



ipm IPM PROJECT MANAGEMENT 2011

IPM 2011 delivers a 360 real-time view of projects, job tasks and operations – combined with extensive reporting and back end financial information.


Powered by Microsoft Dynamics® to deliver extensive document and contract management features, IPM is also supported by native integration with Microsoft Office® including Outlook®.

CERTIFIED FOR



Microsoft
Dynamics® CRM

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IPM Project Management creates a unique environment for managing the day to day operations of all aspects of your project. Operating through MS Outlook® and seamlessly integrating mail and calendar services, IPM puts project management squarely where project staff spend most of their time. IPM's ability to create, store and track all project communications, RFIs, Drawings and Revisions, Meeting Minutes, Change Requests, Subcontracts and Purchase Orders, combined with the power of Microsoft's xRM platform, provides a simple but sophisticated project management toolset.

With customizable screens, reports and workflows, IPM provides a project management platform that is easy to use and able to be quickly adopted by the project team. Non-accounting staff are not intimidated by IPM as it feels and looks like a project management tool, rather than an extension of a financial system.

IPM's sophisticated automatic filing capabilities take the hassle out of organizing documents and communications according to projects. Any email communication, both incoming and outgoing, can also be flagged to be automatically filed against a particular project, getting the ongoing communication filing process off to a good start.

TAKE CONTROL OF YOUR PROJECT ENVIRONMENT:

- Effectively manage job scheduling, resource allocation and task management to deliver successful projects on time and on budget.
- Understand actual costs on a timely up to date basis when running an integrated system.
- Mitigate risk by always knowing the status of tasks.
- Efficiently schedule and allocate budget, equipment and staff resources throughout the project lifecycle.
- Review project conditions through the IPM Job Progress view.
- View critical dates, completion percentages and subcontractor activities for all jobs in a single screen.

IPM REPORTING

IPM optimizes your team's performance by using Microsoft SQL Server reporting services to improve access to your business data and provide better visibility into your projects. IPM delivers an extensive library of predefined reports that reflect over 20 years of experience in the Construction/Engineering industry. These reports can be further tailored to suite individual requirements.

PRODUCTIVITY GAINS

IPM provides a set of productivity tools for added value. These include personal workflows, automatic to-do notifications, accessibility features, capability to quickly build custom reports, and seamless integration with Microsoft Outlook®.

At IPM Global, we believe that the success of an implementation begins with the end user. Ensuring that the platform provides an interface consistent to what is already used is essential to meeting our goals – and your expectations.

DATA MANAGEMENT

Our database architecture allows users to easily store, manage and access relevant documents needed to track and analyse project performance.

IPM uses the powerful Microsoft SQL Server® database engine, with reporting features that enable key performance indicators to be assessed and reviewed continually throughout the project. Contact and project data can be categorized to ensure that the relationship between jobs and contractors remains clear and visible.

OUTLOOK® ENVIRONMENT

The entire project team will be comfortable using IPM – in fact, they already know how to use it because it is run from inside Microsoft Outlook®.

Integration with Microsoft Outlook® lets users remain within a familiar environment that is both flexible and easy to use. Multicurrency and multilingual capabilities ensure that the solution supports international business, and can be personalized to meet the needs of any office.



CHANGE REQUESTS + CHANGE ORDER + SUBCONTRACT CHANGE ORDER

IPM makes Contract Management easy with better access to project data, quick links to contract information and a streamlined process that optimizes the letting of a contract. By utilizing the Outlook® integration, project managers can create, send and receive Change Requests, Change Orders and Subcontract Change Orders all from the one location. Risk can also be significantly reduced with built in work flow rules preventing common administrative errors associated with contract management.

KEY FEATURES:

- Create, manage and send Change Orders and Change Request documents from within a single environment.
- Easily customize user defined Change Order types and classifications.
- Use search functionality to locate previous email communications with subcontractors, clarifying any discrepancies.
- Recall previous contracts associated with subcontractors to assess their performance.
- Attach internal CRM notes to subcontractor information for future reference.

IPM Change Request: 11-0001-0004 (Changes to Plumbing Contract - Sewer Connection) - Microsoft Dynamics CRM

Microsoft Dynamics CRM

Alexey Cherepanov
IPM

File IPM Change Request Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Preview Create PDF Create E-mail Create Transmittal

Information

General Estimate Notes

Related

Common

Activities Closed Activities Audit History Send To SV Price Requests Transmittals

Processes

Workflows Dialog Sessions

IPM Change Request

11-0001-0004 (Changes to Plumbing Contract - Sewer Conn...)

General

Job * 11-0001 (SW Food Warehouse)

Change Order

Number + 11-0001-0004 Date * 5/05/2011 Status Potential

Description * Changes to Plumbing Contract - Sewer Connection

Contract Item Billing Type Lump Sum

Units Unit of Measure

From Hanson Plumbing & Irrigation

Spec. Section 00600 (Plumbing) Schedule Impact 3 Days

Source Other Source Number

Scope The sewer connection is not as detailed on provided plans. This will result in additional excavation and backfill work.

Status Active

Record detailed information about each Change Request in the one form, from estimates and mark-ups to Subcontract Change Order Price Requests.....



IPM Change Request: 11-0001-0032 (Add double thickness of drywall) - Microsoft Dynamics CRM - Windows Internet Explorer

Microsoft Dynamics CRM

Alexey Cherepanov
IPM

File IPM Change Request Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Preview Create PDF Create E-mail Create Transmittal

Information

General Estimate Notes

Related

Common

- Activities
- Closed Activities
- Audit History
- Send To
- SCO Price Requests
- Transmittals

Processes

- Workflows
- Dialog Sessions

IPM Change Request

11-0001-0032 (Add double thickness of drywall)

IPM Change Requests

Estimate

Import Data

Description	Quantity	Unit of Measure	Unit Price	Price	Unit Cost	Cost
Place and finish	1.0000	Ea	\$3,500.00	\$3,500.00	\$3,500.00	
1/2" Drywall	40.0000	Sh	\$65.00	\$2,600.00	\$65.00	
Supervision	5.0000	Hour	\$120.00	\$600.00	\$120.00	
						\$6,700.00

Markup	Price Base	Price Percent	Price	Order No
Subtotal			\$6,700.00	0
Overhead	\$6,700.00	8.0000	\$536.00	1
Profit	\$6,700.00	5.0000	\$335.00	2
			\$7,571.00	

Status Active

...then use workflows to create Change Orders and Subcontract Change Orders from Change Requests.

IPM Subcontract Change Order: 11-0001-0009 (Change to Electrical) - Microsoft Dynamics CRM - Windows Internet Explorer

Microsoft Dynamics CRM

Alexey Cherepanov
IPM

File IPM Subcontract Change Order Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Preview Create PDF Create E-mail Create Transmittal

Information

General Notes

Related

Common

- Activities
- Closed Activities
- Audit History
- Send To
- Subcontract Items
- Transmittals

Processes

- Workflows
- Dialog Sessions

IPM Subcontract Change Order

11-0001-0009 (Change to Electrical)

IPM Subcontract Change ...

General

Job * 11-0001 (SW Food Warehouses)

Subcontract * S11-0001-0002 (Electrical Subcontract)

Vendor Adams Electric

Number + 11-0001-0009 Date * 26/08/2011

Description * Change to Electrical

From

Status Not issued Schedule Impact

Signed Date Revised Completion Date

Misc. Text

Scope Change to the electrical fitout due to client selections
Sodium lights to be replaced by new Halogen lighting

ERP System ipm Cronus Australia Pty Ltd Release to Accounting

Totals

Status Active

Track a potential Change Order from inception



PROGRESS BILLING

Due to the complexity of Progress Billing most companies have in the past used spreadsheets to manage this process. IPM changes this by making the progress billing process simple and time efficient. The IPM Job Progress View is a powerful scheduling tool that displays scheduling data, budget information and links to assigned contractors based on existing data.

IPM Progress Bill: 11-0001-0002 - Microsoft Dynamics CRM

Information: General, Details, Notes

Related: Common (Activities, Closed Activities, Audit History, Send To, Transmittals), Processes (Workflows, Dialog Sessions)

Contract Item	Schedule Item	Billing Type	Original Contract Amount	Revised Contract Amount	Work Previously Completed	Percentage Complete	Work Completed	Materials Previously Stored
11-0001-001 (General Condition		Progress Billing	\$152,400.00	\$152,400.00	\$38,100.00	40.000%	\$22,860.00	\$
11-0001-002 (Sitework)		Progress Billing	\$405,600.00	\$405,600.00	\$243,360.00	70.000%	\$40,560.00	\$
11-0001-003 (Concrete)		Progress Billing	\$380,400.00	\$380,400.00	\$38,040.00	25.000%	\$57,060.00	\$
11-0001-004 (Metals)		Progress Billing	\$248,000.00	\$248,000.00	\$60,000.00	30.000%	\$14,400.00	\$
11-0001-005 (Wood and Plasti		Progress Billing	\$162,800.00	\$162,800.00	\$48,840.00	50.000%	\$32,560.00	\$
11-0001-006 (Thermal Moistu		Progress Billing	\$136,700.00	\$136,700.00	\$60,000.00	43.890%	\$0.00	\$
11-0001-007 (Doors and Wind		Progress Billing	\$16,800.00	\$16,800.00	\$0.00	20.000%	\$3,360.00	\$
11-0001-008 (Finishes)		Progress Billing	\$152,300.00	\$152,300.00	\$0.00	0%	\$0.00	\$
11-0001-009 (Specialties)		Progress Billing	\$64,900.00	\$64,900.00	\$0.00	0%	\$0.00	\$
			\$2,489,500.00	\$2,725,326.50	\$532,495.00		\$182,300.00	\$

As well as displaying the data in an easy to follow visual format, the user can add, change and manage jobs from the display screen



PURCHASE ORDERS

Purchase Orders creation and maintenance can be effectively carried out in the IPM Purchase Order system. Orders can be created for purchases relating to an existing estimate from the budget or a Change Request, or manually entered by choosing from the product list. Workflows can be created to automate the approval of Purchase Orders. You can also deliver Purchase Orders either by direct e-mail or by using the standard IPM transmittal functionality.

IPM Purchase Order: P11-0018-0001 (Materials)

Information: General, Invoices Info, Notes

Related: Common (Activities, Closed Activities, Audit History, Send To, PO Items, Transmittals), Processes (Workflows, Dialog Sessions)

Job: 11-0018 (Waile Wells)

Number: P11-0018-0001 Date: 16/06/2011 Status: Approved

Vendor: Adams Electric

Description: Materials

Delivery Address:

Description	Job Task	Cost Type	Quantity	Rate	Amount	Created On	
2500 PSI Concrete	33-11000 (Water F	M (Material)	0.5000	\$140.00	\$70.00	16/06/2011 5:57 AM	Ale
C.I. Slide Valve ...	33-11000 (Water F	M (Material)	1.0000	\$110.00	\$110.00	16/06/2011 5:57 AM	Ale
12" DIP - Class 52	33-11000 (Water F	M (Material)	36.0000	\$16.67	\$600.00	16/06/2011 5:57 AM	Ale

1 - 3 of 3 (0 selected) Page 1

ERP System: Cronus Australia Pty Ltd Release to Accounting: ☐

Total Amount: 780.00

If integrated through to an ERP system, Purchase Orders are sent through to the accounting system once approved



REQUEST FOR QUOTES (RFQ)

Working within Microsoft Outlook®, the RFQ process is made much simpler with the ability to easily create, store and send a personalized RFQ to each vendor. Without leaving the RFQ screen, you can then evaluate each vendor according to desired criteria and IPM will generate a score to assist with the selection process.

Once quotes are received from vendors, you can update the RFQ details and with the click of a mouse create a Subcontract, Purchase Order or Subcontract Change Order for the winning vendor from within the RFQ screen. Winning bid information can also be automatically updated to the job budget.

IPM RFQ: 11-0001-0001 (Electrical Subcontract) - Microsoft Dynamics CRM

Microsoft Dynamics CRM | Alexey Cherepanov | IPM

File | IPM RFQ | Add | Customize

Save | Save & Close | Deactivate | Assign | Copy a Link | E-mail a Link | Run Workflow | Start Dialog | Run Report | Preview | Create PDF | Send Request | Create Transmittal

Information

- General
- RFQ Details
- RFQ Tender Evaluation
- Notes

Related

- Common
 - Activities
 - Closed Activities
 - Documents
 - Audit History
 - Drawings
 - Request Send To
 - Transmittals
- Processes
 - Workflows
 - Dialog Sessions

IPM RFQ 11-0001-0001 (Electrical Subcontract)

Pre-fill from Estimates | Update Bid

Status	Description	Estimate Quantity	Unit of Measure	Estimate Unit Cost	Estimate Cost	Adams Electric	Barth Electric	Beek BV
Selected	Electrical Service	3.0000	Month	\$65.00	\$195.00	\$350.00		
Selected	Electrical Hookup	1.0000	Each	\$400.00	\$400.00	\$900.00	\$850.00	
					\$595.00	\$1,250.00	\$850.00	

Create Subcontract | Create Subcontract Variation | Create Purchase Order

Delete Related Document Items | Delete Related Documents

Status: Active

The overall scope of the RFQ or Trade Package is detailed on the RFQ Header. The RFQ can be linked to a spec section for reporting

IPM RFQ: 11-0001-0011 (Plumbing and Drainage) - Microsoft Dynamics CRM - Windows Internet Explorer

Microsoft Dynamics CRM | Alexey Cherepanov | IPM

File | IPM RFQ | Add | Customize

Save | Save & Close | Deactivate | Assign | Copy a Link | E-mail a Link | Run Workflow | Start Dialog | Run Report | Preview | Create PDF | Send Request | Create Transmittal

Information

- General
- RFQ Details
- RFQ Tender Evaluation
- Notes

Related

- Common
 - Activities
 - Closed Activities
 - Audit History
 - Drawings

IPM RFQ 11-0001-0011 (Plumbing and Drainage)

RFQ Tender Evaluation

RFQ Evaluation Criteria	Weighting	ALLState University	Alpha Insulation	Beaverton; City of
Proximity to Project	10.00	8.00	5.00	3.00
Subcontractor/ Vendor Performance	10.00	5.00	7.00	4.00
	0.00			

Use the tender evaluation function to assign important information regarding the quality of work required, cost weighting and required completion dates



SUBCONTRACTS

Effective control of subcontracts is crucial to the management of many projects. IPM provides effective subcontract control with facilities to record subcontracts and attach appropriate terms and conditions and other supporting documentation. IPM's Transmittals allow subcontracts to be easily and efficiently delivered to your business partners and any Subcontract Change Orders can be recorded in IPM to track changes as they occur.

Manage or amend Subcontract start and end dates through the interactive IPM Subcontract Progress schedule. Workflows can be created to automate the approval of Subcontracts and Subcontract Change Orders.

IPM Subcontract: S11-0001-0003 (Painting) - Microsoft Dynamics CRM

Microsoft Dynamics CRM

Alexey Cherepanov
IPM

File IPM Subcontract Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Preview Create PDF Create E-mail Create Transmittal

Information

- General
- Schedule
- Claims Info
- Notes

Related

- Common
 - Activities
 - Closed Activities
 - Audit History
 - Send To
 - Subcontract Items
 - Subcontract Inclusions
 - Subcontract Exclusions
 - SV Price Requests
 - Transmittals
- Processes
 - Workflows
 - Dialog Sessions

IPM Subcontract S11-0001-0003 (Painting)

General

Job * 11-0001 (SW Food Warehouse)

Number * S11-0001-0003 Date * 5/05/2011 Status Entered

Vendor * Diamond Vogel Paint

Description * Painting

Scope of Work Exterior Painting Contract

Retention Percent Release to Accounting

ERP System Cronus Australia Pty Ltd

Totals

Amount Original	2,800.00	Amount Approved Changes	0.00
Amount Pending	0.00	Amount Revised	2,800.00

Manage Subcontracts centrally and send through to accounting once approved

IPM RFQ: 11-0001-0001 (Electrical Subcontract) - Microsoft Dynamics CRM

Microsoft Dynamics CRM

Alexey Cherepanov
IPM

File IPM RFQ Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Preview Create PDF Send Request Create Transmittal

Information

- General
- RFQ Details
- RFQ Tender Evaluation
- Notes

Related

- Common
 - Activities
 - Closed Activities
 - Documents
 - Audit History
 - Drawings
 - Request Send To
 - Transmittals
- Processes
 - Workflows
 - Dialog Sessions

IPM RFQ 11-0001-0001 (Electrical Subcontract)

RFQ Details

Pre-fill from Estimates Update Bid

Status	Description	Estimate Quantity	Unit of Measure	Estimate Unit Cost	Estimate Cost	Adams Electric	Barth Electric	Beek BV
Selected	Electrical Service	3.0000	Month	\$65.00	\$195.00	\$350.00		
Selected	Electrical Hookup	1.0000	Each	\$400.00	\$400.00	\$900.00	\$850.00	
					\$595.00	\$1,250.00	\$850.00	

Create Subcontract Create Subcontract Variation Create Purchase Order Delete Related Document Items Delete Related Documents

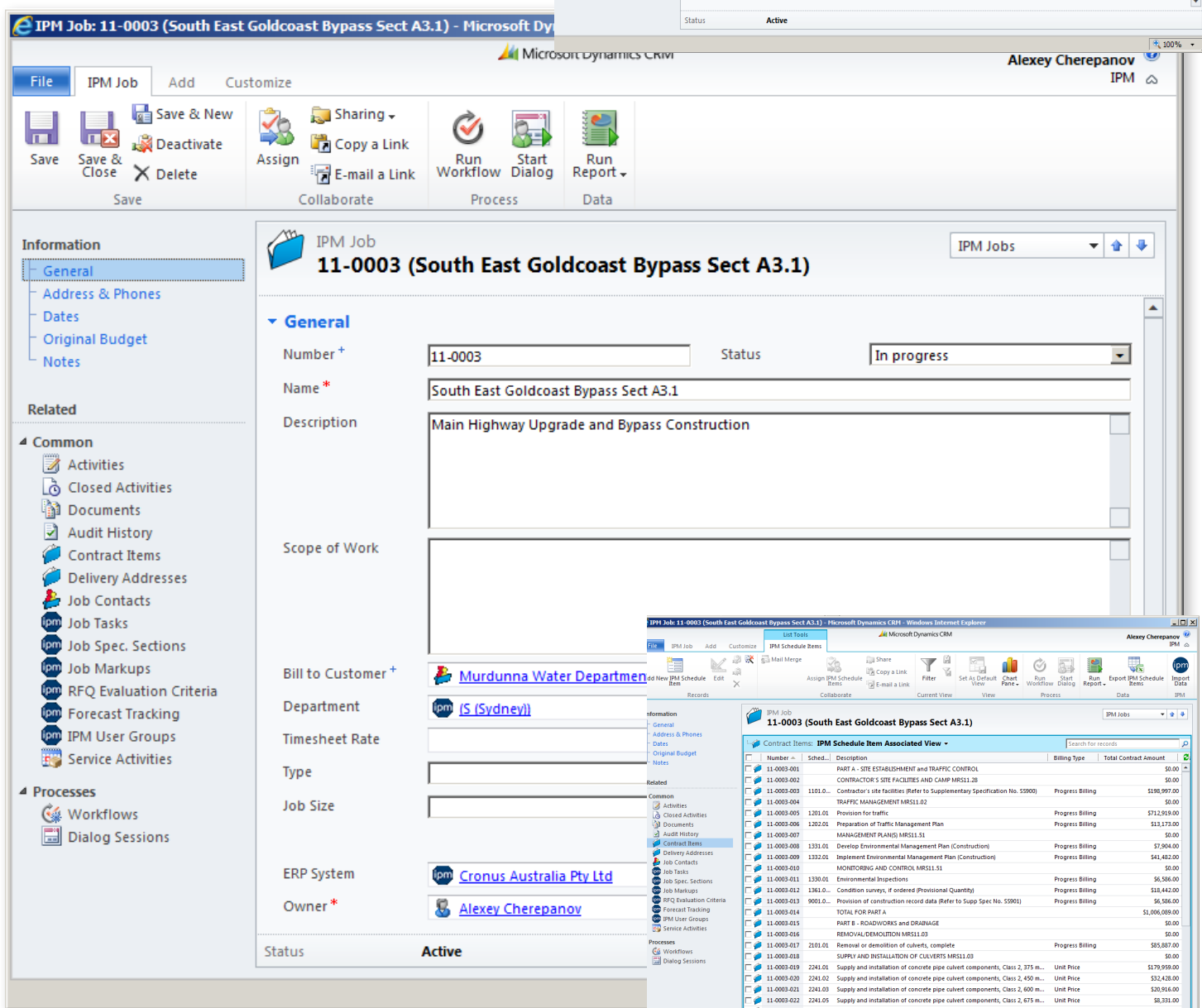
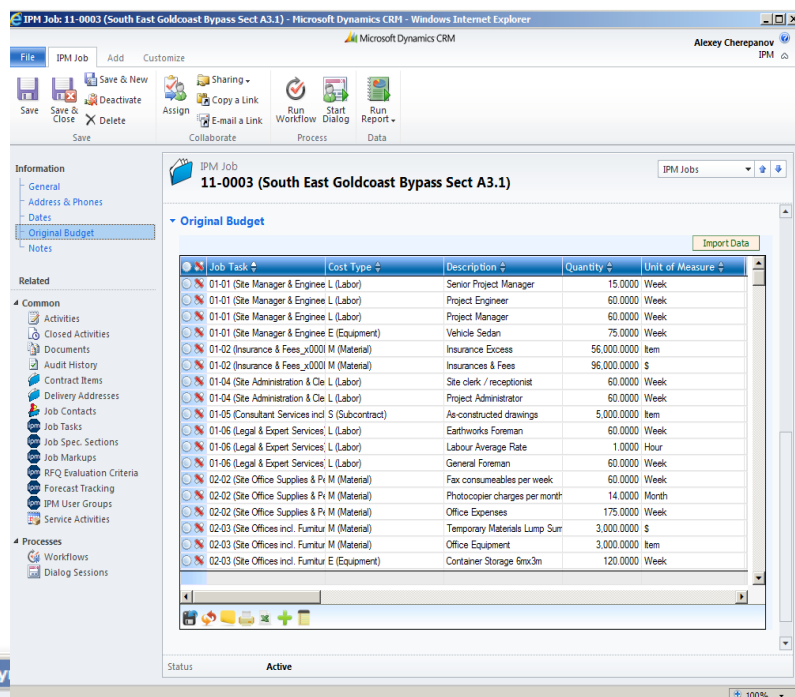
Columns added for each selected vendor and subcontractor allows the recording of the submitted bids and the interactive selection and creation of orders using the submitted prices



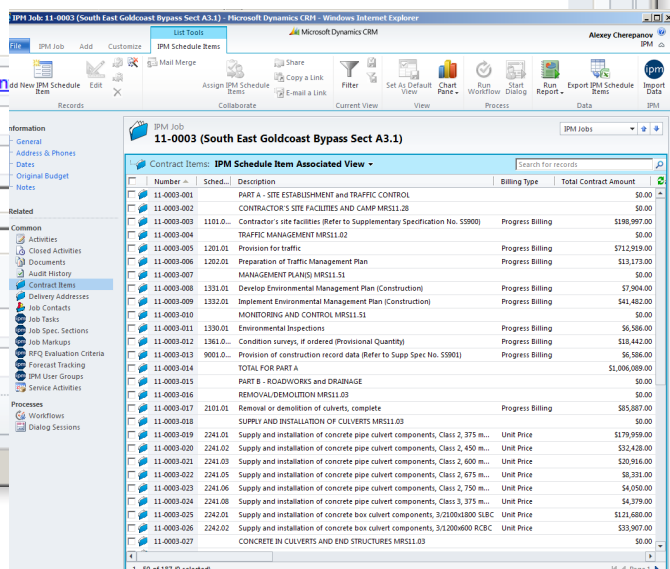
The Jobs setup screen allows the creation of the parameters for the project. From the basic address and contact information to details about insurances and bank guarantees can all be maintained in this area.

The original budget for the Job is recorded here either manually or imported from an Excel spread sheet. The approach of importing from an Excel spread sheet uses a unique process that allows IPM to upload easily from most estimating applications.

Contracts or Price Schedules are also maintained in this area and like the original budget, these can be imported from Excel spread sheets Other import components such as Job Contacts, Change Order Mark-ups and the evaluation criteria for RFQs are all accessed from the Job Setup screen



Contracts or Price Schedules are also maintained in this area and like the original budget, these can be imported from excel spread sheets



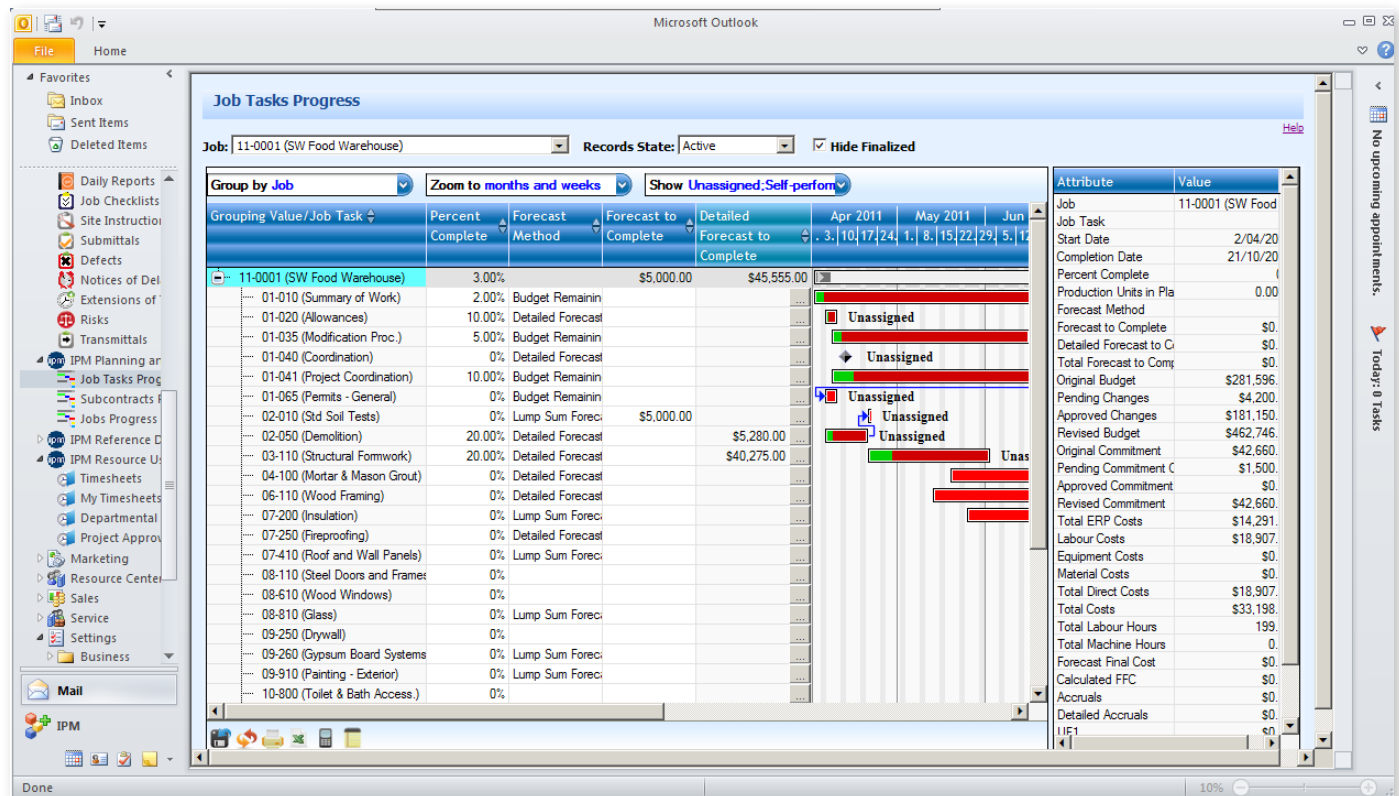


JOB TASKS PROGRESS

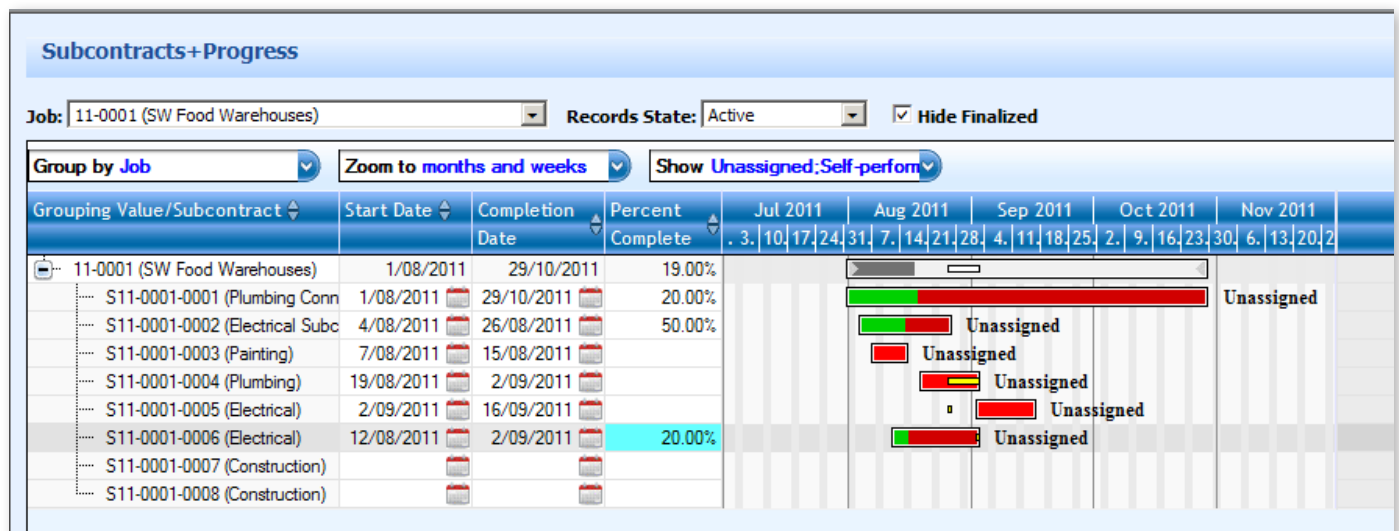
The Job Tasks Progress view is a powerful planning tool that creates a dynamic visual representation of every job within a project. Using an interactive Gantt chart, the Job Tasks Progress displays scheduling data, budget and costs information and detailed forecasts.

Job Progress view features:

- Manage and display the scheduling data of every job in a Gantt chart calendar.
- View and edit start and finish dates for all tasks.
- Display real time information to track job progress against estimates.
- View budget allocation for each job against forecasted cost-to-complete figures.
- View monthly cash flow reports.
- Generate a chart to track all subcontracts.



Jobs are graphically presented in a number of different ways. See actual work performed displayed in an easy to digest graphical format





TIMESHEETS

Depending on the type of projects being managed in IPM, there may be a need to record resource usage. Resources can be people classified as employees, materials or equipment and IPM Timesheet functionality facilitates the recording of resource hours by resource and day of the week. Timesheets can be sorted by either resource or job and can be copied from week to week. Users can also complete their own individual Timesheets in the My Timesheets section, which can then be grouped together with other Timesheet entries to create Timesheet batches for the job.

Rates tables can be configured to associate a cost with the resource and these rates can vary from project to project. The rate table associated with a project is nominated on the project record in IPM job setup. The Timesheet information has up to two levels of approval to allow project managers and accounting staff to separately approve the entries and Timesheets can be exported to payroll systems once approved.

IPM Timesheet Batch: 0003 - Microsoft Dynamics CRM - Windows Internet Explorer

Microsoft Dynamics CRM

Alexey Cherepanov IPM

File IPM Timesheet Batch Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Information

- General
- Week 1
- Notes

Related

- Common
 - Activities
 - Closed Activities
 - Audit History
- Processes
 - Workflows
 - Dialog Sessions

IPM Timesheet Batch 0003

IPM Timesheet Batches

Week 1

Job No	Job Task	Resource	Pay Type	Mon Hrs	Tue Hrs	Wed Hrs	Thu Hrs
11-0001 (SW Food Warehouse 04-100 (Mortar & Mason Gr	PR109 (Timothy Sneath)	Hourly	6.00	7.00	8.00		
11-0001 (SW Food Warehouse 01-041 (Project Coordinatic	PR101 (Rob Johnson)	Hourly	9.00	8.00	8.00		
11-0001 (SW Food Warehouse 02-050 (Demolition)	PR106 (Mary A. Dempsey)	Hourly	8.00	9.00	8.00		
11-0001 (SW Food Warehouse 03-110 (Structural Formwor	PR104 (Linda Martin)	Hourly	8.00	9.00	3.00		
11-0001 (SW Food Warehouse 02-050 (Demolition)	PR102 (Peters, Jerry E)	Hourly	8.00	7.00	7.00		
11-0001 (SW Food Warehouse 03-110 (Structural Formwor	PR105 (Mark Hanson)	Hourly	7.00	8.00	8.00		
11-0022 (Tailings Dam)	02-010 (Std Soil Tests)	PR101 (Rob Johnson)	Hourly	0.00	0.00	0.00	

Create a Timesheet batch for multiple employees and approve them using a two-step approval process for added security

IPM Timesheet Batch: 0003 - Microsoft Dynamics CRM - Windows Internet Explorer

Microsoft Dynamics CRM

Alexey Cherepanov IPM

File IPM Timesheet Batch Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Import Site Diaries Import Data

Information

- General
- Week 1
- Notes

Related

- Common
 - Activities
 - Closed Activities
 - Audit History
- Processes
 - Workflows
 - Dialog Sessions

IPM Timesheet Batch 0003

IPM Timesheet Batches

General

Batch Number * 0003

Number of Weeks * 1

Batch Status * Entered

ERP System ipm Cronus Australia Pty Ltd

Period Begin Date * 5/15/2011

Period End Date * 5/21/2011

Release to Accounting ☐

Defaults

Expense 1

Expense 2

Owner * Alexey Cherepanov

Expense 3

Expense 4

Week 1

Job No	Job Task	Resource	Pay Type	Mon Hrs	Tue Hrs	Wed Hrs
11-0001 (SW Food Warehouse 04-100 (Mortar & Mason Gr	PR109 (Timothy Sneath)	Hourly	6.00	7.00	8.00	

Capture all time and resources in the one place



SUBMITTALS

IPM ensures that every Submittal sent and every response received is accountable and accessible from within the Submittal record. IPM automatically tracks incomplete Submittals through a user-definable status system.

Once a Submittal has been recorded, it can be viewed and retrieved instantly, along with the associated email communications. Search functions can also be used to search for all related communications. Both individual and system-wide workflows can be created by authorized users to facilitate follow-up processes.

The screenshot displays the 'IPM Submittal' form within the Microsoft Dynamics CRM interface. The form is titled 'IPM Submittal: 11-0001-0001 (Light Fittings)'. The left sidebar shows the 'Information' tab with 'General' and 'Notes' sub-tabs. The main form area is divided into sections: 'General', 'Required dates', and 'Actual dates'. The 'General' section includes fields for Job (11-0001 (SW Food Warehouse)), Spec. Section (00010 (Pre-Bid information)), Number (11-0001-0001), Description (Light Fittings), Received From (Joe Zagami), and Returned By (A-1 Electric Company). The 'Required dates' section includes Start (17/06/2011) and On-site (29/06/2011). The 'Actual dates' section includes Start and On-site fields. The 'Task' field is empty, and the 'Type' is set to 'Unassigned'. The 'Owner' is Alexey Cherepanov. The 'Status' is 'Active'. The top ribbon shows various actions like Save, Assign, Run Workflow, Start Dialog, Run Report, Preview, Create PDF, Send Request, Forward Answer, and Create Transmittal.

Field	Value
Job *	11-0001 (SW Food Warehouse)
Spec. Section *	00010 (Pre-Bid information)
Urgency	Normal
Number +	11-0001-0001
Number of Items	20
Description *	Light Fittings
Received From	Joe Zagami
Returned By	A-1 Electric Company
Required dates Start	17/06/2011
Required dates On-site	29/06/2011
Actual dates Start	
Actual dates On-site	
Task	
Copies To Send	
Copies To Forward	
Type	Unassigned
Owner *	Alexey Cherepanov
Status	Active

In IPM you can create, attach, email and track submittals all from the one screen



REQUEST FOR INFORMATION (RFI)

Effective RFI management is essential to meeting budgets and scheduling targets – as well as ensuring the project team has access to accurate, up-to-the-minute information. IPM RFI streamlines and simplifies the RFI process by using native Microsoft Office® integration to create, view, and send RFIs from a single screen.

Automatic filing ensures that the RFI and all related email communications are stored in document history for easy viewing and retrieval. Personal and system-wide workflows can easily be created to facilitate follow-up processes for each RFI document as it moves through its lifecycle.

IPM RFI: 11-0001-0002 (Additional copy of CAD files needed) - Microsoft Dynamics CRM

Microsoft Dynamics CRM

Alexey Cherepanov
IPM

File IPM RFI Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Preview Create PDF Send Request Forward Answer Create Transmittal

Information

- General
- Additional
- Notes

Related

Common

- Activities
- Closed Activities
- Documents
- Audit History
- Drawings
- Request Send To
- Answer Forward To
- Transmittals

Processes

- Workflows
- Dialog Sessions

IPM RFI 11-0001-0002 (Additional copy of CAD files needed)

General

Job * 11-0001 (SW Food Warehouse)

Number + 11-0001-0002 Date * 16/05/2011

Subject * Additional copy of CAD files needed

Question * Please send one copy of the electrical CAD files. We need to provide a set to A-1 Electric.

Spec. Section ipm 01000 (Electrical) Urgency Normal

Received From

Required Date 20/05/2011 Received No

Issue

Owner * Alexey Cherepanov

Additional

Status Active

Preview Create PDF Send Request Forward Answer Create Transmittal

IPM

IPM RFIs

Additional copy of CAD files needed)

IPM's RFI not only records the exchange of information, IPM's integration with Outlook facilitates this exchange as part of the process thereby making the adoption of IPM as a central management tool compelling.

Create, view and email RFI's through to contacts all from the one screen



TRANSMITTALS

IPM takes Transmittals into today's business environment with an increased focus on customization and professional presentation. Every data field within the Transmittal form can be personalized to suit the specific needs and requirements of any business.

IPM also uses the latest Microsoft graphical standards to ensure that every Transmittal appears professional and is familiar to Microsoft Office® users. The Transmittal log automatically stores every Transmittal created for the Job to give you quick information retrieval in the event of a dispute or claim. As with Submittals, both individual and system-wide workflows can be created by authorized users to facilitate follow-up processes.

IPM Transmittal: 11-0001-0003 (RFI 11-0001-0002 (Additional copy of CAD files needed)) - Micros - Windows Internet Explorer

Microsoft Dynamics CRM

Alexey Cherepanov
IPM

File IPM Transmittal Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Preview Create PDF Create E-mail

Information

- General
- Additional
- Notes

Related

- Common
 - Activities
 - Closed Activities
 - Audit History
 - Send To
 - Items
- Processes
 - Workflows
 - Dialog Sessions

IPM Transmittal

11-0001-0003 (RFI 11-0001-0002 (Additional copy of C...

General

Job * 11-0001 (SW Food Warehouses)

Number + 11-0001-0003 Date * 5/25/2011

Subject * RFI 11-0001-0002 (Additional copy of CAD files needed)

WE ARE SENDING YOU:

Attached	<input checked="" type="checkbox"/>	Samples	<input type="checkbox"/>
Shop Drawings	<input type="checkbox"/>	Prints	<input type="checkbox"/>
Copy of Letter	<input type="checkbox"/>	Change Order	<input type="checkbox"/>
Plans	<input type="checkbox"/>	Specifications	<input type="checkbox"/>
Other	<input type="checkbox"/>		
Under Separate Cover via	<input type="checkbox"/>	None	

Remarks

From

Owner * Alexey Cherepanov

Urgency Normal

Additional

Notes

Status Active

100%

Transmittals are optional however if used then all communications will be tracked sequentially by job throughout IPM



MEETING MINUTES

IPM Meeting Minutes lets you record, distribute, and manage meeting items and action items quickly and easily. Set a reminder to appear in all attendees' Outlook® calendar and once meeting items are entered and attendees selected, a single mouse click can generate a PDF of the minutes that can be sent to all attendees via Outlook®.

The PDF is automatically stored in document history, letting you search and retrieve previous meeting minutes whenever they are needed. IPM also allows the creation of a series of Meeting Minutes, which automatically updates items that are resolved and transfers outstanding items to a new meeting.

Number	Responsible	Subject	Originated From	Open Date	Due Date	Status
11-0001-0003-001	Joanne Wise	Inductions	11-0001-0001-002 (Indi	17/06/2011	15/06/2011	Not Started
11-0001-0003-002	Joanne Wise	Site Access issues	11-0001-0001-001 (Site	25/05/2011	2/06/2011	Not Started
11-0001-0003-003	Ace Earthmoving	Meeting Attendance	11-0001-0002-003 (Mee	24/06/2011	30/06/2011	Not Started
11-0001-0003-004	George's Excavation	Problem with earthworks		29/06/2011	30/06/2011	Not Started
11-0001-0003-005	Hanson Plumbing & In	Subsoil structure identified as pr...		30/06/2011	8/07/2011	Not Started
11-0001-0003-006	Joe Zagami	Problem with lighting effecting loc...		30/06/2011	8/07/2011	Not Started
11-0001-0003-007	Joe Zagami	Issues with traffic congestion on E...		2/07/2011	8/07/2011	Not Started

IPM keeps meeting items from getting overlooked & allows reminder follow-up automation

Number	Responsible	Subject
11-0001-0003-001	Joanne Wise	Inductions
11-0001-0003-002	Joanne Wise	Site Access
11-0001-0003-003	Ace Earthmoving	Meeting At
11-0001-0003-004	George's Excavation	Problem wi
11-0001-0003-005	Hanson Plumbing & In	Subsoil str
11-0001-0003-006	Joe Zagami	Problem
11-0001-0003-007	Joe Zagami	Issues v

Keep track of Meeting Minute items that haven't been completed and copy them over to the next meeting.



DRAWING REGISTER

The IPM drawing register lets you attach, edit and send multiple drawings and revisions from a single screen. Integration with Microsoft Outlook® means that you can manage the drawing register without having to change applications – or even change screens. IPM has a built-in document tracking system that lets you view the status, history and version of every drawing.

Users can view current and superseded versions of each drawing, as well as the drawing register communication log, which displays when each drawing version was received. Individual and system-wide workflows can be created by users to facilitate follow-up processes as each drawing moves through its lifecycle.

IPM Drawing: 11-0001-A-0002 Revision 2 (Building Dimension Plan) - Microsoft Dynamics CRM

Microsoft Dynamics CRM

Alexey Cherepanov IPM

File IPM Drawing Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Preview Create PDF Create E-mail Create Transmittal

Information

- General
- Additional
- Notes

Related

- Common
 - Activities
 - Closed Activities
 - Documents
 - Audit History
 - Send To
 - Transmittals
- Processes
 - Workflows
 - Dialog Sessions

IPM Drawing 11-0001-A-0002 Revision 2 (Building Dimension Plan)

IPM Drawings

General

Current ☒ Size A

Job * 11-0001 (SW Food Warehouse)

Discipline * ipm A (Architectural)

Title * Building Dimension Plan

Number + 11-0001-A-0002 Date * 16/06/2011

Revision 2 Sketch

Comments

Status N/A Status Date 16/06/2011

Approved ☒ No ☐ Yes Approved Date 13/07/2011

Owner * Alexey Cherepanov

Additional

Source Type None

Status Active

IPM maintains a central repository of all drawings (& revisions) by project. If you need collaboration these can be accessed via Microsoft SharePoint®



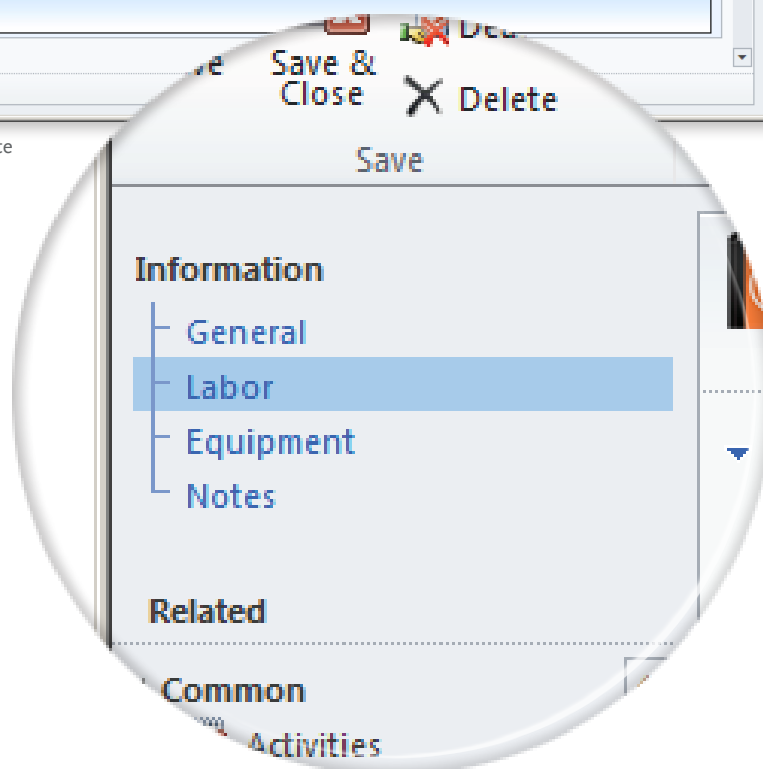
SITE DIARY (FIELD REPORTS)

Entering field reports and daily logs has never been quicker or simpler than with IPM Site Diary. By using the latest Microsoft Dynamics® CRM offline client configuration, users can access, review and submit field reports and daily logs on site without the need for a connected workstation. The offline client allows users to view record and send information to the IPM Site Diary instantly, once communication with the server is established.

When the Site Diary has been submitted, users can check staff attendance, weather conditions, job progress and any other site information that has been recorded. IPM ensures that every site diary entry is automatically filed and can be recalled quickly as needed. Once Site Diaries have been finalized, all job details are automatically updated, including real time information in Job Task Scheduling.

Resource	Task 1/Hours	Task 2/Hours	Task 3/Hours	Task 4/Hours
	03-110 (Structural Formwork)	04-100 (Mortar & Mason Grout)	06-110 (Wood Framing)	07-410 (Roof and Wall Panels)
PR104 (Linda Martin)	0.00	7.00	0.00	0.00
PR109 (Timothy Sneath)	0.00	0.00	0.00	6.00
PR102 (Peters, Jerry E)	5.00	0.00	3.00	0.00
PR107 (Johnson, Steve M)	8.00	0.00	0.00	0.00

Use the site diaries online or in disconnected mode and simply update when you are back in the office



Record data on staff, equipment, job progress and field reports to ensure projects are properly monitored and recorded.



RISK REGISTER

All projects carry some degree of risk and the IPM Risk register provides a convenient place to document and update the details of these risks. The status of the risk can then be managed centrally. Should a risk lead to some other change in the project, workflows can be created to generate RFIs, Change Requests or any other IPM document from any specific risk.

IPM Risk: 11-0001-000001 - Microsoft Dynamics CRM - Windows Internet Explorer

Microsoft Dynamics CRM

Alexey Cherepanov
IPM

File IPM Risk Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Information

- General
- Notes

Related

- Common
 - Activities
 - Closed Activities
 - Audit History
- Processes
 - Workflows
 - Dialog Sessions

IPM Risk 11-0001-000001

General

Job * 11-0001 (SW Food Warehouses)

Number + 11-0001-000001

Subject * Un-determined reason for damp areas in the main concourse.

Description Un-determined reason for damp areas in the main concourse.

Probability % 20 Impact Low

Detectability Low Importance Medium

Category

Trigger Event/Indicator Pooling of water. Water to be tested to determine source

Risk Response and Description Revision of Drainage plans

Contingency Plan Additional 2" Gravel layer to be placed under slab and foundations.

Owner

Status Open

Created On 6/17/2011 3:00 PM Date to Review 9/1/2011

Status Active

Mitigate risk by recording and monitoring these as they are identified.



ISSUES REGISTER

As projects are executed issues always arise from a variety of sources. The IPM issues register provides a centralized system for recording issues and allows other documents such as Change Requests and RFIs to be generated from a particular issue using standard Microsoft Dynamics® CRM workflows.

Microsoft Outlook

File Home

Issues

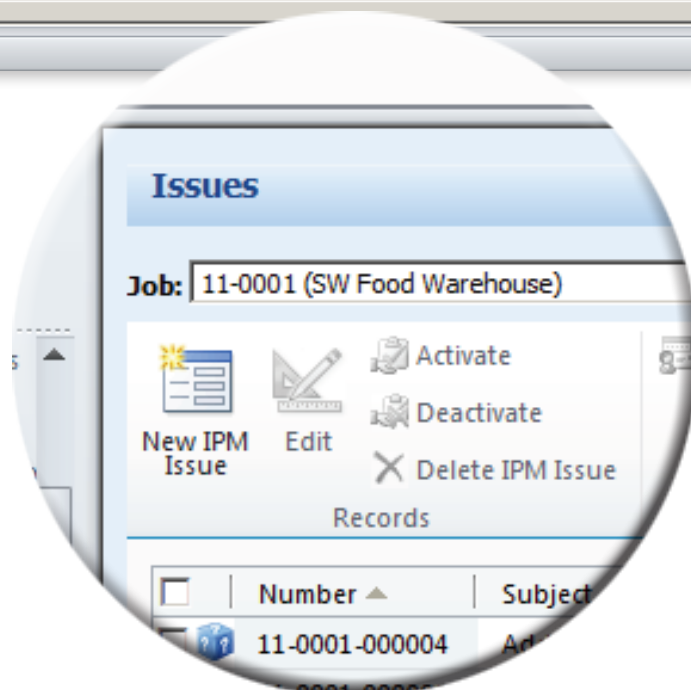
Job: 11-0001 (SW Food Warehouse) Records State: Active Hide Finalized

Records

	Number	Subject	Finalized	Status	Description
<input type="checkbox"/>	11-0001-000004	Additional city sidewalks with curb and gutter	No	Open	Additional city sid
<input type="checkbox"/>	11-0001-000005	Install additional Stone to add sills	No	Open	Install additional S
<input type="checkbox"/>	11-0001-000008	Based on conversation with Jack he may want to change	No	Open	Based on conversa
<input type="checkbox"/>	11-0001-000009	Furnish and install site electrical conduit	No	Open	Furnish and instal
<input type="checkbox"/>	11-0001-000013	Client requested an upgrade to the network	No	Open	Client requested a
<input type="checkbox"/>	11-0001-000014	An incorrect mix has been used in the pour	No	Open	An incorrect mix h
<input type="checkbox"/>	11-0001-000015	Add double thickness of drywall	No	Open	Add double thickn
<input type="checkbox"/>	11-0001-000016	Add bicycle enclosure off back entrance way	No	Open	Add bicycle enclos
<input type="checkbox"/>	11-0001-000017	Problem with site access for rubbish collection	No	Open	Problem with site
<input type="checkbox"/>	11-0001-000018	Problem with installation.	No	Open	Problem with insta

1 - 10 of 10 (0 selected)

Issues are tracked and centrally managed



Filter your issues by Job title to easily view the items that need urgent attention



DEFECTS

Identifying and correcting defects is crucial to ensure jobs are completed to a satisfactory level. With IPM Defects, you can create and store details of any defects that arise on a job, and assign them to a contact. Workflows can also be created to manage the resolution process.

File IPM Defect Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Preview Create PDF Create E-mail Create Transmittal

Information

General Notes

Related

Common

Activities Closed Activities Audit History Send To Transmittals

Processes

Workflows Dialog Sessions

IPM Defect 11-0001-0002 (Incorrect Termination of Electrical Conduit)

General

Job * 11-0001 (SW Food Warehouse)

Number + 11-0001-0002 Date Identified * 17/06/2011

Subject * Incorrect Termination of Electrical Conduit

Description Incorrect Termination of Electrical Conduit. The electrician obviously did not have the correct conduit fittings when finishing off on the main junction box. The fittings he has used, although safe as not to specification or accepted practice.

Location Main Junction Box

Status * Logged Related Subcontract S11-0001-0002 (Electrical Subcontract)

Assigned to Referred to

Target Resolution Date 15/07/2011 Date Closed

Ensure that defects aren't forgotten and are fixed to the standard that is expected within each job using IPM Defects



JOB CHECKLISTS

Ensuring every task on your job is accounted for and gets done is now simpler with the Job Checklists function. It provides you with a convenient area to create and add checklists to your job, and assign each item on the checklist to a contact or user for completion. Check off each item once completed to ensure nothing gets missed, and both individual and system-wide workflows can be created to assist with the follow up process.

IPM Job Checklist: 001 - Project Startup Checklist - Microsoft Dynamics CRM

Microsoft Dynamics CRM Alexey Cherepanov IPM

File IPM Job Checklist Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Information

Checklist Items General Notes

Related

Common

Activities Closed Activities Audit History

Processes

Workflows Dialog Sessions

IPM Job Checklist 001 - Project Startup Checklist

Checklist Items

Number	Description	Person Responsible	Required Date	Completed	Con
001	Induction Register Created	A-1 Electric Company		<input checked="" type="checkbox"/>	
002	Supervisors Advised of Project Safety Practice	Candoxy Nederland BV		<input checked="" type="checkbox"/>	
003	Certifications for Project Signed Off			<input type="checkbox"/>	
004	Council Permits for Project Sited and Logged			<input type="checkbox"/>	

Owner * Alexey Cherepanov

Job Checklists ensure the completion of jobs can be easily viewed and ensure nothing is forgotten



SITE INSTRUCTIONS

On the worksite, real-time site instructions help ensure projects are completed on time, on budget, and to specification. IPM includes a Site Instruction tool that allows users to instantly send instructions to the worksite via a web browser or through Microsoft Outlook®. Once entered into the system, site instructions are delivered as PDF files, and are also stored in document history for easy access.

IPM Site Instruction: 11-0001-0001 (Changes to main sewer line) - Microsoft Dynamics CRM

Microsoft Dynamics CRM

Alexey Cherepanov
IPM

File IPM Site Instruction Add Customize

Save Save & Close Deactivate Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Preview Create PDF Create E-mail

Information

- General
- Additional
- Notes

Related

- Common
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 - Closed Activities
 - Audit History
 - Send To
 - Items
- Processes
 - Workflows
 - Dialog Sessions

IPM Site Instruction

11-0001-0001 (Changes to main sewer line)

IPM Site Instructions

General

Job * 11-0001 (SW Food Warehouse)

Number + 11-0001-0001 Date * 24/05/2011

Instruction * Changes to main sewer line

Details

Please proceed with the changes discussed to the main sewer line to comply with councils request.

From Hanson Plumbing & Irriga

Urgency Normal

Attached ☐

Samples ☐

Shop Drawings ☐

Prints ☐

Copy of Letter ☐

Change Order ☐

Plans ☐

Specifications ☐

Other ☐

Under Separate Cover via ☐

Issue

Status Active

Site Instructions are easy to create and can be distributed to the people who need them



NOTICES OF DELAY AND EXTENSIONS OF TIME

Ensure any potential changes to your schedule are well documented and if necessary, requests submitted for extensions. Working within Outlook®, you can create, store and send any necessary Notices of Delay or Extensions of Time without leaving IPM. Create individual and system-wide workflows to assist with the follow up and approval processes and ensure all necessary schedules are updated.

IPM Notice of Delay: 11-0001-0001 - Microsoft Dynamics CRM

Microsoft Dynamics CRM | Alexey Cherepanov | IPM

File | IPM Notice of Delay | Add | Customize

Save | Save & Close | Deactivate | Assign | Sharing | Copy a Link | E-mail a Link | Run Workflow | Start Dialog | Run Report | Preview | Create PDF | Create E-mail | Create Transmittal

Information

General | Notes

Related

Common

- Activities
- Closed Activities
- Audit History
- Send To
- Transmittals

Processes

- Workflows
- Dialog Sessions

IPM Notice of Delay 11-0001-0001

General

Job * [11-0001 \(SW Food Warehouse\)](#)

Number + 11-0001-0001

Notification Date * 17/06/2011

Subject * The plasterer was not completed

NOD Type * Sub-Contract

Related Subcontract [S11-0001-0002 \(Electrical Subcontract\)](#)

Length (In Days) 3

Reason for Delay The plasterer was not completed as per schedule and this has resulted in a delay in completing fitout

Notified by

Issue

Owner * [Alexey Cherepanov](#)

Notes

IPM Extension of Time: 11-0001-0001 - Microsoft Dynamics CRM

Microsoft Dynamics CRM | Alexey Cherepanov | IPM

File | IPM Extension of Time | Add | Customize

Save | Save & Close | Deactivate | Assign | Sharing | Copy a Link | E-mail a Link | Run Workflow | Start Dialog | Run Report | Preview | Create PDF | Create E-mail | Create Transmittal

Information

General | Notes

Related

Common

- Activities
- Closed Activities
- Audit History
- Send To
- Transmittals

Processes

- Workflows
- Dialog Sessions

IPM Extension of Time 11-0001-0001

General

Job * [11-0001 \(SW Food Warehouse\)](#)

Number + 11-0001-0001

Date Requested * 17/06/2011

Subject * Electrician was late fitting off.

EOT Type * Sub-Contract

Related Subcontract [S11-0001-0003 \(Painting\)](#)

Requested Number of Days 14

Status Pending

Reason for EOT Delayed by other contractors

Requested By [Diamond Vogel Paint](#)

Other Reason Electrician was late fitting off.

Approved Number of Days

Revised Completion Date

Approved By

Scheduling changes caused by delays and extensions of time are easy to automate and provide project managers with the required information for reasons why

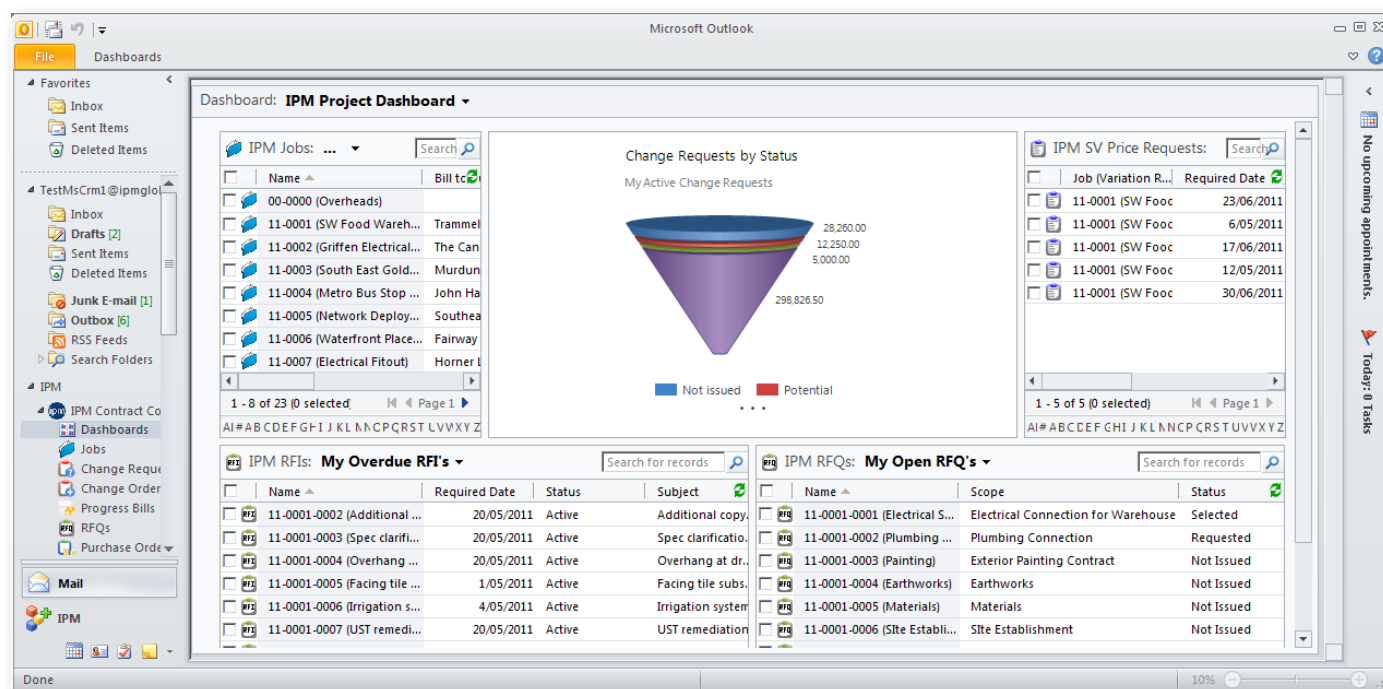
DASHBOARD

The 2011 version of IPM Project Management introduces a number of new features. It brings a whole new interface using the now familiar Microsoft Ribbon to all IPM screens. The Ribbon helps highlight functions to the user. In particular the Run Report button is particularly prominent which helps users to find what they are after more easily.

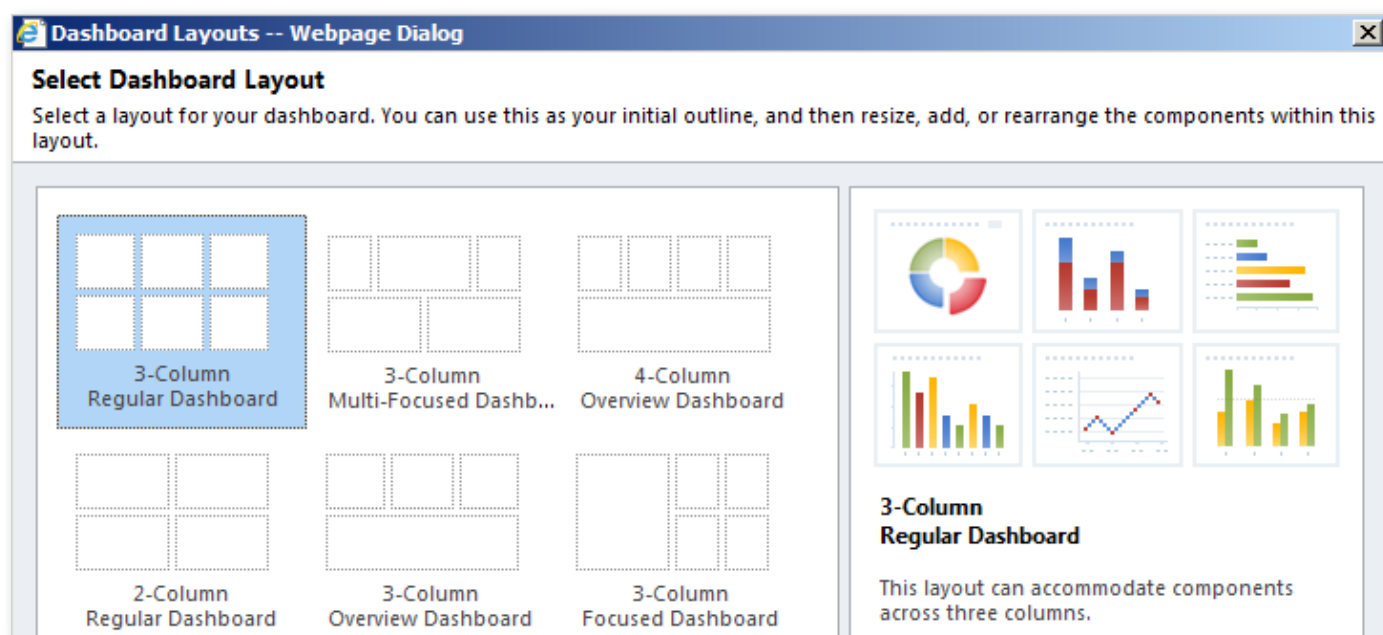
A new Dashboard component is now part of the suite offering easy access to personalized information about such things as overdue RFI's, outstanding Price Requests and open Change Requests. The dashboard content can either take a list form or be presented graphically. The dashboard will certainly reduce the number of notifications that need to be delivered by email by putting all the important content in the one place. The dashboard content is active, not just a static report, which means that any problematic documents that need to be examined in further detail can be opened directly from the dashboard lists.

One important aspect of the dashboard is the context sensitive nature of its content. Lists and graphs not only show relevant content for the organization but will also specifically identify appropriate content by individual user.

With 2011, the concept of customizable workflows has been taken to a new level with the addition of process dialogs which can prompt for additional information required to move a document to completion. IPM Project Management has started to leverage this new technology to streamline project processes.

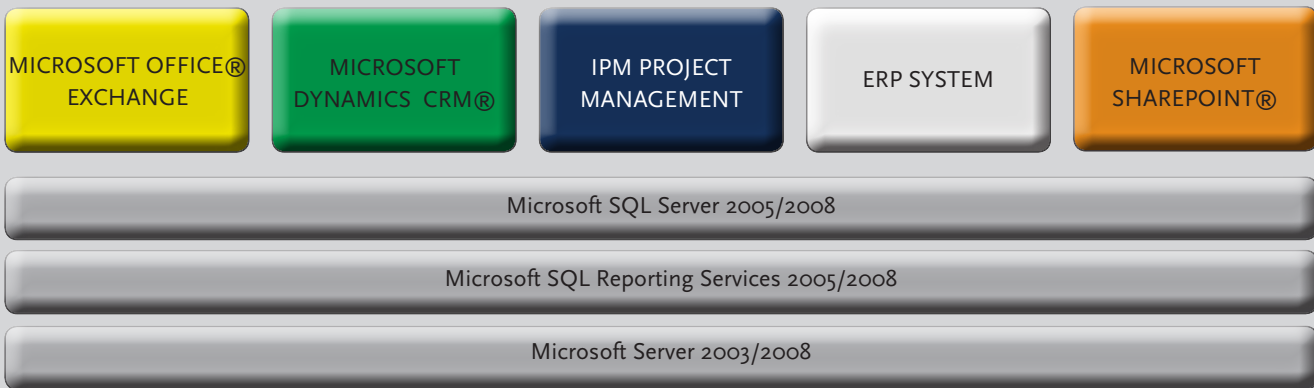


Customize the way you view IPM with the new Dashboard feature that allows you to create your own individual interface to access the features you use quickly and easily



Choose from multiple templates to streamline the way you use IPM

IPM'S Technical Platform



POWERED BY MICROSOFT DYNAMICS ®

IPM is powered by the Microsoft Dynamics® environment. This ensures the application can access people and company data to support and enhance project management features. Through this integration, IPM provides full CRM functionality, using contact information to support the document and contract control process.

Instead of relying on disparate systems, IPM lets you operate within a single program framework, promoting ease of use and efficiency, as well as reducing errors from double-entry. Microsoft Dynamics® adds the tools you need to track activity with subcontractors, business partners and prospects, and helps to provide a 360-degree view of all interactions within a single solution.

IPM Global understands that Project Managers work and communicate in Microsoft Outlook®. Make this your native environment and do away with those filing folders on your server.

BENEFITS OF DYNAMICS PLATFORM

- Improved communication history around the project documents as a result of the automatic filing process.
- Lower cost of ownership resulting from simple processes to create workflows without external consultants.
- Lower cost of ownership resulting from simple report designer tools reducing the need for external consultants.
- Better access to data due to Microsoft Dynamics's® range of deployment options including a detached option for disconnected sites.

IPM CORE FEATURES

GENERAL FEATURES	DOCUMENT CONTROL		CHANGE ORDER CONTROL	PROCUREMENT	RESOURCE MANAGEMENT	PLANNING AND FORECASTING	DAILY REPORTS
Workflow Automation	RFI's	Risk Register	Change Request Control	RFQ	Timesheet Approvals	Forecast to complete	Incident Tracking
Browser Based	Submittals	Issues Register	Change Orders	Purchase Orders	Payroll file creation	Percent Complete	Visitor Tracking
Outlook	Drawing Register	Defects	Progress Billing	Subcontracts	Charge Rate Tables	Task Based Gantt Chart	Progress Tracking
Automated Email Filing	Transmittals	Job Check list	Budget Management	Subcontract Change Orders	Resource Timesheet Processing	Resource Scheduling	Material Receipts
Offline Availability	Site Instructions	Notice of Delay	Multi-currency	Multi-currency		Service Booking	Subcontractor Attendance
Opportunity Management Integration	Meeting Minutes	Extensions of Time	Approval Workflows with email integration	Purchase Approval Workflows with email integration		Subcontract Based Gantt Chart	Utilization for Equipment
	Site Diary						Day Labor Utilization
					Subcontract Approval Workflows with Email Integration		Weather Conditions Tracking

Account and Contact Database integrating with Outlook and Mobile Devices

Report Wizard and Full SQL Reporting Services Integration

Sharepoint integration with Web Parts

IPM LINK

IPM is designed to operate as a standalone Project Management solution within Microsoft Dynamics CRM® with the ability to be integrated with leading Accounting /ERP systems. IPM Link facilitates the exchange of critical data between IPM and the accounting system in order to provide quicker and more convenient access to information whilst staying within the same environment.

Data exchanged includes:

- Customer information, including names, addresses and contacts.
- Supplier information, including names, addresses and contacts.
- Subcontract Information – to the Procurement System
- Progress Billing invoices - to the Receivables ledger

MULTICURRENCY AND MULTILINGUAL

Looking to expand into international markets or already operating in multiple countries? With IPM multicurrency and multilingual options, you can deliver a globally ready solution that supports international operations.

Multicurrency

The IPM Multicurrency function allows a home currency to be selected for the company, and transactional currencies defined for individual transactions. Through a server-based exchange rate setting, this permits price lists and other budget options to be displayed in multiple currencies.

Multilingual

IPM permits installation of more than 20 language packs, including translations for all user interface components. Each user has the ability to customise their own language settings and exchange language labels for custom elements.

SECURITY

The IPM security model provides a highly efficient means for establishing and changing privileges to ensure that users always have the appropriate access level.

Features include:

Role-based security, with privileges based on organisational role rather than on individual users.

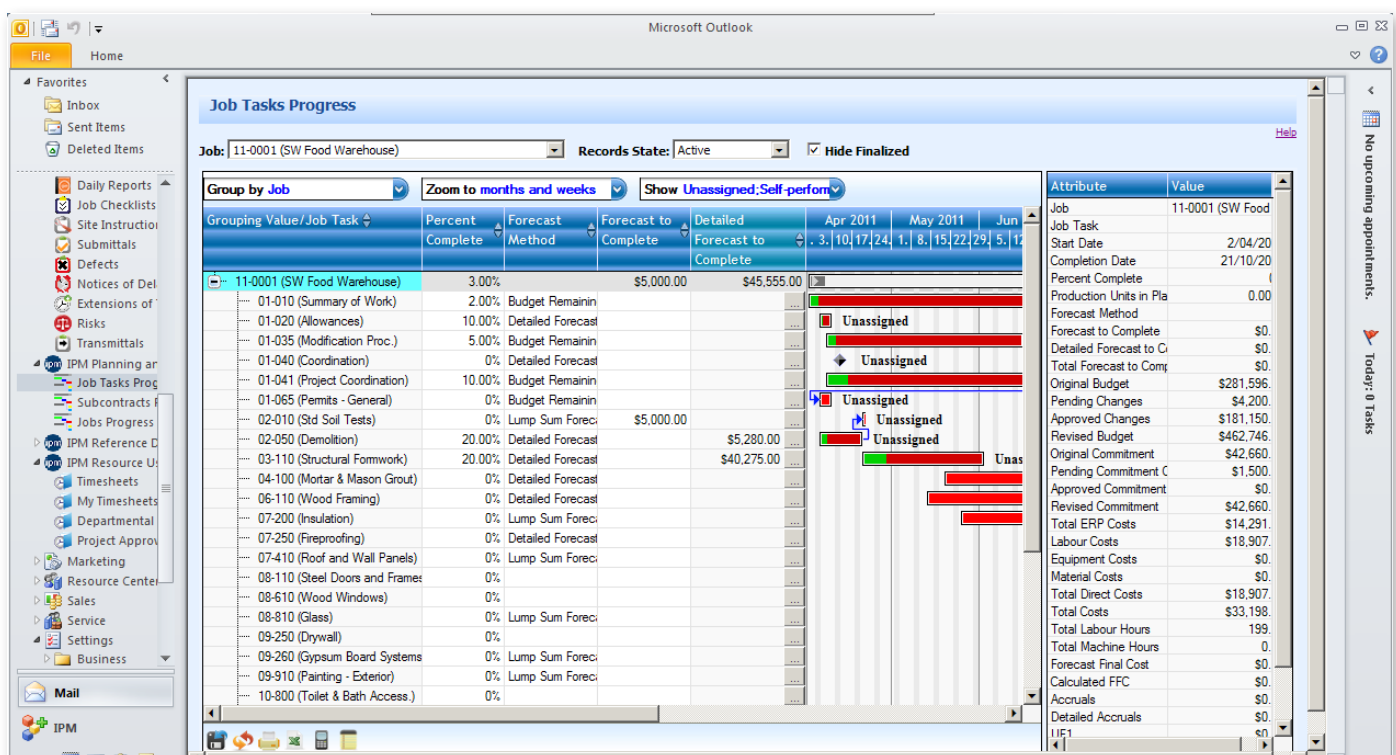
DOCUMENT AND COMMUNICATION

The IPM document history lets users take full advantage of the powerful Microsoft Dynamics® environment by automating filing of all project data. Every type of document, contract, and email communication that is created or received is automatically filed in the database, allowing the user to track, manage and retrieve relevant data from multiple access points.

INFORMATION ACCESS

Today's workers need to access data in an ever-increasing variety of places and situations. For example, a project manager might need access to an application on a mobile phone, over the Internet, or on a laptop while travelling or on-site. IPM uses the Microsoft Dynamics® framework to let users access their data anytime, anywhere, and on the device of their choosing.

As a completely web-deployable application, IPM can access real-time information whenever you are online. When the Internet is not available IPM remains fully functional, and simply syncs with the main database once an Internet connection is restored.



IPM operates within Microsoft Outlook® which allows users to stay within a familiar and easy to use program environment.



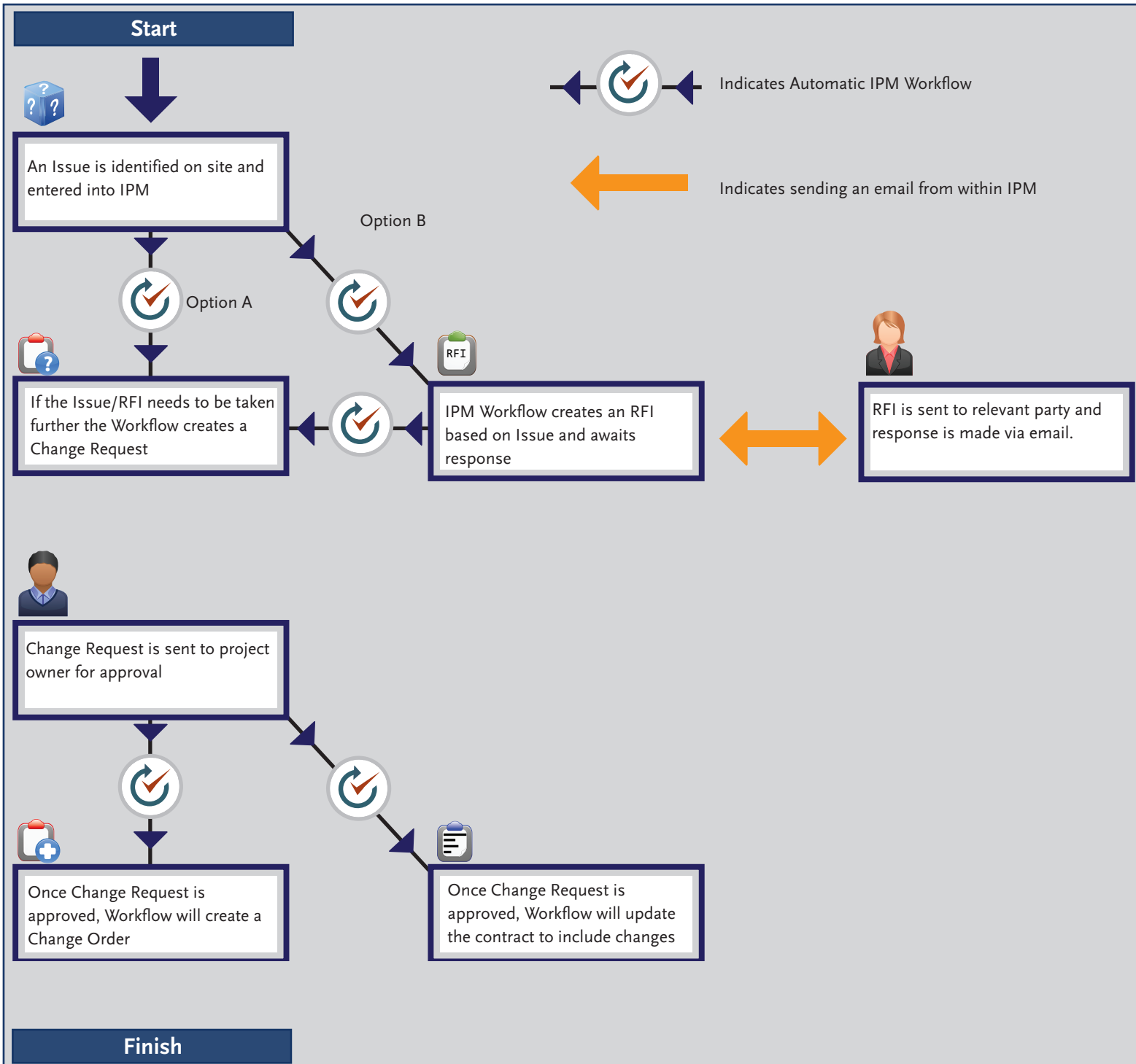
WORKFLOWS

Workflows are a standard feature of the underlying framework and enable users to automate and customize their use of IPM. They are a flexible, easy to use tool that can be created by users with appropriate security access level and used to automate the entire organization's processes as a whole, or each individual user's interactions.

With the ability to seamlessly automate day to day tasks workflows are invaluable for today's busy project manager. As an example use your own custom workflows to automate and simplify the processes of approving purchase orders or monitoring meeting minute items to ensure they are addressed on time and identifying issues on site and converting them into Change Orders.

IPM WORKFLOW EXAMPLE

This example shows how, by using IPM Workflows, an Issue that arises on site can be converted into a Change Order automatically , and all from within the one environment.





IPM Project Management operates within the Microsoft Dynamics CRM® environment which gives every IPM user access to a fully functioning CRM system. The benefit of this setup allows users to access IPM, CRM and accounting data all within a single window. IPM can also be used from within Microsoft Outlook which means users can work within a familiar program environment that is easy to learn and Microsoft Office friendly.

Microsoft Dynamics CRM® is a comprehensive customer relationship management (CRM) suite with marketing, sales, and service capabilities that are fast, familiar and flexible, helping businesses of all sizes to find, win, and grow profitable customer relationships. Microsoft Dynamics CRM® works with familiar Microsoft® products to streamline processes across an entire business.

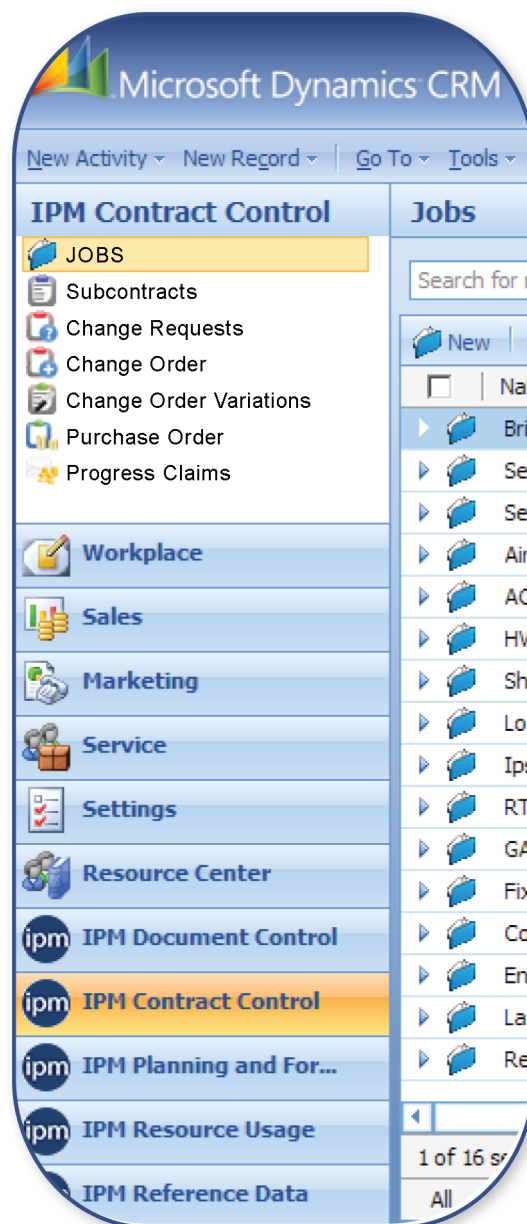
With a streamlined user interface, wizard-based tools, and close integration with Microsoft Office system productivity applications, Microsoft Dynamics CRM works the way your people work.

- Get started quickly in a familiar Microsoft Office Outlook® environment designed to support fast user adoption and high utilization of your CRM solution.
- Empower users to work with familiar tools, such as Microsoft Office Word and Microsoft Office Excel® spreadsheet software, to create their own dashboards and personal workflows with wizard-based tools without reliance on outside support.
- Provide role-tailored access to information and data both online and offline, giving people access to only the information they want and need—delivered in the way they want it.

WORKS THE WAY YOUR BUSINESS DOES

Microsoft Dynamics CRM provides choice and flexibility in how you implement and customize your CRM application so you can achieve the best fit for your business.

- Design and automate business processes to unify line-of-business systems with flexible, easy-to-use tools built on the Microsoft Windows® Workflow Foundation platform.
- Conduct business globally with full support for multiple languages and currencies across multiple time zones so you can compete globally while keeping costs under control.
- Align IT and business goals with point-and-click customizations, extensible data models, and mapping tools to help build a solution that match your business and your people.
- With a streamlined user interface, wizard-based tools, and close integration with Microsoft Office system productivity applications, Microsoft Dynamics CRM works the way your people work.





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