

... Books must follow sciences, and not sciences books...

[Francis Bacon, Proposition touching Amendment of Laws]

... Young men are fitter to invent than to judge, fitter for execution than for counsel, and fitter for new projects than for settled business...

[Francis Bacon, Of Youth and Age.]

Outsourcing Manual



EXPLOITATIONS AND COMMUNICATIONS

Outsourcing Manual

© **CaribCAD – TUD partner**

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Summary

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1. Procedure

1. Foreword:

CaribCAD defined three different procedures for three different work-flows:

- 1. A preliminary and probing approach to outsourcing consisting in:**
 - Sending to the potential future performers an instruction set;
 - Letting them understand, evaluate it and decide if it is compatible with their usual operating way.
- 2. A preliminary testing of the performers' capabilities consisting in:**
 - Asking them to perform a simple test.
- 3. A real outsourcing based on:**
 - The positive evaluation of points 1 and 2;
 - A contractual definition of all the aspects.

Moreover, while the model defined and used for testing was strictly sequential, where a normal practice is following an a-sequential, multi-disciplinary, multi-tasking and co-operative approach, the following procedure is the pragmatic outcome of a practical viewpoint. TUD decided and held on it and by performing several testing saw its practicability being demonstrated as the only capable of producing results.

Although the present manual cannot be conclusive, exhaustive and comprehensive due to the ever-changing rules of the game and the new developments in IT, it is advised to re-define and use it according to one's requirements for an eventual outsourcing process:

1. The following column named "Direct Link" refers to documents that have been pasted in this text to make this text printer friendly. Actually they should be separated parts of the procedure, linked by Hyperlinks.
2. In a real outsourcing, it is advised to use the version with several documents instead of this one.
3. It is clear that a version made by self-referring pieces of procedure allows easy changes, while the present approach makes it necessary, for every occasion that a new project takes place, to check the whole text and eventually rewrite many parts of it.

C a r i b C A D	T i t l e : O U T S O U R C I N G M .
	R e v i s i o n : 0 6 - 0 1 - 0 0
R e f e r e n c e : 0 4 O M	D a t e : 0 3 - 0 5 - 9 9
I s s u e # : 0 1 V C	P a g e : 4 O F 4

PROCEDURE	Step	Performer	Process	Direct Link
1 . DECISION TO OUTSOURCE		EU [Client]	Decision to be outsourcer.	Check list Outsourcing.doc
	2 .	"	Advertise on a devoted site, CaribCAD in this case.	Advertising.doc
3 . SCANNING PROCESS		EU [Client]	Scan drawings.	Scanning Process.doc
	4 .	"	Perform quality tests.	Testing of scanned drawings.doc
	5 .	"	If result is NOT OK:	Go to step: 3.
	6 .	"	Save scanned drawings.	Naming Files Process.doc
7 . OUTSORCEE'S DECISION		DC [Performer]	Decision to be outsourcee.	Check list Outsourcing.doc
	8 .	"	Search for advertisements on devoted sites, CaribCAD in this case.	Researching right advertisement.doc
	9 .	"	Enquire.	Enquiring.doc
	10 .	EU [Client]	Reply to enquire.	Replying to enquiries.doc
11 . PRELIMINARY CONTRACTUAL DEFINITION & TESTING		DC [Performer] and EU [Client]	Preliminary contractual definitions of an eventual outsourcing.	Check List Pre- and Contractual Process.doc
	12 .	EU [Client] and DC [Performer]	Contextual agreement, definition and testing of the client's procedures, performer's skills, etc.	Preliminary Definition and Testing.doc
13 . FINAL DECISION & CONTRACTUAL DEFINITION		EU [Client] (and DC [Performer])	Decision to start a real outsourcing with the tested outsourcee.	Check List Pre- and Contractual Process.doc
	14 .	DC [Performer] and EU [Client]	Contractual definitions for outsourcing.	Contractual Process.doc
	15 .	EU [Client] and DC [Performer]	Contextual agreement and definition of the client's requirements and performer's duties.	Definition.doc
16 . OUTSOURCING		EU [Client]	Decide drawings and pieces of manual to outsource.	
	17 .	"	Annotate files and save annotations.	Writing annotations Process.doc
	18 .	"	Update and save catalogue.	Updating Catalogue Process.doc
	19 .	"	If the necessary files are not more than two or three:	Go to step: 21.
	20 .	"	Zip the necessary files.	Naming Files Process.doc
	21 .	"	Access the CaribCAD Intranet.	Notes about tools.doc [Procedure Intranet Access.doc]

2 2 .	"	Use the available system and upload files	Notes about tools.doc [Procedure Uploading.doc]
. a	"	Post pieces of information.	Notes about tools.doc [Procedure Posting.doc]
. b	"	Send confirmation to DC [Performer].	Procedure confirmation.doc

2 3 . EXECUTION

DC [Performer] **Receive outsourcing request**

2 4 .	"	Access the CaribCAD Intranet.	Notes about tools.doc [Procedure Intranet Access.doc]
2 5 .	"	Use the available system and download files.	Notes about tools.doc [Procedure Downloading.doc]
. a	"	Retrieve pieces of information.	Notes about tools.doc [Procedure Retrieving.doc]
. b	"	Send confirmation to EU [Client].	Procedure confirmation.doc
2 6 .	"	Perform quality tests.	Procedure tests on retrieved drawings
2 7 .	"	If result is GO:	Go to step: 29.
2 8 .	"	If result is CANCEL:	
. a	"	Access the CaribCAD Intranet.	Notes about tools.doc [Procedure Intranet Access.doc]
. b	"	Use the available system and upload files	Notes about tools.doc [Procedure Uploading.doc]
. c	"	Post pieces of information.	Notes about tools.doc [Procedure Posting.doc]
. d	"	Send confirmation to EU [Client].	Procedure confirmation.doc
. e	"	Procedure goes back to:	Steps: 14, 15, and 16,
2 9 .	"	Set up drawing in AutoCAD.	Procedure Set up AutoCAD Drawing ¹
3 0 .	"	Perform drawing procedure.	Procedure CAD Drawing ²

¹ Follow and refer to Volume 05 Appendixes.

² Follow and refer to Volume 05 Appendixes.

3 1 .	"	Save CAD drawings.	Naming Files Process.doc
3 2 .	"	Update and save catalogue.	Updating Catalogue Process.doc
3 3 .	"	Access the CaribCAD Intranet.	Notes about tools.doc [Procedure Intranet Access.doc]
3 4 .	"	Use the available system and upload files	Notes about tools.doc [Procedure Uploading.doc]
. a	"	Post pieces of information.	Notes about tools.doc [Procedure Posting.doc]
. b	"	Send confirmation to EU [Client].	Procedure confirmation.doc

3 5 . EVALUATION EU [Client] **Receive outsourcing results**

3 6 .	"	Update and save catalogue.	Procedure updating catalogue
3 7 .	"	Access the CaribCAD Intranet.	Notes about tools.doc [Procedure Intranet Access.doc]
3 8 .	"	Use the available system and download files.	Notes about tools.doc [Procedure Downloading.doc]
. a	"	Retrieve pieces of information.	Notes about tools.doc [Procedure Retrieving.doc]
. b	"	Send confirmation to DC [Performer].	Procedure confirmation.doc
3 9 .	"	Perform quality tests.	Procedure tests on retrieved CAD drawings ³
4 0 .	"	If result is GO:	Go to step: 42
4 1 .	"	If result is CANCEL:	
. a	"	Annotate files and save annotations.	Writing annotations Process.doc
. b	"	Update and save catalogue.	Updating Catalogue Process.doc
. c	"	Access the CaribCAD Intranet.	Notes about tools.doc [Procedure Intranet Access.doc]
. d	"	Use the available system and upload files	Notes about tools.doc [Procedure Uploading.doc]

³ Follow and refer to Volume 05 Appendixes.

	. e	"	Post comments and request for modifications.	Notes about tools.doc [Procedure Posting.doc]
	. f	"	Send confirmation to DC [Performer].	Procedure confirmation.doc
	. g	"	Procedure goes back to:	Go to step: 23,
4 2 .	INTERIM APPROVAL	EU [Client]	Grant ad interim approval.	
	. a	"	Perform intermediate payment according to stipulated contract.	
4 3 .		"	If outsourcing task is COMPLETE:	Go to step: 45,
4 4 .		"	Go back and repeat procedure for every task until Outsourcing task is complete.	Go to step: 23,
4 5 .	FINAL APPROVAL	EU [Client]	Grant final approval	
	. a	"	Perform final payment according to stipulated contract.	
4 6 .	CHOICE TO OUTSOURCE AGAIN	EU [Client]	Perform choice to outsource again.	Check list Client.doc
	4 7 .	"	If result is NO:	Go to step: 52
4 8 .	PARTNER'S CHOICE	EU [Client]	Perform outsourcee partner choice.	Check list Client.doc
	4 9 .	"	If result is NEW PARTNER:	Go to step: 1,
5 0 .		"	If result is SAME PARTNER:	Go to step: 13,
5 1 .		"	If result is CONTRACTUAL REDEFINITIONS:	Go to step: 11,
5 2 .	PROCEDURE END	EU [Client]	END of procedure.	
5 3 .	PERFORMER'S CANCELLATION	DC [Performer]	Unilateral performer's cancellation.	
	. a	"	Compose comments and cancellation request.	Writing annotations Process.doc
	. b	"	Send confirmation to EU [Client].	Procedure confirmation.doc
5 4 .	EVALUATION OF CANCELLATION REQUEST	EU [Client]	Receive cancellation request.	
	5 5 .	"	If cancellation is NOT accepted:	Go to step: 13,
	. a	"	Accept cancellation.	
	. b	"	Compose comments and cancellation acceptance.	
	. c	"	Request for immediate contractual fine payment.	

	. d	"	Send confirmation to DC [Performer].	Procedure confirmation.doc
5 6 . FINE PAYMENT		DC [Performer]	Receive fine payment request.	
	5 7 .	"	If payment of contractual fine IS done:	Go to step: 60.
	5 8 .	"	Perform post-contractual redefinition, gentlemen's agreement.	
5 9 . COLLECTION OR LEGAL ACTIONS		EU [Client]	Fine collection or legal actions taken.	
	6 0 .	"	If payment is RECEIVED then contract is ended.	Go to step: 46.
	6 1 .	"	Take legal actions	Go to step: 46.
6 2 . CLIENT'S CANCELLATION		EU [Client]	Unilateral performer's cancellation.	
	. a	"	Compose comments and cancellation request.	Writing annotations Process.doc
	. b	"	Send confirmation to DC [Performer].	Procedure confirmation.doc
6 3 . EVALUATION OF CANCELLATION REQUEST		DC [Performer]	Receive cancellation request.	
	6 4 .	"	If cancellation is NOT accepted:	Go to step: 13.
	. a	"	Accept cancellation.	
	. b	"	Compose comments and cancellation acceptance.	
	. c	"	Request for immediate contractual fine payment.	
	. d	"	Send confirmation to EU [Client].	Procedure confirmation.doc
6 5 . FINE PAYMENT		EU [Client]	Receive fine payment request.	
	6 6 .	"	If payment of contractual fine IS done:	Go to step: 68.
	6 7 .	"	Perform post-contractual redefinition, gentlemen's agreement.	
6 8 . COLLECTION OR LEGAL ACTIONS		DC [Performer]	Fine collection or legal actions taken.	
	6 9 .	"	If payment is RECEIVED then contract is ended.	Go to step: 7.
	7 0 .	"	Take legal actions	Go to step: 7.

2. Check list Outsourcing.doc

1. Why Outsource?

- 1. Is it necessary to improve company focus by:
 1. Reducing management loading
 2. Allowing to concentrate on core business
 3. Allowing an increase in flexibility
 4. Allowing an increase in quality
 5. Allowing a reduction in costs

Outsourcing lets the company focus on broader business issues whilst having operational details assumed by an outside performer. It is an organisational-shaping management tool that can lead to a clearer, more effective focus on meeting the customer's needs. Finally it can enable an organisation to accelerate its growth and success through expanded investment in the areas that offer it the greatest competitive advantage.

- 2. Is it important to have access to world-class capabilities by:
 6. Accessing new technology, tools and techniques that the organisation may not currently possess
 7. Avoiding the cost of chasing technology and the training costs associated with each new generation
 8. Enabling the client's staff to concentrate to building new and improved capabilities rather than managing current operations
 9. More structured methodologies, procedures and documentation, as well as more experienced staff, resulting in fewer operational problems
 10. Competitive advantage through expanded skills
 11. A better price/value mix of investments
 12. Delivering world-class support to clients and partners
 13. For the client's organisation freedom to provide proven experience and leadership in the application of their speciality to business processes



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- 14. Accessing knowledge and expertise the outsourcing partner has gained from other clients
- 15. On-site staff to support the clients requirements

By the very nature of some partners' specialisation, it can bring extensive world-wide, world-class capabilities to meeting the needs of its customers. Just as some customers are outsourcing to improve their focus, others have honed their skills in providing the services in which they specialise. Mind that those capabilities are usually the result of extensive investments, made over a considerable period of time, in technology, methodologies and people. They also include specialised expertise gained through working with many clients/performers facing similar challenges. This expertise may be translated in skills, processes, or technologies uniquely capable of meeting these needs.

- 3. Is it necessary to accelerate re-engineering benefits:

Outsourcing is often a by-product of another powerful management tool, procedure – Business Process Re-Engineering. It allows an organisation to immediately realise the anticipated benefits of re-engineering by having an outside organisation, already re-engineered to world-class standards, to take over the process.

- 4. Is it necessary to free resources for other purposes:

Every organisation has limits on the resources available to it. The constant challenge is to ensure that its limited resources are expended in the most valuable areas. Outsourcing permits an organisation to re-direct its resources from non-core activities towards activities that have the greater return in serving the customer.

- 5. Is it necessary to make capital funds available:

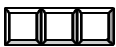
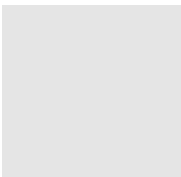
Outsourcing is a way to reduce the need to invest capital funds in non-core business functions. Instead of acquiring the resources through capital expenditures, they are contracted for on an “as used” operational expense basis.

- 6. Is it necessary to reduce and control operating costs:

The single most important tactical reason for outsourcing is to reduce and control operating costs. A greater economy of scale or some other advantage based on specialisation, is clearly and simply one of the most compelling tactical reasons for outsourcing.

- 7. Is it necessary to find resources not available internally:

Companies outsource because they do not have access to the required resources within the company. In this situation, where the required resources would otherwise need to be built from scratch, outsourcing becomes a viable and attractive alternative. Similarly, rapid growth or expansion of operations is



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a strong indicator that outsourcing may be right for a company.

- 8. Is it necessary to manage functions difficult to manage or out of control:

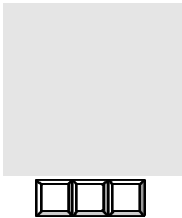
Outsourcing is certainly one option for addressing these types of problems. Outsourcing does not, however, mean abdication of management responsibility nor does it work well as a knee-jerk reaction by companies in trouble.

- 9. Is it necessary to receive a cash infusion:

As outsourcing deals with matters that often are the object of International, EC, national plans, it is possible that funds are granted by banks, institutions etc. to companies that are willing to co-operate. This in the idea that this way creates more equal opportunities for developed and developing countries in terms of economic benefits and human capacities.

2. Which are the problems that cause Outsourcing to fail?

- Outsourcer's business objectives are not clear.
- Unrealistic expectations of the Outsourcer.
- Outsourcee spends inadequate attention, time and resources on managing the deal.
- Outsourcer is unwilling to adequately define scope, levels, standards, conventions or mechanisms.
- Outsourcer's service, quality and performance issues are often linked to inadequate processes.
- Deals are not meeting outsourcer cost expectations.
- Lack of skilled resources committed to deal.
- Lack of adequate management on the outsourcee side.
- Outsourcee is not proactive, mainly reactive, as expected.
- No one is left who understands the contract terms and conditions.
- Unanticipated changes in technology or business.
- It is difficult to ensure that the outsourcee is providing all the skills needed

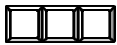
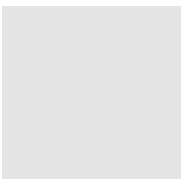


to meet the objectives.

- Cost is also an important consideration.

3. *Why contracts are cancelled?*

- The agreement is due to expire.
- The outsourcee has performed poorly.
- The company has new management.
- The core business of the company has changed fundamentally.
- Technology has changed.
- The company wants to recapture the dissipating magic of the relationship.
- Termination costs no longer seem prohibitive.
- Outsourcees typically promise to cut costs by 5to 20%, but unforeseen add-ons can reduce savings.



3. Advertising.doc

1. What?

- Attract attention.
- Arouse interest.
- Quicken a desire
- Establish conviction.
- Get the action you planned for.
- Promise and ask for discretion.
- Give reasons.
- Request references.
- Give information about the firm.
- Show own production, when possible.
- Show in special folders, maybe pay to see folders, documents that cannot be public. Eventually they can just be samples for testing the future performer.
- Make requests.
- Indicate state of the market/conditions.

Reference:

[Writing messages.doc](#)



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4. Scanning Process.doc

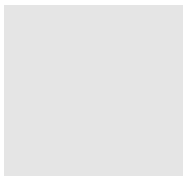
To scan a drawing, use any available program on the market to do the job, eventually use an image editor to add information or edit the image, but the most important thing is to achieve the following standards:

- Is the drawing readable?
- Can all the small texts be understood/read?
- Is the resolution in dpi the one decided?
- Is the scale the one decided?
- Is the drawing the correct one?
- Is the scanned image turned in the right sense?
- Is the saving format at least a TIFF group 4? It is not important, now, the saving name, but it is advisable to give already the final one, not to do mistakes later on in the name giving process.
- Save the scanned drawing and repeat process until all the assigned drawings are finished.

Reference:

Naming Conventions.doc

[Naming File Process.doc](#)

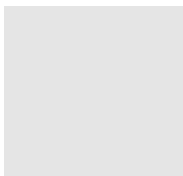


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5. Testing of scanned drawings.doc

To test a scanned drawing, use any available program on the market to do the job, eventually use an image editor to add information or edit the image, but the most important thing is to achieve the following standards:

- Is the drawing readable?
- Can all the small texts be understood/read?
- Is the resolution in dpi the one decided?
- Is the scale the one decided?
- Is the drawing the correct one?
- Is the scanned image turned in the right sense?
- Is the saving format at least a TIFF group 4? It is not important, now, the saving name, but it is advisable to give already the final one, not to do mistakes later on in the name giving process.
- Save the scanned drawing and repeat process until all the assigned drawings are finished.
- Are the drawings more than a reasonable number to be uploaded on the server in a reasonable time? If not, compress/zip them using any tool giving the standard ZIP format. The name should identify all the scanned drawings contained in it, or at least the general project number and the progressive number of all the Zipped files.



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Reference:

Naming Conventions.doc

[Naming File Process.doc](#)

6. Naming Files Process.doc

It is very important to achieve the following standards:

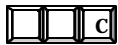
1. *Naming files in a SCANNING PROCESS:*

1. For single files:

- Is the name the same as the one contained in the cartouche, usually found on the lower right corner and composed by letters and ciphers?
- Is there in the name a piece of text specifying the content of the drawing?
- Is there the initials of the person who is scanning plus eventually the version of the drawing?
- If adding remarks, is the file marked -RM?
- If the file is the definitive has the name been cleaned by the mark -RM?]
- Is the file format at least a TIFF group 4?

2. For Zipped files:

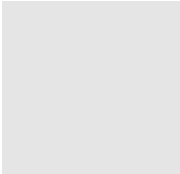
- Is the name the same as the ones contained in the single file's cartouche, usually found on the lower right corner and composed by letters and ciphers?
- Is there in the name a piece of text specifying the content of the drawing?
- Is there the initials of the person who is scanning plus eventually the version of the drawing?
- If adding remarks, is the file marked -RM?
- If the file is the definitive has the name been cleaned by the mark -RM?]
- Is the file format at least a standard ZIP?



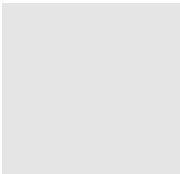
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2. Naming files in a DRAWING PROCESS:

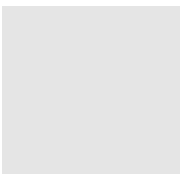
1. For Complete Drawings:



- Is the scale indicated?
- If scale is a two ciphers digit, has a 0 been added in front of it?
- Is the name the same as the one contained in the cartouche, usually found on the lower right corner and composed by letters and ciphers?
 - Is the letter correctly indicated L, C and A, where correct?
 - Is the cipher by brackets the same as the one on the scan?
 - Are the ciphers to the right the same as the ones on the scan?
- If the file is not yet the definitive:
 - Is there in the name a piece of text specifying the content of the drawing?
 - Is there the initials of the person who drew plus eventually the version of the drawing?
 - Is there the sequential number indicating the drawing/revision progression?
 - If adding remarks, is the file marked -RM?
- If the file is the definitive:
 - Has the name been cleaned by the unnecessary elements? [E.g. comments, -RM, initials, etc.]
- Is the file format a real DWG?



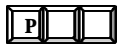
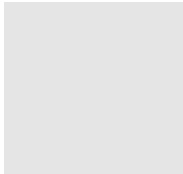
2. For X-refs. [External references]:



- Is the scale indicated?
- If scale is a two ciphers digit, has a 0 been added in front of it?
- Is the name the same as the one contained in the cartouche, usually found on the lower right corner and composed by letters and ciphers?

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- Is the letter correctly indicated L, C and A, where correct?
- Is the cipher by brackets the same as the one on the scan?
- Are the ciphers to the right the same as the ones on the scan?
- Has the level of representation been indicated?
- Is it a valid number: 1, 2, or 3?
- If the file is not yet the definitive:
 - Is there in the name a piece of text specifying the content of the drawing?
 - Is there the initials of the person who drew plus eventually the version of the drawing?
 - Is there the sequential number indicating the drawing/revision progression?
 - If adding remarks, is the file marked –RM?
- If the file is the definitive:
 - Has the name been cleaned by the unnecessary elements? [E.g. comments, –RM, initials, etc.]
- Is the file format a real and standard DWG?



Reference:

Naming Conventions.doc

7. Naming Conventions.doc

According to the Dutch Standards and to the Depot © -a sort of supermarket of elements, or also a working environment- it is very important to have some naming conventions during the course of an outsourcing process; thus it is useful to determine and to state the next items:

1. **Project name:**

Is the name used to define the project, and the client gives it. It must be given to new folders to be created:

- By the performer on his local Hard Disk;
- By the Client on his local Hard Disk.

Into these folders all the pieces of information representing the project must be placed. It is really important for both, the client and the performer, to create the new folder in the same place on their Hard Disks, and to name it in the same way. Actually, using an Intranet system, this folder should take its place on the server itself, but also in this case it should be created on the client and performer machines. For example: **HPA (Hospital Project A)**

1.1. Folders:

**drive: \name **

It will be the folder containing all the pieces of information used for the project "name", currently object of the outsourcing.

**\Scans ** It will contain all the scanned images of the project "name".

**\Drawings ** It will be the library of drawings, all the X-Refs and all the sub-X-Refs of the project "name", if necessary it can be subdivided into Sub-Folders, decided and chosen by the client and performer, so that it can be easier to find some specific information. The final drawings must be placed in the main **\name \Drawings ** folder.

**\Catalogue ** It will be for the moment a library of

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Spreadsheets files. Using at its most possibilities the actual IT techniques, it is meant to be translated into an interactive piece of W-F Management. It should keep note of all the remarks, files, dates, times, individuals locating files on the server, states of the procedure, and so on for the project “name”.

**drive:\ PERFORMER ** Sub-folders are to be created by the PERFORMER and to be used for general annotations / remarks on the procedure, conventions, etc. and not on the issues object of the production. Specific remarks, about the production, must be placed into the catalogue itself or into the CAD drawings themselves. The meaning of this is to have different folders for different remarks/ annotations. It is then easier in the end of the process to draw up conclusions: on the production itself, on the procedure, on the conventions, etc. without needs to browse into a general folder filled by different pieces of information.

**drive:\ CLIENT ** Sub-folders are to be created by the client

**\Process ** It will contain general procedures and general procedural information.

**\name ** It will contain the specific procedure for project “name” and all the procedural information related to it.

**\Conventions ** It will contain all the conventions useful to follow the procedure.

**\Notes ** It will contain remarks useful to the client to draw up conclusions, write a manual/technical report...

1.2. Examples:

**C:\HPA **

**\Scans **

**\Drawings **

**\Catalogue **

**G:\ PERFORMER **

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\Draftsman A \

\... \

D:\ CLIENT \

\Process \

\HPA \

\Conventions \

\Notes \

2. Subjects:

CAD drawings representing the outsourcing project:

The present procedure refers to the Dutch Standards so called NL-SfB, but it has been researched that different offices, in the same country or in different countries can be using different Standards due to their IT systems, practice, etc. This part of the manual should be adapted to reflect the situation.

2.1. Complete drawings:

999X(99) 99-99-xxxx_YY-88. dwg

- Where: 999 = stands for the scale of the paper drawing.
- X = is one of the letter L, C and A: where L stands for Location, C for Component and A for Assemblage.⁴ It refers to the paper drawing's cartouche.
- (99)-99 = is the number written to the right hand side of the letter in the cartouche. It is a code representing the material and kind of element according to the Dutch Standardisation system. Refer to [Layer Conventions.xls](#).
- xxxx = an eventual piece of text, it is used just until the drawing is not definitive. It is a short description of what is inside the drawing itself.
- _YY = is the initials of the draftsman/reviewer; it is used just until the drawing is not definitive.

⁴ L= Location, these drawings are normally plans, sections, facades; the L represents the "scene of the action", the stage, the "location" and it is used to orient into the project.
 C= Component, these drawings are normally complete representations of elements. Their names refer to the Dutch standardisation system and point to a specific element/material. They can also be imagined as "abaci" of elements in a building object.
 A= Assemblage, these drawings are details and they normally refer to L and C drawings.

C a r i b C A D		T i t l e : O U T S O U R C I N G M .	
		R e v i s i o n : 0 6 - 0 1 - 0 0	
R e f e r e n c e :	0 4 O M	D a t e :	0 3 - 0 5 - 9 9
I s s u e # :	0 1 V C	P a g e :	2 3 O F 2 3

-88 = is the sequential number representing the various steps and being a number or the initials RM [remarks].

2.2. Examples: **050C(28) 01-05_VC-RM.dwg**
100L(00) 13.dwg
 Etc.

2.3. Composed by X-refs: **999X7(99) 88 88 88 88 88-xxxx_YY-66.dwg**

Where: 999 = stands for the scale of the paper drawing.
 X = is one of the letter L, C and A: where L stands for Location, C for Component and A for Assemblage. It refers to the paper drawing's cartouche.
 7 = stands for the level of representation [valid ciphers 1,2 and 3].
 (99) = is the number written to the right hand side of the letter in the cartouche. It is a code representing the material or kind of elements according to the Dutch Standardisation system. Refer to appendix [Layer Conventions.doc](#).
 88 88 88 88 88 = is the element according to the general categories, highlighted in yellow into the appendix [Carib_Layers.xls](#) it can also be expressed as an interval for example 88-88.
 -xxxx = an eventual piece of text, it is used just until the drawing is not definitive. It is a short description of what is inside the drawing itself.
 _YY = is the initials of the draftsman/reviewer; it is used just until the drawing is not definitive.
 -66 = is the sequential number representing the various steps and being a number or the initials RM [remarks].

2.4. Examples: **1002SL(00) 01-25-Bovenbouw_KM-03.dwg**
0501FL(05) 00.dwg
 Etc.

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2.5. Composed by different Layers: According to the client's practice, the client can or cannot be interested in the naming of layers. It is advised, anyway, to give a simple name referring to the drawn material. E.g. concrete wall.

Always refer to appendix [Layers.xls](#)

2.6. Scans: **999X(99) 99-99-xxxx_YY-88. tif**

Where: 999 = stands for the scale of the paper drawing where possible, otherwise as a XXX.

X = is one of the letter L, C and A: where L stands for Location, C for Component and A for Assemblage. It refers to the paper drawing's cartouche.

(99)-99 = is the number written to the right hand side of the letter in the cartouche. It is a code representing the material and kind of element according to the Dutch Standardisation system. Refer to [Layer Conventions.xls](#).

-xxxx = an eventual piece of text. It is a short description of what is inside the drawing itself.

_YY = is the initials of the scanner/reviewer.

-88 = is the sequential number representing the various steps and being a number or the initials RM [remarks].

2.7. Examples: **100L(00) 01-25-Bovenbouw_VC-RM.tif**

XXXL(05) 00-Internal Pictures.tif Etc.

2.8. Zips: **999X(99) 99-99-xxxx_YY-88. zip**

Where: 999 = stands for the scale of the paper drawings, where all of the same scale, otherwise as a XXX.

X = is one of the letter L, C and A: where L stands for Location, C for Component and A for Assemblage. It refers to the paper drawing's cartouche.

(99)-99 = is the number written to the right hand side of the letter in the cartouche. It is a code representing the material and kind of element

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according to the Dutch Standardisation system. Refer to [Layer Conventions.xls](#).

- xxxx = an eventual piece of text. It is a short description of what is inside the drawing itself.
- _YY = is the initials of the scanner/reviewer.
- 88 = is the sequential number representing the various steps and being a number or the initials RM [remarks].

2.9. Examples: **1002SL(00) 01-25-Bovenbouw_KM-03.dwg**

0501FL(05) 00.dwg

Etc.

2.10. Catalogue: It will be for the moment a library of Excel files. Using at its best possibilities the actual IT techniques, it is meant to be translated into an interactive piece of WF Management. It should keep note of all the remarks, dates, times, persons locating files on the server, states of the procedure, and so on for any project.

CatalogueDDMmmYY_XX. xls

It is the file where the History of sent/received/scanned/procedures/drawings/remarks/requests/etc. files is kept for bureaucratic reasons, as an interacting interface or finally to manage what is happening to the process. It must be kept in the apposite folder.

- Where: DD = is the day of the changes to the file itself
- Mmm = is the abbreviation of the month
- YY = are the last two numbers of the year [there is no need for the moment to get worried for the year 2000, not being this file object of automated calculations]
- _XX = is the initials of the draftsman/reviewer

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2.11. Example: Complete catalogue: [Catalogue27Nov98 AT.xls](#)
Model of catalogue: [Catalogue Model VC-01.xls](#)

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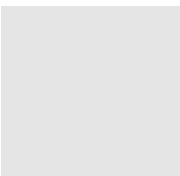
8. Researching right advertisement.doc

1. What?

- Advertisement attracts attention.
- Advertisement arouses interest.
- Request for discretion.
- Reasons given.
- References requested.
- Information about the firm given.
- Firm own production is shown.
- Requests are interesting.
- State of the market/conditions indicated and interesting.

Reference:

[Writing messages.doc](#)



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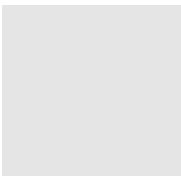
9. Enquiring.doc

1. What?

- Give source of information.
- Give information about the firm.
- Promise and ask for discretion.
- Request references.
- Show own production, when possible.
- Show in special folders, maybe pay to see folders, documents that cannot be public.
- Make requests.
- Indicate state of the market/conditions.

Reference:

[Writing messages.doc](#)



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10. Writing messages.doc

1. *Parts of the business letter:*

1. Heading:
 - Name of the firm
 - Kind of business carried out
 - Telephone number/s
 - Fax number
 - E-mail address
 - Eventually pagers, telegraphic address, telex number, others

2. References:
 - They consist of the initials of the person who signs the letter (usually capital letters) and of those of the typist (usually small letters).
 - In some cases other letters or numbers are added for filing purposes.
 - References allow a quick link with previous correspondence and ensure that the letters will reach the right person or department without delay. It is customary to quote the reference initials of the correspondent in a reply.

3. Date:
 - It usually follows the order of **day, month, year**.
E.g. 31st December 2000
 - A cardinal number may be used for the date.
E.g. 31 December 2000
 - In American style the month comes first.
E.g. December 31, 2000
 - Abbreviations may be used for the months of the year.
E.g. Jan. Feb. Mar. Apr. May Jun.
Jul. Aug. Sep. Oct. Nov. Dec.
 - Do not write the month in figures. It may be confusing in correspondence with the U.S.A.

4. Inside address:
 - The title **Messrs** (abbreviations of Messieurs) is used before the name of a company that contains one or more personal names.
E.g. Messrs Smith & Wesson Ltd

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- If there is no personal name, the article “the” is used before the name of the company.
E.g. *The CaribCAD project*
 - When addressing a person, who holds a particular position in the firm, write “the” before the position.
E.g. *The Manager*
 - When writing to a correspondent personally, write **Mr**, **Mrs**, or **Miss** before the name. If it is not known whether a woman is married or single, use the title **Ms**.

- 5. Attention line:
 - It is used when addressing a letter to a particular member of an organisation.

- 6. Salutation:
 - If writing to a firm use: *Dear Sirs*,
 - In a letter to the U.S.A. use: *Gentlemen*:
 - In a letter addressed to a particular person (the Manager, the Director, etc.) use the form: *Dear Sir*, *Dear Madam*,
 - If knowing personally the correspondent by name use: *Dear Mr. Curti*, *Dear Miss Pandolfi*, etc.
 - Always start with a capital letter and put a comma at the end of the salutation (a colon in American style).

- 7. Subject line:
 - It states briefly the theme of the letter and has the same purpose of the reference.
 - It ensures that a letter is immediately passed to the right person or department.
E.g. Outsourcing project HPA

- 8. Body of the letter:
 - It is usually organised in several paragraphs, according to the points the writer wants to deal with.

- 9. Complimentary close:
 - It starts with a capital letter and is usually followed by a comma.
 - The one most commonly used in a formal or routine business letter is: *Yours faithfully*,
 - The American counterpart is: *Yours very truly*, or *Very truly yours*,
 - When the correspondent is addressed by his or her name adopt: *Yours sincerely*,
 - The American usage is: *Sincerely yours*, or *Cordially yours*,

- 10. Signature:
 - In normal correspondence, often signatures are illegible, so the name of the person who signs the letter should always be typed below the space left for the signature.
 - In e-mails, use digital signatures, when possible, they constitute legal proof of the writer’s identity.
 - The signature is followed by the writer’s position in the firm.
 - Often letters are typed some time after they have been dictated, and maybe the person who has dictated a letter is no longer available.

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In that case the typist or some other employee will sign it on behalf, but the word “for” or the initials “p.p.” will precede the name of the person who is responsible for the letter.

11. Enclosure: ▪ The number shows how many items are being sent.
E.g. Enc. 2

2. Rules for Writing Good Letters/Memorandums:

1. Spell the names right:
 - If the name can't be find out any other way, call the office of the person to whom the letter is meant.
 - When in doubt, use Ms. -- don't guess a woman's marital status

2. Get the address right:

3. Include only one topic per letter:
 - Know the purpose and write to that purpose.
 - Keep the reading time under 1.5 minutes.

4. Be courteous and considerate of the reader :
 - Respect readers as people and professionals.
 - Use praise but not flattery.
 - Don't exaggerate -- maintain trust.

5. Make the first sentence great:
 - Get to the point.
 - Let the reader know if the letter is a reply to their correspondence.
 - Example (from a letter soliciting funds for UNICEF):

"In the ten seconds it took you to open and begin to read this letter, four children died from the effects of malnutrition or disease somewhere in the world."

6. Stop when you're through:
 - Avoid "call if you have questions" types of endings.
 - Can include a personal note if you are close friends.

7. Highlight important words/ points:
 - Use underlining.
 - Use **boldface type**.
 - Use *Italics*.
 - Use larger font sizes
 - Use ALL CAPS.

- 8. Use standard English:
 - Avoid telescoping sentences.
 - Avoid incomplete sentences.
 - Use correct grammar, spelling, and punctuation.

- 9. Edit and rewrite:
 - Avoid having all paragraphs the same length.
 - Use short and varied sentences. Keep the average sentence length between 7 and 17 words.
 - Avoid jargon (terms that are highly technical and understood by only a few people).
 - Avoid flowery terms (e.g., magnificent, exceptional).
 - Use active voice.
 - Use short words.

- 10. Follow the seven C's:

Each letter/memorandum should be:

 - conversational
 - clear
 - concise
 - complete
 - concrete
 - constructive
 - correct

3. Ten secrets of writing business letters

- 1. To begin with:
 - 1. Start From the End**
 - Decide what the result of the letter ought to be.
 - List things you'd like to say, and review them.
 - Remove those not supporting the main idea.
 - Good letters have a strong sense of purpose.
 - 2. Get to the point early**
 - Do not delay.
 - State main cause in the first paragraph.
 - 3. Put Yourself in Your Reader's Place**
 - If the letter came to you, how would you respond?
 - Be pleasant; try to turn negative statements into positive ones.

- 2. No Business-jargon:
 - 4. Say it plainly**
 - Phrases like "in compliance with your request" and "enclosed herewith" are stilted.
 - Write as you talk — naturally.
 - Include just one idea.
 - Sentences longer than two typed lines are suspect.
 - 5. Clear the Deadwood**
 - Cut words, sentences, and even paragraphs that don't contribute.
 - Work hard to simplify your reader's job.

- Be especially careful with adjectives, which can sap strength from your words.
- 6. Use Active Verbs**
- Passive voice is weak and confusing. “A decision has been reached by the committee” is inferior to “The committee has reached a
 - Also, readers can sense your evasiveness if you write: “Your order has been misplaced” instead of “I misplaced your order.”
- 7. Be Human**
- Your letter should read like a conversation.
 - Address your reader by name: “Dear Ms. Hartman.”
 - And if you can fit it in naturally, use Ms. Hartman’s name in the body.
 - You want her to know the letter is personal. Whenever you can, use pronouns like I, we, and you.
3. Be Positive: **8. Never Write in Anger**
- Anger will evaporate; a letter won’t.
 - Devise a way to handle problems in an upbeat manner.
 - Your chances of success will multiply tenfold.
- 9. End With an Action Step**
- The end of a letter should suggest the reader’s next move, or your own.
 - Don’t write distracting closings like: “Again, thank you for . . .” or “If you have problems, please don’t hesitate to call.”
 - Close with a simple “Sincerely,” and your signature; it may be a perfect ending.
- 10. Be Professional**
- The most well written letters can’t survive bad presentation.
 - Use a clean, logical format for your letter.
 - A crowded or over-designed page distracts from your message.

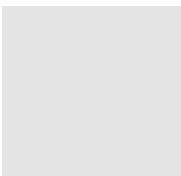
11.Replying to enquiries.doc

1. What?

- Acknowledging receipt of a letter.
- Sending requested pieces of information.
- Stating terms of business.
- Request references.
- Giving information about own production.
- Encouraging the eventual performer to go forward.

Reference:

[Writing messages.doc](#)

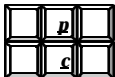
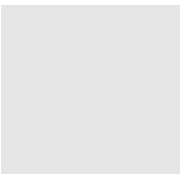


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12. Check List Pre- and Contractual Process.doc

1. Which are the problems that cause Outsourcing to fail?

- Outsourcer's business objectives are not clear.
- Unrealistic expectations of the Outsourcer.
- Outsourcee spends inadequate attention, time and resources on managing the deal.
- Outsourcer is unwilling to adequately define scope, levels, standards, conventions or mechanisms.
- Outsourcer's service, quality and performance issues are often linked to inadequate processes.
- Deals are not meeting outsourcer cost expectations.
- Lack of skilled resources committed to deal.
- Lack of adequate management on the outsourcee side.
- Outsourcee is not proactive, mainly reactive, as expected.
- No one is left who understands the contract terms and conditions.
- Unanticipated changes in technology or business.
- It is difficult to ensure that the outsourcee is providing all the skills needed to meet the objectives.
- Cost is also an important consideration.



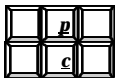
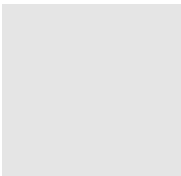
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2. Why contracts are cancelled?

- The agreement is due to expire.
- The outsourcee has performed poorly.
- The company has new management.
- The core business of the company has changed fundamentally.
- Technology has changed.
- The company wants to recapture the dissipating magic of the relationship.
- Termination costs no longer seem prohibitive.
- Outsourcees typically promise to cut costs by 5to 20%, but unforeseen add-ons can reduce savings.

3. Successful steps:

- Must have tightly defined metrics. They are the keys to prioritising goals and setting standards when farming out a network, data centre, application development, help desk and company environment, etc.
- Employee surveys.
- Optimal performing combination of tools, methods, and quality assurance procedures.
- Multi-supplier contracts as outsourcers realise that no one outsourcees can be best in all areas.
- Renegotiations, as:
 - A standard activity in the life of an outsourcing deal.
 - Client's business requirements do change and technology changes over the life of a relationship.

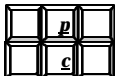
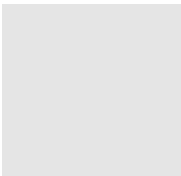


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N.B.

1. It is important that both sides be flexible enough to modify the agreement over the life of the contract.
2. The renegotiations team –which should include business managers and lawyers- should thoroughly review the contract before any renegotiations discussions with the outsourcee partner take place.
3. Note that the outsourcer is usually renegotiating for lower unit charges to keep pace with market rules. While the outsourcee is typically negotiating for changes in service levels of the increased scope of work.

- Benchmarking provisions should be routinely inserted into outsourcing contracts, but very few re-calibration of pricing will result from the research.
- Outsource small pieces.
- Stipulate and subscribe contracts with shorter lengths.
- Stipulate and subscribe contracts flexible enough to allow the change

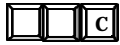
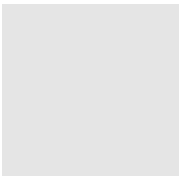


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13. Writing annotations

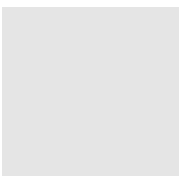
Process.doc

1. Writing annotations in Outsourcing:



- Clarify points that will be for sure not understood by the performer.
- Specify and outline specific things that are required or must be done.
- Specify standards that differ from the representation.
- Give measures that are unclear or different from the drawing.
- Specify constructive differences on the building that are not represented on the drawing.
- Clarify future modifications of the building respect to drawings due to the design phase.

2. Writing annotations and remarks in Evaluation:



- Be impartial and objective.
- Show appreciation for the performer's work.
- But be firm and resolute in giving remarks and annotations.
- Always only refer and point to the given procedure.
- Highlight and request corrections to the differences from what requested.
- Define and outline specific things that are required or must be done.
- If a task is unconventional, clarify how to perform it.
- If requested for information, or clarification reply pointing to the bulleted, numbered items.
- Specify standards that differ from the representation.
- Give measures that are not represented, unclear or different from the drawing.
- Specify constructed differences on the building that are not represented

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on the drawing.

- Clarify future modifications of the building respect to drawings due to the design phase.
- Add further official graphical representations or sketches of unclear parts of the drawing.

Reference:

[Giving remarks.doc](#)

[Naming Files Process.doc](#)

[Writing messages.doc](#)

14.Updating Catalogue Process.doc

1. *Updating Catalogue in a SCANNING PROCESS:*

- Is the file name inserted in the File column the same as the one uploaded on the server?
- Has the related extension been written in the Extension column? Is it a TIFF or ZIP?
- Are there any remarks to be done? In such a case refer to: [Giving Remarks Process.doc](#) Have the remarks been written in the Remarks column? Is the name of the person giving the remarks stated at the beginning of the first remark cell?
- Has the date been indicated in the format DD/MM/YYYY hh: mm?
- Has the size of the sent file being inserted In the Sent file size column as found in the rounded cipher given by MS Explorer?
- Is it in the format 99.9 Kb?
- Has the Catalogue name been updated following the procedure given in [Naming Conventions.doc](#)?

2. *Updating Catalogue in a PROCESS TO STATE A PROCEDURE:*

- Is the row containing the Process information highlighted in yellow?

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- Is the file name inserted in the File column the same as the one uploaded on the server?
- Has the related extension been written in the Extension column? Is it a TIFF or ZIP?
- Is the process named in the Remarks column?
- Has the date been indicated in the format DD/MM/YYYY hh: mm?
- Has the Catalogue name been updated following the procedure given in [Naming Conventions.doc](#)

**3. Updating Catalogue in a
RETRIEVING FILES
PROCESS:**

- Does the file, downloaded by the server, having the same name as the one inserted in the File column?
- Is the extension written in the Extension column the same as the one downloaded?
- Have the remarks, written in the Remarks column, been read? Is it everything clear? Are there any remarks to be done? In such a case refer to: [Giving Remarks Process.doc](#)
- Is the size of the received file the same as the one being inserted In the Sent file size column?
- Has the size of the received file being inserted in the Received file size column as found in the rounded cipher given by MS Explorer?
- Is it in the format 99.9 Kb?
- Has the Catalogue name been updated following the procedure given in [Naming Conventions.doc](#)

**4. Updating Catalogue in a
DRAWING PROCESS:**

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- Is the file name inserted in the File column the same as the one uploaded on the server?
- Has the related extension been written in the Extension column? Is it a DWG or ZIP?
- Are there any remarks to be done? In such a case refer to: [Giving Remarks Process.doc](#) Have the remarks been written in the Remarks column? Is the name of the person giving the remarks stated at the beginning of the first remark cell?
- Has the date been indicated in the format DD/MM/YYYY hh: mm?
- Has the size of the sent file being inserted In the Sent file size column as found in the rounded cipher given by MS Explorer?
- Is it in the format 99.9 Kb?
- Has the Catalogue name been updated following the procedure given in [Naming Conventions.doc](#)

Reference:

Giving Remarks Process.doc

[Naming Conventions.doc](#)

15. Notes about tools.doc

This replaces: Procedure Intranet Access.doc
 Procedure Uploading.doc
 Procedure Downloading.doc
 Procedure Posting.doc
 Procedure Retrieving.doc)

During CaribCAD's life, it emerged in many different occasions and with different implications, the urging necessity to relate all of the different aspects as a unique balanced combination of Technical basis, Human capacities, and Protocols. It can be foreseen this to result in positive outcomes in Outsourcing of Computer Aided Design/Drafting (CAD) workloads from engineering companies in Europe (EU) to specialised companies in Developing Countries (DC).

As expressed in the final documents provided by the Newcastle's team, the objectives of CaribCAD were never "to develop advanced computing solutions to concurrent engineering in construction". Still, the entire testing performed in many different occasions by different and various CaribCAD partners proved in an unmistakable and evident way that failures, lacks or missing decisions on Technical basis, Human capacities, and Protocols results in more or less severe failures in an Outsourcing results.

What follows is the GroupWare Practical, a document provided by the University of Newcastle on how to use their server, an MS Exchange 5.5 Server™. The basic idea was to allow a restricted and programmed access to it through the World Wide Web interface of the Server and to use its native client, MS Outlook™, only to perform very specific routines such as launching tasks. TUD discussed a lot about this issue; mainly over server settings, uses, functionality etc. and proposed the easier setting of server and client to allow sharing of data, programs, procedures, flows etc. instead of trying to program the server to allow WWW accesses. But due to problems such as lack of time and skilled co-operators, as well as continuous changes in the IT, a preconceived definition of CaribCAD as misunderstandings, the server status has not been brought to the full potentialities of an Exchange Server™. Please consider this when reading the following text.

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Moreover, be aware and consider the following:

- Depending on the availability of certain servers or others, the previous procedure will be implemented in different ways and different will also be its grades of automations, thus giving different momentary procedures.
- Differences will mainly regard uploading, acknowledging sending /retrieval of data, and downloading...
- Uses of this demo server together with a Work Flow Management tool such as Keyflow™ was only possible through the use of Outlook, to start the automated Work flows;
- The procedure experienced problems or incongruousness and obstacles due probably to programming mistakes or lacks, and for sure to missing implementations of basic features, of the Depot environment, of the Catalogue;
- In spite of this, it is thought that the choice for an Exchange server is definitely positive, but requiring further researches, full implementation and some programming to be really effective.

The final advice then is to require, previously to any kind of Outsourcing, a neutral advice on the state of the art in Information Technology and extensive instruction on the proper use of the adopted tools, as is the case of CAD programs.

Reference:

[Naming Conventions.doc](#)

16.Procedure Intranet

Access.doc [or GroupWare Practical by Steve Lockley]

Getting Access

Accessing the demo CaribCAD Pilot Environment
Using any of the following WEB Browsers (for Mac, 95, NT or Unix, other browsers that support Java and frames should work)

- Netscape Navigator 3.0 or better
- Microsoft Internet Explorer 3.0 or better

Access the site <http://arch50.ncl.ac.uk> in the box marked Log On enter your User ID, this is typically your initials preceded by the letter "n", this will have been sent by a separate mail. You will be prompted to enter your password and user ID, enter your ID again and your password. You should now see the main CaribCAD GroupWare interface. The main screen shows your mailbox, this is a separate mailbox from your normal Internet mailbox and only mail from CaribCAD pilots will appear in this box. It is not intended to replace or be used for communication outside of the pilot projects. No other person can deliver mail to you through this mailbox.

Double click on the mail item to view any mail you have (try the welcome mail, look at the attachment).



Sending a mail

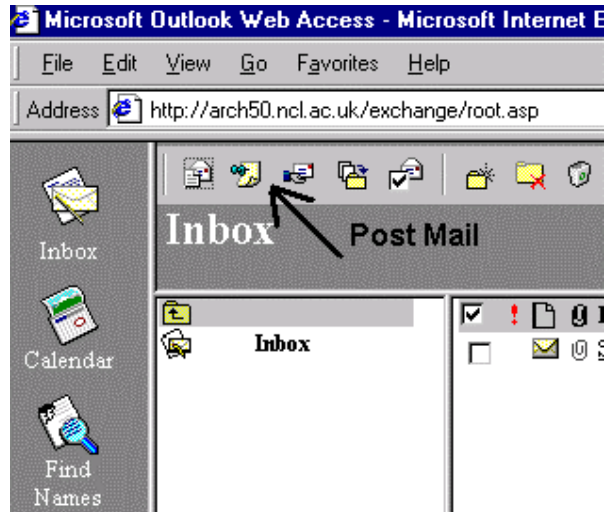
Sending a mail to a CaribCAD member, click the send mail button in the top left corner. Use their initials followed by @caribcad E.g. to mail Grahame Bevan use ngb@arch50.ncl.ac.uk

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The procedure is pretty much the same as any mailer from here on.

Using the Post Facility

Post is very similar to a mail except that it is placed directly into a mailbox or folder on the server. In this basic interface you can only post to your own inbox. This provides a facility for you to store information on the CaribCAD server that is private and can only be accessed by yourself. For example, you may want to put a copy of a file on the server for future use and to add some keywords to it to help you retrieve it in the future.



Select the Post option from the toolbar

Add some keywords to the keyword box, add a subject and a message.

Click on the attachment tab.

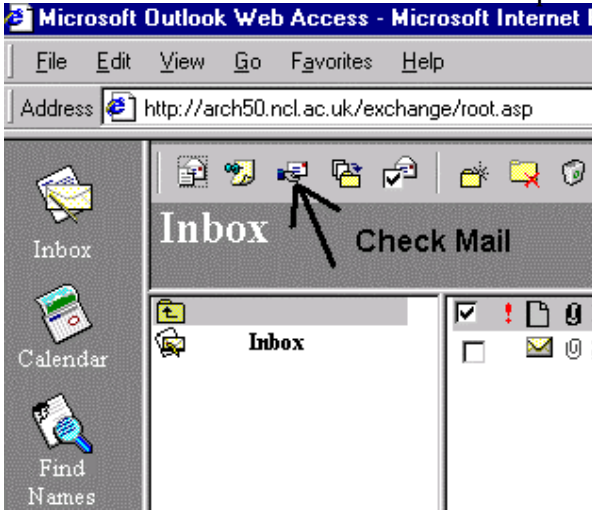
Using the browse button select any file from your PC

Click on the "Add Attachment Now" button

Now click on the Post Icon in the top left corner

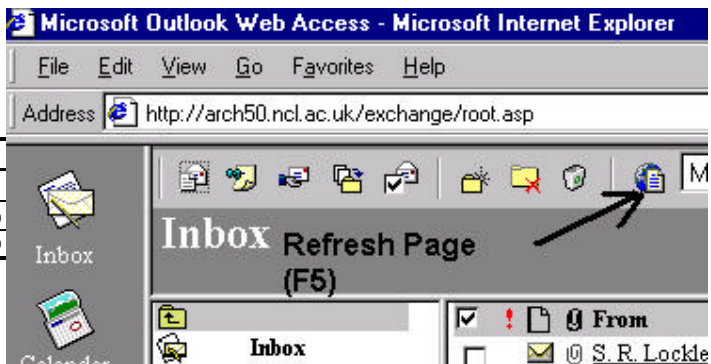
You will now be returned to the main GroupWare desktop, however you will

not see your newly posted item until you refresh the view. Either press the refresh mail icon to check for new mail or refresh the entire page by clicking the refresh page icon (Pressing F5 has the same effect)



Double click on the new mail item to see what

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you have stored (All File transfer has occurred and the document now resides on the UNINEW server)

We have stored our file in the inbox, which is not really ideal, a better place would be to have separate folders for different types of information

Creating Folders

To create a new folder below your inbox, click on the New Folder icon

When prompted for a name, type something like

"My documents"
You will see the new folder appear in the gutter of the window. Double click on it and repeat the previous post operation.



Review

So far we have looked at the basic mail support that we are all used to, with our normal mailers. We have not seen any real GroupWare facilities, The main difference between this environment and your normal mailer is.

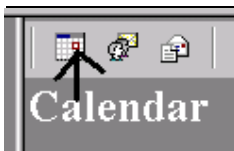
1. You do not need any software other than a WEB browser to use it.
2. You have a private and secure environment dedicated to the Pilot Project members
3. Mails are not routed around the Internet Mail hubs, therefore the risk of loss or failure is reduced and delivery is immediate
4. Files/Documents can be stored on the Server using simple mail like interfaces, the file size restriction is not a problem

Calendars

As well as mail the Demo Environment support calendars or diaries. Click on the folder icon above the Inbox. You will now see the rest of the types of

data objects that can be used. Please note in this version we only have Calendar, Inbox, Deleted Items, Sent and Outbox operational. Tasks and Notes are not yet implemented Click on the Calendar folder to see your diary.

The diary can be viewed on a day by day basis or a weekly view. Change the view by selecting a different value in the listbox at the top centre of the



screen. NB. Please be patient it takes a while to load the new view.
Click on the Compose New Appointment icon in the top left of the toolbar

A new window will appear, create a new appointment, i.e. CaribCAD Delft workshop for the next two days.

It is at this point the GroupWare aspects begin to appear, any item placed in your diary will be visible to other members of the Pilot Project. It will be used to help you co-ordinate and arrange meetings or workloads.

Click on the arrange meeting icon. Enter into the "To" box the initials of people you want to meet, separate their initials by a semicolon

E.g. nsm;nbvg;nsd;nrl

Now click on the Meeting Planner, the availability of those you wish to meet will be displayed. Note the actual details of their availability is hidden, only their available status (busy, out of office, tentative)

Pick a meeting time and send the request.

Now return your inbox and look at the meeting request, reply that it is OK

Now return to your calendar and see that the appointment has been entered



Review

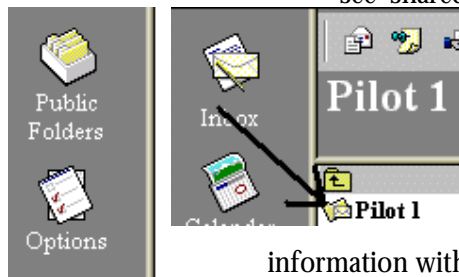
We have looked at the very first level of Collaboration, the ability to see other peoples availability and to identify times when we can arrange meetings, whether they are physical, by phone or on the internet. This can also be used to monitor the availability of staff and resources as we develop the environment.

All aspects to date have dealt with private items sent by mails between recipients; the next stage is to look at Public and Shared work areas, Forms, Roles and Teams

Public/Shared Work Areas

Click on the Public Folders icon

Double click on the Pilot 1 folder.; You will now see shared/public folders for EGM and TECAM and in the right hand window a series of test mails and postings that are in the Pilot 1 folder. Click on any of these to see their contents. You can place information either as a mail or as a post in these folders, repeat the POST example in this folder to share



information with other team members.

17.Procedure confirmation.doc

1. What?

- Acknowledging receipt of a letter.
 - Giving assurance of attention and confirming conditions.
 - Expressing hope for future positive communication.

or

- Expressing regret/apologise for the delay.
- Giving reasons for the delay.
- Expressing hope that the delay will not cause inconvenience.

or

- Stating inability to execute.
- Giving reasons for declining orders.

Reference:

[Writing messages.doc](#)

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18. Giving remarks.doc

1. What?

- Acknowledging receipt of a letter.
- Sending requested pieces of information.
- Stating terms of business.
- Request references.
- Giving information about own production.
- Encouraging the eventual performer to go forward.

Reference:

[Writing messages.doc](#)