

**REDACTED**

**Transition Manual**

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## Introduction

Congratulations on your new appointment, and welcome to Bow Valley Tech.

The training partnership between Bow Valley Tech and OmniNeft represents a chance for employees of OmniNeft subsidiaries from all round the world to receive quality technical training and cultural counselling in an environment that demonstrates the benefit of Bow Valley Tech's experience and showcases Bow Valley Tech's commitment to excellence. OmniNeft made a substantial investment of money and faith in Bow Valley Tech with the expectation that this institution could train OmniNeft employees to meet a set of core employment competencies, give its employees the language foundation skills to learn, work, and relax in English, and present its employees with the tools they need to appreciate North America and to understand the OmniNeft corporate culture. Your role as the assistant to this project is vital to our goals—providing first-rate technical training and laboratory experience, accommodating and acclimatising participants from a wide variety of nations and backgrounds, and reporting regularly on the progress OmniNeft's employees are making in their training and cultural activities. We're looking forward to working with you in the months and years ahead to make the most of this exciting opportunity.

Good luck. And welcome aboard.

## Key Personnel

Here are the main contacts at Bow Valley Tech for the OmniNeft project.

| Name               | Work Phone # | Home Phone # | Cell         | Fax          | Room   | Department                    |
|--------------------|--------------|--------------|--------------|--------------|--------|-------------------------------|
| Andrew Adams       |              |              |              |              | N608   | Dean of Engineering           |
| Betty Battenberg   | 403-555-0117 |              |              |              | N608   | Administrative Co-Ordinator   |
| Chuck Cartwright   |              |              | 403-555-0117 |              |        | Counsellor                    |
| Daphne Dewdney     | 403-555-0117 |              |              |              | N612   | Budget Officer                |
| Eric Essen         | 403-555-0117 |              |              |              | Z103   | Residence + Conference Centre |
| Frank Foxworthy    | 403-555-0117 | 403-555-0117 | 403-555-0117 | 403-555-0117 | N510   | Engineering                   |
| George Gordon      | 403-555-0117 |              |              | 403-555-0117 | N509   | Instructor                    |
| Harry Hallam       | 403-555-0117 |              | 403-555-0117 |              | N612   | Business Manager              |
| Ian Isbister       |              |              |              |              |        | Instructor                    |
| Jean-Michel Jutras | 403-555-0117 |              |              |              | MA323E | Provost                       |
| Klara Kuznetsova   | 403-555-0117 |              |              |              | MA222  | Timetabling                   |
| Lana Lawrence      | 403-555-0117 |              |              |              | N606   | Wellsite Bookings             |
| Michelle Marks     | 403-555-0117 |              |              |              | N210   | Food Services                 |
| Nancy Nelson       | 403-555-0117 |              |              |              |        | Business & Tourism            |
| Oksana Orlova      | 403-555-0117 |              |              |              | MA206  | International Student Centre  |
| Pete Parsons       | 403-555-0117 |              | 403-555-0117 | 403-555-0117 | T228   | Engineering                   |
| Quincy Quentin     | 403-555-0117 |              |              |              | N1004  | HR (Payroll)                  |
| Roberta Robinson   | 403-555-0117 | 403-555-0117 | 403-555-0117 | 403-555-0117 | N512   | Counsellor                    |
| Sally Smithers     | 403-555-0117 |              |              |              | V105   | Room Bookings (MA-1xx)        |
| Tug Thorvaldsen    | 403-555-0117 |              |              |              | T342   | Engineering                   |
| Uriah Upton        | 403-555-0117 |              |              | 403-555-0117 | MA308  | Business Development          |
| Valerie Vicks      | 403-555-0117 |              |              |              | MA323  | EA to Jean-Michel Jutras      |
| Walter Wilson      | 403-555-0117 |              |              |              | N612   | Project Financial Officer     |
| Xavier Xin         | 403-555-0117 |              |              | 403-555-0117 | N509   | Engineering                   |
| Yancey Yablonsky   | 403-555-0117 |              |              |              | N510   | Project Manager               |

You will also have regular contact on a departmental level with Budget and Performance Analysis, Corporate Reporting and Controller's Office, and Purchasing. Bow Valley Tech maintains an online personnel directory at <http://phonebook.BowValleyTech.ab.ca/> for daily use.

Here are the main contacts at OmniNeft for the project.

| Name             | Work Phone # | Home Phone # | Cell         | Fax          | Room | Department          |
|------------------|--------------|--------------|--------------|--------------|------|---------------------|
| Akhmad Aslanov   | 713-555-0118 |              |              |              |      | OmniNeft - Houston  |
| Barbara Borden   | 713-555-0118 |              |              |              |      |                     |
| Carl Corson      | 713-555-0118 |              |              | 713-555-0118 |      |                     |
| David Douglas    | 713-555-0118 |              |              |              |      | OmniNeft - Houston  |
| Eddie Eaton      | 713-555-0118 |              | 713-555-0118 |              |      | OmniNeft - Houston  |
| Fiona Freiberger | 713-555-0118 |              |              |              |      | OmniNeft - Houston  |
| Gus Gardiner     | 713-555-0118 |              |              |              |      | OmniNeft - Houston  |
| Hal Harrison     | 713-555-0118 |              |              |              |      |                     |
| Ivan Ilyushin    | 713-555-0118 |              |              | 713-555-0118 |      | OmniNeft - Houston  |
| Jack Johnson     | 713-555-0118 |              |              | 713-555-0118 |      |                     |
| Kevin Kruger     | 713-555-0118 |              | 713-555-0118 |              |      | Head HR-OmniNeft SI |

In addition, there are a number of independent contractors assigned to the project.

| Name             | Work Phone # | Home Phone # | Cell         | Fax | Room | Department         |
|------------------|--------------|--------------|--------------|-----|------|--------------------|
| Aaron Albertson  | 403-555-0119 | 403-555-0119 | 403-555-0119 |     |      | Instructor         |
| Bert Brewster    | 403-555-0119 |              | 403-555-0119 |     |      | Special Consultant |
| Connie Curtin    |              |              |              |     |      | Instructor         |
| Deborah Dunn     | 403-555-0119 |              |              |     |      | Instructor         |
| Evan Edwards     |              | 403-555-0119 | 403-555-0119 |     |      | Curriculum Design  |
| Fred Farquharson |              | 403-555-0119 |              |     |      | Instructor         |
| Gwendolyn Gwyn   | 403-555-0119 |              |              |     |      | Instructor         |

## Equipment and Records

All of the basic equipment you will require will be available at your desk, except for the OmniNeft Project Files, which are located in the filing cabinet behind the desk, and for the Minolta DiAlta Di-520 digital photocopier, which is located in NN-509. Betty Battenberg will have your door codes and your network and telecommunications passwords available for you shortly after you arrive. If you experience any technical difficulties later on, you may contact the Help Line during regular office hours at **local 4357, extension 4**.

You will find a CD-ROM in the top drawer of the desktop filing cabinet. This CD-ROM will contain files in two folders. The contents of the first folder on the CD-ROM, "**1) Personal Folders.pst**", need to be copied from the disc and pasted to the folder **C:\Pst Files**, and then bookmarked in Microsoft Outlook through the **File | Open | Personal Folders Files (.pst)...** command menu. The contents of the second folder on the CD-ROM, "**2) My Documents**", need to be copied from the disc and pasted to the **My Documents** folder. Once you have completed these procedures, please keep the CD-ROM in a secure location for archival purposes. At that point, you will be ready to review the rest of this chapter.

### ***Desktop Computing and Telecommunications***

Your personal computer is a Pro-Data Performance Design system with specifications as listed on the insert attached to the case. It is equipped with Microsoft Windows 2000, Microsoft Office 2000, and a variety of additional applications. There are two peripheral devices connected directly to the computer—a Hewlett Packard ScanJet 6200C flatbed scanner, suitable for capturing graphic image files and performing optical character recognition, and a Seiko Instruments Smart Label Printer 120, useful for printing individual address and identification labels.

The default network laser printer is the Hewlett Packard LaserJet 4000dn located in room NN-512. For colour printing, the Faculty of Engineering uses a Hewlett Packard Colour LaserJet 5500dtn located in NN-606. To ensure that the costs of operating the colour laser printing are accurately captured for the project, a spreadsheet located at [My Documents\Printer Calculation.xls](#) allows you to date, identify, and assess the number of pages you have printed in each job. The calculations in the spreadsheet derive from data provided by the printer's online diagnostic and supply tracking system, which is viewable at any time by visiting <http://10.98.42.236> in Microsoft Internet Explorer.

Your telecommunications console is a Nortel Meridian M2616, a unit featuring hands-free speech capabilities, a two-line display, and programmable function keys; the console is described in greater detail at [http://intranet.BowValleyTech.ab.ca/infosystems/telephones/meridian\\_telephone\\_user\\_guide.htm](http://intranet.BowValleyTech.ab.ca/infosystems/telephones/meridian_telephone_user_guide.htm). The voice messaging system has a set of summary instructions available for examination and perusal at [http://intranet.BowValleyTech.ab.ca/infosystems/telephones/meridian\\_mail\\_quick\\_guide.htm](http://intranet.BowValleyTech.ab.ca/infosystems/telephones/meridian_mail_quick_guide.htm) and more detailed instructions, describing all of the primary functions and commands for the voice messaging system, at [http://intranet.BowValleyTech.ab.ca/infosystems/telephones/meridian\\_mail\\_user\\_guide.htm](http://intranet.BowValleyTech.ab.ca/infosystems/telephones/meridian_mail_user_guide.htm) for your review.

### ***Equipment Available for Lending***

There is a Canon PowerShot A70 digital camera available to any member of the project who wishes to sign it out using the Camera Register at the desk. The camera is kept locked in the top filing drawer, and at any given time is issued in an accompanying camera satchel with a set of four AA nickel-metallic-hydride batteries and one 128 MB Compact Flash card already installed. Users have the option of signing out an additional set of batteries, an additional Compact Flash card, or a camera operator's

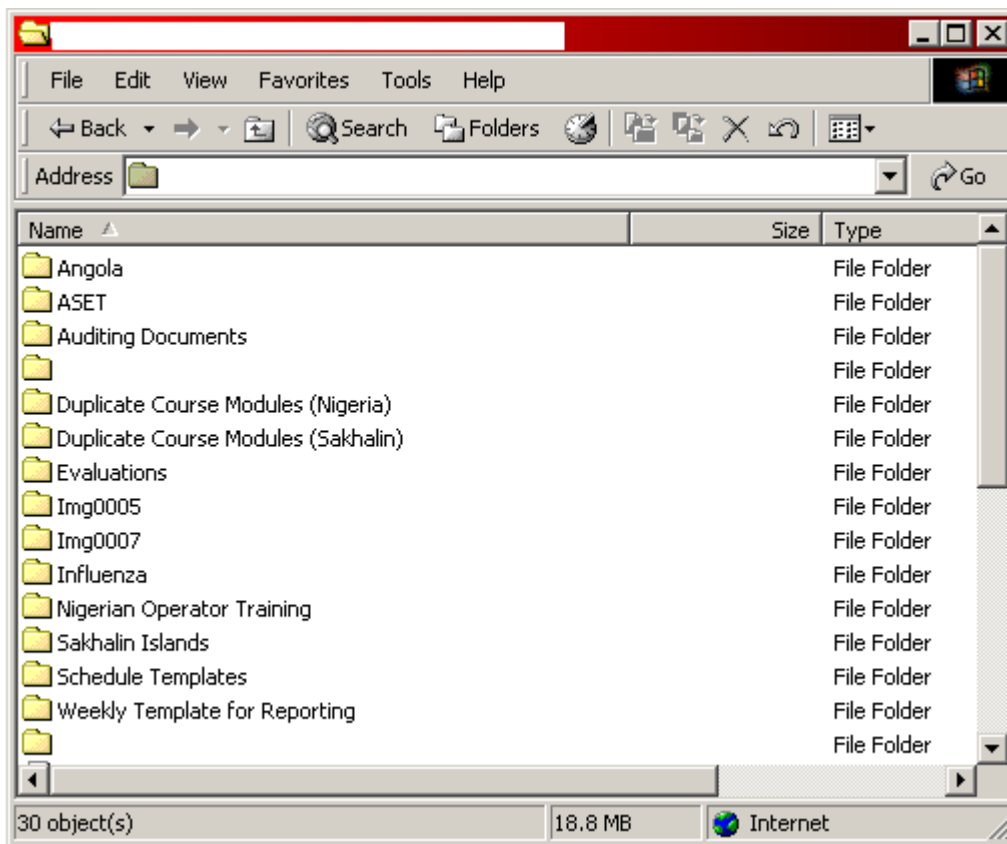
manual at the time the camera is issued. In addition, the filing drawer contains a battery charger and a Compact Flash card reader, both of which are for use within the office only.

Members of the project are also entitled to sign out room keys using the Key Register at the desk. The keys are contained in a pencil pot at the desk, and are available for a number of rooms in Foundation House and for the laboratory facilities. Because of the limited quantities of keys available, it is important to ensure that the keys are returned in a timely fashion.

Moreover, there are a total of 24 Cobra FRS-132 wireless transceivers available to members of the project who wish to sign them out using the Transceiver Register at the desk. The transceivers are kept underneath the desk, and may be issued in any quantity required. Each transceiver is marked with an identifier tag denoting the charging cradle, also tagged, to which it has been assigned. There are also transceiver operator's manuals available for lending; these are located in the project file drawer.

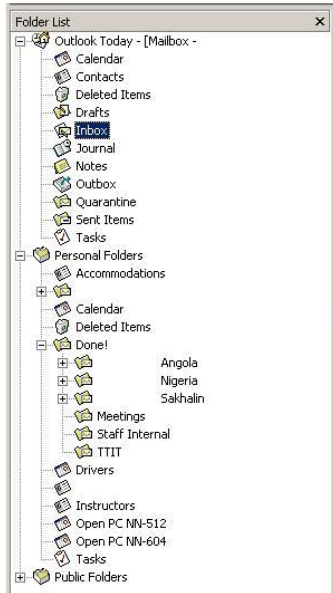
## ***Network and Document File System***

Most of the files you will use regularly, and all of the files to which other project users will have access, are located in the **dfsroot on 'acdm.ds.BowValleyTech.ca'** network file share; this location is most commonly known as the **Q:\** drive. The specific path for project files is **Q:\staffEngineering\dataCommon\OmniNeft**, and this folder on the drive consists in turn of multiple nests of subfolders containing and classifying all of the critical information used by various members of the project.



Although you will have the option of storing some of your personal working files on your individual file share, more commonly known as your **X:\** drive, the relative lack of space on this file share limits its usefulness to application files that you are certain you will use from multiple computers. The **My**

**Documents** folder allows for the storage of many more files, particularly image files, and is suitable for storing personal files that do not have to be cited from other computer locations. This folder is also useful for saving e-mail messages and file attachments, but your electronic correspondence will be easier to archive and review in the MS Outlook **Personal Folders** you have already installed.



The primary function of the **Personal Folders** as they have been designed and installed is to extract, store, and make available for retrieval all of the message traffic that the **Outlook Today** folders, given the severe limitations on their data capacity, are incapable of storing. Because the **Personal Folders** are installed to your personal computer instead of to the network, the theoretical data capacity is very high, although the practical limit depends on whether you intend to archive your **Personal Folders** to CD-ROM. All you would need to do is drag and drop any items from **Inbox** or from other **Outlook Today** folders to the desired target location in **Personal Folders**.

The OmniNefit folders contain several nested subfolders as shown below:



The structure of this file tree is designed to parallel a portion of the document filing system in place for the OmniNeft project. Each current OmniNeft project, having already been assigned a directive code, has had a file tree constructed and has been assigned a colour code as follows:

| <b>Country</b> | <b>Directive Code</b> | <b>Colour Code</b> |
|----------------|-----------------------|--------------------|
| Sakhalin       | 581024                | Teal               |
| Nigeria        | 581505                | Green              |
| Angola         | 583601                | Black              |

One of the most important components of the document filing system is the contract documentation section, in which you would maintain records for Casual Employment Agreements and for Independent Contractor Agreements. A Casual Employment Agreement applies to sole proprietors and to unincorporated partnerships, as well as to staff members who are hired by Bow Valley Tech for a short period of time; after the employee signs the agreement, it must be stamped and initialled by the budget officer and countersigned by the dean before it is circulated to Human Resources and the employee, and copied to the employee's project personnel file. A signed Independent Contractor Agreement must be accompanied by proof of incorporation, proof of insurance, and a signed and completed Test of Contractor Independence indicating that the contractor is not being employed in any capacity by Bow Valley Tech; it must then be stamped and initialled by the budget officer and countersigned by the dean before being circulated to Accounts Payable and the contractor, and copied to the contractor's project personnel file.

## Policy and Procedure

The administrative responsibilities of the position fall into five distinct categories. **Intake administration** deals with the processes of identifying, registering, documenting, and supporting OmniNefl students upon their arrival at Bow Valley Tech. **Travel administration** involves all aspects of staff and student travel, ranging from planning and confirming travel itineraries for business trips to booking accommodations in Calgary and elsewhere to hiring vehicles. **Programme administration** requires close contact with Bow Valley Tech's Customer Services department to ensure that OmniNefl students are registered in their training courses and are booked into classroom and laboratory facilities. **Expense administration** entails the acquisition, tracking, and reporting of all goods and services that the project requires. **Reporting administration** covers the contact information, progress tracking, and project documentation necessary to the successful outcome of the OmniNefl project. Each of these categories will be discussed in detail below.

### **Intake Administration**

The first step in registering an OmniNefl student at Bow Valley Tech is to complete a Full Time Application Form, which is available for you to download at your convenience from the Customer Services Intranet site at <http://customer.services.BowValleyTech.ab.ca/> and is also stored in [My Documents/dayapplication.pdf](#) as a backup measure. All new students will have a student identification number assigned to them, but it is important, especially for those OmniNefl participants who are registering for advanced-level programmes, to confirm with Customer Services whether the students have registered previously at Bow Valley Tech, in which case they would already have student identification numbers in place. Once you have completed the students' application forms and confirmed their identification numbers with Customer Services, enter their information into the Project Participants database at [Q:\staff\Engineering\data\Common\OmniNefl\Project\\_Participants.mdb](#) and submit the original completed applications to Customer Services; as well, send one set of copies to Oksana Orlova of the International Centre, and keep one set of copies on file.

Once the project participants arrive at Bow Valley Tech, you will need to confirm their identities. One of the project counsellors will ensure that you receive the students' passports, travel visas, and study permits, so that you may scan each page of each student's travel documentation for imaging to a CD-ROM that will be delivered to OmniNefl. The students will also be required to sign a Copyright Release Form and an Examination Mark release form, both of which are available at **Q:\staff\Engineering\data\Common\Front Office StaffForms**; submit the original signed forms to Customer Services, and as well send one set of copies to Oksana Orlova of the International Centre, and keep one set of copies on file.

From time to time, the project counsellors may need your help in providing consular or other emergency assistance to the OmniNefl participants. In general, OmniNefl is responsible for planning, preparing, and arranging transportation to and from Canada for the participants, but on occasion circumstances arise that make it necessary for the project counsellors to intervene. It is in those situations that the project counsellors may request your aid.

### **Travel Administration**

All travel outside the Calgary city limits for Bow Valley Tech employees and casual employees attached to the OmniNefl project has to be approved by the project manager, the business manager, and the department dean; in addition, all travel outside the province of Alberta requires the approval of the provost, and all travel outside North America requires a current Country Travel Report from the Department of Foreign Affairs and International Trade's consular affairs website at

<http://www.voyage.gc.ca/dest/ctry/reportpage-en.asp> indicating that the destination presents no hazards to travel. To document this authorisation process, Accounts Payable will require you to complete an AP-775-GX/7A Travel Authorisation Form, which is available at [My Documents\Shortcut to AP-775-GX/7A.xls](#) for your review; once you have obtained the necessary signatures on this form, submit the original to Accounts Payable, deliver a copy to the employee, and retain a copy on file. Although you should discuss the travelling employees' flight plans in advance, it is only when you have the necessary signatures in place that you will be able to contact Juliana Maxwell at Travel Tedium International to book and confirm the employees' itineraries, which through Travel Tedium International will consist primarily of flight and vehicle bookings.

Bow Valley Tech employees who travel for the purposes of the project will most likely travel to Houston, Texas, or Dallas, Texas, to meet with OmniNefl officials; as of this assessment, the Hotel Derek in Houston (<http://www.hotelderek.com/>) will charge a rate of US\$ 125.00 per night, while the Holiday Inn Fort Worth South ([http://www.metrotravelguide.com/hotelinfo/fort\\_worth/tx/usa/17505/](http://www.metrotravelguide.com/hotelinfo/fort_worth/tx/usa/17505/) for further details) will charge a rate of US\$ 89.00 per night. For OmniNefl personnel and independent contractors who visit Bow Valley Tech on official business, there is a list of account representatives for a range of hotels and executive suites, and this list is maintained in MS Outlook under **Personal Folders | Accommodations**. Although OmniNefl project participants may also use these hotels and executive suites in some circumstances, the primary facility designated for their use is the Bow Valley Tech Residence and Conference Centre, for which the main contact is Eric Essen.

Any Bow Valley Tech employee who wishes to hire a vehicle for project purposes must possess a Class 4 Alberta driving permit and present a completed Authorised Driver Form (available at [My Documents\Authorised Driver Form.doc](#)) and current driver's abstract; the two latter documents need to be transmitted to Ken Curtis of Budget and Performance Analysis, with copies to the employee and to the employee's project personnel file. Once this documentation is in place, you will be able to make vehicle reservations online at <http://www.jitneyworld.com> for any employee who provides you with a minimum 24 hours' notice; Karen Engels from Facilities Management will help you set up your account and password. In an emergency situation, you may also make vehicle reservations by contacting Jackie, Jitney World's account manager for Bow Valley Tech, by telephone at 403-555-1550. Whichever method you use to make a reservation, it is important to make certain that you receive the documentation and vehicle keys directly from the Jitney World delivery representative; you will need to sign and initial the vehicle rental agreement and ensure that Betty Battenberg receives a photocopy of the agreement for reconciliation purposes before you transfer the keys and the agreement to the employee.

## ***Programme Administration***

Although it is always a good idea to keep records pertaining to the general information and administration of each project, it is of vital importance to maintain a current and effective repository of information about the set-up of each OmniNefl project. Each new project requires the preparation for Customer Services of a New Programme Information form, describing in detail the programme, registration requirements, parchment particulars, and the breakdown of each course to be included in the programme. In practice, the programmes you will be expected to prepare will closely resemble pre-existing programmes, either for entry-level oilfield trainees such as those from Russia and Angola or for advanced operator technicians such as those from Nigeria. Under these circumstances, your objective will be to confirm the dates for each course and to obtain Course Registration Codes (CRC) from Customer Services for each course in the programme.

The importance of obtaining CRCs lies in their use for the process of booking classroom and laboratory facilities for the project participants. To reserve classrooms in Foundation House, to which you will see room numbers coded MA-1xx, you will need to provide a CRC to Eric Essen of Conference Services; for the most part, these rooms are booked by the semester for each training project, although on rare occasions it becomes necessary for Conference Services to juggle reservations to meet prior commitments. You will also need a valid CRC to book laboratory facilities through Lana Lawrence, who is

responsible for making all reservations for its classroom, laboratory, and outdoor facilities. For any other classroom or laboratory bookings you will need to make, be sure to contact Customer Services.

## Expense Administration

Bow Valley Tech's Budget and Performance Analysis department uses a coding system to track every expense that is incurred over the course of the OmniNeft project, and thus to determine the extent to which the project is meeting its original budget projections. The **Initiative** code for the project is **1101**, and the **Faculty** code is **2702**; these figures remain constant. What will vary in the course of tracking each expense are the **Account** codes, described in more detail in [My Documents\IFADUP Chart.xls](#) for your review, and the **Directive** codes, which differ for each individual training programme in the project.

All documentation pertaining to an expense must be assigned a code containing all four figures. In the example fuel receipt at right, the four-figure code **1101 2702 7101 581505** indicates that the expense will be charged to the **Operating** fund (**1101**), to the **Engineering: Instruction** organisation (**2702**), to the **Business Travel, Alberta** account (**7101**), and to the **OmniNeft Nigeria** programme (**581505**). The total cost of \$45.17 can therefore be analysed alongside other **Business Travel, Alberta** account expenses, or alongside other **OmniNeft Nigeria** programme expenses.

The project manager must countersign all expenses up to \$1,000. Expenses up to \$25,000 require the countersignature of the business manager, while expenses up to \$50,000 require the countersignature of the dean. Any expense in excess of \$50,000 must have the approval of the provost, though such expenditures in the course of the project are rare. All records of expenses need to be copied to the project financial officer and copied to file.

N 1101 2702 7101 581505

home of WinterGas

PETRO-CANADA  
1320 16 AVE NW  
CALGARY  
Alberta T2M 0L1

GST #: 872104666  
2003-12-08 08:27

PUMP PLUS 03  
LITRES L 70.689  
PRICE/L \$ 0.639  
FUEL SALES \$ 45.17

\* GST INCL. \$ 2.96

INVOICE 600466  
MASTERCARD  
5177\*\*\*\*\*274757  
AUTH: 901634

THANK YOU

THANK YOU  
HAVE A GOOD DAY  
VISIT US AT  
WWW.PETROCANADA.CA

## Hospitality Expenses

All requests for hospitality services at Bow Valley Tech require the completion of a Courtesy Services Requisition form. Food Services requires one business day's notice for meal tickets, which need to be prepared and countersigned in advance, two business days' notice for beverage and cold food service, and five business days' notice for hot food service; in all of these instances, the Courtesy Services Requisition form needs to be completed, coded, and countersigned before being copied to file and brought in person to the Food Services office in NN-210. For circumstances in which a project employee requests gift certificates to the Memorial Dining Room, have the Courtesy Services Requisition form completed, coded, and countersigned before copying it to file and conveying it personally to the front desk of the Memorial. Food Services will transmit statements of all of the catering, meal ticket, and Highwood gift requests they have completed; copy these to the project financial officer and commit them to file.

## Invoices and RFIs

The project financial officer will transmit Request for Invoice (RFI) forms to the Revenue Accounting office, and it is from these RFI forms that the invoices Bow Valley Tech transmits to OmniNeft for project work are derived. Copy the completed invoice and all related paperwork you receive to file. The original invoice should be enclosed with a covering letter from the project manager, in conjunction with any necessary supporting documentation, and transmitted by courier to OmniNeft's accounts payable office

for the project. You will need to complete a Request for Courier or Shipping Service form, available in NN-512, and convey the form and the transmittal envelope to Shipping and Receiving.

## **Supplies and Expenses**

This category is divided into monthly subfolders in the document filing system because of the high volume of expenses that need to be tracked. Betty Battenberg will ensure that you have an account to place stationery orders online through <http://www.paperclipland.com/> and that the account is configured to allow you to process orders programme by programme; Paperclip Land generally will process and deliver your orders by the next business day. Ray Thomas of Almost There Express Ltd will configure, demonstrate, and answer any questions you may have about the online delivery client software his firm provides for courier service within the city of Calgary; any courier deliveries that you send outside the city need to be processed through Shipping and Receiving with a completed Request for Courier or Shipping Service form.

Purchase requisitions represent one of the more complex tasks you will be asked to complete. The first stage involves completing a Purchase Requisition form, available in NN-512, and paying close attention both to the commodity code (see [My Documents\Commodity List.doc](#) for more details) and to the budget code for each item being requisitioned. This document needs to be reviewed by Betty Battenberg and countersigned by the project manager (and, depending on the expenses being incurred on the requisition, by the business manager and by the dean) before you enter the requisition information into QUAGMIRE, Bow Valley Tech's proprietary enterprise resource management system (see [My Documents\ENTERING PURCHASE REQUISITIONS INTO QUAGMIRE.doc](#) for details). The requisition approval process takes about five business days, and results in the creation of a purchase order, the code for which needs to be transmitted to the supplier before the person requesting the commodities in the requisition arrives at the supplier's location. The receipt for the resulting purchase must, along with the original purchase requisition form, be copied to the project financial officer and copied to file before being transmitted to Purchasing.

Expense claims must be coded, countersigned, and presented either with supporting receipts or with No Receipt Forms ([Q:\staff\Engineering\data\Common\Forms\no\\_receipt\\_form.doc](#)) for each expense item being claimed, before being copied to file and transmitted to Accounts Payable. Casual employees attached to the project must submit their timesheets in accordance with the schedule listed in [My Documents\Payroll Cutoff.doc](#) to have their hours totalled and submitted to Human Resources; once this process is complete, copy the timesheets to the project financial officer and place the originals in the employees' project personnel files. Invoices from independent contractors need to be coded, countersigned, and copied to the project financial officer and to the contractors' project personnel files before being transmitted to Accounts Payable.

## **Work Order and Budget Codes**

All of the OmniNeft project work orders derive from the Continuing Services Agreement that Bow Valley tech and OmniNeft signed in July 2003. Each work order pertains to a specific OmniNeft training project, and is retained with all of its correspondence and amendments in the document filing system. The work orders are reviewed and analysed, and all of the activities described in each work order are given account codes to match the account codes in use at Bow Valley Tech.

## **Reporting Administration**

There are two dimensions to the contact listing process for the OmniNeft project. Individual participants have their contact information captured and analysed in the Project Participants database that you would use to enter information about new and pending participants. Although most of the instruction and

counselling staff are already being tracked either in the Bow Valley Tech phonebook or in MS Outlook under **Personal Folders | Instructors**, there is an additional resource in the form of a spreadsheet located under <Q:\staff\Engineering\data\Common\OmniNeft\Sakhalin Islands\Phone List Sakhalin.xls> for your review; although it is primarily intended for personnel attached to the Sakhalin Island programme, it does list other people involved in other aspects of the OmniNeft project.

Participants' marks in their studies are captured by differing methods to meet OmniNeft's requirements and to meet Bow Valley Tech's requirements. Each training cohort has been assigned an MS Excel workbook in which the participants' results are entered and weighed to calculate a final grade in each of the subjects being taught (for an excellent example of how this system is designed to work, refer to <Q:\staff\Engineering\data\Common\OmniNeft\Sakhalin Islands\Marks and Scores\Sakhalin 1 Marks.xls>), and these spreadsheets are updated on a regular basis for OmniNeft to review. The instructors then enter the overall results of the courses in each training programme in [instructornet.bowvalleytech.ca](http://instructornet.bowvalleytech.ca), an Intranet tool designed to capture student grades throughout the institution as a whole.

Under the terms of the Continuing Services Agreement, Bow Valley Tech is obliged to collect and deliver weekly and monthly reports of its activities in the OmniNeft project. To that end, the project manager solicits weekly reports from the instructors and counsellors attached to each project, and your role will be to consolidate these individual reports into a single document for each week of each programme. In addition, the project manager prepares an overall financial and narrative report every month for each programme, and you will be asked to ensure that these monthly reports are duplicated, bound, and delivered directly to OmniNeft by courier.

## Other Issues

The Faculty of Engineering is slated to relocate in July 2004 from its present location in the Diefenbaker Building to new quarters in the Viscount Bennett Building. Although this relocation would represent an opportunity to consolidate offices in multiple locations into one central area, the space requirements and the design specifications for the proposed consolidated location are at this point still in the planning stages. The key planning issues that remain under review are the systems and facilities that would be available in a consolidated location, the ability to control and maintain the existing document filing systems across the department, and the design parameters for office and resource spaces for the department's existing and proposed workgroups. You will most likely be asked to process and transmit most of the information the members of the OmniNeft project will require to prepare for relocation.