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Project Reporting Introduction Guideline



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1.0 PURPOSE

The purpose of the Reporting chapter is to advise the Entity the appropriate reporting principles that will efficiently advise progress, performance, schedule and cost status of projects to the project team, management and any stakeholder. The methods, processes, procedures and templates to perform Reporting activities on all projects will be outlined in the proceeding sections.

This procedure applies to works performed under all Government construction projects executed throughout the Kingdom of Saudi Arabia.

2.0 SCOPE

This introduction and the procedures it references are intended to cover a project's life cycle. Reporting is required in order to meet the requirements and needs of various stakeholders in identifying, capturing, controlling and forecasting project activities. It is part of the foundation for managing and controlling project delivery. The procedures will ensure a common framework and provide guidance to ensure a consistent approach.

Project reporting is prepared by the Project Controls group with input from all groups within the project team. Best practice dictates the following minimum suites of reports:

- Weekly Report
- Monthly Report
- Cost Reports
 - Cost and Commitment Report
 - Summary Cost Report
 - Invoice Summary Log
 - Change Order Report
- Schedule Reports
- Critical Item Action Report

A Project Weekly Report is prepared with input from the project team and is issued to project management. It includes a narrative of the highlights of progress for the past week and work planned for the week ahead. It also includes a status of project safety, overall construction progress, construction manpower, and weekly progress photos. For guidance on the Project Weekly Report, see EPM-KPR-PR-000001 – Project Weekly Reporting Procedure.

A Monthly Project Progress Report is prepared from input from all departments on the project. Its purpose is to advise management of the project's progress, schedule and cost status. Narrative sections include an executive summary with key project metrics. Other section include quantified progress for engineering, procurement, construction and overall progress for the past month, key issues and the plans for the next month. For guidance on the Project Monthly Report, see EPM-KPR-PR-000002 – Project Monthly Reporting Procedure.

Each project will have cost reporting requirements depending on its stage gate, size and management's need. A customary report is the Cost and Commitment Report showing payments made versus commitments recorded. It establishes the cost incurred and financial obligations made by the project. The Cost and Commitment report serves as a reference for expenditures and as a tracking and forecasting tool for the project team. The Invoice Summary Log is a report that identifies the status of invoices. It facilitates the control and management of costs. Control of change is a significant part of maintaining cost control. The Change Order Report identifies and quantifies perceived changes that could result in a change to the cost or schedule of the project. For a guidance on cost reporting, see EPM-KPR-PR-000003 – Project Cost Reporting Procedure.

Schedule Reports are prepared with input from the project team and include Level 1 Management Schedule, Level 3 Control Schedule, and the various Level 5 Look-ahead Schedules, Engineering, Procurement, Delivery and Quantity trackers as well as Pre-Operational Testing, Commissioning and Handover reports. For guidance on the Schedule Reports, see EPM-KPR-PR-000003 – Project Schedule Reporting Procedure.

A Critical Items Action Report provides continuous visibility of key activities critical to the overall project cost and schedule. Critical items are defined as those items which may impact project completion or important milestone



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dates. Action items are those requiring continuous attention to ensure progress is maintained. The report is intended to identify an item's impact and establish the action required to avoid or minimize the impact. For further guidance, see procedure EPM-KPR-PR-000004 – Project Critical Items Action Report procedure.

3.0 DEFENITION

Definitions	Description
Level 1: Management Schedules (MS)	A 1 page (normally A3 size) summary schedule including baseline, current forecast, risk items, critical path, and key events
Level 2: Summary Schedules	For large projects only, schedules addressing specific sites, markets or regions, as a refinement and supplement to the Level 1
Level 3: Control Schedules (CS)	Center piece of the scheduling system, developed on CPM schedule software by the contractors, which captures all direct work (and critical indirect work) with a balanced level of detail
Level 4: Subject Matter Schedules	As required, specific scopes that demand more detailed analysis (complex installations, intricate coordination with others, ...)
Cost & Commitment Report – CoCo Report)	This is a cost report that measures committed/Incurred cost against established budget for specific scope of work

4.0 REFERENCES

1. EPM-KPR-PR-000001 - Project Weekly Reporting Procedure
2. EPM-KPR-PR-000002 - Project Monthly Reporting Procedure
3. EPM-KPR-PR-000003 - Project Cost Reporting Procedure
4. EPM-KPR-PR-000004 - Project Schedule Reporting Procedure
5. EPM-KPR-PR-000005 - Project Critical Items Action Report Procedure