Managers:** the last cost report and the final account reading from the same numbers.
- **Legal and claims teams:** an evidence pack already linked when adjudication timescales start.

The Rolling Final Account: Seamless Project Settlement

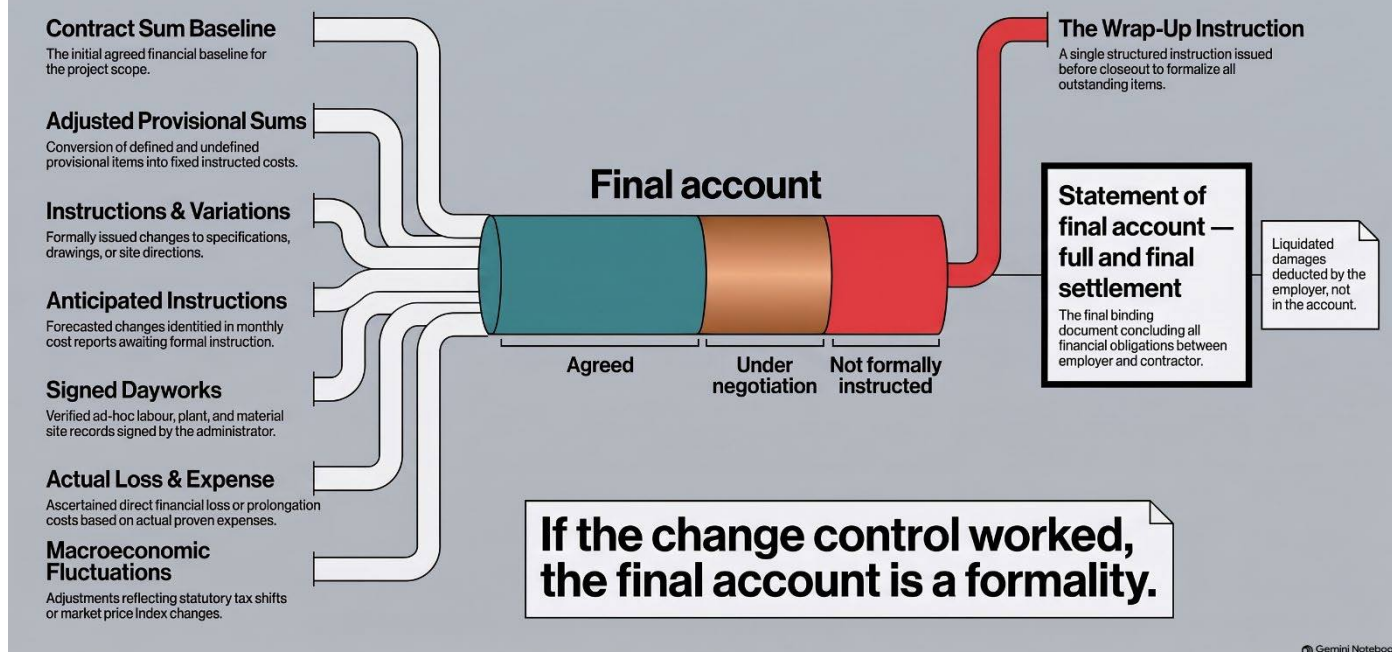


Figure 1: The rolling final account: every element agreed as the project proceeds, so the end is a formality

What RICS Requires

The minimum level of service

Final account procedures §1.1 sets out what the QS, or any consultant administering the contract with regard to final accounts, is expected to do regardless of the detailed terms of appointment:

- prepare the final account and report against the last cost or financial report
- engage in final account meetings with contractors
- value variations with the contractor to enable agreement
- advise on the cost implications of loss and expense claims, when instructed
- prepare the statement of final account
- advise on costs associated with defects
- advise the employer on calculations for withholding liquidated damages, when instructed
- prepare final account documentation for auditing purposes

Rolling final accounts

The guidance encourages rolling final accounts, which "ensure that all instructions and cost effects to a project are agreed and up-to-date at the point of the latest financial report". It adds that the last formal cost report "should provide a very good indication of where the final account is likely to be settled": if costs have been tracked properly, the only difference should be changes since that report.

What the final account contains

The principal content of a statement of final account, per §3.6, is the adjustment of provisional sums, prime cost sums and provisional quantities; contract instructions; anticipated instructions, which must be formalised before the account is agreed; fluctuations; and loss and/or expense. Liquidated damages are normally not in the statement: the employer deducts them from the final payment by notice. The statement typically closes with "full and final settlement" wording and signature spaces for both parties.

Loss and expense

GN 69/2011 §4.1.13 sets the rules: the claim must fall within the matters the contract lists; the loss and expense must be actual, so the CA should "not estimate value but actually find out what the contractor has expended or lost"; the contractor's application must have been made as soon as the contract requires; and whenever even part is ascertained, it should be included in the next interim certificate. The CA should inform the employer of any claim received in writing and keep the employer updated. Final account procedures §3.10 advises isolating loss and expense from the rest of the account, agreeing it fairly, and then adding it at the end.

Disputes and audit

If adjudication is needed, "it would be almost impossible to pull together all necessary backup and evidence in the tight timescales of adjudication if it is not already in a good order. All companies should ensure that their documentation and files are 'audit ready'." The guidance also notes that the final account documentation can be "an important forensic tool" if the employer later pursues its design team, and that "all final account documentation should be treated as though it could be used as evidence in a court of law".

PMWEB Out of the Box: The Account Is Already Being Built

By the time a PMWEB contract reaches completion, most of the final account already exists as approved records:

Final account element	Where it already lives in PMWEB
Contract sum	Commitment (Article 2)
Provisional sums and their expenditure	Commitment provisional sum lines and the change orders that spent or omitted them (Article 4)
Contract instructions and variations	Contract instruction register and commitment change orders (Articles 3 and 4)
Anticipated instructions	Pending potential change orders at their probable value
Dayworks	Approved daywork sheets linked to PCOs
Loss and expense	Loss and expense claim records (below) linked to extension of time determinations (Article 6)
Retention	Progress invoices, including release at practical completion (Article 5)
Defects and contra charges	Punch lists and the change orders or deductions that resulted
Payments made	Progress invoices and payments returned from the ERP

The **Cost Worksheet** brings these together for every contract and cost code, and the Change Control Register (Article 4) shows the cumulative position. What remains is to present it in the RICS structure, track agreement item by item, and handle loss and expense and disputes with the same discipline.

Extend: The Loss and Expense Claim as an Adaptive Form

A loss and expense claim needs its own record, separate from the extension of time that may have triggered it, because RICS is clear that "there is no direct relationship between the two sets of provisions". CMCS builds it as an **Adaptive Form**.

Section	Fields and behaviour
Basis	Contract clause and the listed matter relied on; linked notice and its timing; linked extension of time determination, if any
Heads of claim	Grid of heads (site overheads, head office overheads, finance charges, disruption, acceleration costs), each with amount claimed, evidence and assessed amount
Evidence	Links to cost records, timesheets, invoices, daily reports and the schedule analysis that show actual loss
Assessment	Assessed amount per head, reasons, partial ascertainment date
Payment	When part is ascertained, a change order or certificate line is raised so it enters the next interim certificate
Workflow	Contractor submits; QS assesses quantum; CA reviews entitlement; employer informed; PI notification step if the CA's own act is the cause

The last workflow step reflects a point in GN 69/2011 that is easy to overlook: where the actions, default or omissions of the CA caused the employer to incur cost, "it may be necessary to notify PI insurers". Having the question asked on every claim is better than discovering it at the end.

Extend: The Statement of Final Account

The statement of final account is generated from a **Custom Form** that rolls up the PMWEB records into the RICS structure and tracks the agreement status of each item: agreed, under negotiation, or not yet formally instructed.

Logged into: All Levels

Assets > Checklist for Payment Certificate - Final Payment > Manager Page > 1 -

Assets > Checklist for Payment Certificate - Final Payment > Manager Page > 1 -

MainNotesAttachments

Date16-Apr-2019 12:00:00 AM

Subject

Project*RV50104 - Boston Medical Center

Record #*1

Reference

Category

StatusDraft

Budget Total\$0.00

Created ByBassam Samman

Record Date16-Apr-2019 12:00:00 AM

Revision0

Vendor

Type

CUSTOM FORM FIELDS

Contract Reference

Client

Certificate No.

Contractor

Consultant

Project Manager

PAYMENT CHECKLIST

EditRefresh

NO.	ITEM DESCRIPTION	STATUS
1.00	Duly Signed Payment Certificate	☐
2.00	Contractor's Payment Application and Consultant's Evaluation	☐
3.00	Copy of Retention Bond (If applicable to the Certificate)	☐
4.00	Details of Deductions	☐
5.00	Copies of Approved Variation Order Forms	☐
6.00	Original of Summary Work Done Progress	☐

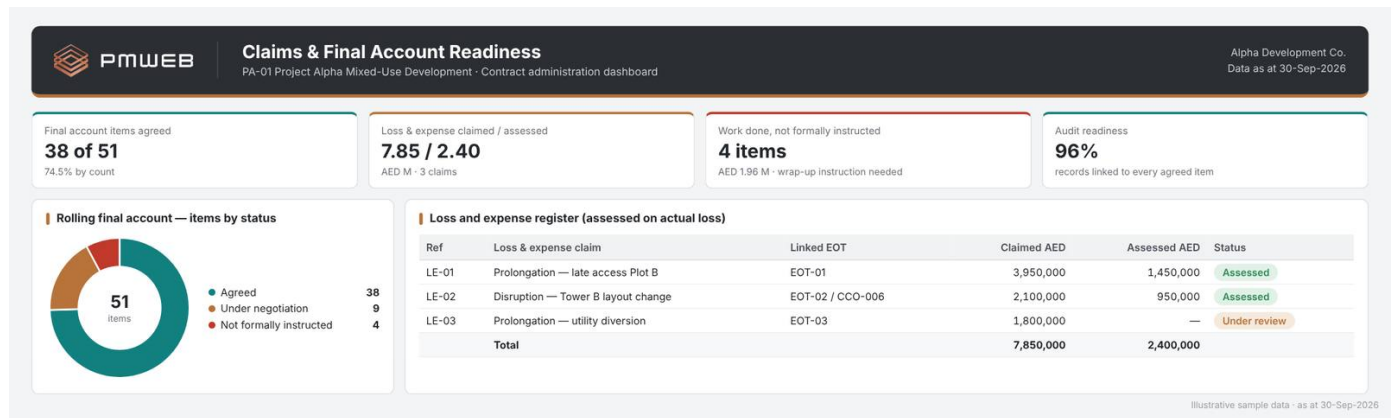
Screenshot S1: Statement of Final Account (draft): the RICS Final account procedures structure populated from PMWEB records, with the status of items

Screenshot S1 shows the rolling statement for contract MC-001 at 30 September 2026, structured as RICS describes: the contract sum, less provisional sums included, plus their expenditure as instructed, plus agreed variations, plus anticipated instructions, fluctuations (deleted in the particular conditions) and assessed loss and expense. The anticipated final account is AED 437.94 million, the same figure the control centre shows in Article 1, because both read from the same records. The status table shows four items not yet formally instructed, worth AED 1.96 million, and the note confirms that liquidated damages are not included.

Dealing with items not formally instructed

Final account procedures §4.3 recommends a single "wrap-up" instruction, categorised in subsections, to formalise outstanding items on a well-run project. In PMWEB the items are already visible as PCOs or records with no linked instruction, so the CA can issue the wrap-up instruction from the contract instruction form with each item as a line, closing the gap before the final account meeting rather than in it.

The Claims and Final Account Readiness Dashboard



Screenshot S2: Claims and Final Account Readiness dashboard: items by agreement status, loss and expense claimed versus assessed, and audit readiness

Screenshot S2 gives the employer and the CA the readiness view. Thirty-eight of fifty-one final account items are agreed. Loss and expense claimed is AED 7.85 million against AED 2.40 million assessed on actual loss, across three claims linked to their extension of time determinations. Four items need a wrap-up instruction. The audit readiness measure counts agreed items with linked evidence, the "audit ready" files RICS asks for.



Figure 2: From notice to resolution: negotiation, mediation, adjudication and arbitration, with the PMWEB evidence pack at each stage

Disputes: The Evidence Pack Is Already Assembled

When a disagreement cannot be resolved, RICS services 8.4 to 8.6 ask the CA to support adjudication, mediation, arbitration or litigation. The contract's dispute route, whether negotiation, mediation, a dispute avoidance or adjudication board, adjudication or arbitration, is recorded in a **dispute register Adaptive Form**: parties, contract reference, subject, amount, stage, key dates and linked records.

The real value is that the evidence already exists in linked form. For a disputed variation, the pack is the instruction, the RFI and drawings behind it, the PCO with its valuation basis, the daywork sheets, the meeting minutes where it was discussed, and the workflow history showing who decided what and when. For a disputed extension of time, it is the notice, the schedule baseline and updates, the fragnet, the daily reports and weather records, and the CA's determination with reasons. PMWEB's reports, linked records and archive export let the team assemble that package from the system, rather than searching mailboxes under adjudication deadlines.

Timescales and Audit

Control	How PMWEB supports it
Contractual timescales for final account submissions	Held in the notices and time-bar register: for example JCT's six months for the contractor's information and three months for the account, or FIDIC's draft final statement 56 days after the performance certificate
Arithmetic and reference checks	The statement is calculated from the records; there are no pencil figures to ink in
Audit before agreement	An audit step in the final account workflow, before the statement is issued for signature, as RICS recommends
Approval of the statement	Routed by value through the DoA before it is issued under the full and final settlement wording
Settlement agreements	Recorded with their build-up attached, because RICS warns the build-up must show why the deal represents the employer's liability

Workflow and DoA

Loss and expense assessments, final account agreement and settlement agreements route through the DoA by value. RICS stresses that "it is not the role of the QS to agree variations or final accounts" and that the QS may negotiate a settlement only when instructed by the employer. The workflow makes that boundary explicit: the QS values and recommends; the authority to agree sits with the employer's approver at the right level.

What Changes for Your Organisation

Without a PMIS	With PMWEB 2026
Final account prepared after completion	Rolling final account agreed item by item
Loss and expense estimated and argued at the end	Assessed on actual cost, linked to evidence
Unformalised instructions found at the final meeting	Reported monthly and cleared by wrap-up instruction
Evidence searched for under adjudication deadlines	Linked records ready to export
Statement totals checked by hand	Statement calculated from approved records

What the Owner and the CA Must Put in Place

- Run the final account from day one.** Every instruction, PCO and daywork sheet is a line in the eventual statement.
- Separate loss and expense from extensions of time.** Different provisions, different records, linked but not merged.
- Assess loss and expense on actual cost.** Link the evidence; include partial ascertainties in the next certificate.
- Report items not formally instructed every month.** And clear them with a wrap-up instruction before completion.
- Keep the dispute evidence pack as linked records.** Adjudication timescales leave no time to assemble it.
- Audit before signature.** Build the audit step into the final account workflow.

RICS references for this article

RICS document	Edition and type	Status
Contract Administration Services (RICS Standard Form of Consultant's Appointment)	May 2022	Current
Final account procedures	1st edition, practice information (reissued 2024; first published 2015)	Current

RICS document	Edition and type	Status
Ascertaining loss and expense	2nd edition (RICS Black Book)	Current
Conflict avoidance and dispute resolution in construction	1st edition (RICS Black Book)	Current
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022; cited for practical content only

RICS documents are UK-based; apply them in the GCC subject to the governing law and the form of contract.

See it with your own contract. CMCS can walk your commercial, contract administration and cost teams through these processes in PMWEB 2026, configured to your form of contract and your Delegation of Authority. Write to info@CMCS-MENA.com.

If your largest contract reached practical completion tomorrow, what share of its final account would already be agreed, and how many items would still need a formal instruction?

Talk to us: info@CMCS-MENA.com

#CMCS #PMWEB #RICS #FinalAccount #LossAndExpense #Claims #DisputeResolution #QuantitySurveying #CapitalProjects #GCC

About the Author

Bassam Samman, PMP, PSP, EVP, GPM is the Chairman and Chief Executive Officer of CMCS FZ-LLC, the PMWEB Authorised Implementation Partner for the Gulf Cooperation Council and broader Middle East and North Africa region. CMCS holds the PMWEB Global Partner of the Year 2025 designation and serves capital project owners, contractors and consultants across the UAE, Saudi Arabia, Qatar and Kuwait.

Bassam has over four decades of experience providing project management, project controls services and project management information systems to more than two hundred capital projects with a combined value exceeding one hundred billion US dollars. He is the author of four published books on project management digitalisation and has lectured at more than three hundred and fifty international events. He holds a Master's degree in Engineering Administration (Construction Management), with Faculty Commendation, from George Washington University and a Bachelor's degree in Civil Engineering from Kuwait University, with executive education at Harvard Business School and London Business School.

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One Cost Language: Reporting the Adjusted Contract Sum and Capital Cost to ICMS 3 with PMWEB

How capital project owners and their cost advisers set up the PMWEB cost breakdown structure to ICMS 3, the International Cost Management Standard, so that budget, commitments, change, valuations and forecasts report in one consistent, benchmarkable structure

Bassam Samman, PMP, PSP, EVP, GPM | Chairman & CEO, CMCS FZ-LLC | PMWEB Authorised Implementation Partner, GCC & MENA

RICS asks the contract administrator to keep a running record of the estimated final adjusted contract sum and to report to the employer on total project cost. The International Cost Management Standard, now in its third edition (ICMS 3), gives that report a common language. When the PMWEB cost breakdown structure is built to ICMS 3 from the first day, every budget line, commitment, change, valuation and forecast already speaks it.

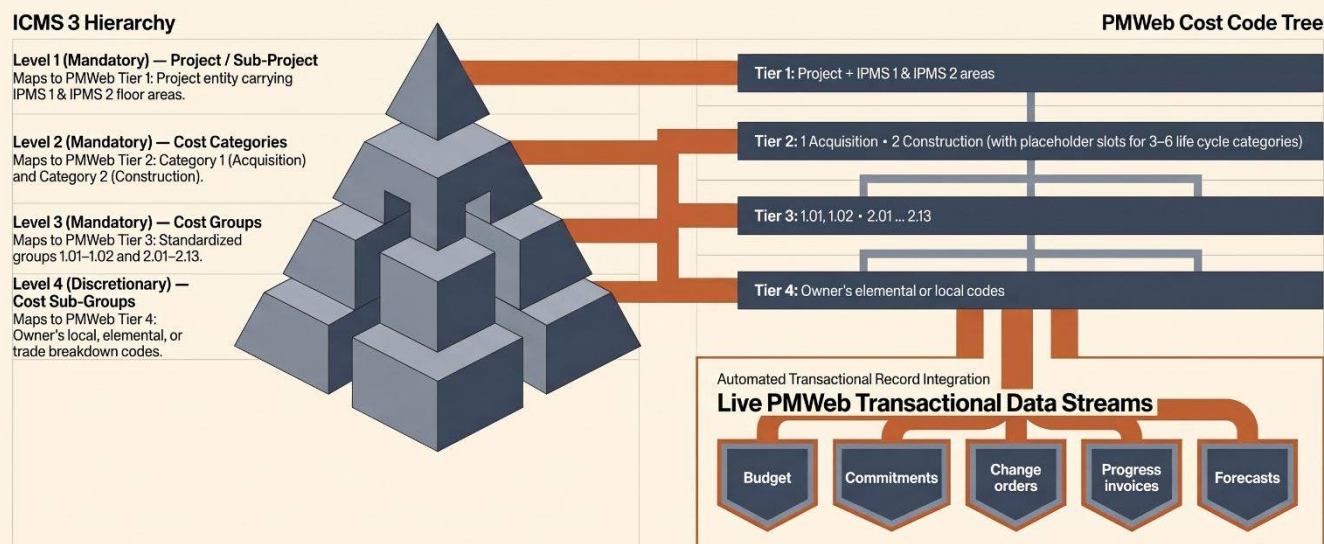
Owners rarely complain that they lack cost data. They complain that the data from one project cannot be compared with the next: one cost consultant reports by trade package, another by elements, a third by the contractor's bill sections. Benchmarking becomes a re-coding exercise, and the monthly report becomes a spreadsheet assembled from several systems.

This article covers RICS service 1.3 (regular quality, progress and cost reports), ICMS: International Cost Management Standard, 3rd edition (2021, published by RICS in June 2022), and the related RICS Black Book titles Cost reporting and Cost analysis and benchmarking. It also draws on the practical reporting checklist in the RICS 2011 guidance note Contract administration (GN 69/2011, archived by RICS in May 2022 and retained for information). It shows how to set up the PMWEB cost structure to ICMS 3 and what the reports look like.

Why this matters to you

- **Commercial Directors:** a total project cost report that reconciles to the contract administrator's figures without manual adjustment.
- **Cost Managers and Qs:** ICMS-coded data that can be benchmarked across projects and markets without re-coding.
- **Contract Administrators:** the running record of the adjusted contract sum produced by the system, every month.
- **Owners and investors:** cost per square metre comparable from one project to the next.

ICMS 3 Four Levels Mapped to the PMWeb Cost Structure



Core Takeaway

Code once to ICMS 3, report everywhere.

Figure 1: The ICMS 3 four-level hierarchy mapped to the PMWEB cost breakdown structure, and the PMWEB records that post to it

What RICS Requires

The running record of the adjusted contract sum

The archived GN 69/2011 (§4.1.7) said the CA should "keep and manage a running record of the estimated final adjusted contract sum", including preliminaries, specified works, outstanding unspent provisional and contingency sums, additions, omissions, employer variations, anticipated variations, loss and expense, prolongation costs and potential contractor claims. The CA should provide regular reports on the likely final figure "so that effective decisions can be made by the CA and employer ahead of time, particularly with regard to keeping the cost of the project within budget".

Total project cost

It added (§4.2.2) that the employer is primarily interested in the total final cost of the project, including consultants' fees and VAT. The CA may not know the terms of other consultants' appointments and should advise the employer of any limitation in the total cost picture. Final account procedures §4.11 lists items outside the contractor's account that the QS may need to report: loose furniture, fittings and equipment; professional fees; authority contributions and levies; VAT; and the employer's internal costs.

ICMS 3: a framework for classifying and reporting cost

The first edition of ICMS (2017) covered capital costs. The second edition (2019) added life cycle costs, and the third edition (2021), now titled International Cost Management Standard, adds a common framework for reporting carbon emissions alongside cost. ICMS 3 is the edition RICS publishes today, and it is the one this series uses.

ICMS 3 keeps a four-level hierarchy:

Level	ICMS 3 term	Status
1	Projects or sub-projects	Mandatory; each sub-project described by its own attributes and values
2	Categories	Mandatory and standardised
3	Groups	Mandatory and standardised
4	Sub-groups	Discretionary

Level 2 has six categories across the life cycle: 1 Acquisition costs, 2 Construction costs, 3 Renewal costs, 4 Operation costs, 5 Maintenance costs and 6 End of life costs. Contract administration and capital cost reporting work mainly in the first two:

Code	Category and Level 3 groups
1	Acquisition costs: 1.01 site acquisition; 1.02 administrative, financial, legal and marketing expenses
2	Construction costs: 2.01 demolition, site preparation and formation; 2.02 substructure; 2.03 structure; 2.04 architectural works or non-structural works; 2.05 services and equipment; 2.06 surface and underground drainage; 2.07 external and ancillary works; 2.08 preliminaries; 2.09 risk allowances; 2.10 taxes and levies; 2.11 work and utilities off-site; 2.12 production and loose furniture, fittings and equipment; 2.13 construction-related consultancies and supervision

Renewal and maintenance costs reuse the same group list (3.01 to 3.13 and 5.01 to 5.13), which is what lets an owner carry the capital cost structure into whole-life reporting later. ICMS 3 requires a cost or carbon report for a building to state both gross external floor area, IPMS 1 (EXTERNAL), and gross internal floor area, IPMS 2 (INTERNAL), so that cost per square metre is comparable across markets.

RICS's 2017 user guide ICMS Explained, written for the first edition and updated as ICMS 3 Explained (2022), describes the uses that matter to an owner: benchmarking, structuring tender pricing documents so returns can be compared on a common basis, and "quantum forensics", where a recognisably classified cost history supports a claim. It also expected that digital templates would be prepared by software vendors and organisations, which is what a PMIS set up to ICMS provides.

Groups 2.11 to 2.13, together with the acquisition costs in category 1, are where the items outside the contractor's account belong: off-site utilities, loose furniture and equipment, consultants' fees, and the client's own costs. ICMS 3 gives the total cost picture the employer wants a structure.

Setting Up the PMWEB Cost Breakdown Structure to ICMS

PMWEB's cost breakdown structure is a multi-level cost code hierarchy that every cost-bearing record posts to: budgets, budget requests, commitment lines, change orders, progress invoices, miscellaneous invoices and forecasts. CMCS sets it up as follows.

ICMS level	PMWEB implementation
Level 1 project or sub-project	PMWEB project, or a project with sub-projects (for example podium, Tower A, Tower B, infrastructure), carrying project attributes such as use, storeys, IPMS 1 and IPMS 2 areas and base date as project fields
Level 2 category	First segment of the cost code (1 acquisition, 2 construction; 3 to 6 where life cycle costs are reported)
Level 3 group	Second segment (1.01, 1.02, 2.01 to 2.13)
Level 4 sub-group	Third segment, adopted from the ICMS 3 examples or the owner's elemental standard
Local or contract detail	Further segments for the contract package, trade or bill section, so the contractor's schedule of values maps cleanly

Two design choices make the structure work for contract administration as well as cost reporting.

- **Dual coding.** Many owners have an established local structure, for example NRM elements or an internal WBS. ICMS is designed as a framework into which locally prepared data can be allocated for comparison, not as a replacement for local standards. In PMWEB, the local code can be held as an attribute of each ICMS cost code, so reports can be produced in either structure from the same transactions.
- **Contract lines coded at award.** Each line of the contractor's schedule of values is coded to an ICMS cost group when the commitment is created (Article 2). Change order lines and progress invoice lines inherit or select codes from the same list. Nothing is re-coded at reporting time.

Risk allowances (group 2.09) are held as budget lines. Drawdowns move through approved budget requests (Article 4), so the movement of contingency into the cost groups that consumed it is itself reportable.

The Cost Worksheet: The CA's Live Cost Report

PMWEB's **Cost Worksheet** shows, for every cost code, the latest position from every cost process. The user chooses a saved layout, groups by any level of the cost breakdown structure, filters by period, and clicks any cell to see the transactions behind it. If multi-currency is enabled, the worksheet can be displayed in a selected currency.

RV50104 - Boston Medical Center

Cost Worksheets: Cost Report

Main Notes Attachments

Worksheet: Cost Report Period From: *All* Period To: *All*

Group by: None Currency: Project Default ☐ Project Default Add Edit Export To Excel

G	Cost...	Budget D...	Origin...	Projec...	Revise...	Origin...	Projec...	Antici...	Award...	Purch...	Appro...	Total ...	Antici...	Antici...	Total ...
✓ 00 ...	00-0000...	Sales	\$12,000.0...	\$0.00	\$12,000.0...	\$0.00	\$0.00	\$12,000.0...	\$100,000.00	\$0.00	\$0.00	\$100,000.00	\$21,000.00	\$50,000.00	\$98,021.00
✓ 01 ...	01-000001	Land Acquisition	\$1,200.00...	\$0.00	\$1,200.00...	\$0.00	\$0.00	\$1,200.00...	\$0.00	\$0.00	\$10,000.00	\$10,000.00	\$0.00	\$50,000.00	\$60,000.00
✓ 01 ...	01-000002	Land Permits a...	\$450,000.00	\$0.00	\$450,000.00	\$-20,000.00	\$0.00	\$430,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$410,000.00
✓ 02 ...	02-010002	General Condi...	\$197,500.00	\$0.00	\$197,500.00	\$0.00	\$0.00	\$197,500.00	\$0.00	\$0.00	\$800.00	\$800.00	\$200,000.00	\$0.00	\$200,000.00
✓ 02 ...	02-0200...	Existing Condi...	\$1,100,000.00	\$30,000.00	\$1,130,000.00	\$0.00	\$0.00	\$1,130,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$90,000.00	\$0.00	\$90,000.00
✓ 02 ...	02-0300...	Concrete	\$875,000.00	\$110,000.00	\$985,000.00	\$0.00	\$152,400.00	\$1,137,400.00	\$1,473,760.00	\$0.00	\$0.00	\$1,473,760.00	\$3,414,000.00	\$45,000.00	\$3,414,000.00
✓ 02 ...	02-0500...	Metals	\$850,000.00	\$20,000.00	\$870,000.00	\$0.00	\$1,000.00	\$871,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$825,100.00	\$25,000.00	\$825,100.00
✓ 02 ...	02-061000	Rough Carpen...	\$122,500.00	\$10,000.00	\$132,500.00	\$0.00	\$75,000.00	\$207,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$165,000.00	\$40,000.00	\$165,000.00
✓ 02 ...	02-071000	Dampproofing...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
✓ 02 ...	02-0800...	Openings	\$0.00	\$30,000.00	\$30,000.00	\$0.00	\$10,000.00	\$40,000.00	\$51,500.00	\$0.00	\$0.00	\$51,500.00	\$0.00	\$0.00	\$51,500.00
✓ 02 ...	02-0990...	Painting and C...	\$300,000.00	\$15,900.00	\$315,900.00	\$0.00	\$0.00	\$315,900.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250,000.00	\$30,000.00	\$250,000.00
			\$72,842,5...	\$192,900.00	\$73,035,4...	\$-20,000.00	\$163,400.00	\$73,178,80...	\$158,339,7...	\$115,000.00	\$49,970.00	\$158,504,7...	\$7,242,43...	\$250,000.00	\$105,242,4...

1 - 31 of 31

<< < 1 > >>

250 Rows

Screenshot S1 shows the construction works for the Project Alpha development, groups 2.01 to 2.10. Columns combine the original budget, approved budget changes, current budget, committed value, pending changes, invoiced actuals, forecast at completion and variance. The forecast at completion column is where the CA's running record of the adjusted contract sum meets the owner's total project cost.

The ICMS 3 Cost Report

Code	Description	AED M	AED/m² IPMS 1	AED/m² IPMS 2	% of capital cost
	Capital cost (1 + 2)	735.54	5,373	5,729	100.0%
1	Acquisition costs	104.40	763	813	14.2%
1.01	Site acquisition	85.00	621	662	11.6%
1.02	Administrative, financial, legal and marketing expenses	19.40	142	151	2.6%
2	Construction costs	631.14	4,610	4,915	85.8%
2.01	Demolition, site preparation and formation	19.69	144	153	2.7%
2.02	Substructure	56.60	413	441	7.7%
2.03	Structure	127.40	931	992	17.3%
2.04	Architectural works non-structural works	104.16	761	811	14.2%
2.05	Services and equipment	130.73	955	1,018	17.8%
2.06	Surface and underground drainage	9.90	72	77	1.3%
2.07	External and ancillary works	23.35	171	182	3.2%
2.08	Preliminaries constructors' site overheads	41.86	306	326	5.7%
2.09	Risk allowances	12.91	94	101	1.8%
2.10	Taxes and levies	26.14	191	204	3.6%
	Subtotal 2.01-2.10 — construction works	552.74	4,038	4,305	75.1%
2.11	Work and utilities off-site	24.30	178	189	3.3%
2.12	Production and loose furniture, fittings and equipment	22.50	164	175	3.1%
2.13	Construction-related consultancies and supervision	31.60	231	246	4.3%

Project attributes: mixed-use, 2 towers + podium · IPMS 1 (EXTERNAL) 136,900 m² · IPMS 2 (INTERNAL) 128,400 m² · base date Q1-2025 · anticipated final costs from the PMWEB cost worksheet. Renewal, operation, maintenance and end-of-life categories (3-6) are not part of this capital cost report.

Illustrative sample data

Screenshot S2: ICMS 3 cost report: anticipated final capital cost by category and group, with cost per square metre on IPMS 1 and IPMS 2 and percentage of capital cost

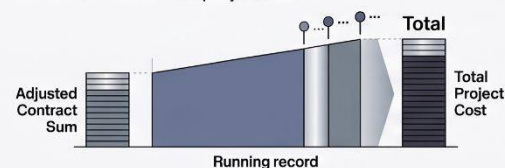
Screenshot S2 shows the anticipated final capital cost of the development, AED 735.54 million, classified to ICMS 3. Acquisition costs are AED 104.40 million and construction costs AED 631.14 million. Each group shows its value, its cost per square metre on IPMS 1 and IPMS 2 areas, and its share of the total. Renewal, operation, maintenance and end-of-life categories are outside this capital cost report.

Groups 2.01 to 2.10 total AED 552.74 million, the sum of the anticipated final accounts of the four construction contracts, including MC-001 at AED 437.94 million, the figure the control centre and the statement of final account show in Articles 1 and 7. Group 2.11 holds the off-site utilities contract and group 2.12 the FF&E supply contract. The CA's adjusted contract sum and the owner's capital cost agree because they are built from the same records, not because someone reconciled them at month end.

Four Uses of ICMS 3-Coded PMWEB Data

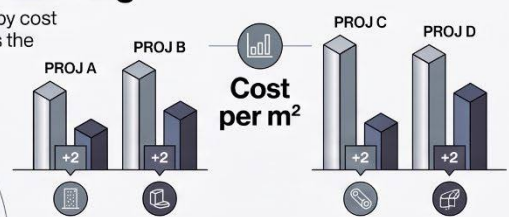
Monthly Cost Report

Running record of the adjusted contract sum and total project cost.



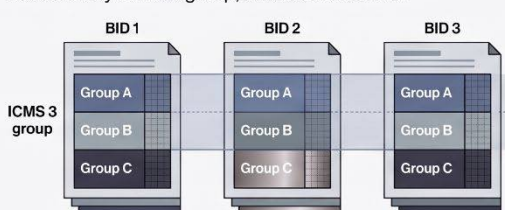
Benchmarking

Cost per m² by cost group across the portfolio.



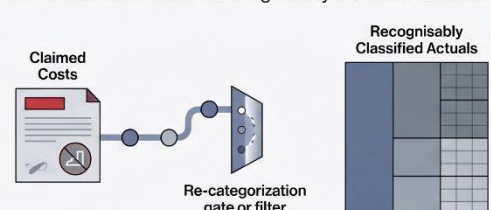
Comparable Tenders

Bid forms by ICMS 3 group; levelled like for like.



Quantum Forensics

Claimed costs traced to recognisably classified actuals.



One cost language for reporting, benchmarking, tendering and claims.

Source: ICMS 3rd edition (2021); ICMS 3 Explained (RICS, 2022)

Gemini Notebook

Figure 2: Four uses of ICMS 3-coded PMWEB data: monthly cost reporting, benchmarking across the portfolio, comparable tender returns, and quantum forensics in claims

Benchmarking Across the Portfolio

When every project in PMWEB uses the same ICMS 3 Level 2 and Level 3 codes and records IPMS areas as project attributes, the owner can compare projects on a like-for-like basis with no re-coding. Portfolio reports and Power BI dashboards can show cost per square metre by cost group across completed and live projects, flag outliers early in design, and build the owner's own historic cost database, which is the use ICMS Explained anticipates and the subject of the RICS practice information Cost analysis and benchmarking.

The same structure helps at tender. ICMS Explained notes that the classification can be used to structure tender pricing documents so returns can be interrogated and compared on a common basis. PMWEB's Procurement module can issue bid forms built on the ICMS 3 groups, so bid levelling compares bidders group by group and the winning bid becomes a commitment that is already coded.

Quantum Forensics

ICMS Explained points out that cost advisers often need to prove entitlement to the recovery of costs incurred, and that using ICMS ensures project cost is classified in a recognisable manner, "thereby providing greater confidence over the validity of the claim". In PMWEB, the loss and expense records in Article 7 link to actual cost transactions that are already ICMS-coded, so a claimed prolongation cost can be traced to the preliminaries cost group and its invoices, and a disruption claim to the cost groups affected.

Workflow and DoA

The cost structure is controlled data. Adding or changing cost codes follows a workflow owned by the cost manager. Budget transfers between ICMS cost groups go through budget requests routed by value. Forecast submissions are approved monthly before they feed the employer's report, so the cost report the employer reads has been through the same governance as the transactions behind it.

ERP Touchpoint

The ICMS cost codes are synchronised with the ERP's project or WBS structure, so that purchase orders, invoices and payments posted in the ERP carry the same codes. Actual cost returned from the ERP lands in the right cost group in the PMWEB cost worksheet. Article 10 explains the integration in more detail.

What Changes for Your Organisation

Without a PMIS	With PMWEB 2026
Each consultant reports in its own structure	ICMS 3 Levels 1 to 3 on every project
Benchmarking means re-coding old projects	Portfolio comparison from coded transactions
Fees, FF&E and client costs outside the report	Capital cost across acquisition and construction categories
Tender returns compared line by line by hand	Bid forms structured by ICMS cost group
Monthly ICMS report rebuilt in Excel	ICMS 3 report generated from PMWEB

What the Owner and the Cost Adviser Must Put in Place

1. **Adopt ICMS 3 Levels 1 to 3 as the mandatory top of the PMWEB cost structure.** On every project, without exception.
2. **Record project attributes and IPMS areas.** Without them, cost per square metre is not comparable.
3. **Code the schedule of values at award.** Re-coding at reporting time is where consistency is lost.
4. **Hold the local structure as an attribute, not a separate system.** Report in both from one set of transactions.
5. **Report risk allowances and their drawdown openly.** Through budget requests, by cost group.

6. **Generate the ICMS 3 report from PMWEB.** The monthly report should be a run, not a rebuild.

RICS references for this article

RICS document	Edition and type	Status
Contract Administration Services (RICS Standard Form of Consultant's Appointment)	May 2022	Current
ICMS: International Cost Management Standard	3rd edition (2021; RICS June 2022)	Current
ICMS Explained / ICMS 3 Explained	RICS user guides, 2017 and 2022	Current (ICMS 3 Explained)
Cost reporting	1st edition (RICS Black Book)	Current
Cost analysis and benchmarking	2nd edition, practice information (RICS Black Book)	Current
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022; cited for practical content only

RICS documents are UK-based; apply them in the GCC subject to the governing law and the form of contract.

See it with your own contract. CMCS can walk your commercial, contract administration and cost teams through these processes in PMWEB 2026, configured to your form of contract and your Delegation of Authority. Write to info@CMCS-MENA.com.

Could you compare the cost per square metre of structure, services or preliminaries across your last five projects today, on a like-for-like basis, without re-coding anything?

Talk to us: info@CMCS-MENA.com

[#CMCS](#) [#PMWEB](#) [#RICS](#) [#ICMS](#) [#CostManagement](#) [#CostReporting](#) [#Benchmarking](#) [#QuantitySurveying](#) [#CapitalProjects](#) [#GCC](#)

About the Author

Bassam Samman, PMP, PSP, EVP, GPM is the Chairman and Chief Executive Officer of CMCS FZ-LLC, the PMWEB Authorised Implementation Partner for the Gulf Cooperation Council and broader Middle East and North Africa region. CMCS holds the PMWEB Global Partner of the Year 2025 designation and serves capital project owners, contractors and consultants across the UAE, Saudi Arabia, Qatar and Kuwait.

Bassam has over four decades of experience providing project management, project controls services and project management information systems to more than two hundred capital projects with a combined value exceeding one hundred billion US dollars. He is the author of four published books on project management digitalisation and has lectured at more than three hundred and fifty international events. He holds a Master's degree in Engineering Administration (Construction Management), with Faculty Commendation, from George Washington University and a Bachelor's degree in Civil Engineering from Kuwait University, with executive education at Harvard Business School and London Business School.

About PMWEB

PMWEB is an enterprise-class, web-based capital construction project management platform trusted by organisations worldwide including Harvard University, the United Nations, and Atlanta Airport. Built on Microsoft .NET technology, PMWEB manages the entire project lifecycle within a single integrated platform, from portfolio planning and cost management through document control, procurement, scheduling, asset management, and business intelligence. With 150+ pre-configured SSRS reports, drag-and-drop dashboard design, multi-currency support, and open REST/SOAP API integration, PMWEB delivers enterprise capability with implementation timelines measured in months, not years.

About CMCS

CMCS (Collaboration, Management and Control Solutions) is the PMWEB Authorised Implementation Partner for the GCC and MENA regions, awarded PMWEB Global Partner of the Year 2025. CMCS markets, implements and supports PMWEB for more than 60 enterprise clients across the UAE, Saudi Arabia, Qatar and Kuwait, helping capital project owners, PMC firms and contractors digitalise their project management processes on a single, governed platform. Contact: info@CMCS-MENA.com

Authority Written Once, Enforced Everywhere: PMWEB Workflow and Delegation of Authority Compliance

How capital project owners turn the contract administrator's spending authority and their own Delegation of Authority matrix into PMWEB workflow conditions, so every instruction, change, certificate and determination is approved at the right level and on time

Bassam Samman, PMP, PSP, EVP, GPM | Chairman & CEO, CMCS FZ-LLC | PMWEB Authorised Implementation Partner, GCC & MENA

RICS asks that the contract administrator's authority over contingency, provisional sums and unforeseen work be confirmed at appointment, and that the CA seeks the employer's authority before instructing expenditure outside it. Owners add their own Delegation of Authority (DoA) for every financial decision. In PMWEB 2026 both are written once, as workflow configuration, and enforced on every record.

Every article in this series has ended with a workflow: who reviews, who approves, who is informed and at what value. This article explains the engine behind those workflows and how it gives owners and contract administrators something a policy document cannot: evidence that authority was respected every time, without anyone having to remember to check.

It covers RICS service 2.2 (agree with the client an appropriate level of authority to instruct works), the practical guidance on the CA's authority in the RICS 2011 guidance note Contract administration (GN 69/2011, archived in 2022: §3.1.5, §4.1.8, §4.2.1 and part (c) of the Appendix A pre-commencement checklist), and the governance controls owners typically add: approval thresholds, segregation of duties and audit trails.

Why this matters to you

- **Commercial Directors and CFOs:** no approval outside the Delegation of Authority, with proof available to auditors in one click.
- **Contract Administrators:** your authority enforced by the system, so instructions above it cannot be issued without the employer's approval.
- **Internal audit and governance teams:** segregation of duties, delegation and full audit trails on every transaction.
- **Project Directors:** visibility of where approvals wait, and for how long.

AUTHORITY WRITTEN ONCE, ENFORCED EVERYWHERE:

Translating DoA into Automated Workflows

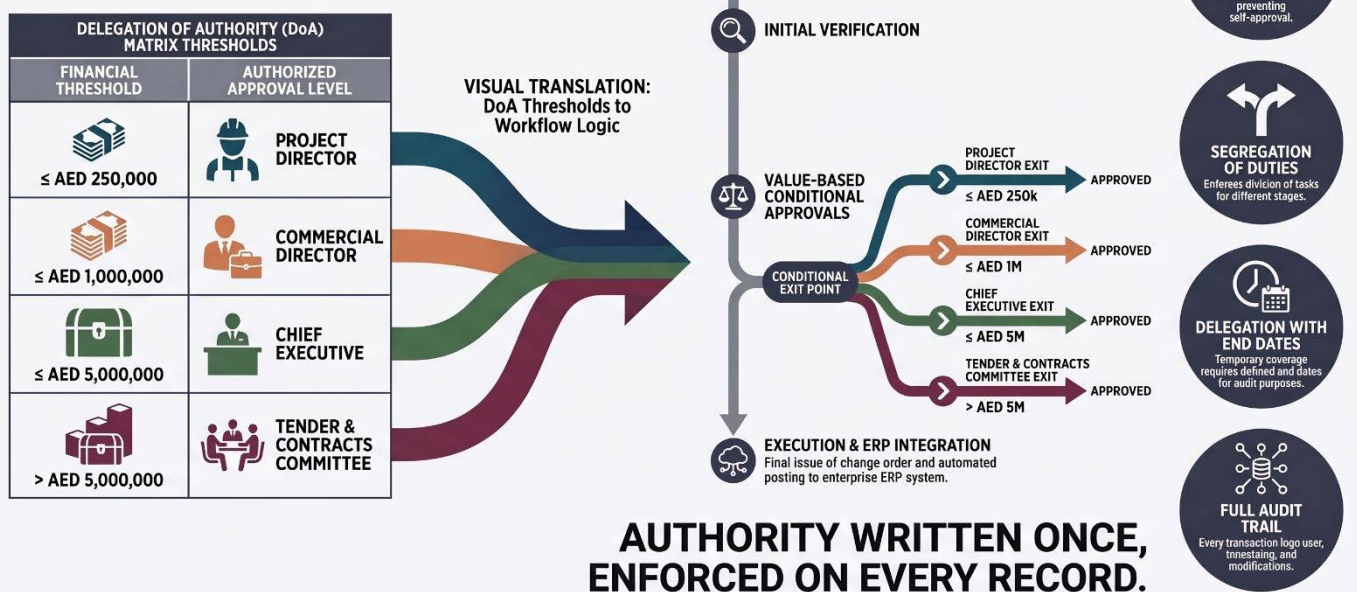


Figure 1: The DoA matrix becomes workflow conditions: one change order routed to the approver whose limit covers its value

What RICS Requires

The CA's authority

GN 69/2011 makes several points about authority.

- **Confirm it at appointment (§3.1.5).** The terms of appointment will not normally allow the CA to issue instructions that alter the extent of the works without the employer's explicit prior agreement. The extent of the CA's authority over contingency monies, provisional sums and additional or unforeseen works "should be confirmed within the appointment agreement".
- **Seek the employer's authority first (§4.1.8, §4.1.11).** Where an instruction would incur expenditure outside the building contract provisions or the CA's appointment, the employer's approval must be sought before the instruction is given.
- **Follow the employer's own rules (§4.2.1).** Some employers have their own, more stringent requirements, which the CA should be aware of and follow. Where the CA has no authority for decisions with financial implications, it is useful to agree at the outset a method for dealing with unforeseen and additional works and for expending contingency.
- **Agree who may instruct (Appendix A part c).** Persons authorised to issue instructions, the system for issuing and confirming instructions, and the employer's approval procedure for instructions and changes are agreed and confirmed in writing before works start.

The CA's impartial decisions

Not every CA decision is an approval by the employer. Under most forms of contract, determinations of extensions of time, valuations and certificates are the CA's own decisions, made impartially. The employer must be kept informed, but the CA is not asking permission. A well-designed workflow distinguishes the two, which GN 69/2011 §2.2.2 describes as the agency function and the decision-making function.

The owner's governance

Owners add their own controls. The procedural manuals CMCS sees across the region typically require that approval workflows reflect the DoA; that approval thresholds apply to changes, payment certificates and claims; that duties are segregated so the person who prepares a transaction does not approve it; that large financial transactions need more than one level of approval; and that every transaction is logged with user, time and change.

How PMWEB Workflow Works

Every PMWEB record type, native or built with the Custom Form Builder or Adaptive Forms, can carry a **business process**. A business process is a sequence of steps. Each step defines:

Element	What it controls
Role	Who acts, defined as a project role rather than a named person, so routing survives staff changes
Allowed duration	Days allowed for the step, which drives due dates, reminders and overdue reporting
Actions	What the user may do: submit, approve, return for correction, reject, or acknowledge
Conditions	Rules on record fields that add, skip or redirect steps, for example by amount, category or a yes/no flag
Notifications	Who is e-mailed on arrival, approval, return or rejection, including people outside the approval chain

Every action is recorded on the record's **Workflow** tab with the user, date, time and comment. Users see their pending steps in the PMWEB workflow inbox and receive e-mail notifications that take them to the record.

Conditions turn the DoA into routing

Conditions are what make the DoA enforceable. A change order business process can contain a step for each authority level, each with a condition on the change order's net value. A change order within the Project Director's limit completes after the Project Director's step. One above it continues to the Commercial Director, and so on. The approver cannot be skipped, because the step is generated by the value, not chosen by the submitter.

Logged into: All Levels | Workflows > Business Processes > (System)

Roles | Business Processes (BPM) | Defaults | APM Rules

Select Template: D026 - GCC_RED_Commitment Co - C | USE VISUAL DESIGNER

BPM ID*: D026
Template Name*: GCC_RED_Commitment Co - Contractor
Recalculate Due Dates On Actions: ☒
Single "All Must Approve" Email: ☐
Associate With: Commitment Change Orders

BPM MANAGERS

OVERDUE ALERT
Alert Active: ☒
Days (+/-): 0
Role(s): -- Overdue Approver --
Email: ☒
Onscreen: ☐

ROLES & APM RULES

STEPS

STEP #	TYPE	DESCRIPTION	LEVEL	ACTION	RETURN TO	DELEGATE	DOCUSIGN
1	PMT L2		System	Next Step		☒	☐
2	PMT L1		System	Next Step		☒	☐
3	Commercial Manager		System	Next Step		☒	☐
4	Assignee		System	Next Step		☒	☐
5	GM - Projects		System	Next Step		☒	☐
6	The value is more than 5M			Branch		☐	☐
6.1	Finance Team		System	Final Approve		☒	☐

VISUAL WORKFLOW

SHOW ROLES
SHOW USER NAMES

SUBMITTER | WITHDRAW | PMT L2 | PMT L1 | COMMERCIAL MANAGER | ASSIGNEE | GM - PROJECTS | THE VALUE IS MORE TH... | FINAL APPROVE | REJECT

Screenshot S1: Business process BP-11 for commitment change order approval, and the DoA matrix that drives its step conditions

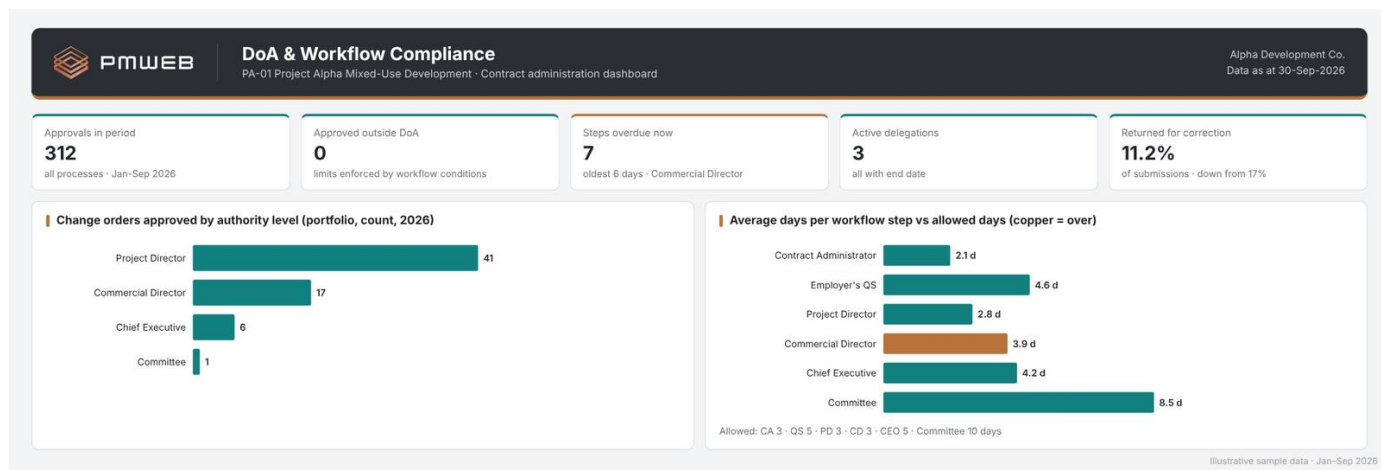
Screenshot S1 shows the configuration for contract MC-001. Steps 4 to 7 carry the DoA thresholds for change orders: up to AED 250,000 the Project Director, up to AED 1 million the Commercial Director, up to AED 5 million the Chief Executive, and above that the tender and contracts committee, with a board minute reference required. Step 8 returns the record to the CA to issue the change order and post it to the ERP. The DoA matrix below shows the thresholds for the other processes that use the same engine: budget transfers, payment approvals, contract awards and notifications of extension of time determinations.

Mapping RICS and DoA Rules to Workflow Design

Rule	PMWEB workflow design
CA's authority to instruct (RICS 2.2, GN §3.1.5)	Condition on the contract instruction: value above the CA's limit inserts the employer's approval step before issue
Employer authority before costly instructions (GN §4.1.11)	The instruction cannot reach the "issue" step until the employer's approval is recorded; its reference is stored on the record
Contingency expenditure method (GN §4.2.1)	Budget request business process with its own thresholds, separate from change order approval
Persons authorised to instruct (Appendix A part c)	Only the CA role holds the "issue" action on instruction records
CA's impartial determinations	Extension of time and certificate workflows notify the employer under the standard forms; where GCC particular conditions require the employer's prior approval above set limits, an approval step is added by condition
Approval thresholds (owner DoA)	Conditional steps by value on change orders, budget requests, payment approvals and awards
Segregation of duties	Roles designed so that the preparing role and approving role are held by different people; the submitter does not hold an approval step on the same record
Dual authorisation for large transactions	Two sequential or parallel approval steps above a set value
Continuity during leave	Delegation to a named alternate for a defined period, recorded on the workflow history
Audit trail	Workflow tab history on every record, retained with the record

Measuring Compliance: The DoA and Workflow Dashboard

Configuration prevents approvals outside authority. Owners also want to see how the process performs: whether approvals are timely, where records wait, and how often submissions are returned. Because every step is recorded with its due and actual dates, PMWEB data supports a compliance dashboard, delivered in Power BI inside PMWEB.



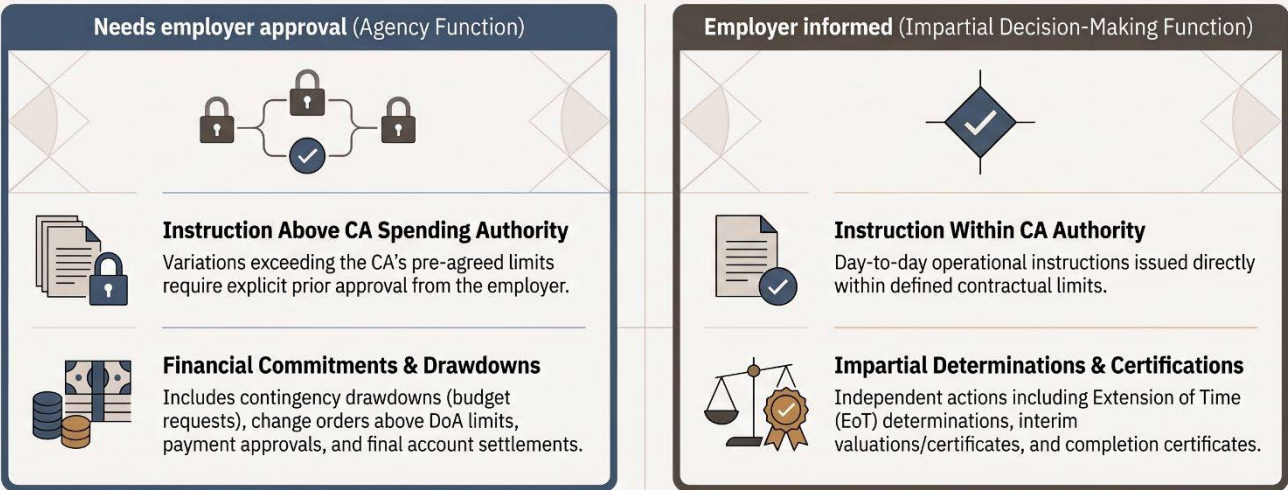
Screenshot S2: DoA and workflow compliance dashboard: approvals by authority level, overdue steps, active delegations, return rate and average days per step against the allowed days

Screenshot S2 shows the view for January to September 2026. There were 312 approvals across all processes and none outside the DoA, because the limits are enforced by workflow conditions rather than by review. Seven steps are overdue now, the oldest six days with the Commercial Director. Three delegations are active, all with end dates. The bar chart compares the average days each role takes with the days allowed, and highlights the Commercial Director's step as running over its allowance.

CMCS's generic workflow task and performance dashboard extends the same data to every PMWEB client: each team member's due and delayed tasks, tasks delayed by a preceding step, and planned against actual performance, with deliverable processes linked to their schedule activity for planned dates.

Agency versus decision-making in PMWEB workflow

Translating the Contract Administrator's (CA) dual function under RICS GN 69/2011 into PMWEB paths for compliance and project trust.



Design the workflow around the CA's dual role, and both parties can trust it.

RICS GN 69/2011 (archived): the CA acts for the employer in some matters and decides impartially in others

Gemini Notebook

Figure 2: Agency versus decision-making: which CA actions need employer approval and which only inform the employer, as PMWEB workflow paths

Designing Workflows That People Use

Article 4 quoted RICS's warning that a cumbersome change control system deters people from using it. The same is true of every workflow. CMCS applies a few design rules.

- **Add a step only where the DoA or the contract requires a decision.** Information can be shared by notification rather than an approval step.
- **Route to roles, never names.** Roles survive resignations, leave and reorganisations.
- **Set realistic allowed durations.** Base them on the contractual period, so overdue steps mean something.
- **Use conditions rather than many separate processes.** One change order process with value conditions is easier to govern than five processes chosen by hand.
- **Allow return for correction as well as rejection.** Most problems are incomplete submissions, not wrong decisions; the return rate on the dashboard shows where guidance is needed.
- **Review the configuration when the DoA changes.** The DoA document and the workflow conditions must change together, under the owner's change control.

ERP Touchpoint

Workflow approval is often the trigger for ERP posting. An approved commitment creates the purchase order; an approved change order updates it; an approved payment certificate creates the accounts payable invoice. Because the approval happens in PMWEB under the DoA, the ERP receives only transactions that have already been authorised, and the PMWEB workflow history is the approval evidence behind each ERP posting.

What Changes for Your Organisation

Without a PMIS	With PMWEB 2026
DoA in a PDF, checked occasionally	DoA as workflow conditions on every record
Approver chosen by the submitter	Approver chosen by the value

Without a PMIS	With PMWEB 2026
Approvals by e-mail, hard to evidence	Workflow history on the record
Bottlenecks discovered when payments are late	Dashboard of overdue steps by role
Leave stops the process	Delegation with start and end dates

What the Owner and the CA Must Put in Place

1. **Write the CA's authority and the DoA as numbers per process.** Per instruction, per change order, per budget transfer, per payment, per award.
2. **Configure conditions, not lists of approvers.** Let the value choose the route.
3. **Separate the CA's decisions from the employer's approvals.** Inform where RICS and the contract say inform; approve where they say approve.
4. **Design roles for segregation of duties.** Preparer and approver are never the same person on the same record.
5. **Set up delegation with end dates.** And review active delegations monthly.
6. **Monitor the workflow, not just the outcomes.** Overdue steps and return rates show where the process needs attention.

RICS references for this article

RICS document	Edition and type	Status
Contract Administration Services (RICS Standard Form of Consultant's Appointment)	May 2022	Current
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022; cited for practical content only
Final account procedures	1st edition, practice information (reissued 2024; first published 2015)	Current

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If an auditor picked any change order from last year, could you show in one click that it was approved by the person whose authority covered its value, within the allowed time?

Talk to us: info@CMCS-MENA.com

#CMCS #PMWEB #RICS #DelegationOfAuthority #Workflow #Governance #ContractAdministration #InternalControl #CapitalProjects #GCC

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From Record to Decision: ERP Integration, SSRS Reporting and Power BI for RICS Contract Administration

How PMWEB 2026 connects contract administration to the owner's finance system and turns the RICS record into reports, KPIs and executive dashboards, completing a single source of truth for capital contracts

Bassam Samman, PMP, PSP, EVP, GPM | Chairman & CEO, CMCS FZ-LLC | PMWEB Authorised Implementation Partner, GCC & MENA

RICS asks the contract administrator to report regularly on quality, progress and cost, to monitor key performance indicators, and to maintain a secure project document management platform. None of that is credible if the contract sum in the PMIS differs from the purchase order in the ERP, or if the monthly report is re-keyed from both. PMWEB 2026 closes the loop: integration keeps the two systems in step, SSRS produces the formal outputs, and Power BI turns the record into decisions.

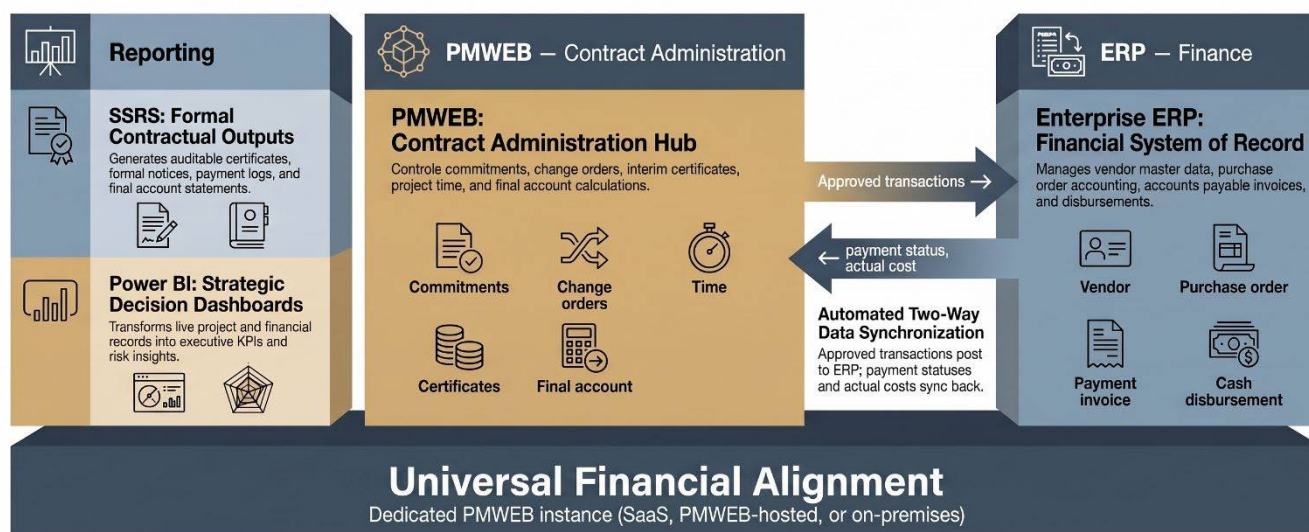
The previous nine articles followed a contract from commencement to the final account and showed how each RICS contract administration service becomes a structured, workflow-controlled PMWEB process. This final article covers what makes those processes part of the owner's enterprise: integration with the ERP, the reporting layer, and the key performance indicators RICS asks the CA to monitor.

It covers RICS services 1.3 (regular quality, progress and cost reports), 8.7 (monitor key performance indicators) and 8.8 (set up and maintain a secure project and document management website), and the reporting guidance in the RICS 2011 guidance note Contract administration (GN 69/2011, archived in 2022). The current RICS Black Book title Cost reporting covers cost reports in more depth.

Why this matters to you

- **Commercial Directors and CFOs:** one contract sum, one certified value and one anticipated final account across PMWEB, the ERP and board reports.
- **Contract Administrators:** formal certificates, registers and statements produced from the record, ready for signature.
- **Cost Managers and controls teams:** Power BI dashboards and KPIs calculated from live data rather than collected.
- **IT and data teams:** integration with SAP, Oracle and Microsoft Dynamics on the owner's own dedicated instance.

Integrated Capital Project Governance: PMWEB, ERP, and Business Intelligence



One contract sum, one certified value, one anticipated final account, everywhere.

Figure 1: One source of truth: PMWEB for contract administration, the ERP for finance, SSRS and Power BI for reporting

Why Integration Belongs in Contract Administration

The CA certifies; the employer pays. The certificate lives in the PMIS; the payment lives in the ERP. On many projects the two are connected by e-mail and manual re-entry, and the consequences are familiar: a purchase order that was never increased for approved change orders, so the ERP rejects a valid invoice; retention held in PMIS but not in the ERP; a payment made late with nobody in the contract team aware of it; and a monthly cost report that reconciles two systems before anyone can read it.

Appendix A of GN 69/2011 asks the CA to know the employer's payment procedures and payment dates. RICS Final account procedures asks for the final account to reconcile all payments made. Both depend on PMWEB and the ERP agreeing.

The Integration Touchpoints

CMCS designs PMWEB and ERP integration around a small number of touchpoints, each with a clear system of record.

Touchpoint	Direction	System of record	Contract administration purpose
Vendor master	ERP to PMWEB	ERP	Contractors and consultants created once, with bank and tax details controlled by finance
Cost codes and WBS	Two-way mapping	Agreed per client	ICMS-coded cost structure (Article 8) matches the ERP project structure
Budget and budget transfers	PMWEB to ERP	PMWEB	Approved budgets and budget requests update the ERP budget
Commitments	PMWEB to ERP	PMWEB	Awarded contracts create purchase orders with value, retention and advance terms
Change orders	PMWEB to ERP	PMWEB	Approved change orders update the purchase order value
Interim certificates	PMWEB to ERP	PMWEB	Certified amounts create accounts payable invoices, with retention, advance recovery and VAT carried separately
Miscellaneous invoices	Either	Agreed per client	Non-contract costs coded to the cost structure
Payments	ERP to PMWEB	ERP	Payment status, amount and date returned to the progress invoice

Touchpoint	Direction	System of record	Contract administration purpose
Actual cost	ERP to PMWEB	ERP	Costs posted directly in the ERP appear in the PMWEB cost worksheet

Two principles keep integration safe. First, only approved transactions cross: PMWEB posts to the ERP when the workflow has completed under the DoA (Article 9), so the ERP never receives an unauthorised commitment or certificate. Second, each data item has one system of record, so there is never a question about which value is right.

Experience and architecture

PMWEB integrates through its REST and SOAP APIs and its dedicated SQL Server database. CMCS has delivered PMWEB integrations with SAP, Oracle Fusion Cloud ERP, Oracle E-Business Suite and Microsoft Dynamics 365 for owners across the GCC. Because each client has a dedicated PMWEB instance and database, whether SaaS, hosted by PMWEB (including in-Kingdom options) or on the owner's premises, the integration can be designed around the owner's ERP configuration and data residency requirements.

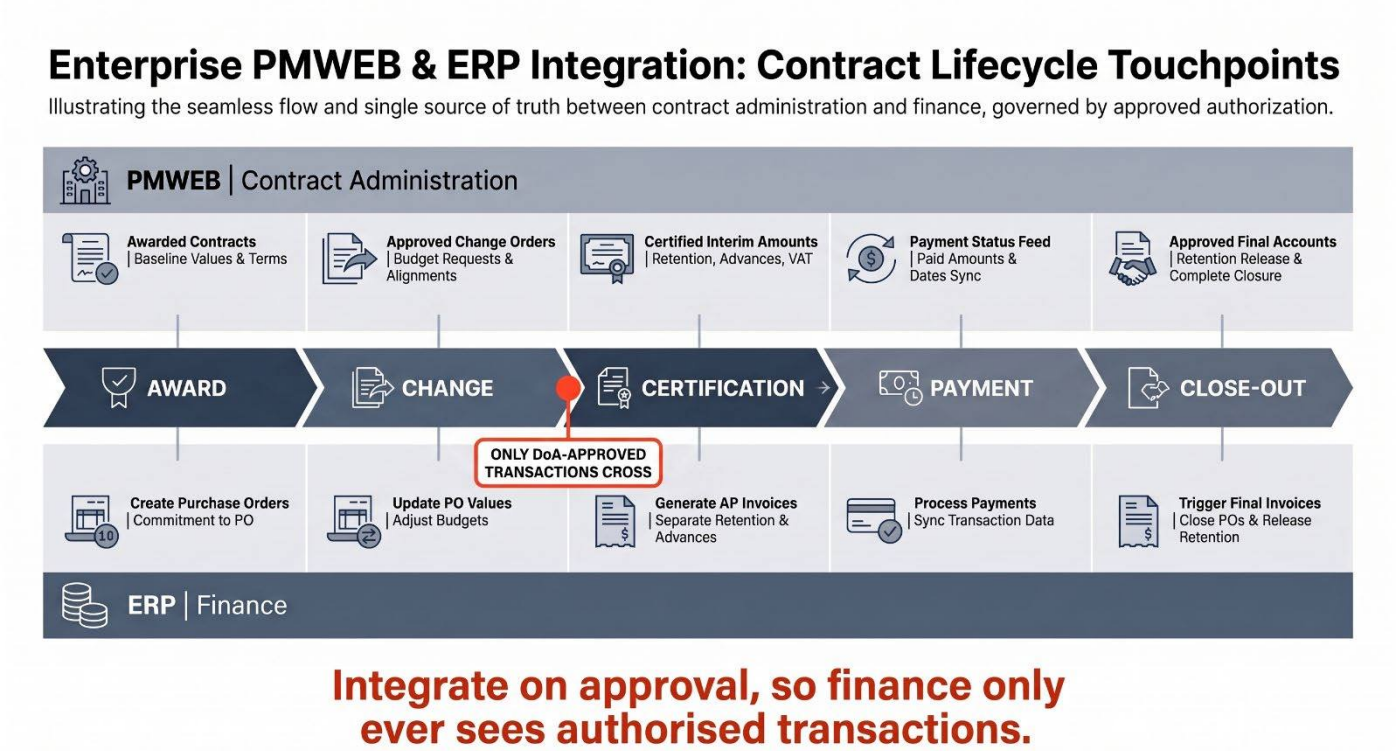


Figure 2: The PMWEB and ERP touchpoints along the contract lifecycle: award, change, certification, payment and close-out

SSRS: The Formal Outputs of Contract Administration

RICS expects formal outputs: certificates issued to the employer with a copy to the contractor, instructions in writing, registers, and a statement of final account for signature. PMWEB produces these through SQL Server Reporting Services (SSRS).

PMWEB ships with more than 150 pre-configured SSRS reports, and every module in this series has its standard forms and logs. Across the series, the outputs used have included:

Contract administration area	Out-of-the-box SSRS outputs (examples)
Contracts and commitments	Contracts Log, Contract Details, Subcontract forms, Commitment Logs by vendor, cost code or project
Change	Change Events log and form, Change Events Log (budget and cost), Commitment Change Order log and form, Contract Change Order form, Change Orders Not Executed letter
Payment	Application and Certificate for Payment, Progress Invoice form, Commitment Invoices log, payment forms and logs, aging reports
Budget and cost	Cost Codes, Budget Summary, Budget Request form and log, Budget and Actual Cost Comparison, Forecast Details, Cash Flow Schedule

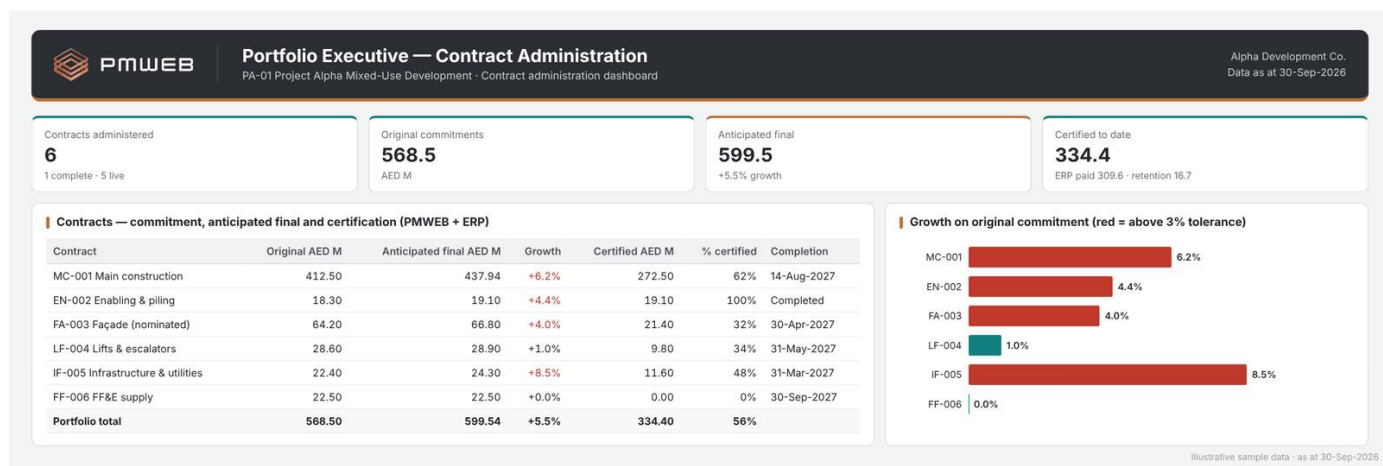
Contract administration area	Out-of-the-box SSRS outputs (examples)
Time	Schedule Barchart, Claim Analysis, Schedule Earned Value, Projects Behind/Ahead Schedule
Site and documents	Daily reports, Inspection forms, Punch List Details, RFI Details, RFIs Summary Log, Transmittals, Correspondences, Meeting minutes

Where an output must follow the wording of a particular form of contract, such as an interim payment certificate, a completion certificate or a statement of final account, CMCS designs the SSRS layout from the same data. Every Custom Form Builder and Adaptive Form record gets its own form and register outputs in the same way. Outputs can be printed for wet signature and stamping, or saved as PDF for digital signature where the contract permits, which is how the series has shown the interim certificate, the notices register and the statement of final account.

Power BI: From Record to Decision

SSRS answers "show me the document". Power BI answers "what is happening across my contracts, and where do I need to act?". Power BI reports connect to the PMWEB database through reporting views, refresh on a schedule (daily, or more often where needed) and are embedded in the PMWEB dashboards area, so users see them in the PMWEB interface under role-based security.

The series has shown five such dashboards: the contract administration control centre (Article 1), time and completion (Article 6), claims and final account readiness (Article 7), DoA and workflow compliance (Article 9) and, below, the portfolio executive view.



Screenshot S1: Portfolio executive dashboard: contracts by original commitment, anticipated final account, growth, certification and completion, combining PMWEB and ERP data

Screenshot S1 shows the six contracts on the Project Alpha development. The main construction contract MC-001 has grown 6.2% from AED 412.50 million to an anticipated AED 437.94 million, above the owner's 3% tolerance and highlighted in red; three other contracts are also above tolerance. Certified values come from PMWEB progress invoices, and paid values and retention come back from the ERP, so the board sees one consistent picture across contract administration and finance.

Monitoring KPIs (RICS Service 8.7)

RICS lists "monitor key performance indicators" as an additional service, and Final account procedures notes that adherence to contractual timescales is itself a KPI for employers and contractors. Because every PMWEB record has dates, values and workflow history, contract administration KPIs can be calculated rather than collected.

KPI	Calculated from
Certificates issued within the contractual period	Progress invoice statement date, certification deadline and workflow completion date
Instructions confirmed in writing within the agreed period	Contract instruction form: verbal direction date against confirmation date
RFI response time against the contractual period	RFI workflow dates
Contract growth against original commitment	Commitment and change orders
Probable value of pending change	Pending PCOs at assessed value

KPI	Calculated from
Extension of time days pending determination	EOT Adaptive Form records
Final account items agreed	Statement of final account status
Workflow steps overdue, by role	Business process history
Insurances and securities expiring within 45 days	Securities register

A Secure Project Document Platform (RICS Service 8.8)

RICS lists "set up and maintain a secure project and document management website" as an additional service, and GN 69/2011 Appendix B warns that archived electronic data becomes unusable without active management. PMWEB's Document Manager, role-based security, version control, transmittals and archive export meet that service directly, and because the records and documents sit in the owner's dedicated PMWEB database and file store, the archive belongs to the owner, not to the consultant or to an outside platform.

Bringing the Series Together

RICS service block	Where the series covered it
1 General	Articles 2, 3, 4, 8, 9 and 10
2 Commencement	Article 2
3 Statutory compliance	Article 2
4 Programme	Article 6
5 Construction phase	Article 3
6 Variations and certifications	Articles 4 and 5
7 Practical completion	Articles 6 and 7
8 Additional services	Articles 4, 6, 7 and 10
9 Bespoke	Custom Form Builder and Adaptive Forms throughout

The argument of the series is simple. RICS defines what good contract administration looks like and what a court may later judge the CA against. PMWEB 2026 provides the modules, forms, workflows, reports and integration to make that practice the way the work is done, and to leave behind a record that proves it.

What Changes for Your Organisation

Without a PMIS	With PMWEB 2026
PMIS and ERP reconciled by hand	Approved transactions flow to the ERP; payments flow back
Board pack assembled from three systems	Power BI dashboards inside PMWEB
KPIs collected by e-mail	KPIs calculated from record dates and values
Formal outputs formatted in Word each time	SSRS outputs from the record
Archive held by the consultant	Archive held in the owner's platform

What the Owner Must Put in Place

1. **Agree the system of record for each data item.** PMWEB for contract administration transactions, the ERP for vendors, payments and accounting.
2. **Integrate on approval, not on entry.** Only DoA-approved transactions should reach the ERP.
3. **Use SSRS for formal outputs and Power BI for decisions.** Do not ask one tool to do the other's job.

4. **Define contract administration KPIs from PMWEB data.** And review them monthly with the CA.
5. **Keep the archive in the owner's platform.** The record should outlive every appointment.

RICS references for this article

RICS document	Edition and type	Status
Contract Administration Services (RICS Standard Form of Consultant's Appointment)	May 2022	Current
Final account procedures	1st edition, practice information (reissued 2024; first published 2015)	Current
Cost reporting	1st edition (RICS Black Book)	Current
Contract administration (GN 69/2011)	1st edition guidance note	Archived May 2022; cited for practical content only

RICS documents are UK-based; apply them in the GCC subject to the governing law and the form of contract.

See it with your own contract. CMCS can walk your commercial, contract administration and cost teams through these processes in PMWEB 2026, configured to your form of contract and your Delegation of Authority. Write to info@CMCS-MENA.com.

Do your contract administrator, your finance team and your board look at the same contract sum, the same certified value and the same anticipated final account, or three different spreadsheets?

Talk to us: info@CMCS-MENA.com

#CMCS #PMWEB #RICS #ERPIntegration #PowerBI #SSRS #ContractAdministration #ProjectControls #CapitalProjects #GCC

About the Author

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Bassam has over four decades of experience providing project management, project controls services and project management information systems to more than two hundred capital projects with a combined value exceeding one hundred billion US dollars. He is the author of four published books on project management digitalisation and has lectured at more than three hundred and fifty international events. He holds a Master's degree in Engineering Administration (Construction Management), with Faculty Commendation, from George Washington University and a Bachelor's degree in Civil Engineering from Kuwait University, with executive education at Harvard Business School and London Business School.

About PMWEB

PMWEB is an enterprise-class, web-based capital construction project management platform trusted by organisations worldwide including Harvard University, the United Nations, and Atlanta Airport. Built on Microsoft .NET technology, PMWEB manages the entire project lifecycle within a single integrated platform, from portfolio planning and cost management through document control, procurement, scheduling, asset management, and business intelligence. With 150+ pre-configured SSRS reports, drag-and-drop dashboard design, multi-currency support, and open REST/SOAP API integration, PMWEB delivers enterprise capability with implementation timelines measured in months, not years.

About CMCS

CMCS (Collaboration, Management and Control Solutions) is the PMWEB Authorised Implementation Partner for the GCC and MENA regions, awarded PMWEB Global Partner of the Year 2025. CMCS markets, implements and supports PMWEB for more than 60 enterprise clients across the UAE, Saudi Arabia, Qatar and Kuwait, helping capital project owners, PMC firms and contractors digitalise their project management processes on a single, governed platform. Contact: info@CMCS-MENA.com