

# Client Reference

## Oil and Gas | Retail

### Contractor Invoicing Report



#### Client Background

The client makes use of multiple contractors for their day-to-day operations and services. These contractors have to supply an invoice for the work done within an agreed time frame. Once this period elapsed, the relevant work order is closed and considered non-invoiceable.

The client approached Pragma to develop a report containing all of the relevant work orders within the invoicing time frames, which can be sent to the various contractors on a scheduled basis.

The report's main objective is to remove the need for the client to send updates to contractors individually to inform them of work that still needs to be invoiced.

**”** *The new way of working where the 30-day and 10-day reports are sent automatically to all contractors makes the administrators' workload much lighter because it eliminates the manual emails they had to send for each invoice (in rejected status or work orders that are still in work at site completed status).*

#### Pragma Intervention

- Development of an On Key Insights dashboard containing contractor invoicing data from On Key 5 that facilitates easy navigation and data exploration.
- Granted specific access to certain users by means of user authentication.
- Configured dashboard to reload every 2 hours, ensuring data is up to date.
- Development of Microsoft Excel report containing contractor invoicing data from On Key 5 that is attached to emails sent to all relevant contractors every morning.

#### Key Challenges

- Report must be emailed to contractors based on their contact details in the On Key EAMS.
- Report must be attached as a Microsoft Excel sheet.
- Relevant work orders must be sectioned by specific time frames to clearly indicate current status.
- Report information must be viewable across all contractors, only accessible by the client.
- Contractors must not be able to view each other's invoicing information

30 DAY Contractor Invoice				
Contractor: <Contractor Name>				
Site	Section Code	Work Order Changed on: WSC-Completed - Work at Site Completed	30 days from closure	Days
<i>Invoicing period: This Work orders will not be re-opened and are considered as completed a</i>				
CE BUILDING	1234	2020/03/25	2020/04/24	
HEADQUARTERS	1234	2020/03/26	2020/04/25	
CE BUILDING	1234	2020/04/05	2020/05/05	
<b>Work Order 0 - 14 days before the 30-day contractor invoicing period expires</b>				
AST MALL	1234	2020/04/28	2020/05/28	
ADIUM	1234	2020/04/28	2020/05/28	
DSCH SQUARE	1234	2020/05/04	2020/06/03	
<b>Work Order 15-30 days before the 30-day contractor invoicing period expires</b>				
MALL	1234	2020/05/05	2020/06/04	
LK	1234	2020/05/08	2020/06/07	

  

WSC-Completed	Closure Date	Days Left	Work Order Open or Closed
2020/09/04	2020/10/04	5	Close to Closure
2020/09/04	2020/10/04	5	Close to Closure
2020/09/04	2020/10/04	5	Close to Closure
2020/09/04	2020/10/04	5	Close to Closure
2020/09/04	2020/10/04	5	Close to Closure
2020/09/07	2020/10/07	8	To be submitted
2020/09/07	2020/10/07	8	To be submitted

#### Value Add

- Contractors receive daily updates on the status of invoiceable work, resulting in increased alignment and clarity between parties.
- Reports are generated automatically, allowing more time to spend on other activities.
- The client has access to continuously updated report information of all their contractors via the online dashboard.
- Contractor invoicing data can be viewed in different ways to analyse and interpret the data.

#### Tools and Technology

- On Key Insights - Dashboard
- On Key Insights Reporting - generate and send the reports
- On Key EAMS